

# Adding a new LTD/CIC/LLP to Client Engager

27 Steps

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Created by

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Creation Date

June 3, 2023

Last Updated

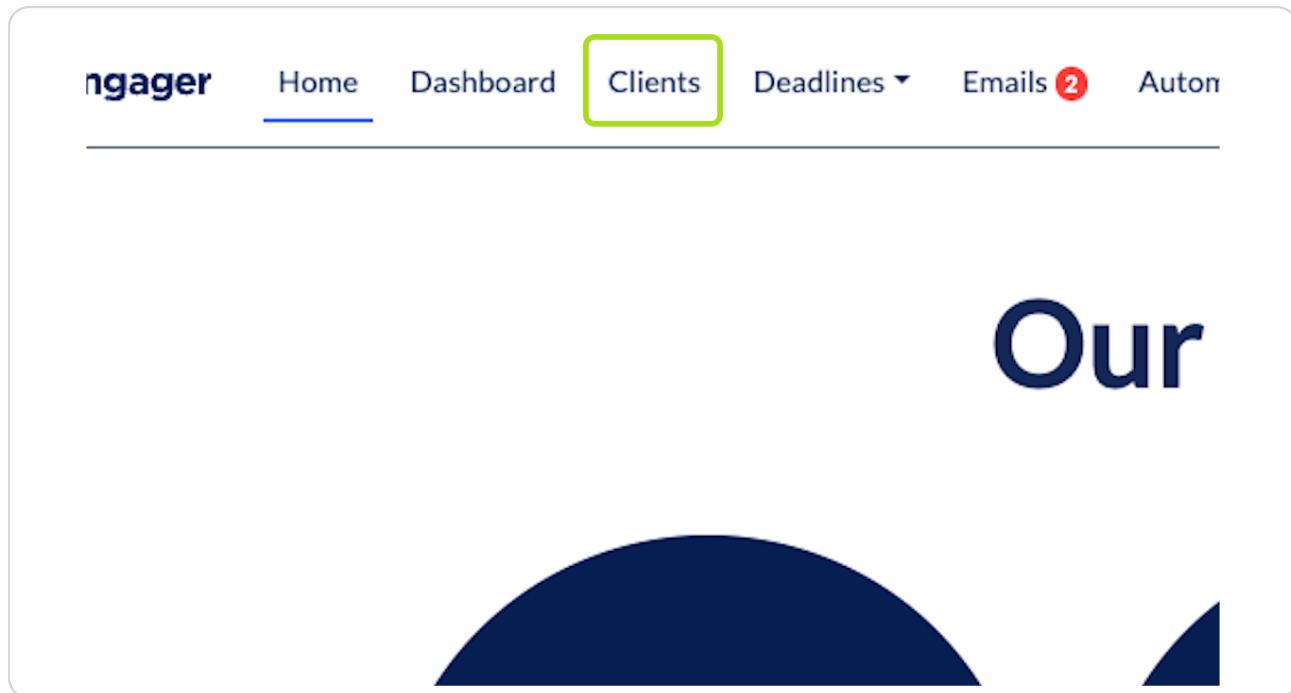
June 3, 2023



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

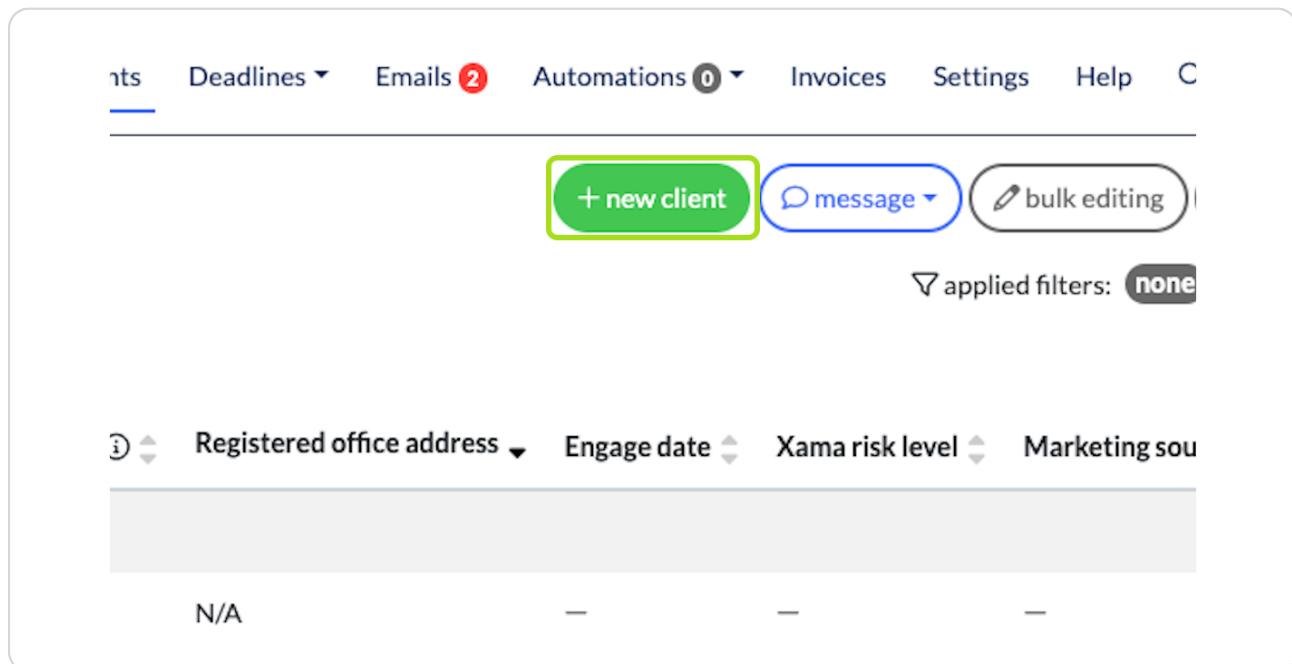
## STEP 1

### Click on Clients



## STEP 2

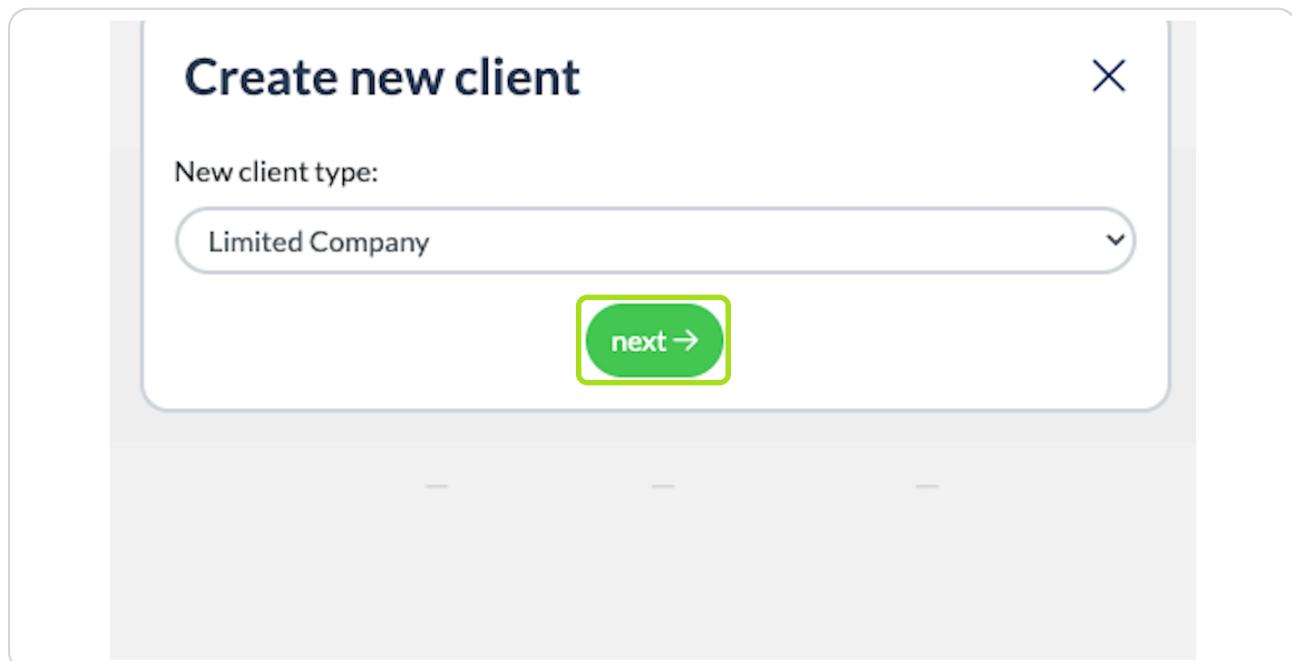
### Click on new client



The screenshot shows a software interface with a navigation bar at the top. The 'Emails' tab has a red badge with the number '2'. Below the navigation bar are three buttons: '+ new client' (highlighted with a green box), 'message' (with a blue icon), and 'bulk editing' (with a pen icon). A status message 'applied filters: none' is displayed. The main area shows a list of clients with columns for 'Registered office address', 'Engage date', 'Xama risk level', and 'Marketing sou'. The first client in the list is 'N/A'.

## STEP 3

### Click on next



The screenshot shows a 'Create new client' dialog box. It asks for the 'New client type' and has a dropdown menu set to 'Limited Company'. At the bottom is a green 'next →' button.

## STEP 4

### Click on prospect...

**Create new client**

Step 3: Related businesses Step 4: Services & pricing Step 5: Service details Step 6: Manual AML check Step 7: External systems Step 8: Terms Step 9: Summary

**General info**

ID: (will be assigned automatically)

Client type: Limited Company

Status:  prospect  active  archived

[Import from Companies House](#) [Link with QuickBooks](#) [Link with Xama](#)

Name:

Company number:

Companies House authentication code:

E-reminder:  subscribed  not subscribed

Office address:  Premise, Street Name

## STEP 5

### Click on Import from Companies House

**General info**

ID: (will be assigned automatically)

Client type: Limited Company

Status:  prospect  active  archived

[Import from Companies House](#) [Link with QuickBooks](#)

Name:

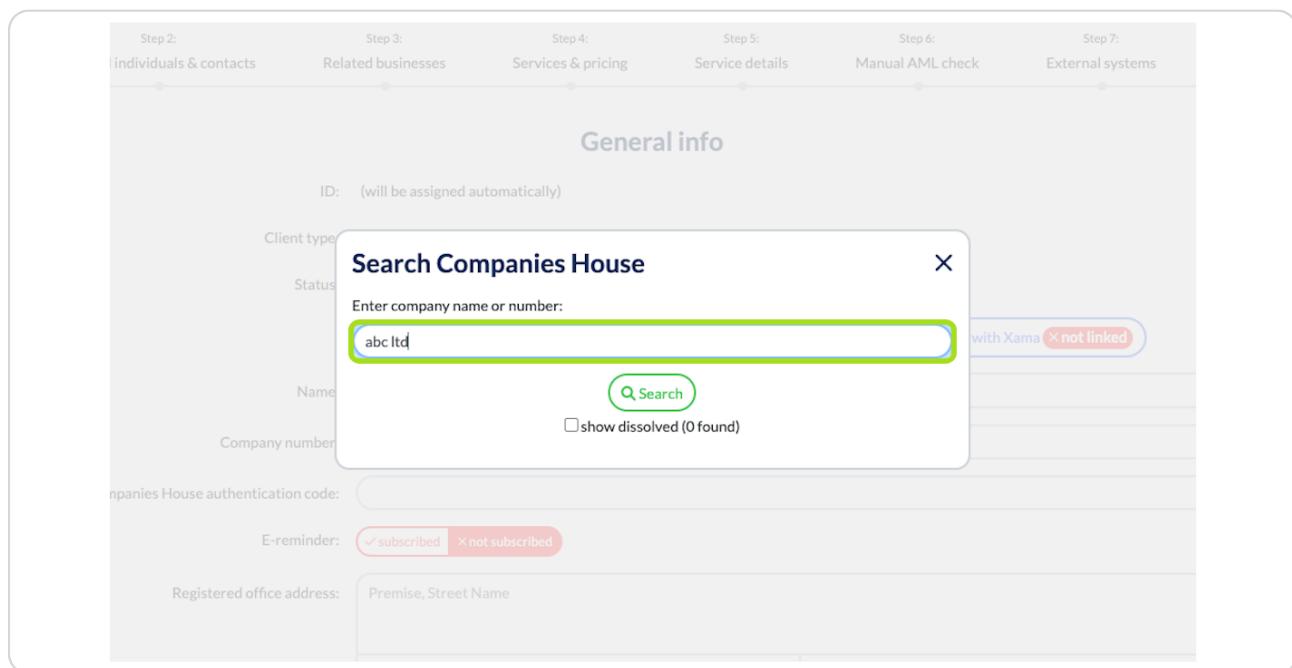
Company number:

Companies House authentication code:

E-reminder:  subscribed  not subscribed

## STEP 6

### Type the name of your clients LTD



Step 2: individuals & contacts Step 3: Related businesses Step 4: Services & pricing Step 5: Service details Step 6: Manual AML check Step 7: External systems

General info

ID: (will be assigned automatically)

Client type: **Search Companies House**

Status:

Name:  show dissolved (0 found)

Company number:

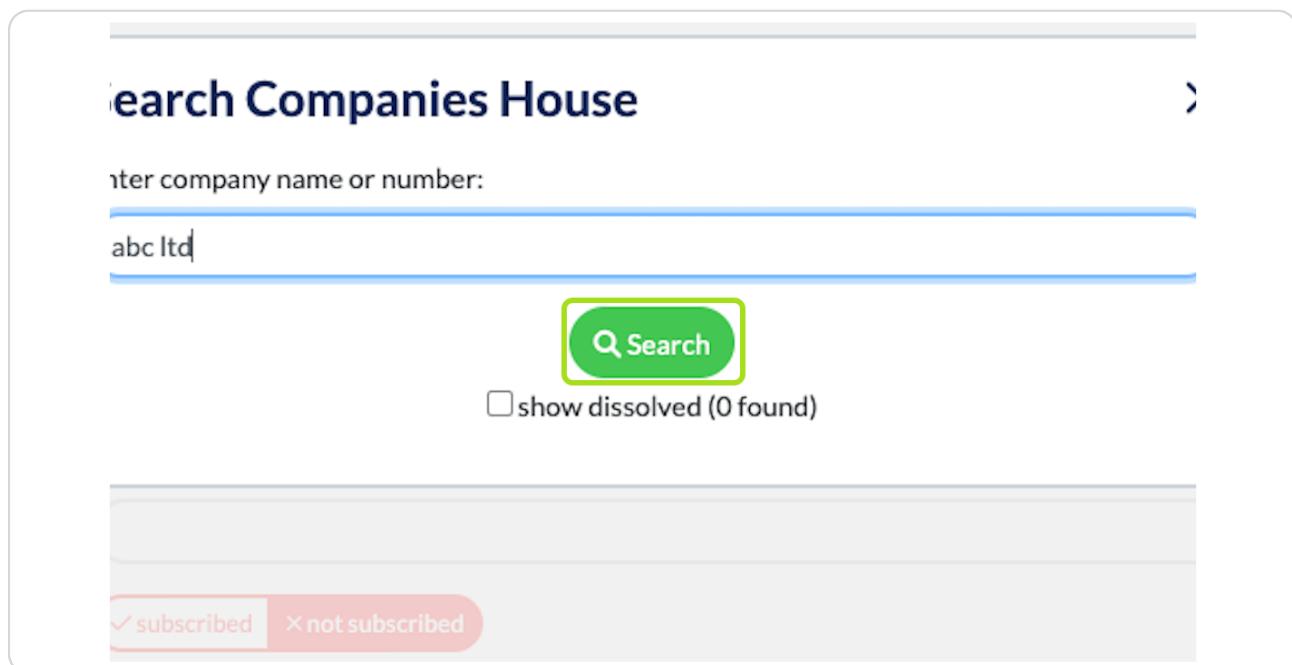
Companies House authentication code:

E-reminder:  subscribed  not subscribed

Registered office address: Premise, Street Name

## STEP 7

### Click on Search



## Search Companies House

Enter company name or number:

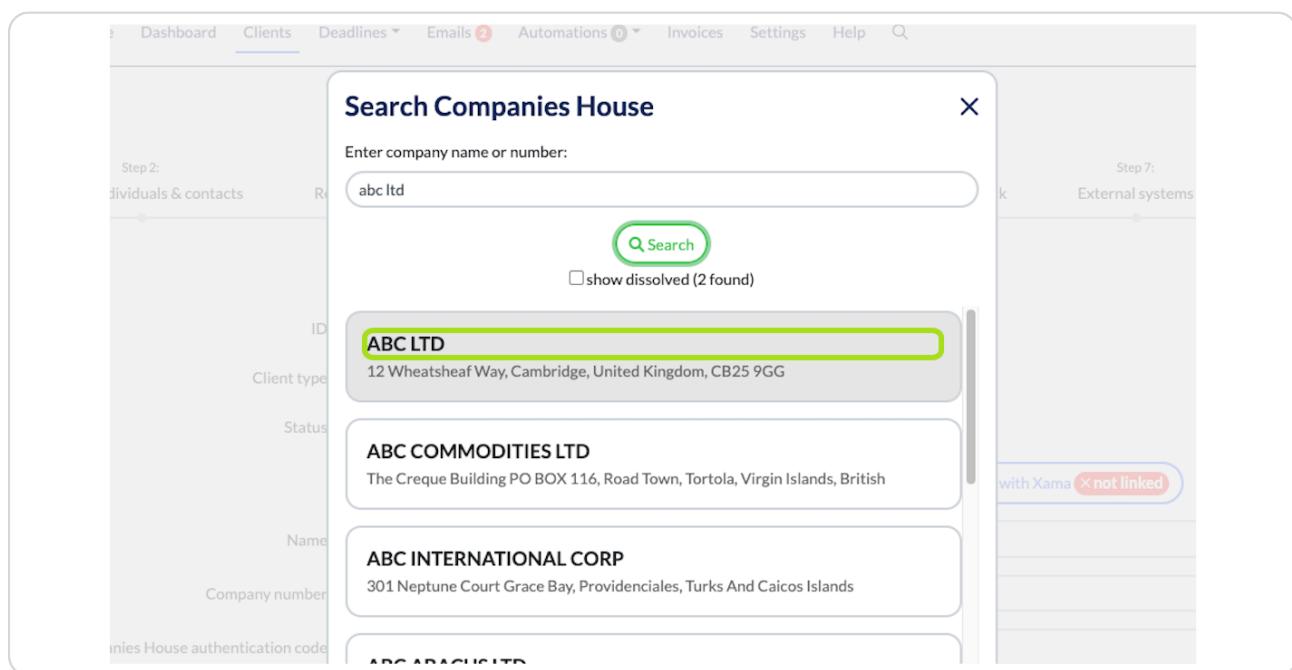
abc Ltd

show dissolved (0 found)

subscribed  not subscribed

## STEP 8

### Click on your client



Search Companies House

Enter company name or number: abc ltd

ABC LTD

12 Wheatsheaf Way, Cambridge, United Kingdom, CB25 9GG

ABC COMMODITIES LTD

The Creque Building PO BOX 116, Road Town, Tortola, Virgin Islands, British

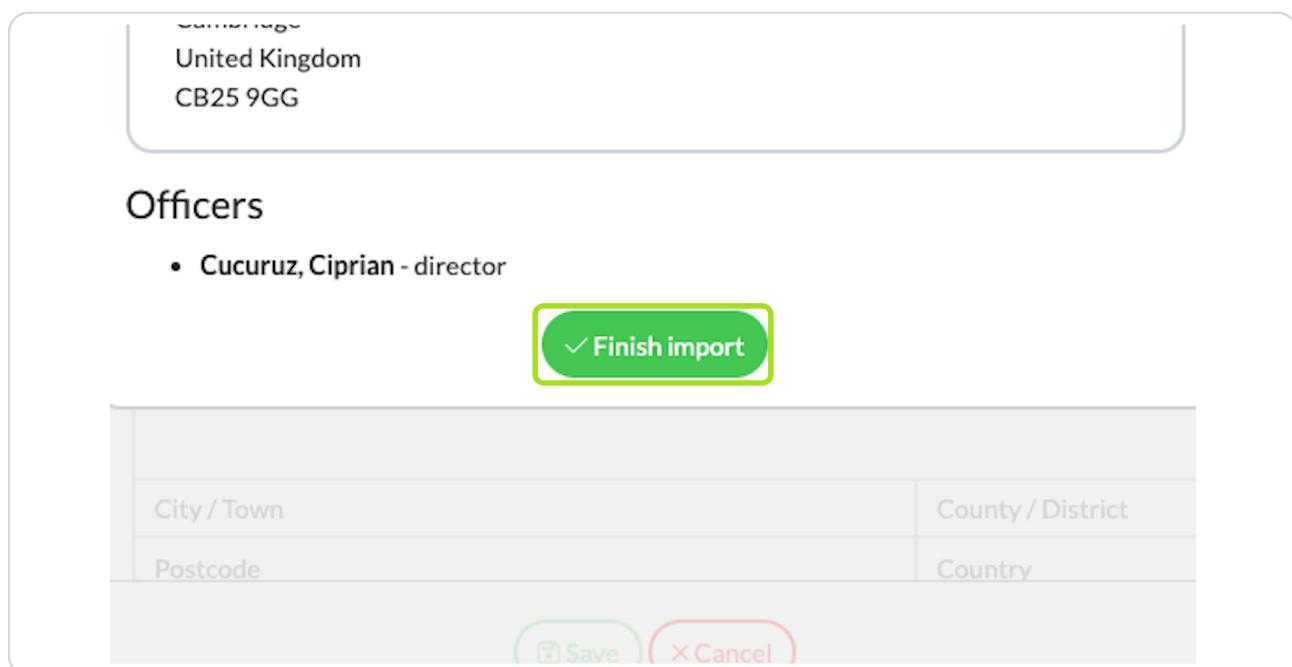
ABC INTERNATIONAL CORP

301 Neptune Court Grace Bay, Providenciales, Turks And Caicos Islands

ABC APAC LTD

## STEP 9

### Click on Finish import



Officers

- Cucuruz, Ciprian - director

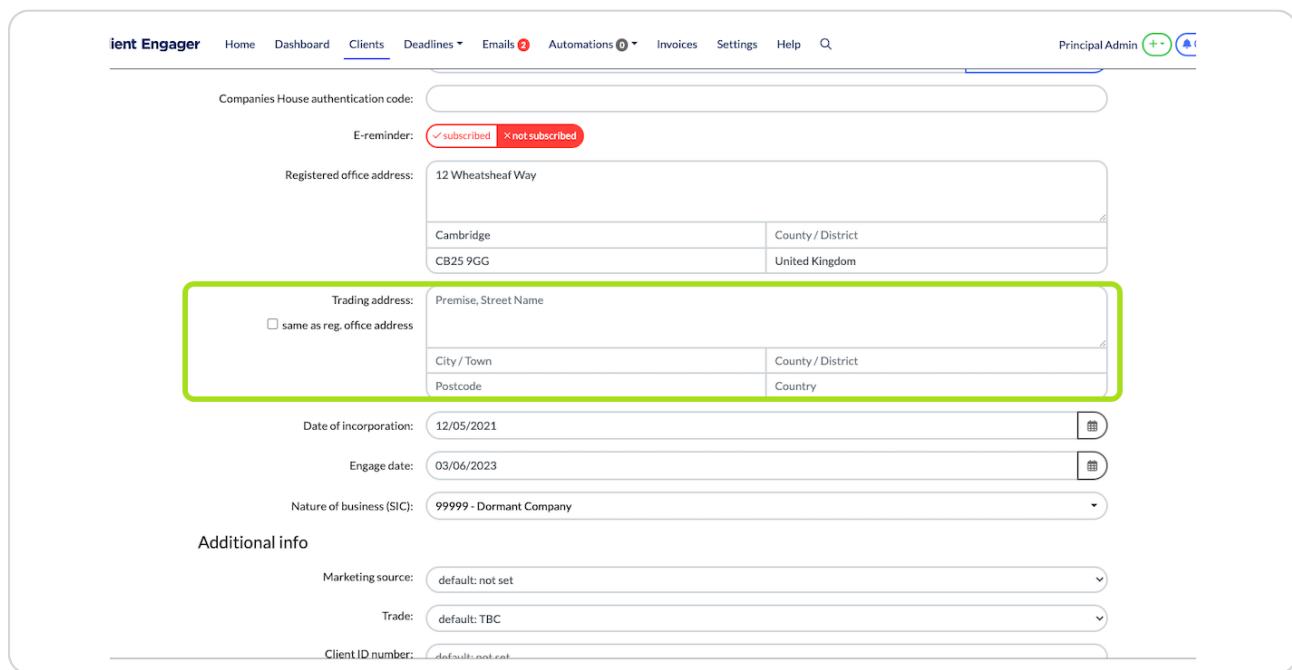
✓ Finish import

City / Town	County / District
Postcode	Country

Save Cancel

## STEP 10

### Check and update addresses if different from companies house



Client Engager Home Dashboard Clients Deadlines Emails 2 Automations 1 Invoices Settings Help Q Principal Admin + 4

Companies House authentication code:

E-reminder:  subscribed  not subscribed

Registered office address: 12 Wheatsheaf Way

Cambridge	County / District
CB25 9GG	United Kingdom

Trading address:  same as reg. office address

Premise, Street Name	
City / Town	County / District
Postcode	Country

Date of incorporation: 12/05/2021

Engage date: 03/06/2023

Nature of business (SIC): 99999 - Dormant Company

Additional info

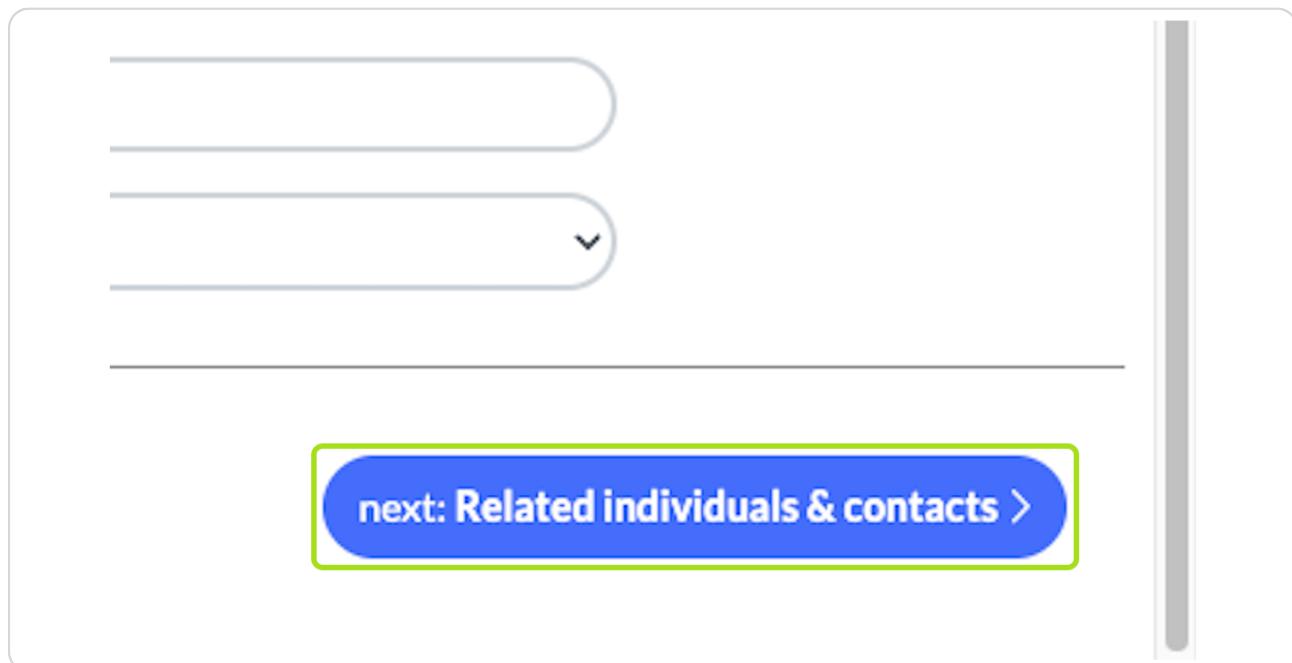
Marketing source: default: not set

Trade: default: TBC

Client ID number: default: not set

## STEP 11

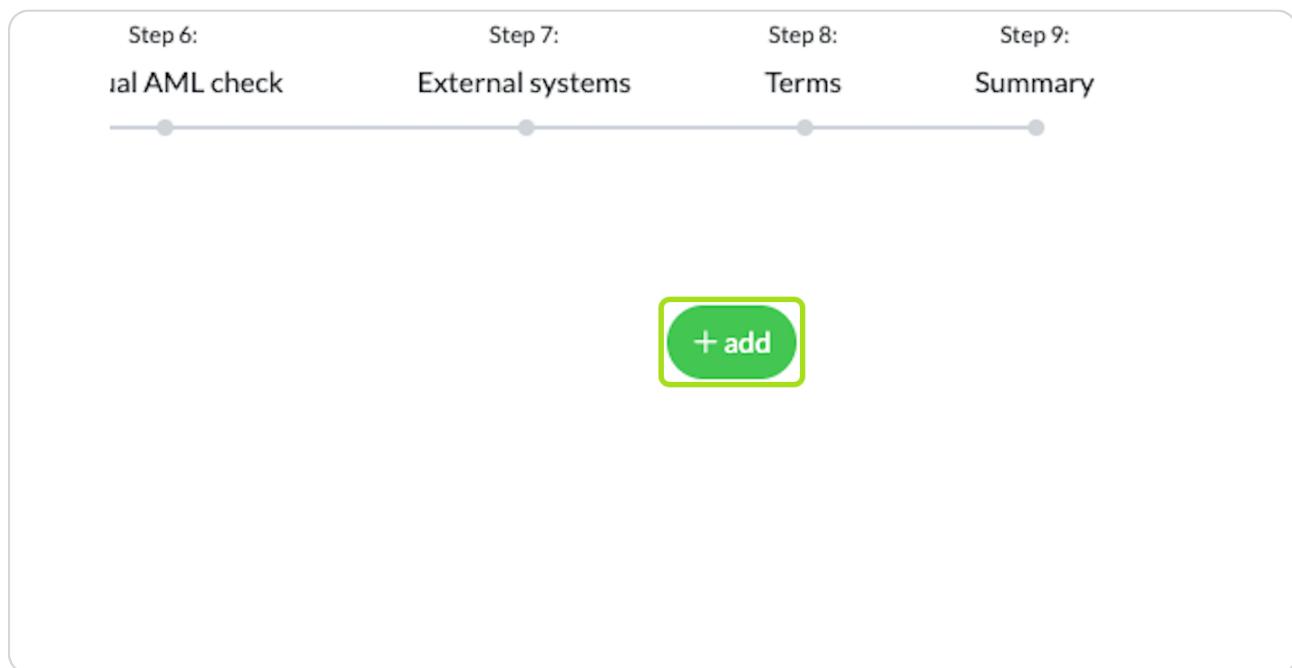
### Click on next: Related individuals & contacts



next: Related individuals & contacts >

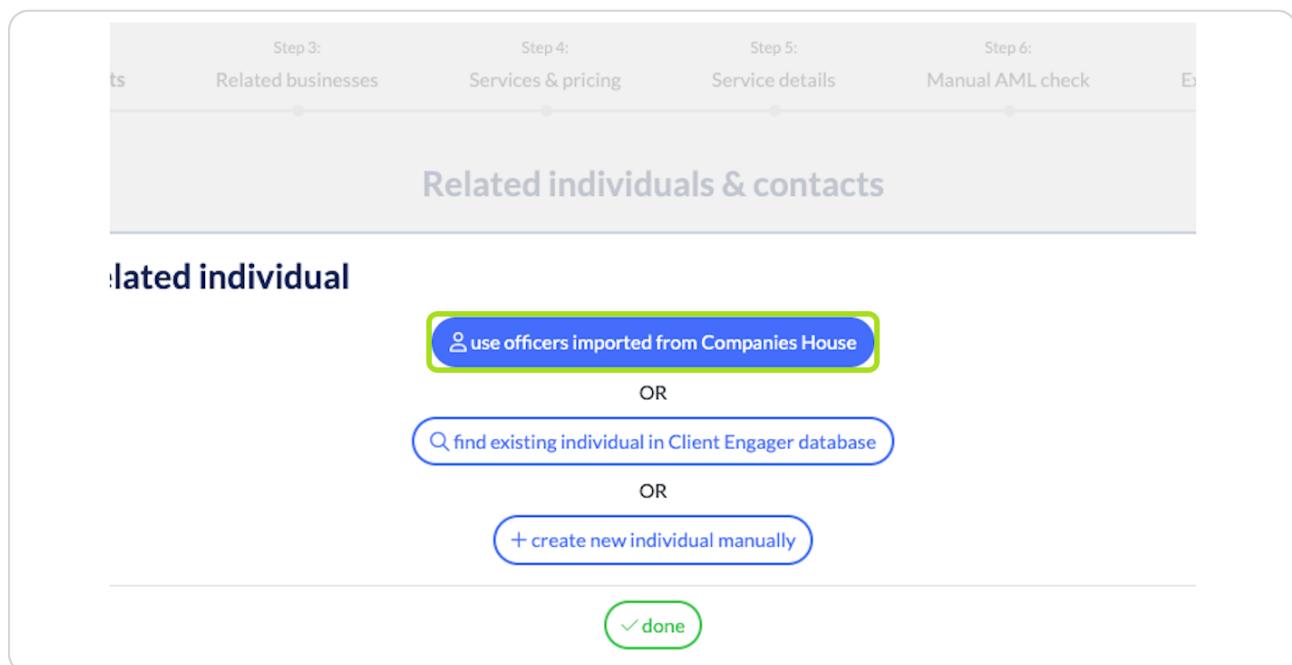
## STEP 12

**Click on add**



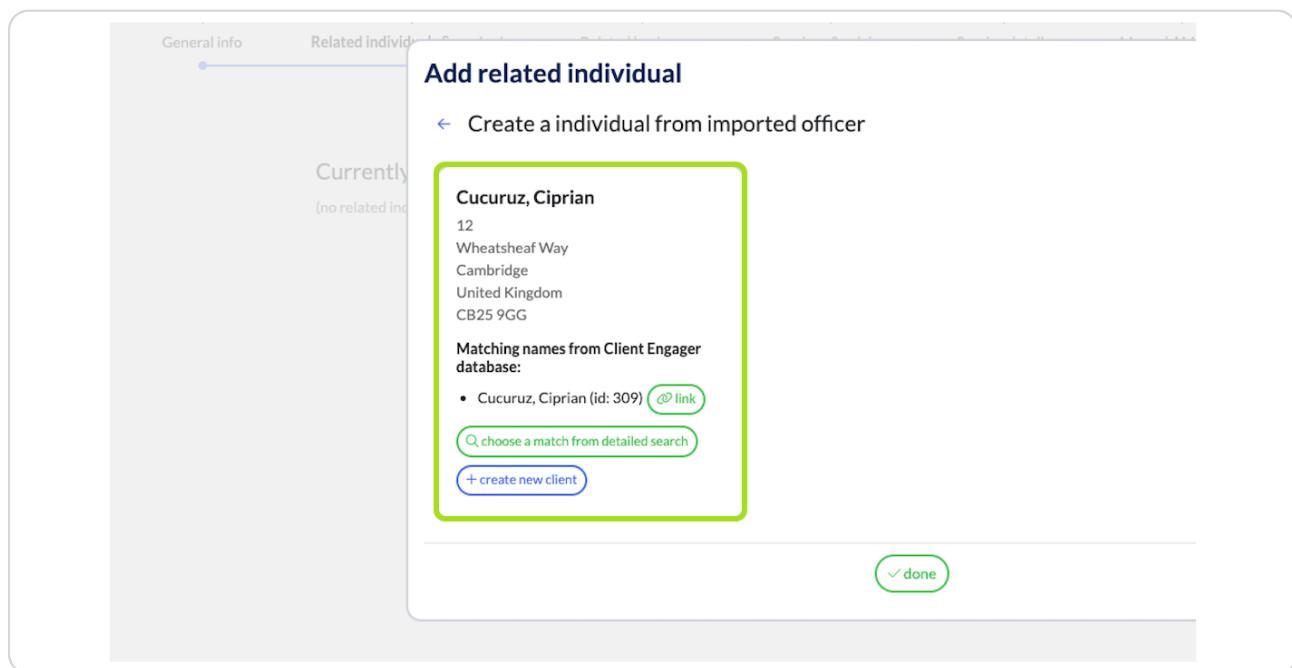
## STEP 13

**Click on use officers imported from Companies House**



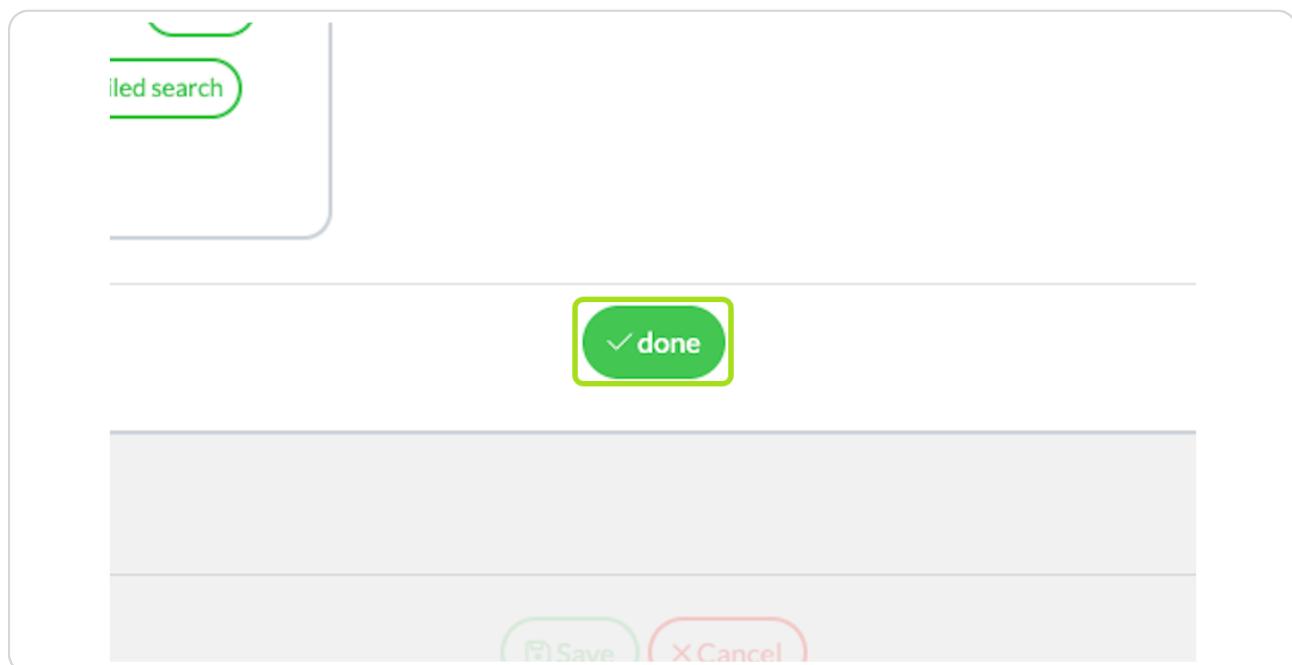
## STEP 14

Click on Cucuruz, Ciprian...



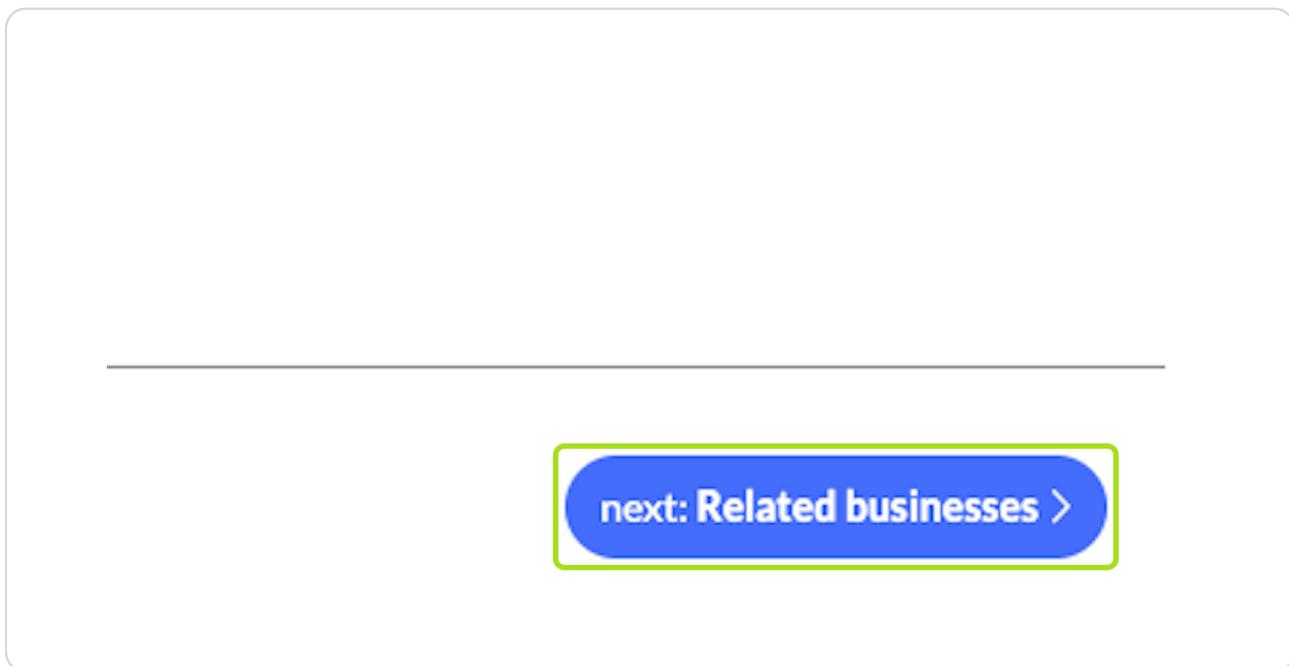
## STEP 15

Click on done



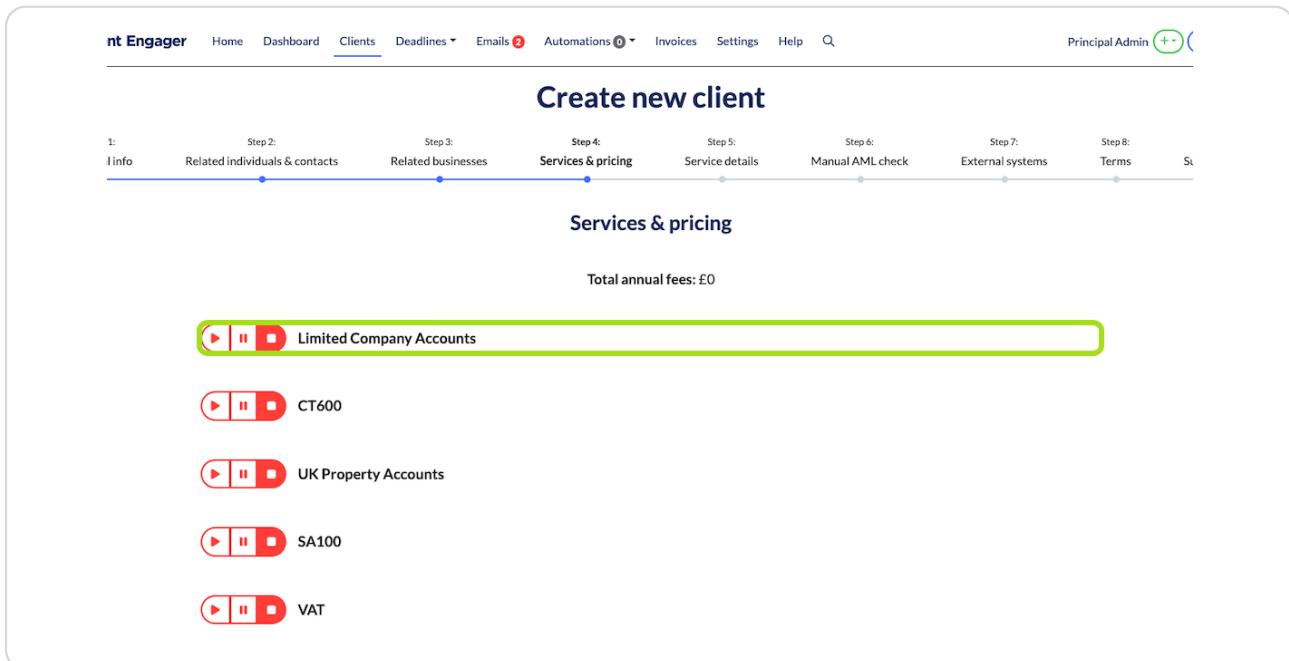
## STEP 16

Click on next: Related businesses



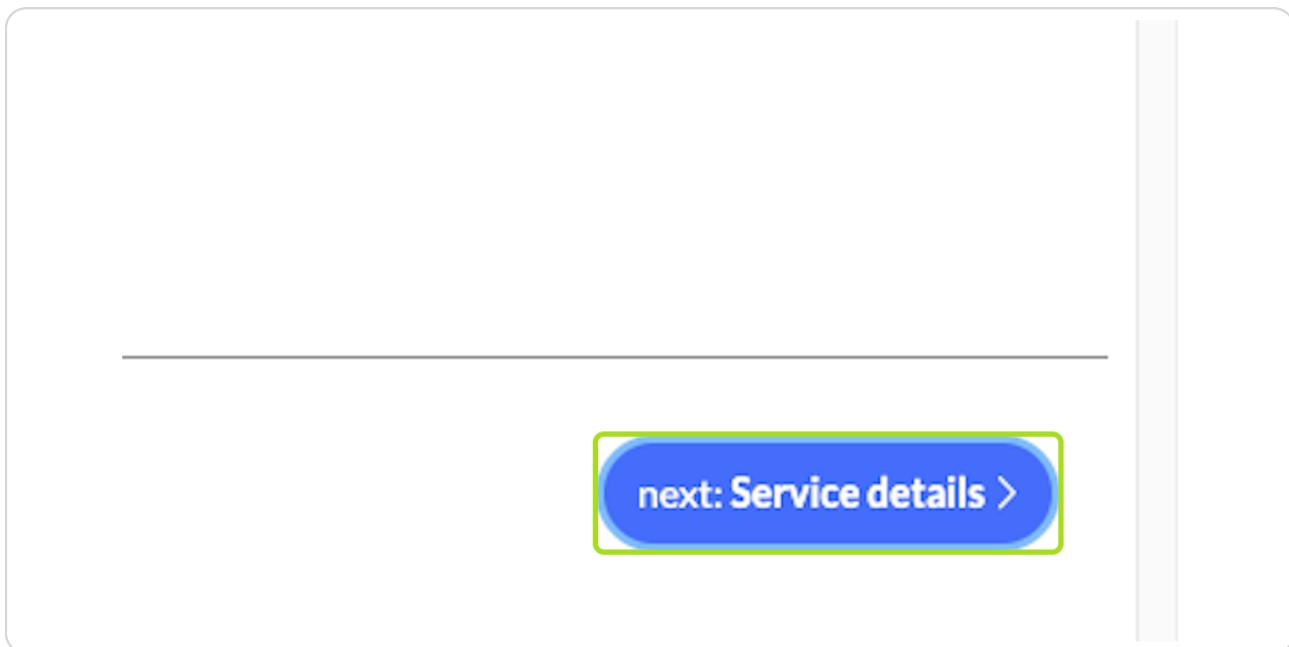
## STEP 17

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

Current: **Collect Records**  
Previous completed: N/A

[^ hide details](#)

**1. Collect Records**

Staff responsible:

default: Helen Brown (HB)

Completed: **not completed** [edit](#)

**2. Preparation**

Staff responsible:

default: Peter Jones (PJ)

Completed: **not completed** [edit](#)

## STEP 21

### Check frequency is right for each service

**Limited Company Accounts**

Frequency

default frequency custom frequency one-off job

By default deadline occurs every: **1 year**

**Dates**

Next due: 29/02/2024

Records received: not received yet

Internal deadline: not specified

**Additional info**

Records location: (not set)

Agent authorisation granted

General remarks: Additional details about the job that apply to this particular client, eg. 'Collect bank feed only' or 'Always ask for seasonal employees'.

**1. Collect Records**

Staff responsible:

default: Helen Brown (HB)

Completed: **not completed** [edit](#)

**2. Preparation**

Staff responsible:

default: Peter Jones (PJ)

Completed: **not completed** [edit](#)

**3. Approval**

Staff responsible:

default: Steve Jones (SJ)

Completed: **not completed** [edit](#)

**4. Filing**

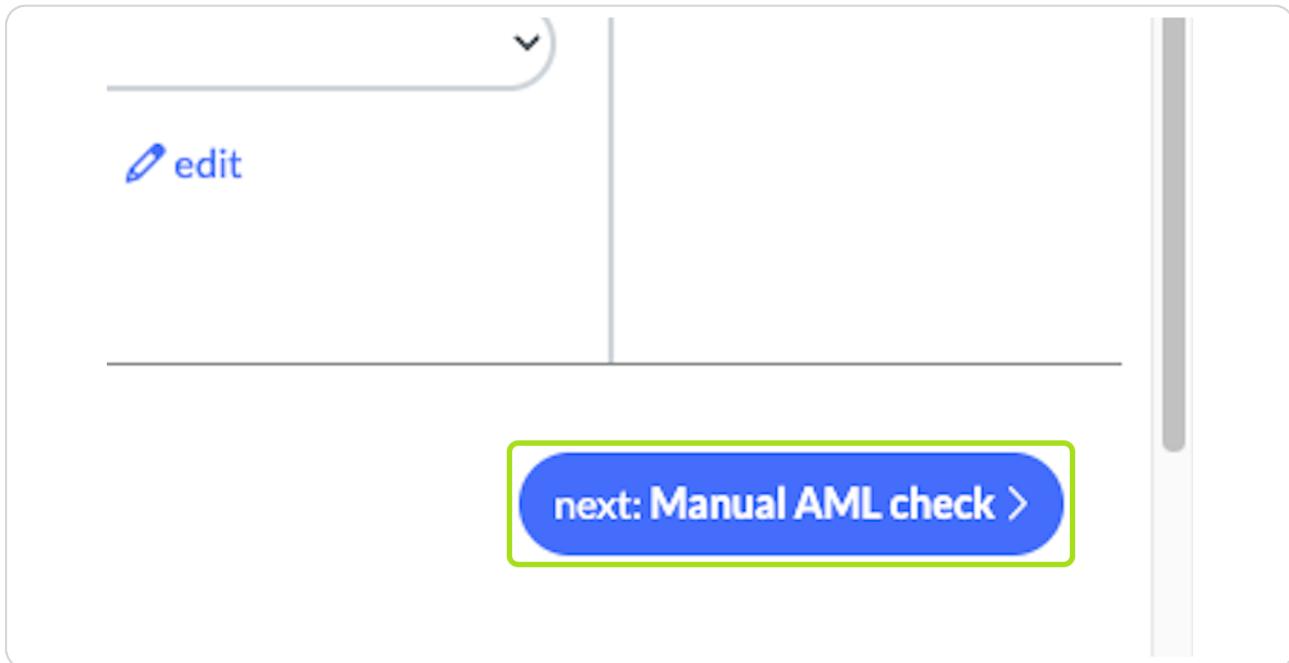
Staff responsible:

default: Helen Brown (HB)

[^ hide details](#)

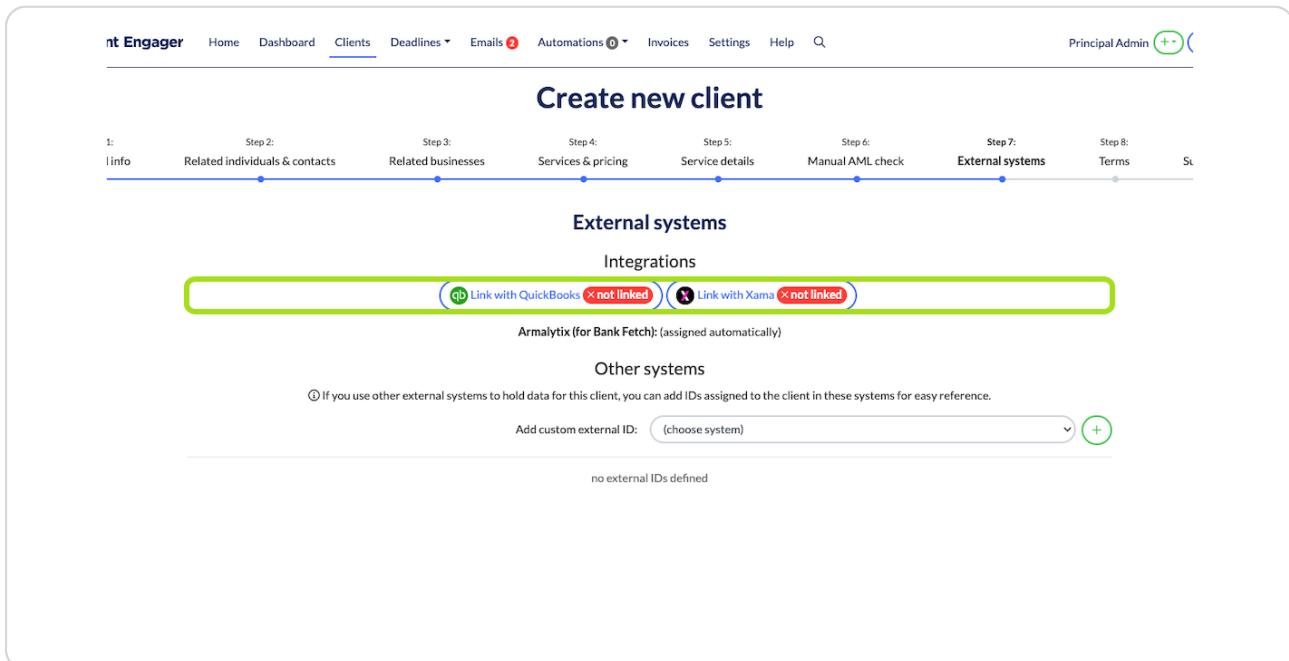
## STEP 22

Click on next: until you reach External systems



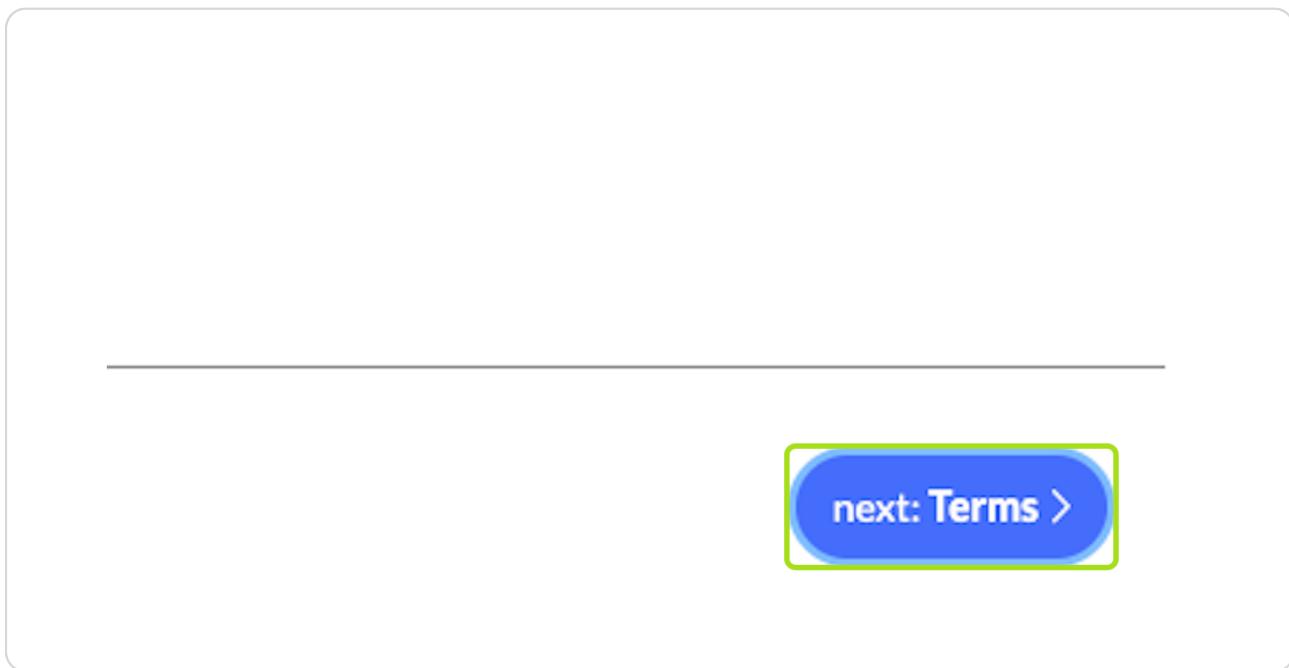
## STEP 23

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

1: Step 2: Step 3: Step 4: Step 5: Step 6: Step 7: Step 8:   
sl info Related individuals & contacts Related businesses Services & pricing Service details Manual AML check External systems Terms Sun

**Terms**

Director: default: Helen Brown (HB)

Manager: default: Principal Admin (PA)

Payment due days: default: 7

Late payment %: default: 8

Data Protection Officer: default: unknown

Data Protection email address: default: data@example.com

Notification days: default: 7

No. of years data to be held after disengagement: default: 7

next: External systems

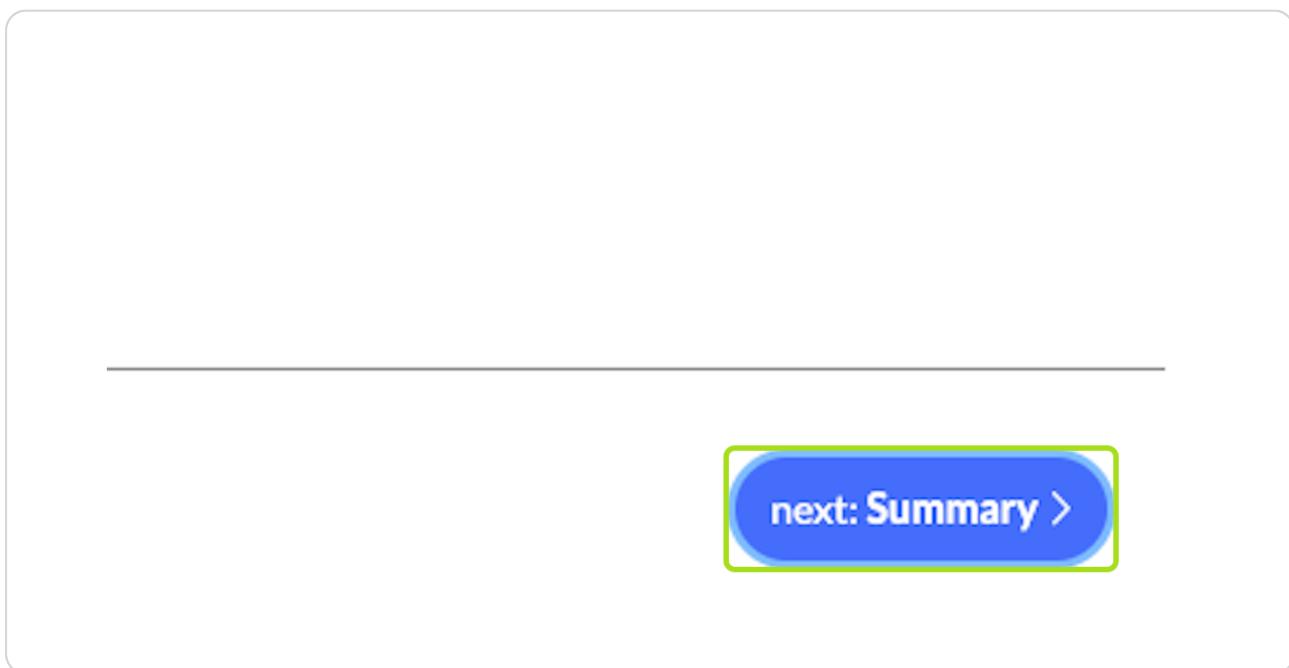
Save Cancel

Saving is only possible after completing all steps.

next: Sun

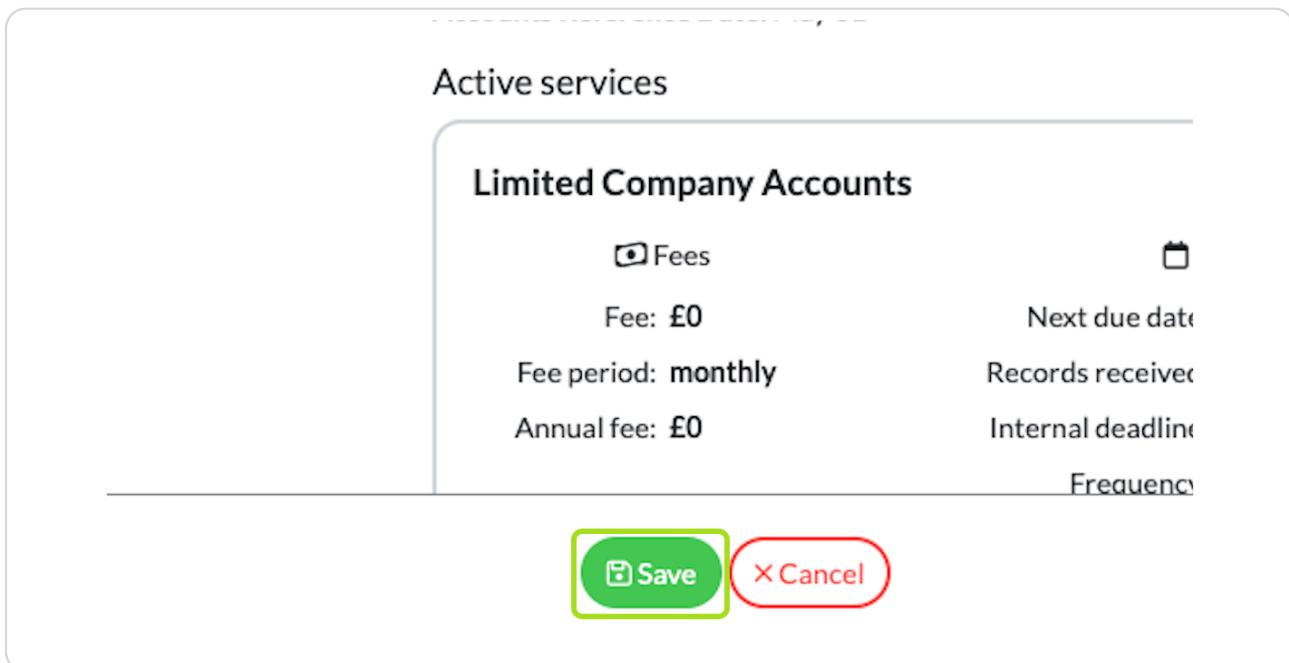
## STEP 26

Click on next: Summary



## STEP 27

Click on Save



# Tango

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