

A Step-by-Step Setup for Your Company Information and Preferences

20 Steps [View most recent version on Tango.us](#) 

Created by

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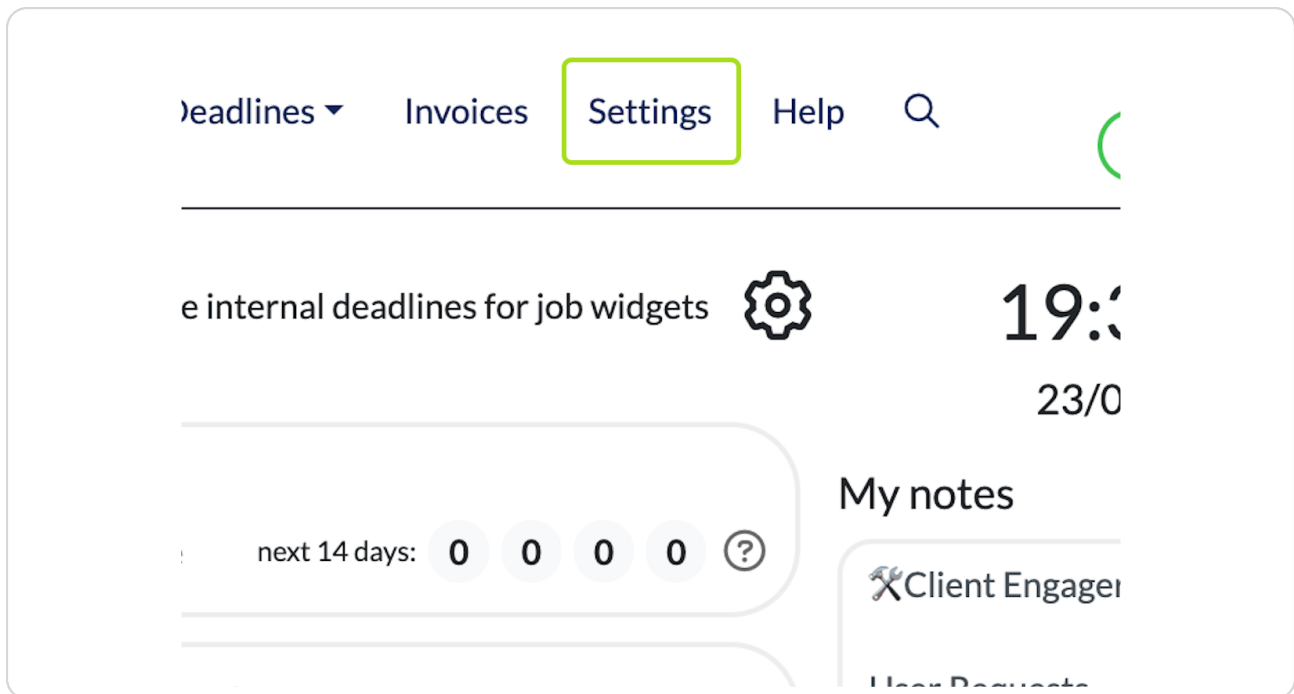
Last Updated

May 23, 2023

Go to <https://demo.engager.app/dashboard>

STEP 1

Click on Settings



STEP 2

Add firm name

ails 2 Deadlines ▾ Invoices Settings Help 🔍

Principal Admin + 0 ↔

Information

:

My Practice

:

Engager.app

11 of 11 characters used. This will appear as sender name for every text message you send using Client Engager.

:

098765432

:

✓ yes ✗ no

:

123 3456 78

STEP 3

Add name to appear on text messages

ails 2 Deadlines ▾ Invoices Settings Help 🔍

Principal Admin + 0 ↔

Information

:

My Practice

:

Engager.app

11 of 11 characters used. This will appear as sender name for every text message you send using Client Engager.

:

098765432

:

✓ yes ✗ no

:

123 3456 78

STEP 4

Enter CompanyNumber

Information

:

My Practice

:

Engager.app

11 of 11 characters used. This will appear as sender name for every text message you send using Client Engager.

:

098765432

:

✓ yes

✗ no


:

123 3456 78

:

20

:



STEP 5

Enter VAT number

:

Engager.app

11 of 11 characters used. This will appear as sender name for every text message you send using Client Engager.

:

098765432

:

✓ yes

✗ no



:

123 3456 78

:

20

:



Upload new logo (max. 100KB):

Choose file


 No file chosen

STEP 6

Select VAT rate you charge


: 123 3456 78


: 17

: 

MY PRACTICE

Upload new logo (max. 100KB): No file chosen

:  or

: 


A demo of two colours interacting with each other.


STEP 7

Upload your logo

)

100KB): No file chosen

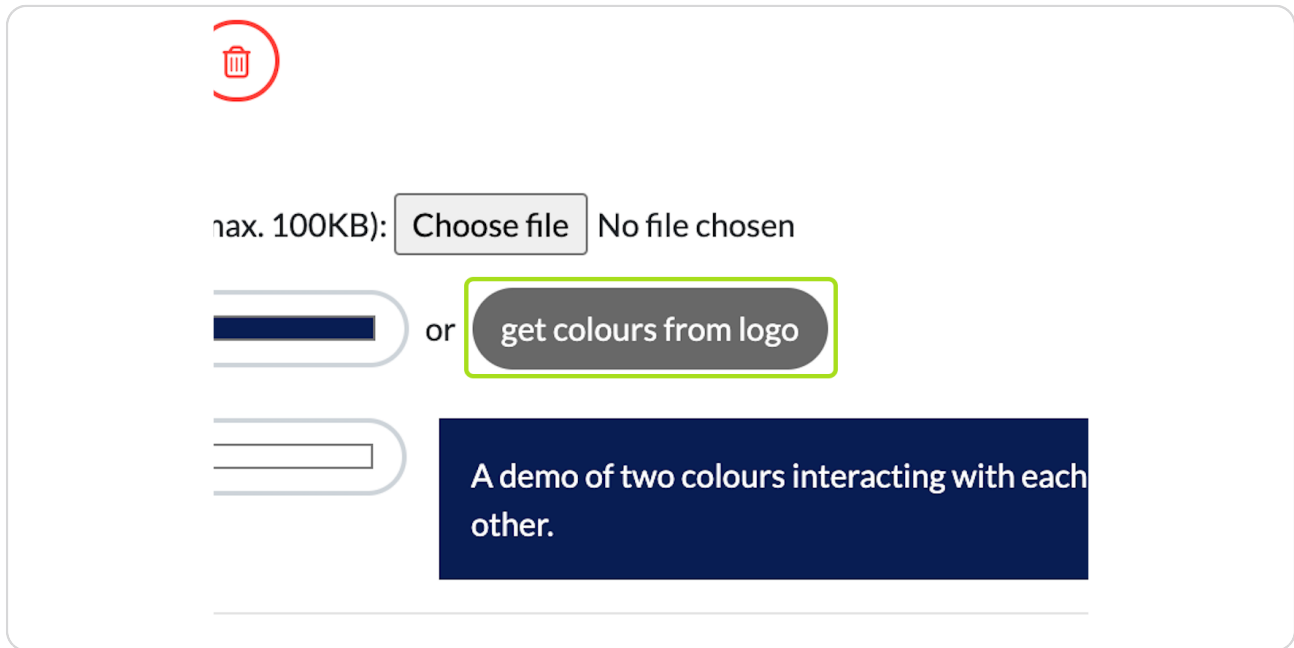
 or



A demo of two colours interacting with each other.

STEP 8

Click on get colours from logo to choose the colour in your logo you want to use on documents



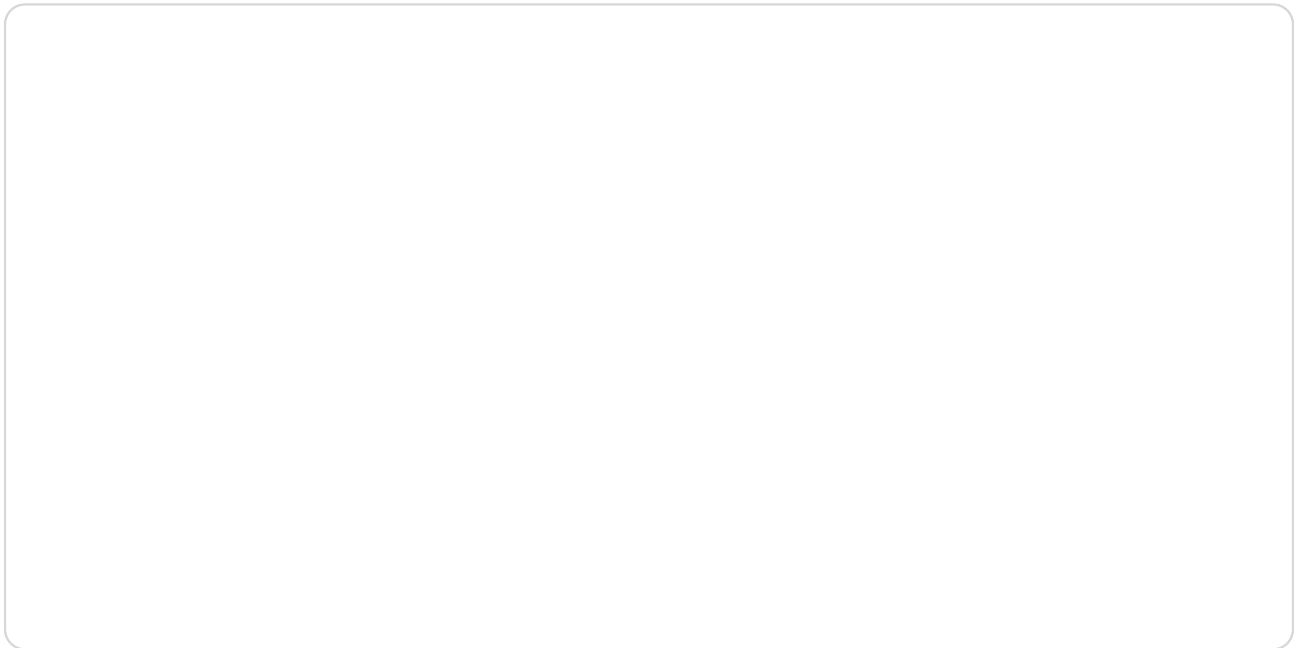
max. 100KB): Choose file No file chosen

or get colours from logo

A demo of two colours interacting with each other.

STEP 9

Click the colour



STEP 10

Click on ForeColor

Text color:

A demo of two colours other.

Address Line 1: Building 1

Address Line 2: 11 Some Street

STEP 11

Enter your business address

:

A demo of two colours interacting with each other.

: Building 1

: 11 Some Street

: Some Town

: Some County

: AA99 9BB

STEP 12

Enter your website

☐ show on homepage

☐ show on homepage

☐ show on homepage

STEP 13

Enter the firm email address

☐ show on homepage

☐ show on homepage

☐ show on homepage

STEP 14

Enter your mobile if you want to

:

:

:

☐ show on homepage

:

☐ show on homepage

:

☐ show on homepage

STEP 15

Enter your values to populate to the home screen

☐ show on homepage

Telephone:

☐ show on homepage

Core Values:

Name	Description
<input type="text" value="Efficiency"/>	<input type="text" value="Kanban"/>
<input type="text" value="Teamwork"/>	<input type="text" value="Unlimited users"/>
<input type="text" value="Collaborate"/>	<input type="text" value="Share ideas"/>
<input type="text" value="Adaptable"/>	<input type="text" value="Fully cloud"/>
<input type="text" value="Improving"/>	<input type="text" value="Give us feedback"/>

STEP 16

Select the Director from The position of Primary Officer:

Collaborate

Share ideas

Adaptable

Fully cloud

Improving

Give us feedback

+ add core value

/

:

:

:

:

:

Director

England and Wales

British Pound (£)

Association of Chartered Certified Accountants (ACCA)

STEP 17

select Country of origin:

Improving

Give us feedback

+ add core value

/

:

:

:

:

:

Director

England and Wales

British Pound (£)

Association of Chartered Certified Accountants (ACCA)

✓ yes ✗ no

STEP 18

Select Currency:

+ add core value

/

:

:

:

:

:

1

3

:

Director

England and Wales

British Pound (£)

Association of Chartered Certified Accountants (ACCA)

✓ yes

✗ no

STEP 19

Select your governing body

/

:

:

:

:

:

1

3

:

Director

England and Wales

British Pound (£)

Association of Chartered Certified Accountants (ACCA)

✓ yes

✗ no

Save

STEP 20

Click on Save

Country:

English (Canada)

Professional Body:

Association of Chartered Certified Accountants

Do you have access to offers from Client Engager and its partners:

✓ yes

✗ no

Save

Tango

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