Adding a new LTD/CIC/LLP to Client Engager

27 Steps   [View most recent version on Tango.us](https://tango.us)

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Creation Date
June 3, 2023

Last Updated
June 3, 2023

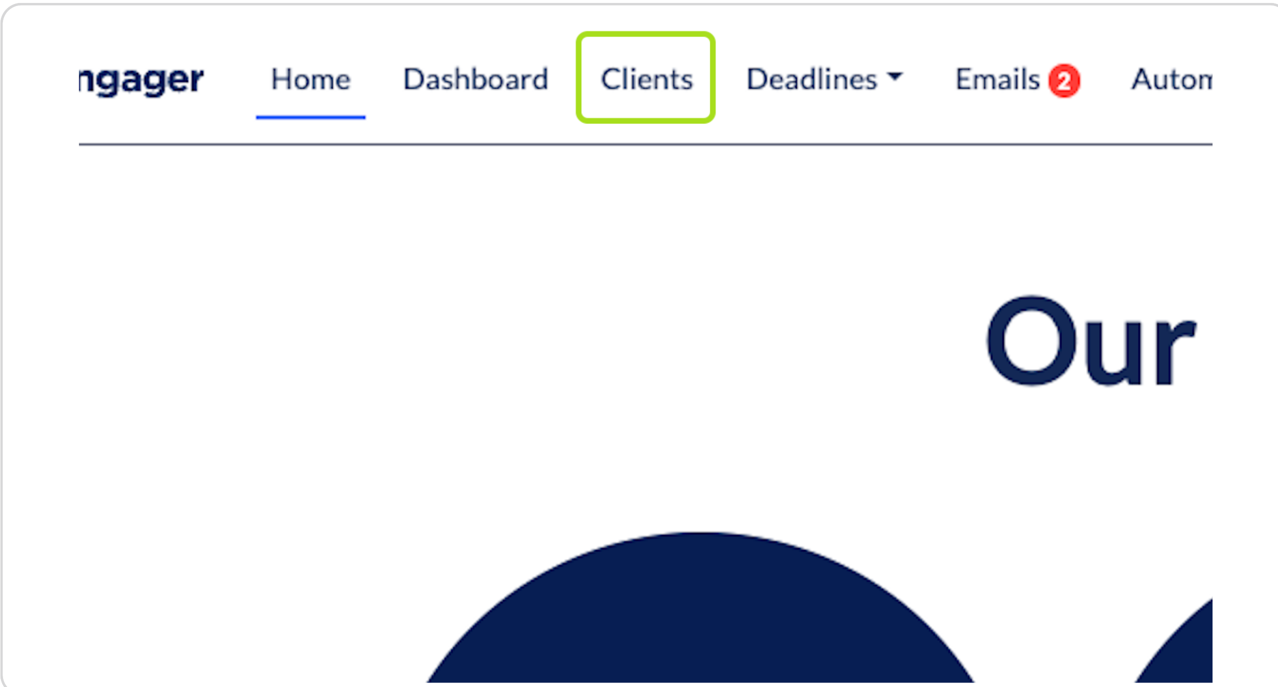
Home - Client Engager

27 Steps

Go to https://demo.engager.app/home

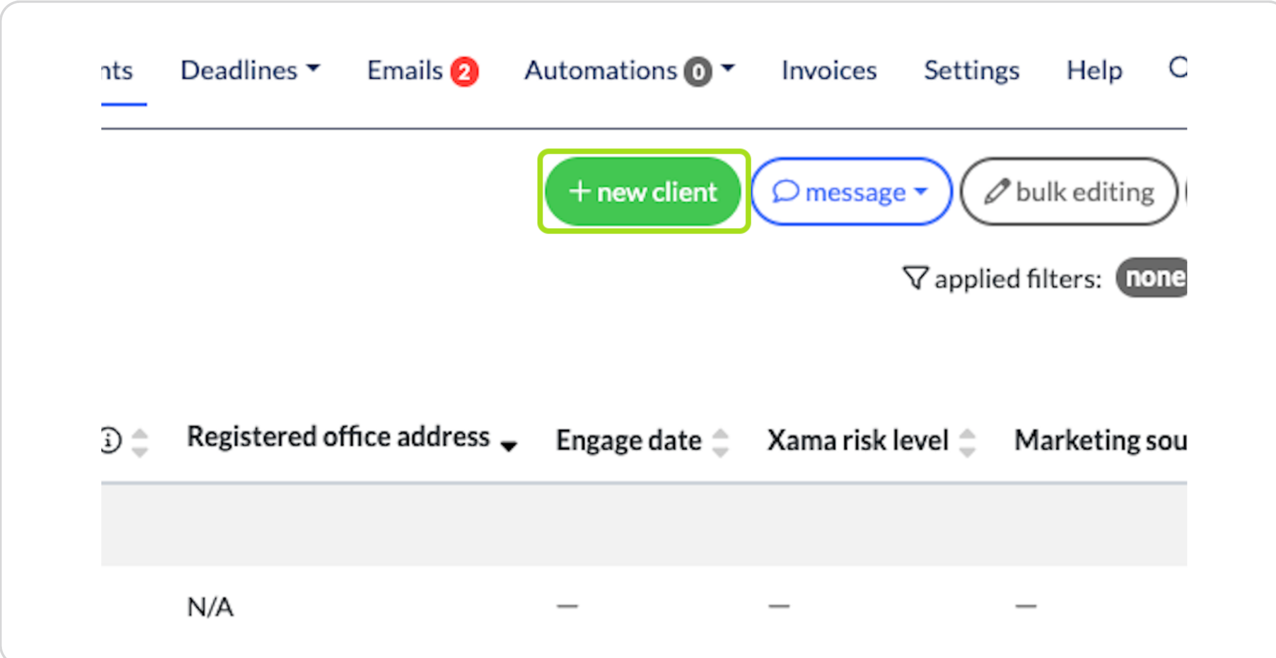
STEP 1

Click on Clients



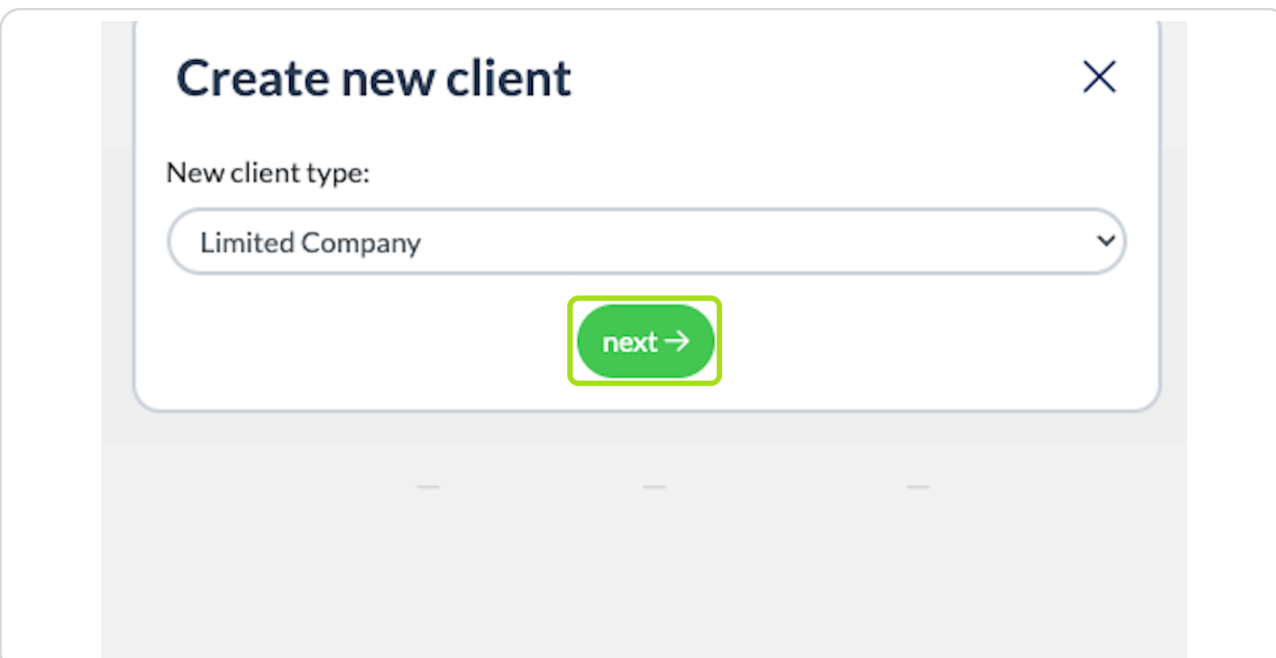
STEP 2

Click on new client



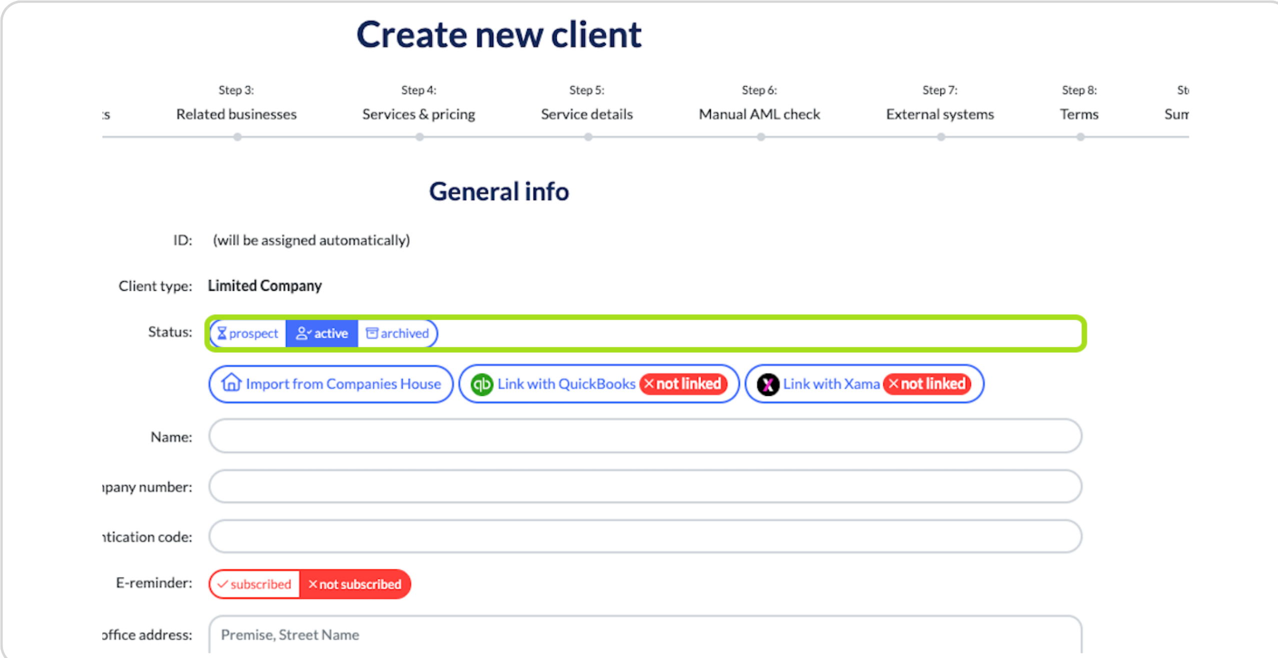
STEP 3

Click on next



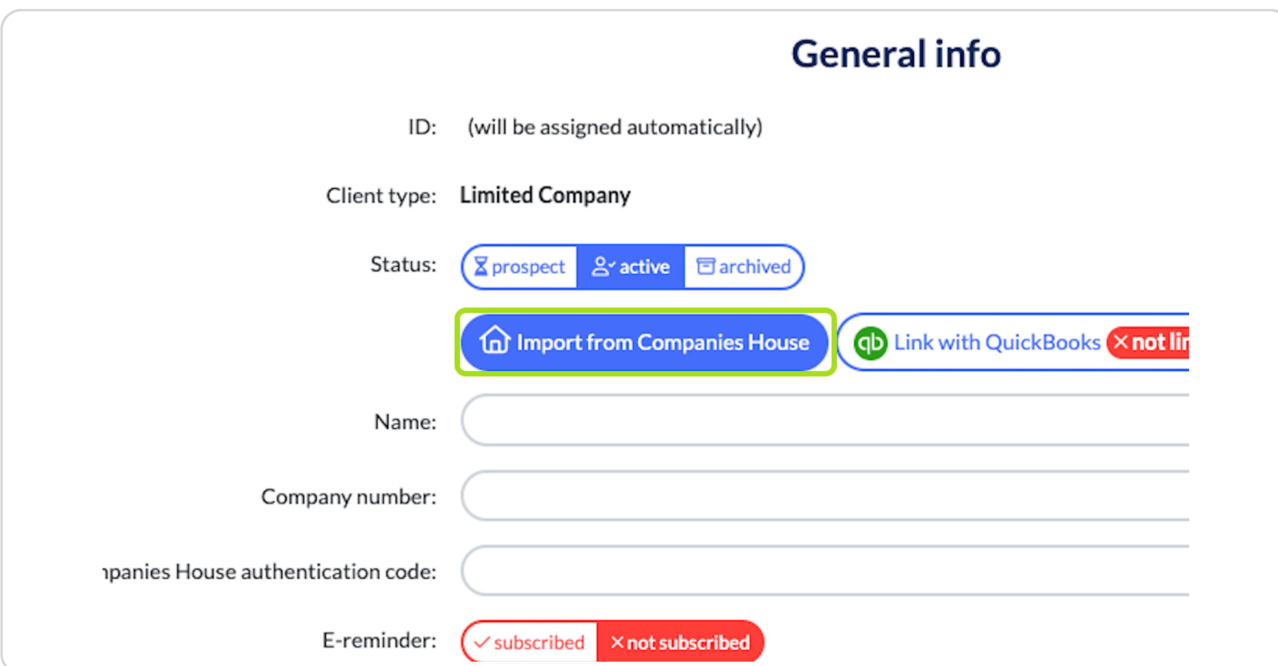
STEP 4

Click on prospect...



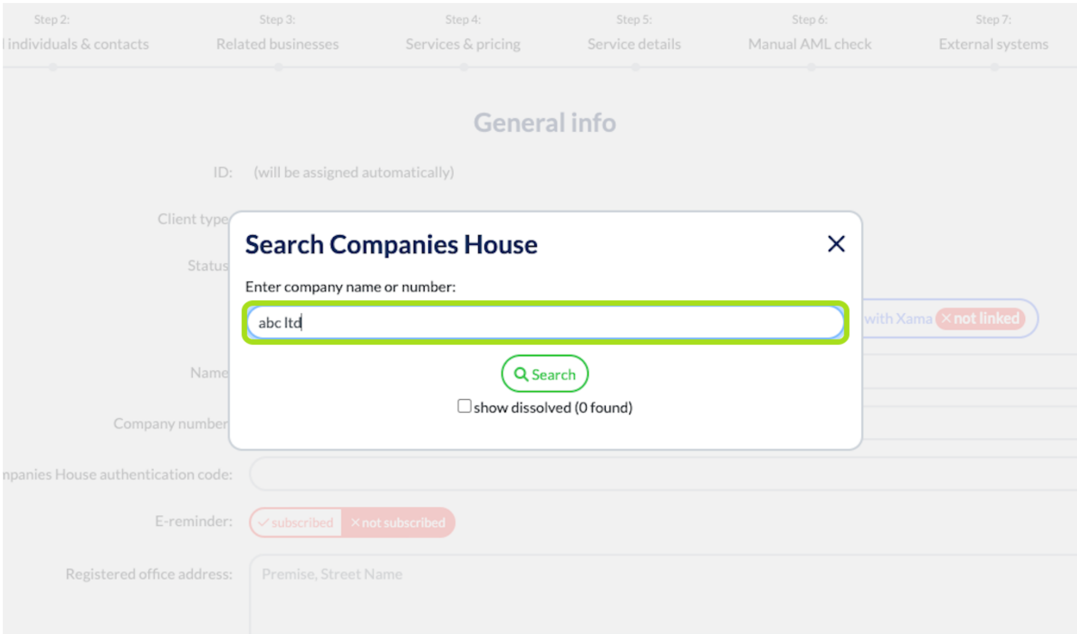
STEP 5

Click on Import from Companies House



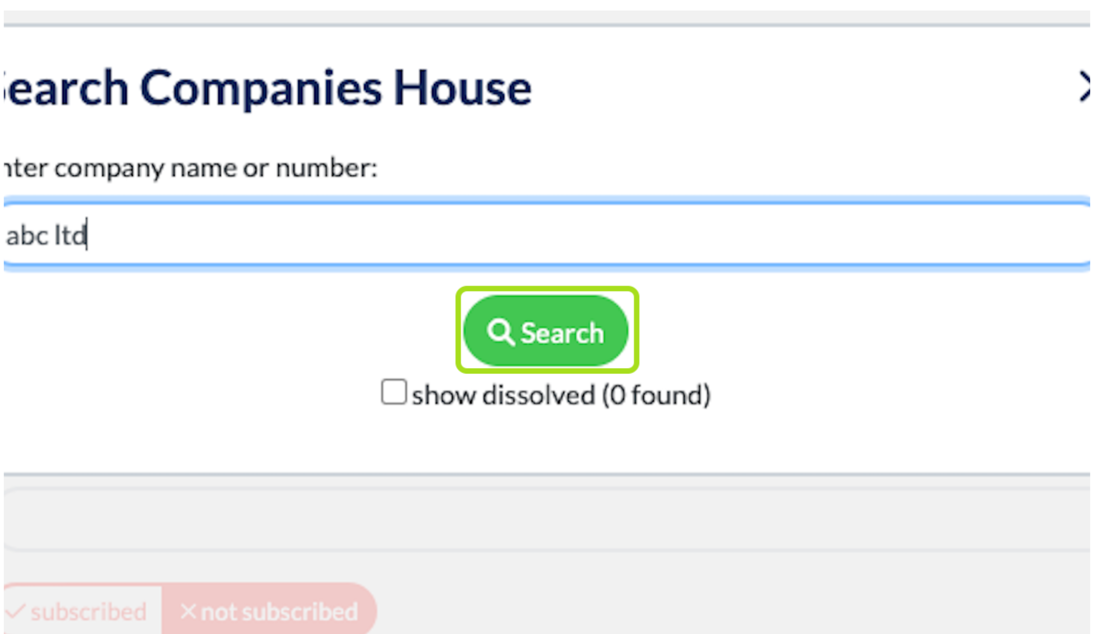
STEP 6

Type the name of your clients LTD



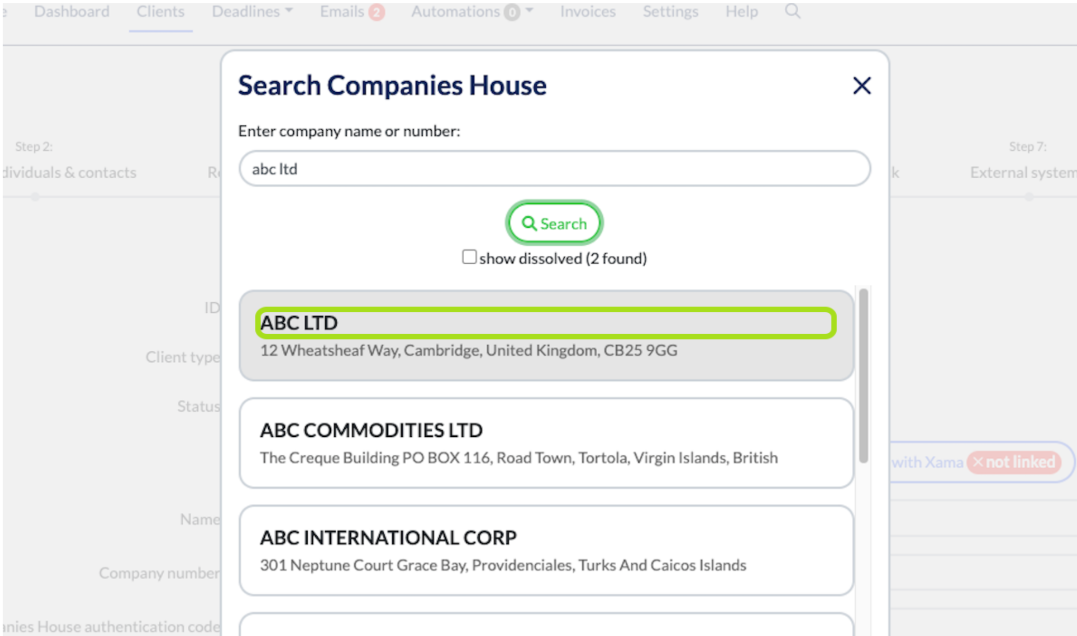
STEP 7

Click on Search



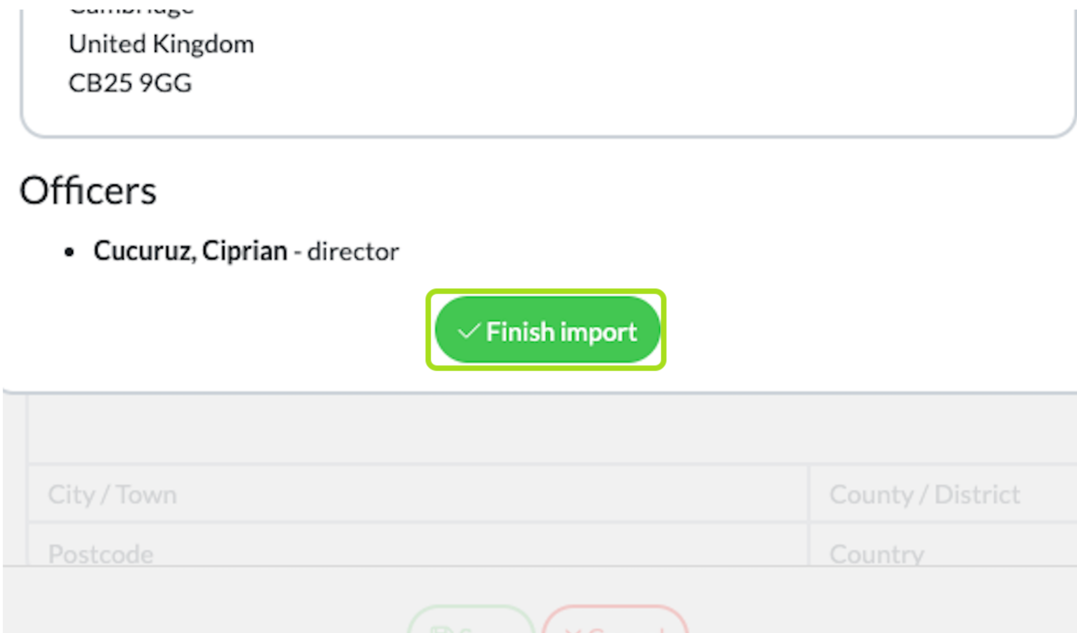
STEP 8

Click on your client



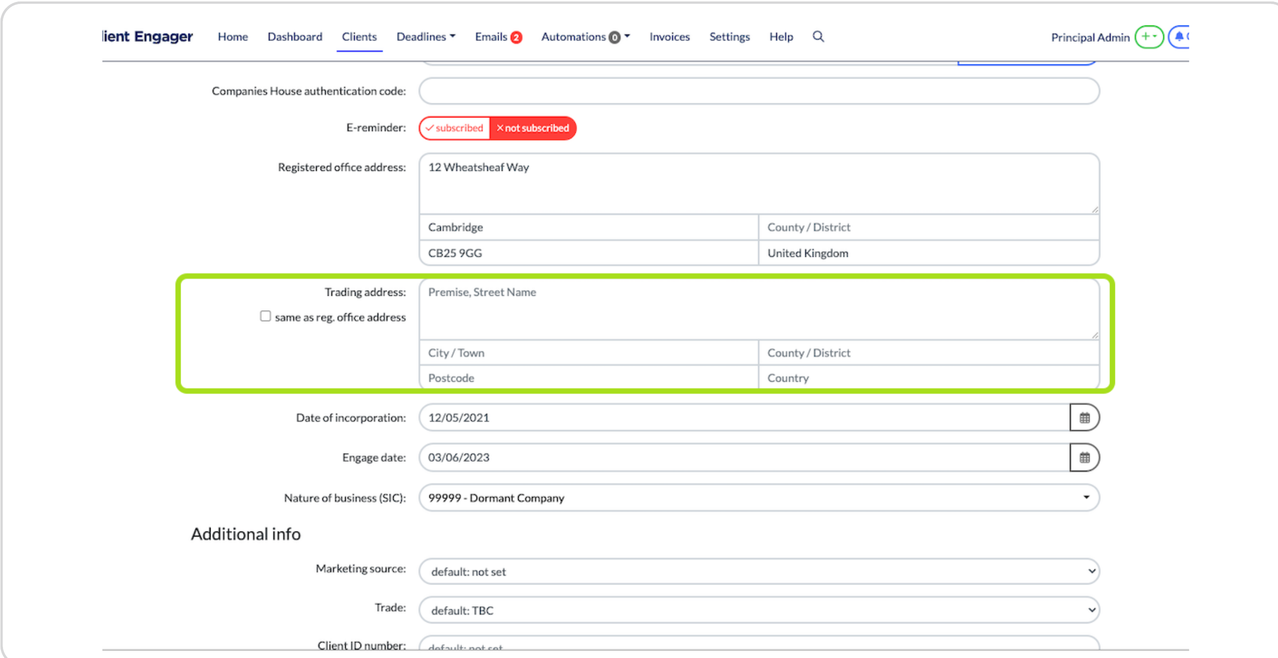
STEP 9

Click on Finish import



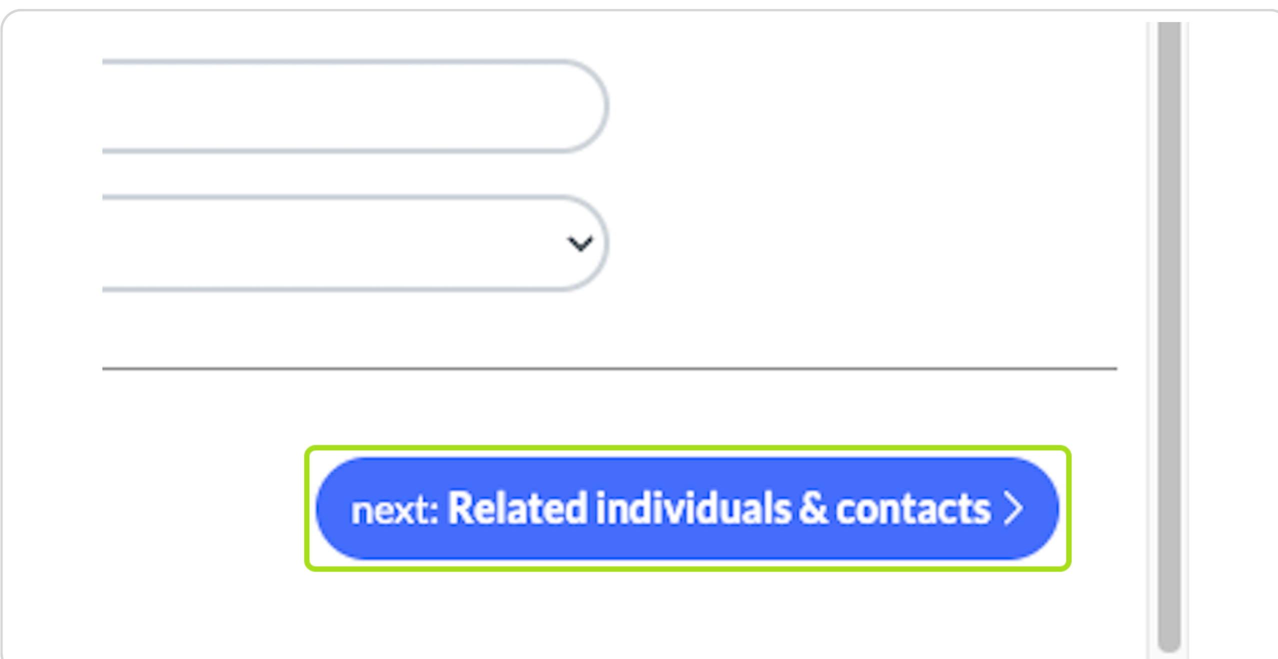
STEP 10

Check and update addresses if different from companies house



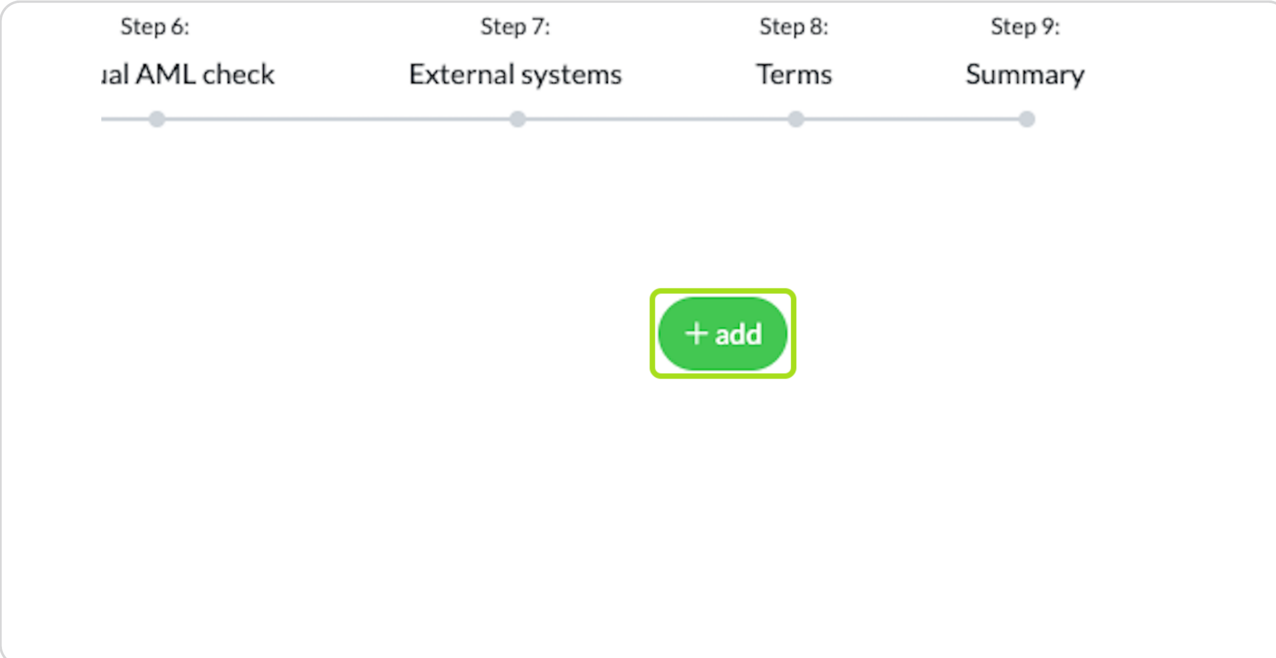
STEP 11

Click on next: Related individuals & contacts



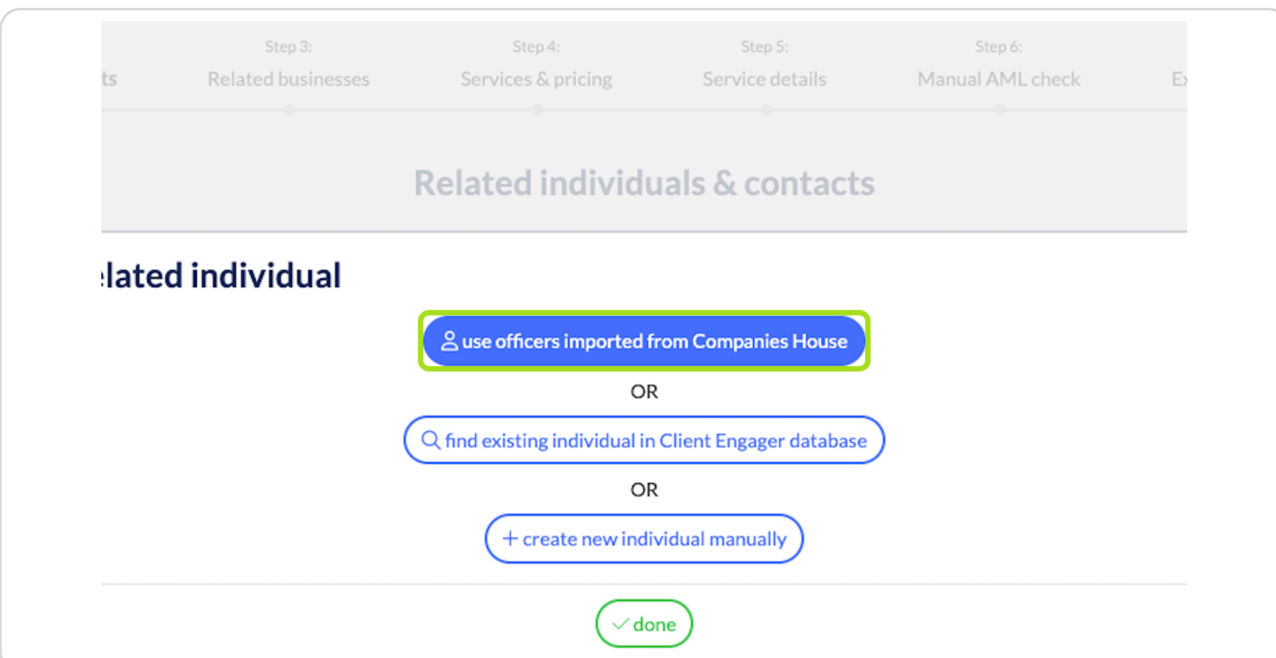
STEP 12

Click on add



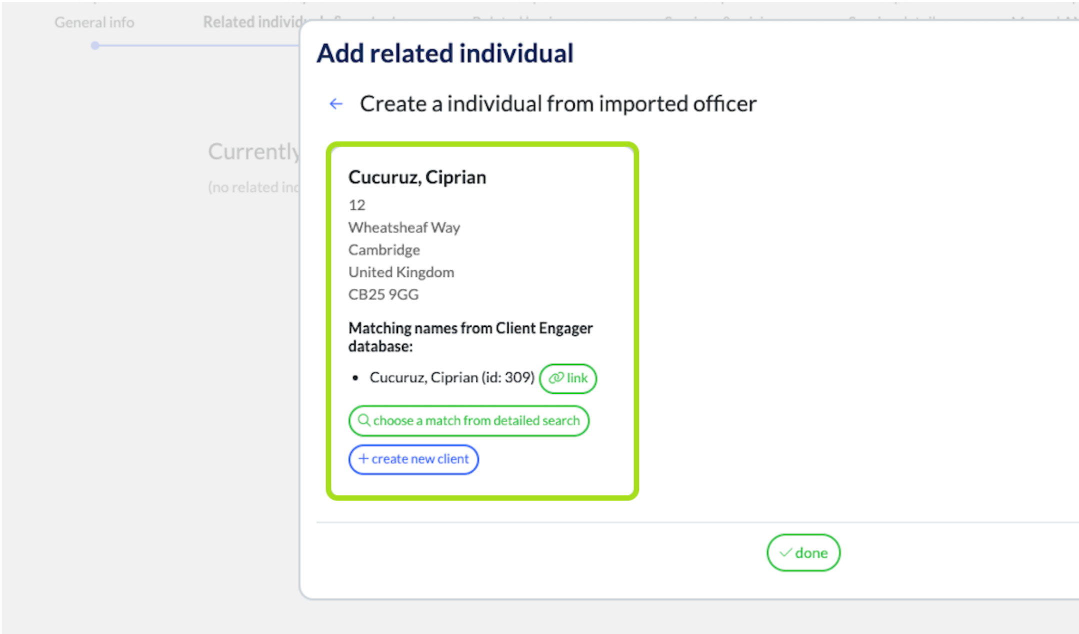
STEP 13

Click on use officers imported from Companies House



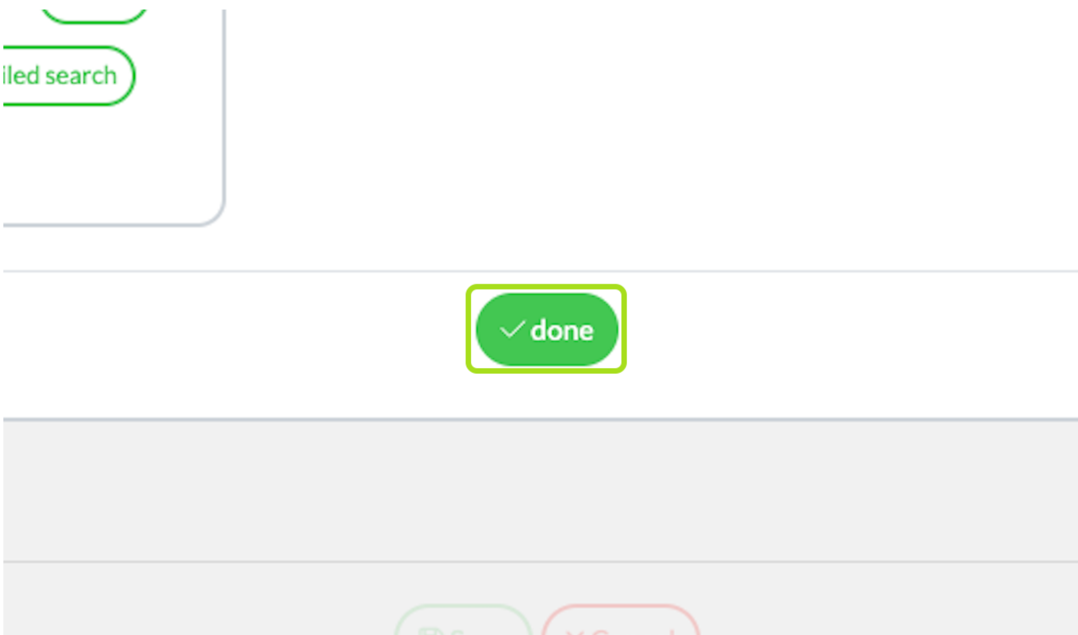
STEP 14

Click on Cucuruz, Ciprian...



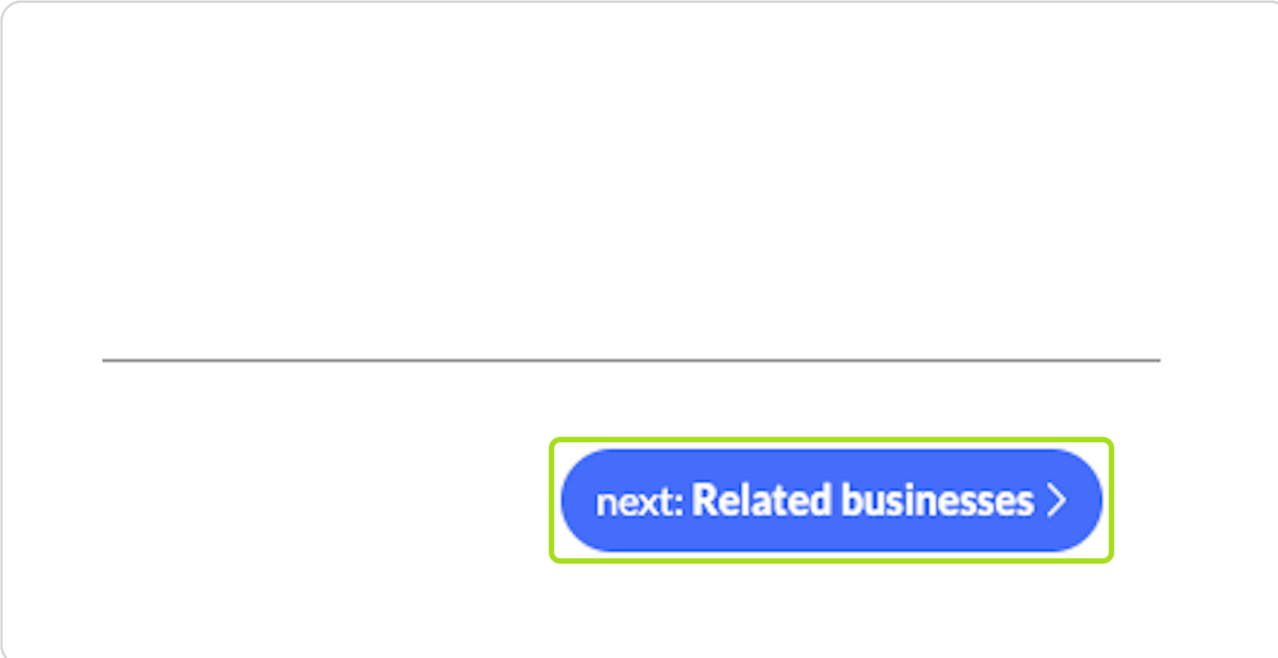
STEP 15

Click on done



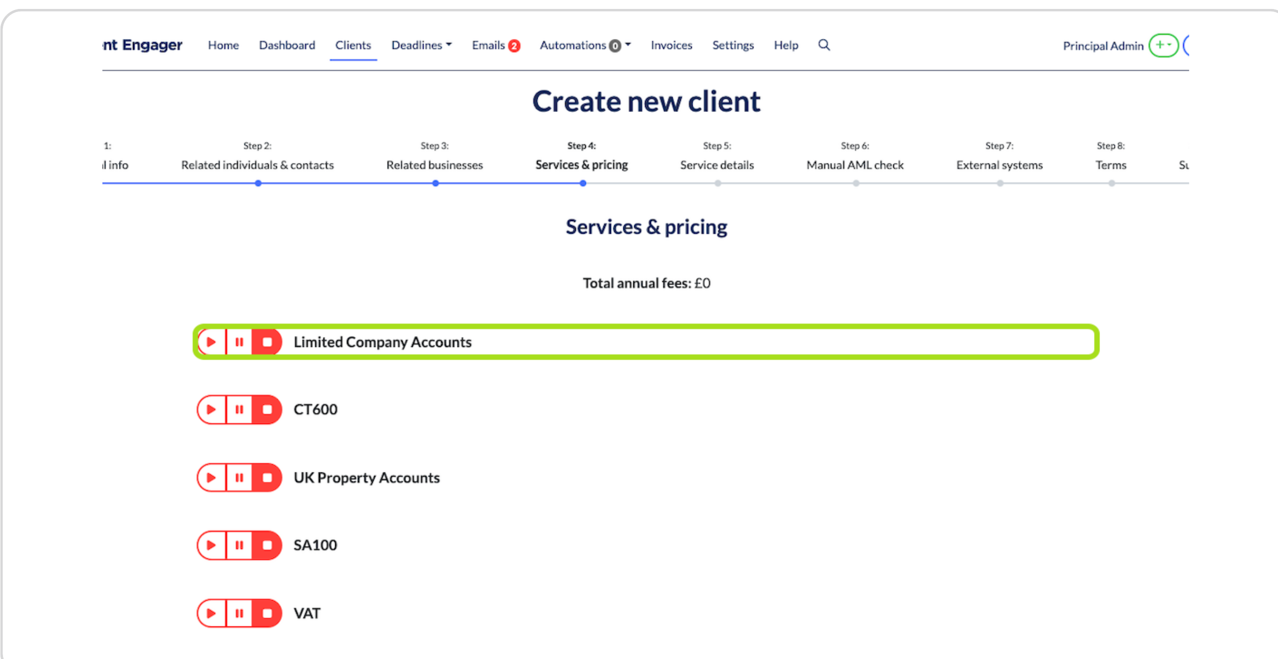
STEP 16

Click on next: Related businesses



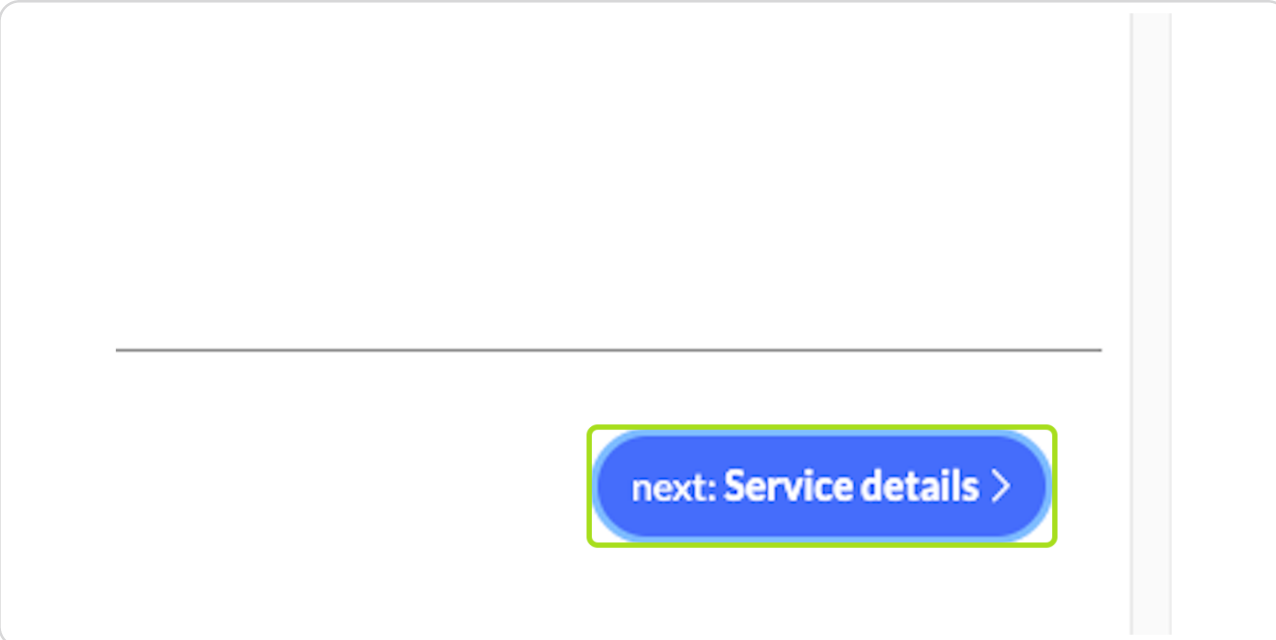
STEP 17

Click on Limited Company Accounts



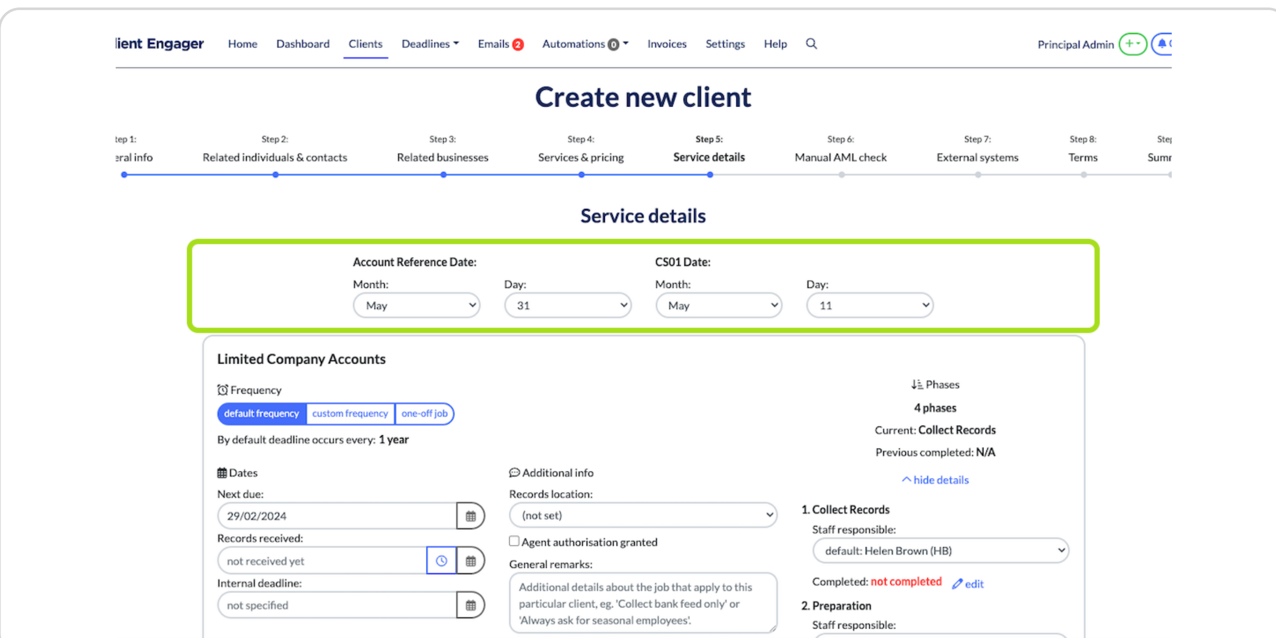
STEP 18

Click on next: Service details



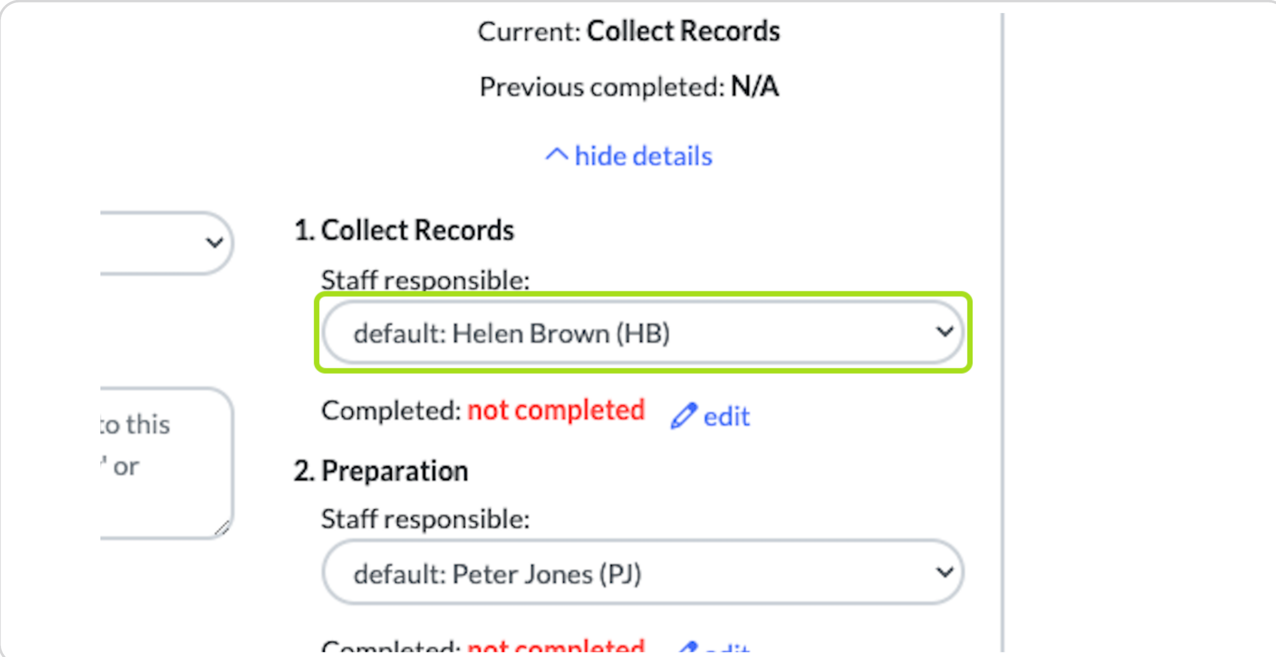
STEP 19

Check the dates pulled through from Companies House make match your records



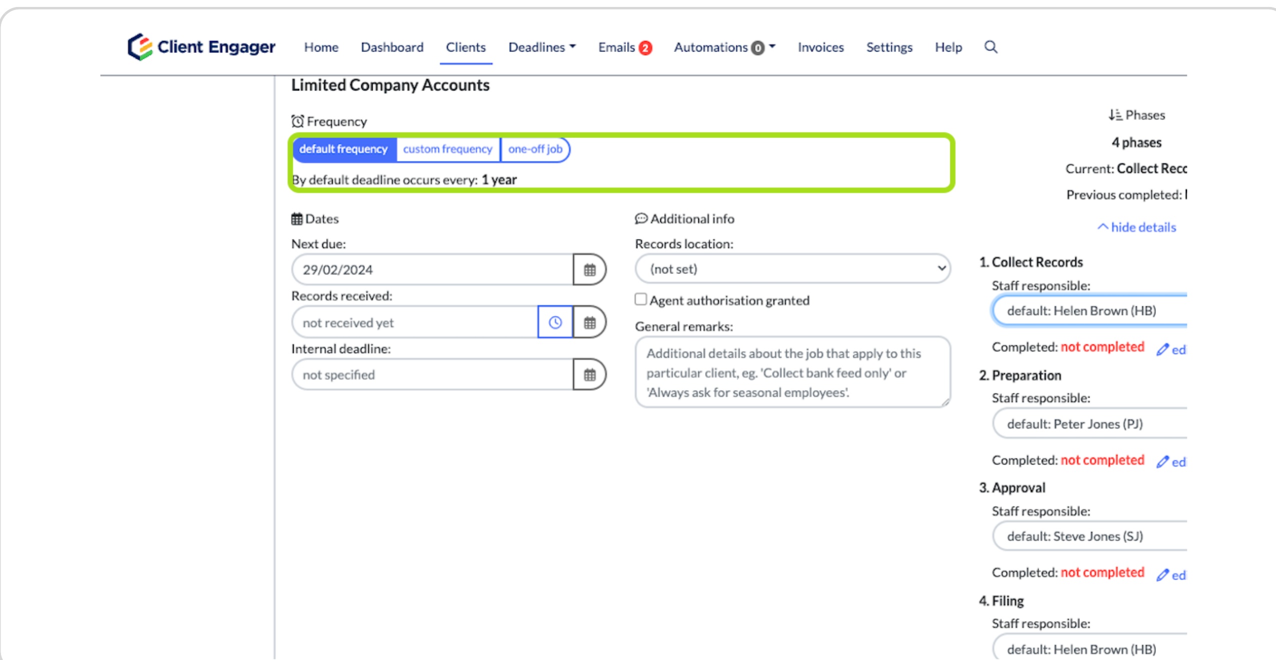
STEP 20

Select who's going to be doing each phase of the job



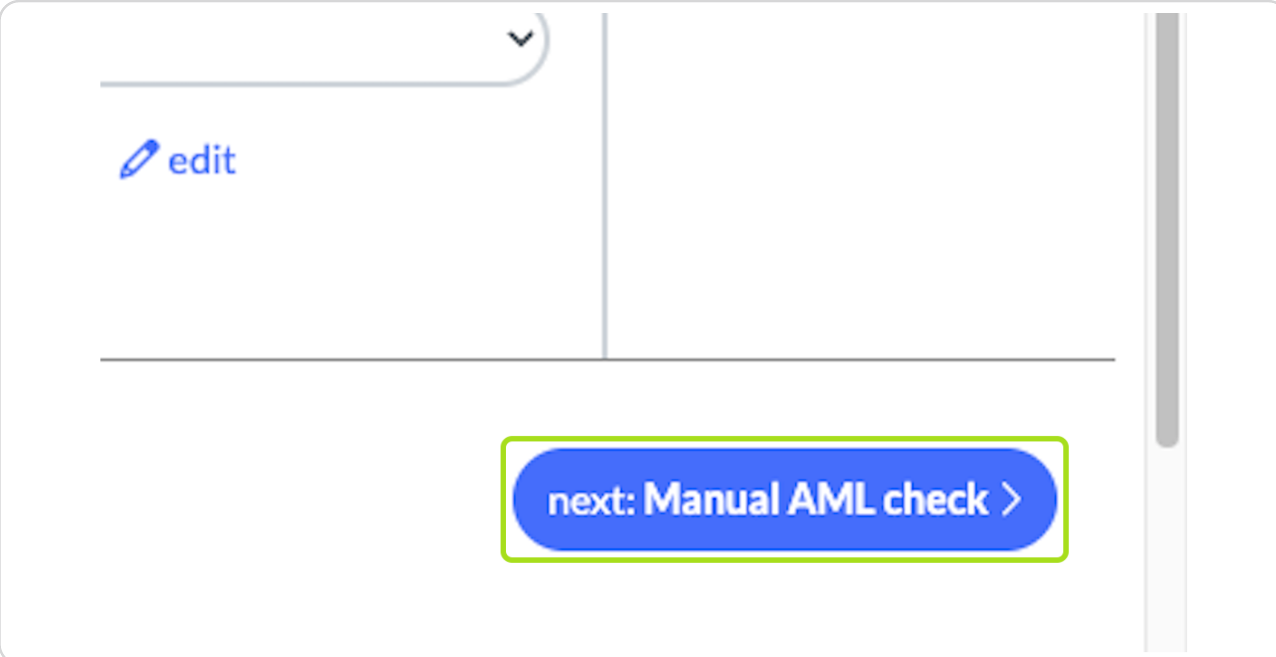
STEP 21

Check frequency is right for each service



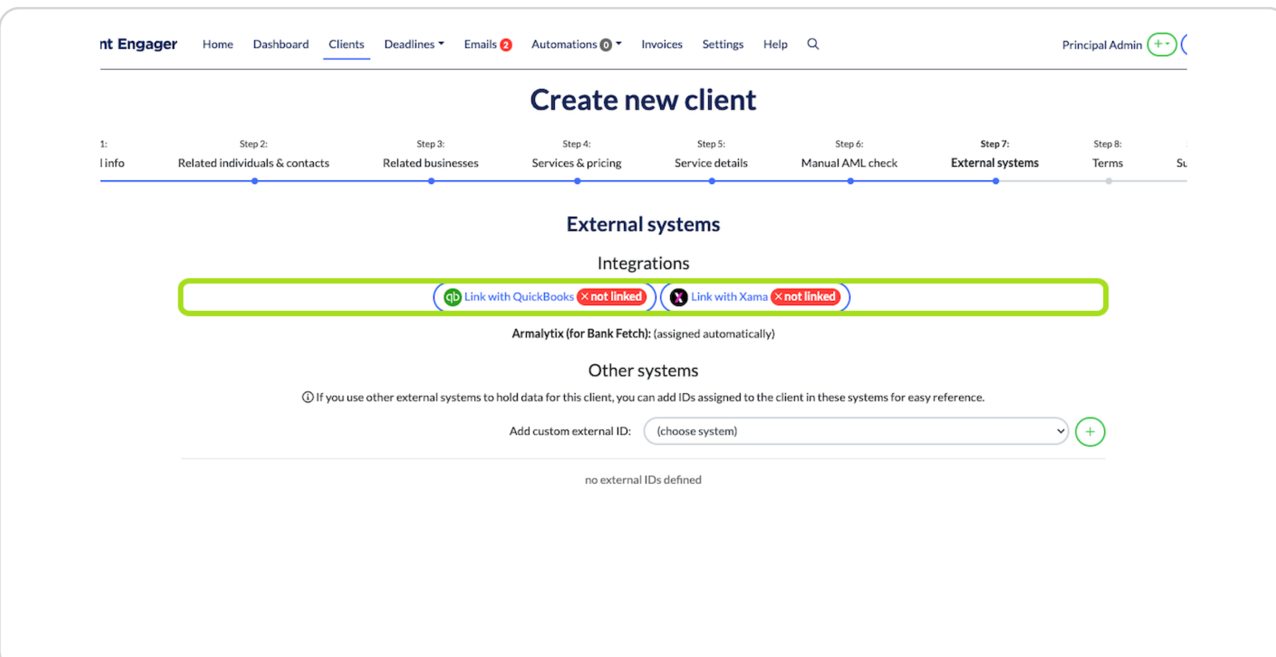
STEP 22

Click on next: until you reach External systems



STEP 23

This is where you can link to Xama and QBO to save duplicating info later

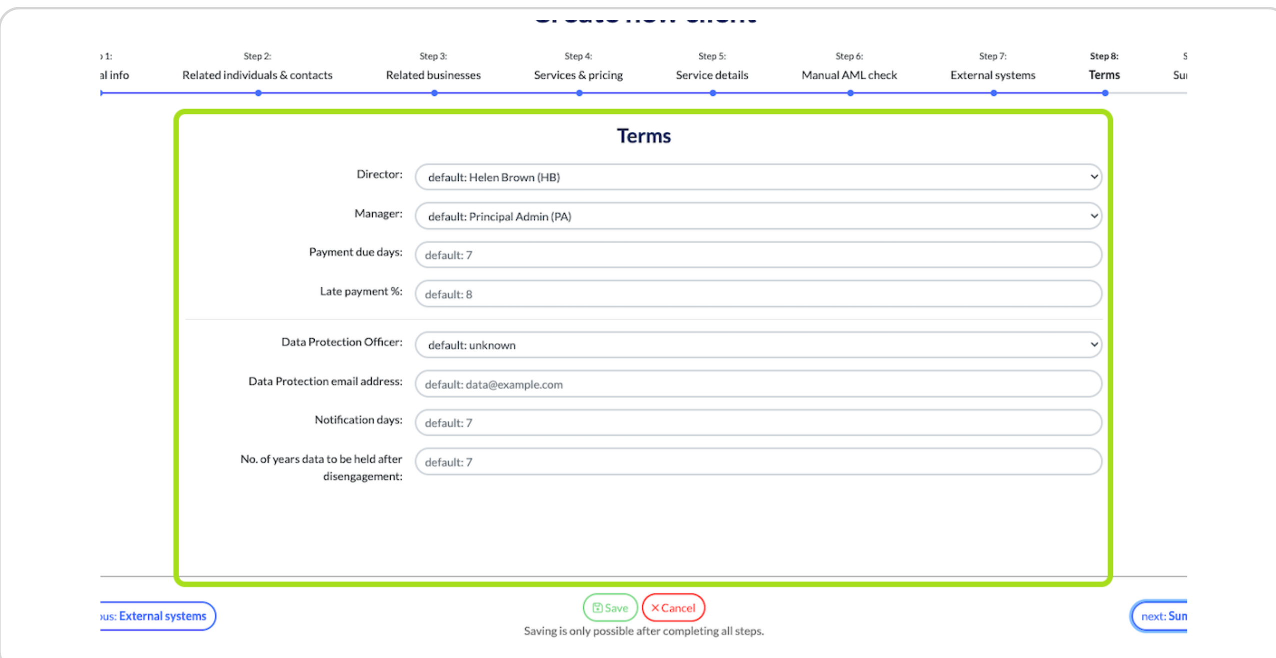


STEP 24

Click on next: Terms

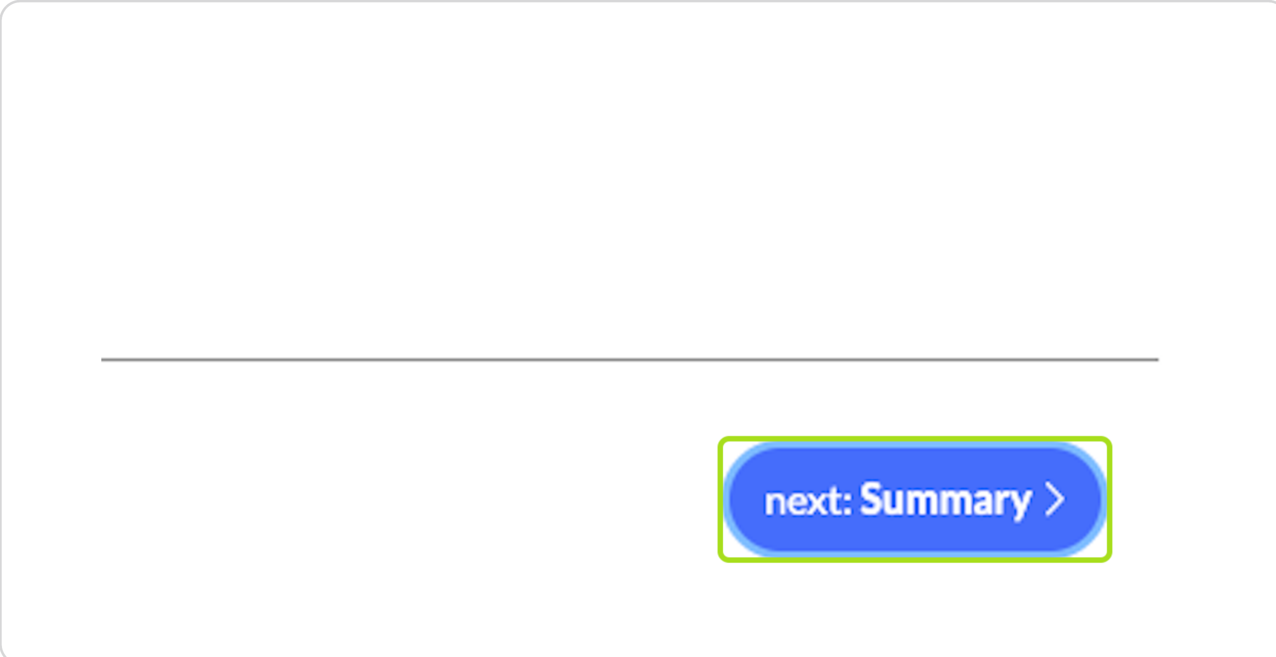
STEP 25

Update these fields



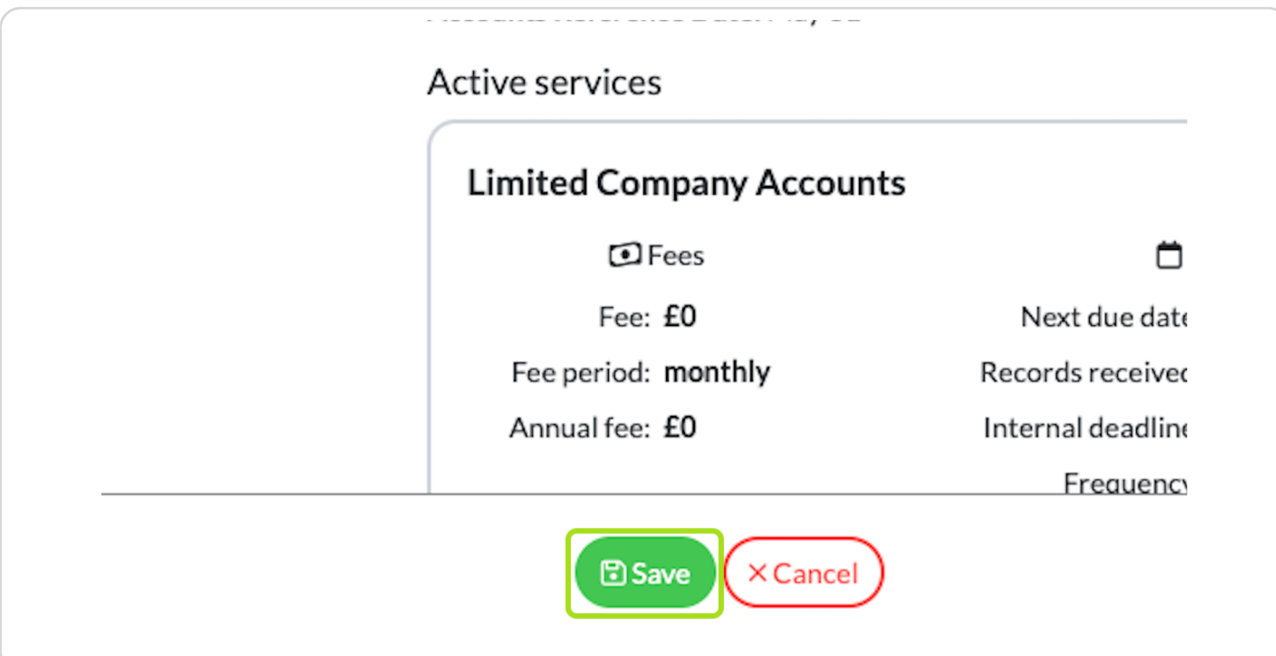
STEP 26

Click on next: Summary



STEP 27

Click on Save



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