

Adding a new LTD/CIC/LLP to Client Engager

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Created by

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Creation Date

June 3, 2023

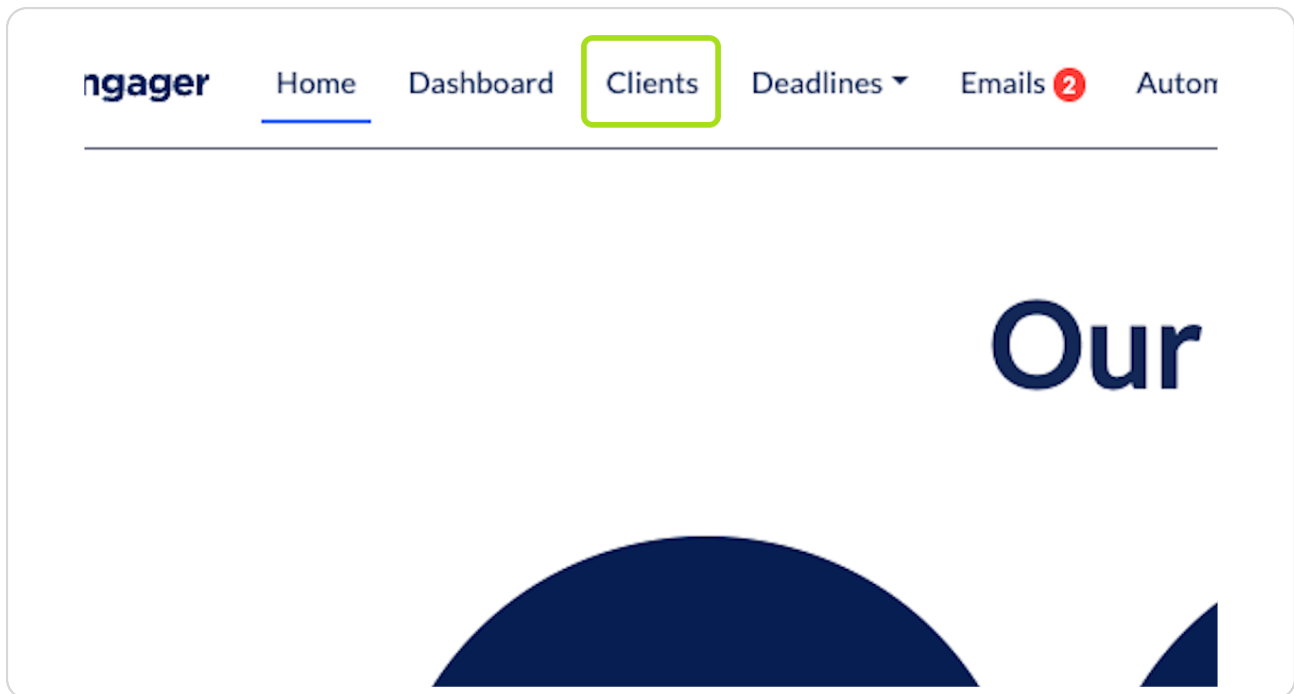
Last Updated

June 3, 2023

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

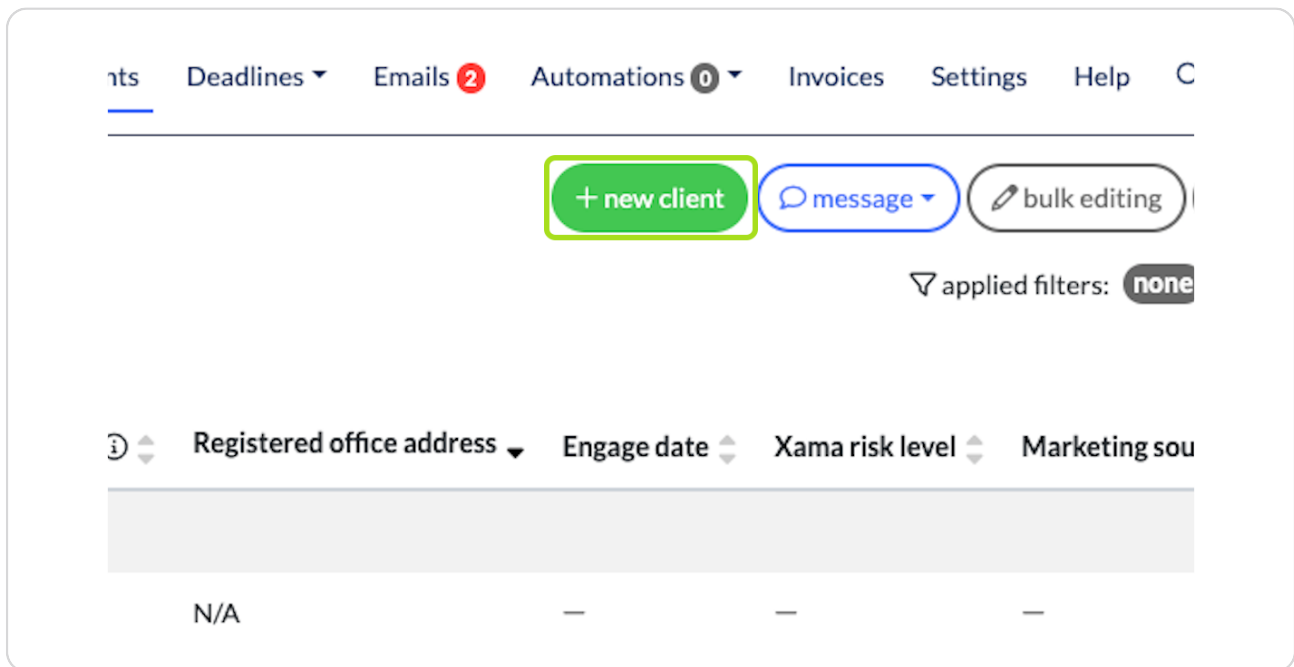
STEP 1

Click on Clients



STEP 2

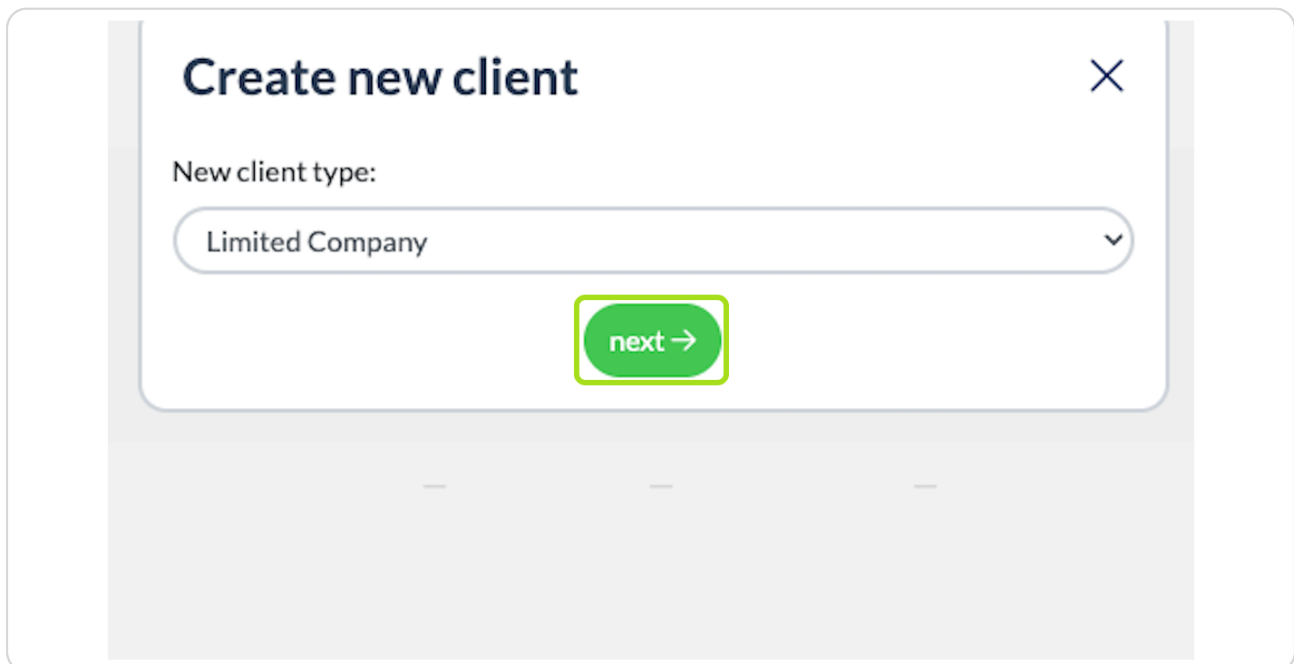
Click on **new client**



The screenshot shows a dashboard with navigation tabs: **nts**, **Deadlines**, **Emails** (with a red badge '2'), **Automations** (with a grey badge '0'), **Invoices**, **Settings**, **Help**, and a user icon **C**. Below the tabs, there are three buttons: **+ new client** (highlighted with a green box), **message** (with a speech bubble icon), and **bulk editing** (with a pencil icon). To the right of these buttons, it says 'applied filters: none'. Below this, there is a table with headers: **Registered office address**, **Engage date**, **Xama risk level**, and **Marketing sou**. The first row of the table shows 'N/A' under the first header and dashes under the others.

STEP 3

Click on **next**



The screenshot shows a modal titled **Create new client** with a close button (X) in the top right corner. Inside the modal, there is a label **New client type:** followed by a dropdown menu showing **Limited Company**. Below the dropdown, there is a green button labeled **next →** (highlighted with a green box). The modal is set against a light grey background.

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](#) not linked [Link with Xama](#) not linked

Name:

Company number:

Authentication code:

E-reminder: **✓ subscribed** not subscribed

Office address:

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](#) not linked

Name:

Company number:

Companies House authentication code:

E-reminder: **✓ subscribed** not subscribed

STEP 6

Type the name of your clients LTD

The screenshot shows a multi-step form titled 'General info'. At the top, a progress bar indicates steps from 'Step 2: Individuals & contacts' to 'Step 7: External systems'. The form fields include 'ID: (will be assigned automatically)', 'Client type', 'Status', 'Name', 'Company number', 'Companies House authentication code', 'E-reminder: ✓ subscribed × not subscribed', and 'Registered office address: Premise, Street Name'. A modal window titled 'Search Companies House' is open, featuring a search input field with 'abc ltd' entered, a 'Search' button, and a checkbox for 'show dissolved (0 found)'. A red '× not linked' status is visible on the right side of the form.

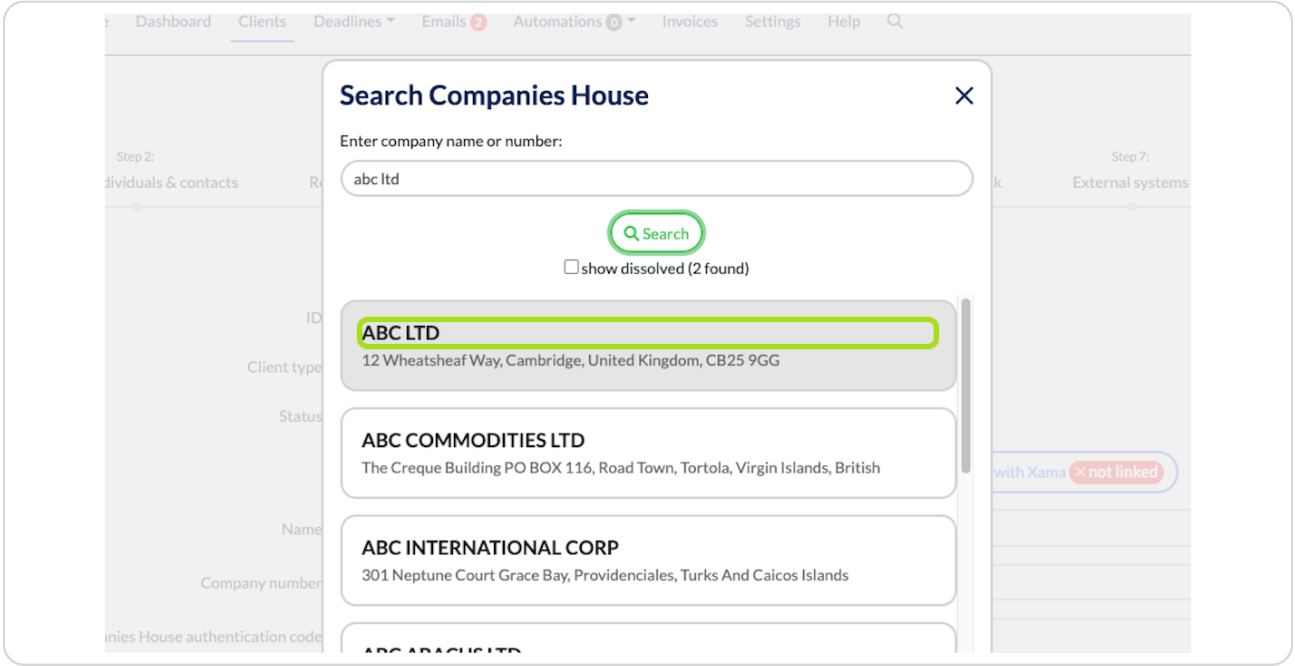
STEP 7

Click on Search

This is a close-up of the 'Search Companies House' modal. The title 'Search Companies House' is at the top right. Below it is the label 'Enter company name or number:' followed by a text input field containing 'abc ltd'. A green 'Search' button is highlighted with a red border. Below the button is a checkbox labeled 'show dissolved (0 found)'. At the bottom of the modal, there is a red bar with the text '✓ subscribed × not subscribed'.

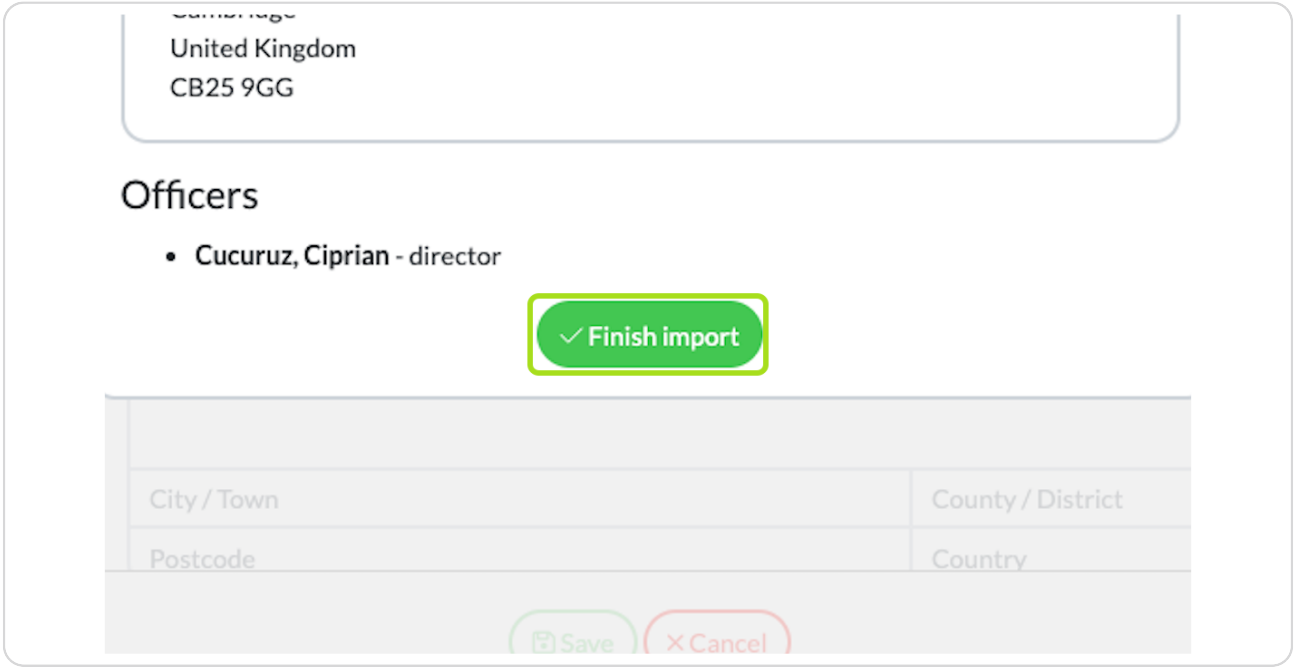
STEP 8

Click on your client



STEP 9

Click on Finish import



STEP 10

Check and update addresses if different from companies house

The screenshot shows the 'ient Engager' interface with a navigation bar at the top containing links for Home, Dashboard, Clients, Deadlines, Emails, Automations, Invoices, Settings, and Help. The user is logged in as 'Principal Admin'. The form contains the following fields:

- Companies House authentication code: [text input]
- E-reminder: [checked] subscribed [unchecked] not-subscribed
- Registered office address: 12 Wheatsheaf Way, Cambridge, CB25 9GG, United Kingdom
- Trading address: [checkbox] 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

The screenshot shows a form with two text input fields and a dropdown menu. A blue button with the text 'next: Related individuals & contacts >' is highlighted with a green border. A vertical scrollbar is visible on the right side of the form.

STEP 12

Click on **add**

Step 6: Manual AML check Step 7: External systems Step 8: Terms Step 9: Summary

+ add

STEP 13

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

Step 3: Related businesses Step 4: Services & pricing Step 5: Service details Step 6: Manual AML check Step 7: Summary

Related individuals & contacts

Related individual

use officers imported from Companies House

OR

find existing individual in Client Engager database

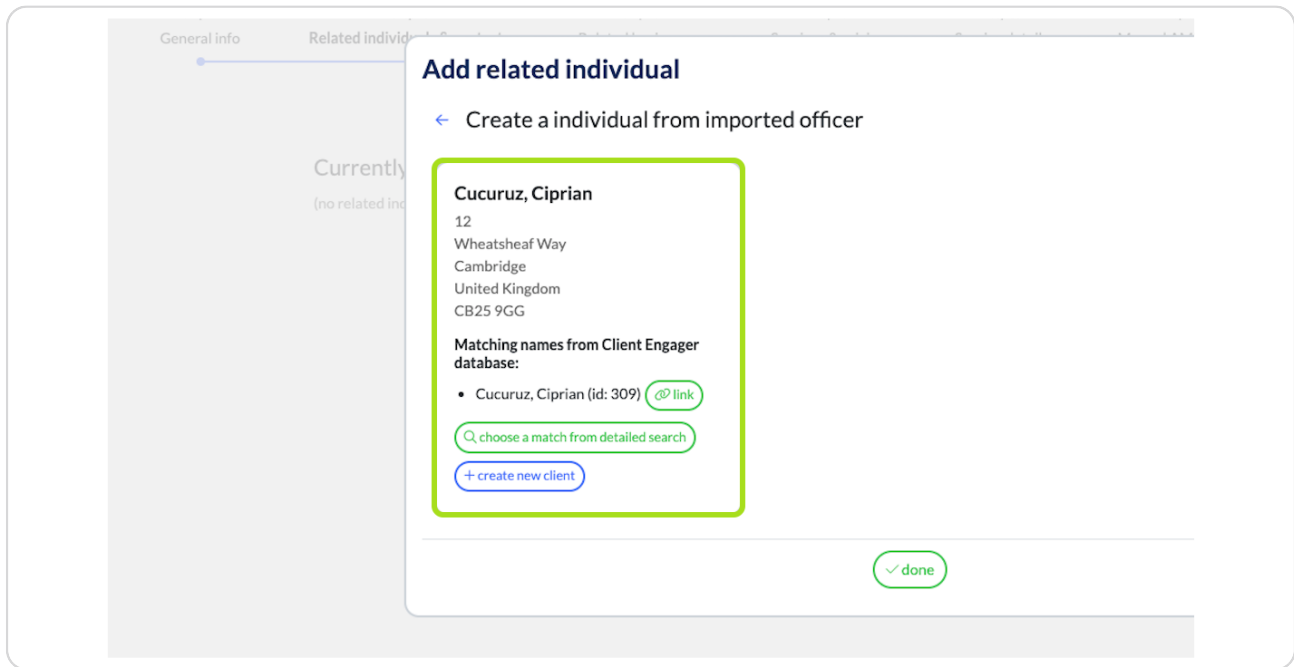
OR

+ create new individual manually

done

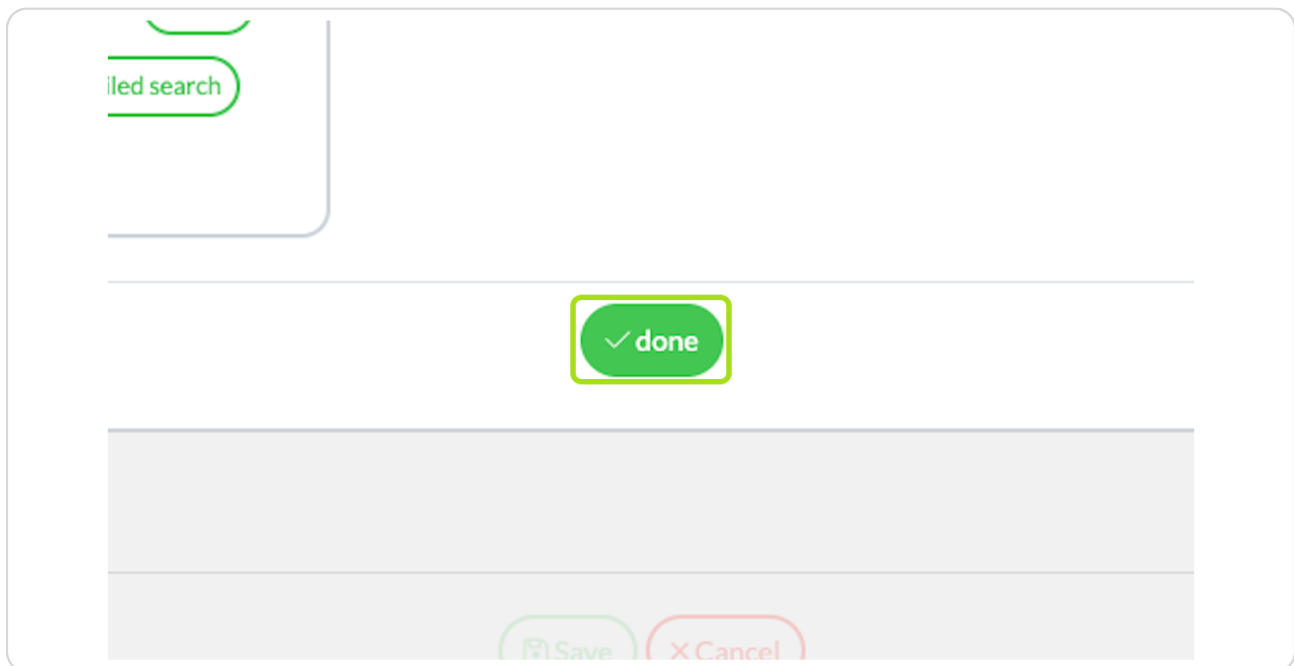
STEP 14

Click on Cucuruz, Ciprian...



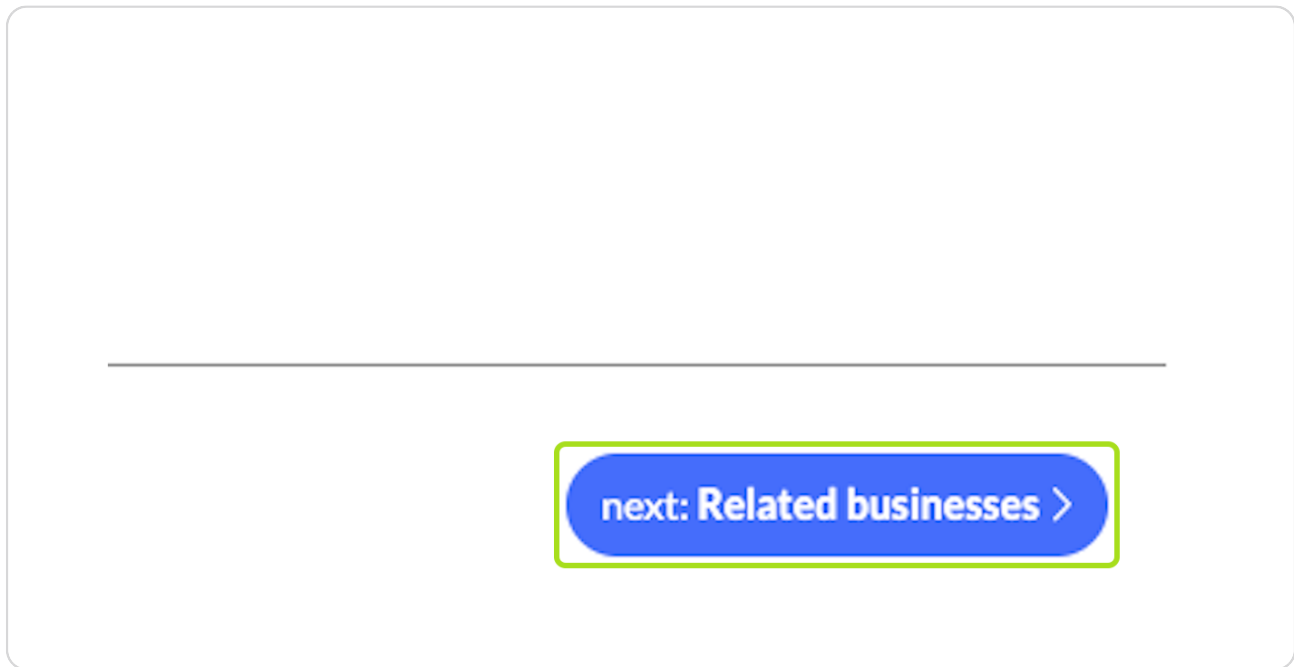
STEP 15

Click on done



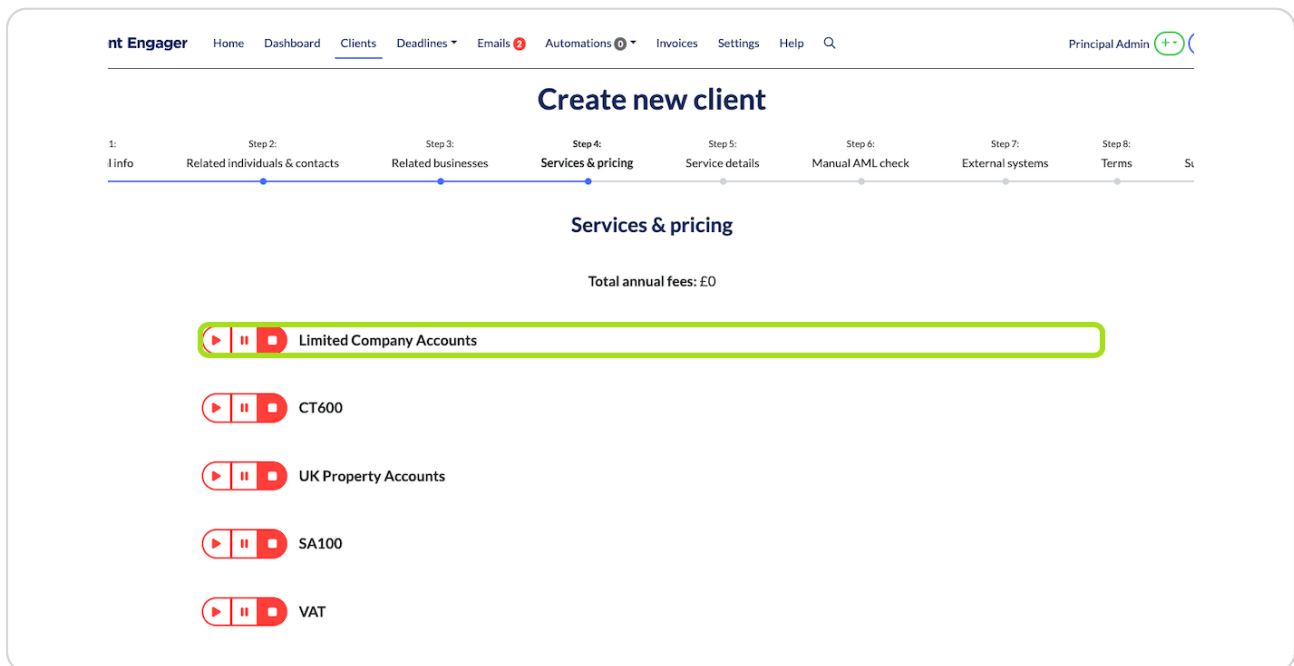
STEP 16

Click on next: Related businesses



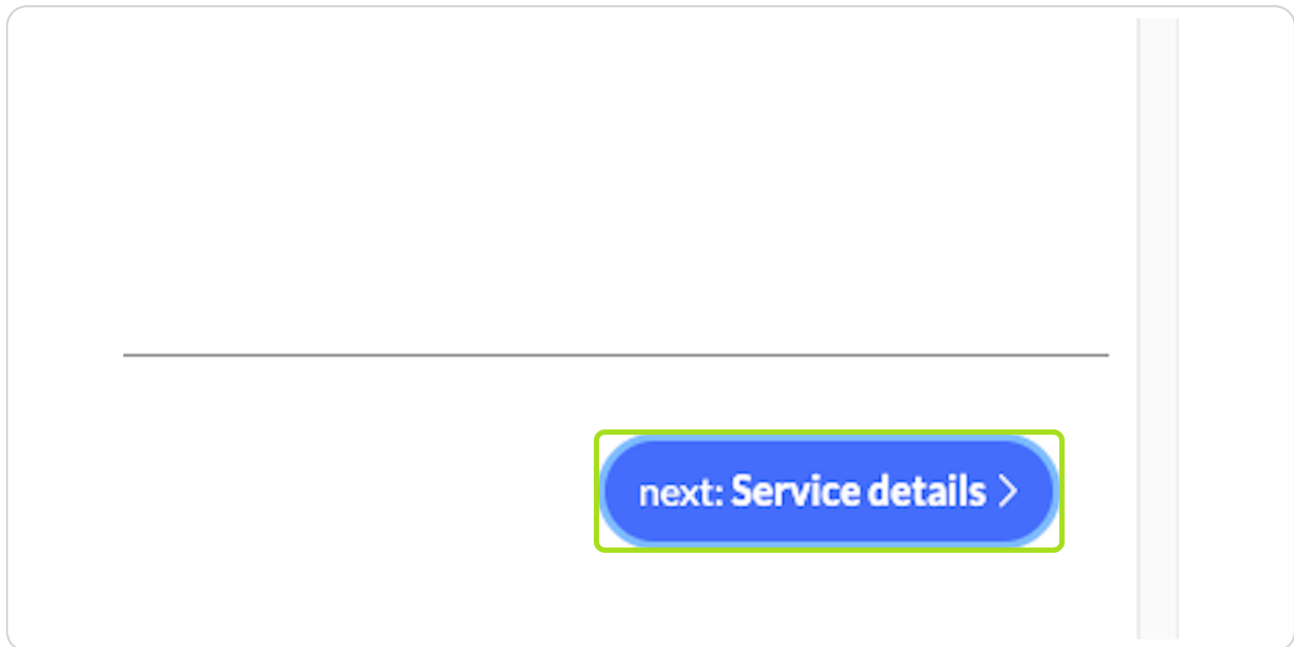
STEP 17

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

A screenshot of the 'Create new client' form in the 'Client Engager' application. The form is titled 'Create new client' and shows a progress bar with steps from 'Step 1: Personal info' to 'Step 9: Summary'. The current step is 'Step 5: Service details'. The form contains several sections: 'Account Reference Date' with dropdowns for Month (May) and Day (31); 'CS01 Date' with dropdowns for Month (May) and Day (11); 'Limited Company Accounts' with tabs for 'default frequency', 'custom frequency', and 'one-off job'; 'Dates' with a 'Next due' date of 29/02/2024; 'Records received' with a dropdown set to 'not received yet'; 'Internal deadline' with a dropdown set to 'not specified'; 'Additional info' with a 'Records location' dropdown set to '(not set)'; 'Agent authorisation granted' checkbox; 'General remarks' with a text area; 'Phases' section with '4 phases' and 'Current: Collect Records'; and '1. Collect Records' with a 'Staff responsible' dropdown set to 'default: Helen Brown (HB)'. The form also shows 'Completed: not completed' and 'Previous completed: N/A'.

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

2. **Preparation**
Staff responsible:
default: Peter Jones (PJ) [edit](#)
Completed: **not completed** [edit](#)

STEP 21

Check frequency is right for each service

Client Engager Home Dashboard Clients **Deadlines** Emails Automations Invoices Settings Help

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'.

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

1. Collect Records
Staff responsible: default: Helen Brown (HB)
Completed: **not completed**

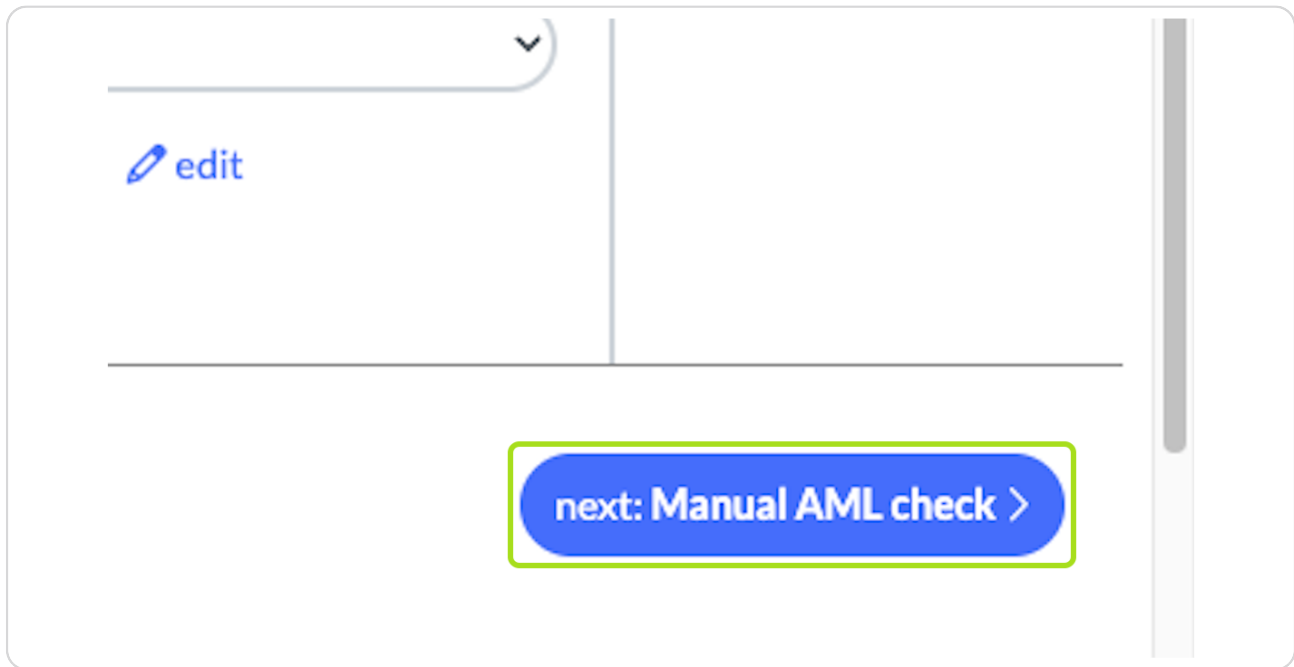
2. Preparation
Staff responsible: default: Peter Jones (PJ)
Completed: **not completed**

3. Approval
Staff responsible: default: Steve Jones (SJ)
Completed: **not completed**

4. Filing
Staff responsible: default: Helen Brown (HB)

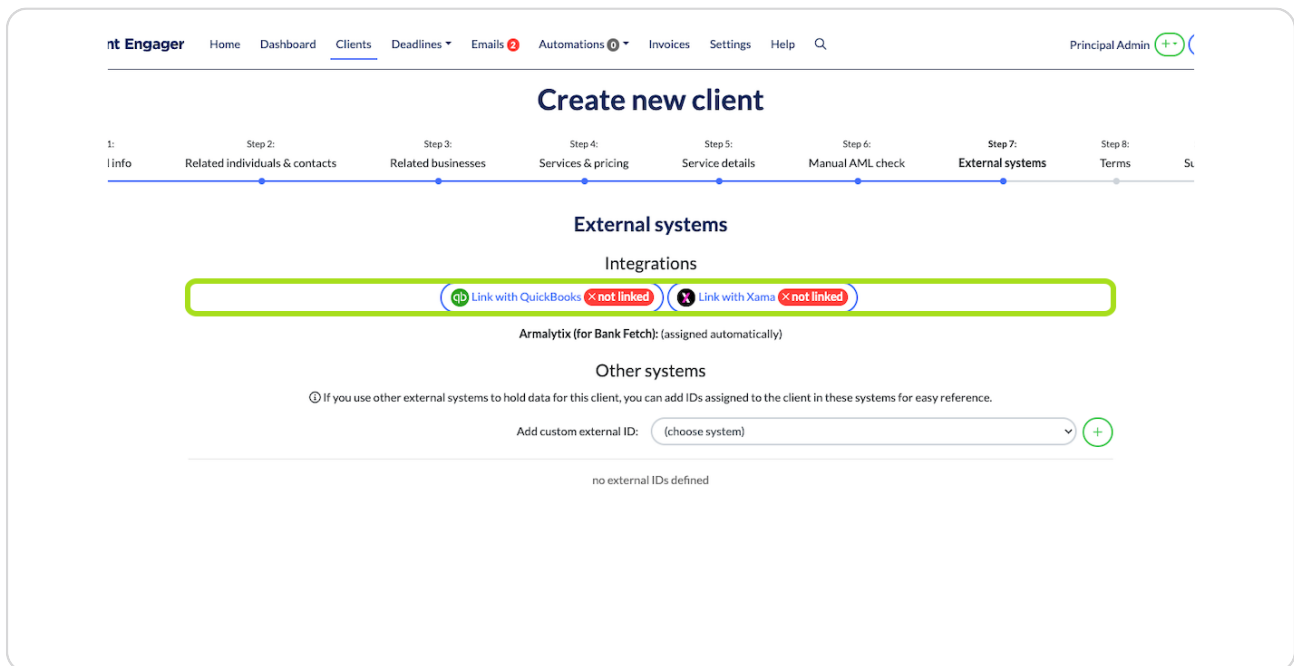
STEP 22

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

next: Terms >

STEP 25

Update these fields

Step 1: Personal infoStep 2: Related individuals & contactsStep 3: Related businessesStep 4: Services & pricingStep 5: Service detailsStep 6: Manual AML checkStep 7: External systemsStep 8: TermsStep 9: Summary

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

Previous: External systems

Save

Cancel

next: Summary

Saving is only possible after completing all steps.

STEP 26

Click on next: Summary


next: Summary >

STEP 27

Click on Save

Active services

Limited Company Accounts




Fees

Fee: £0

Fee period: monthly

Annual fee: £0



Next due date

Records receiver

Internal deadline

Frequency

Save

Cancel

Tango

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