

Overview of what the menus on the client info page are

27 Steps

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Created by

Johann Goree

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June 3, 2023

STEP 1

By clicking on a clients name it opens their record.

There are two main menus

- Steps 1-9 along the top, these are the setup menus that you may need to go into to change details
- The left-hand menu where you carry out actions or see details for the specific client you are looking at

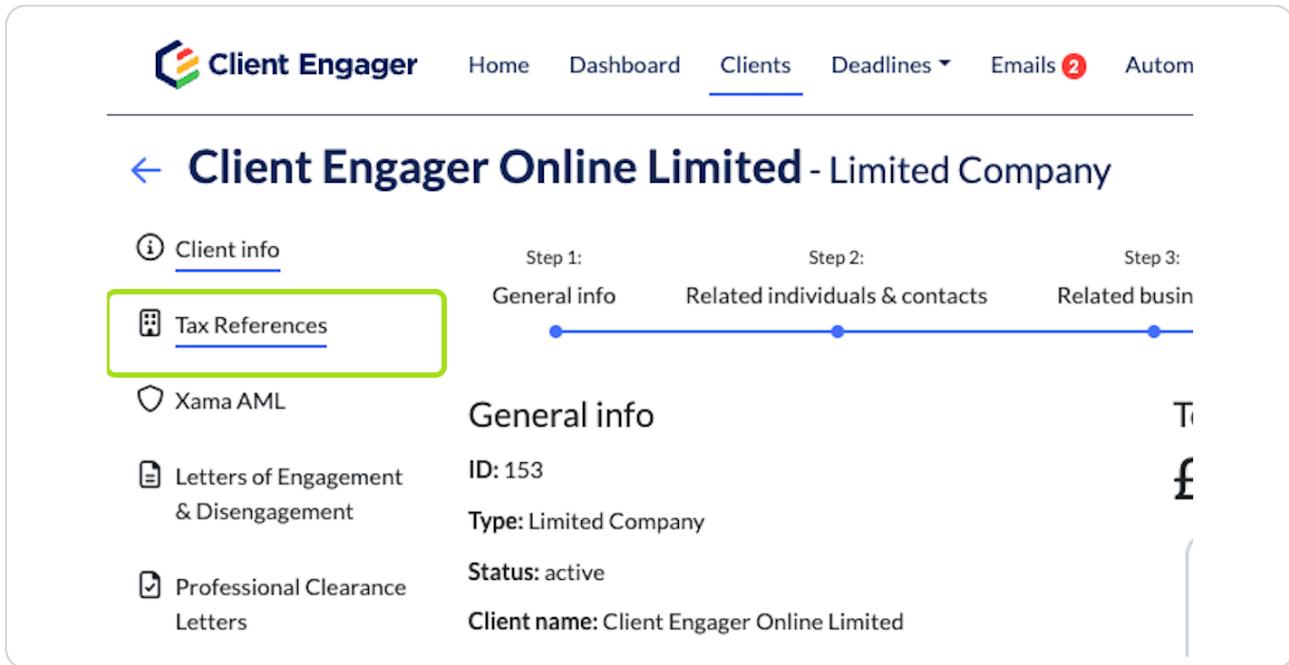
The screenshot shows the Client Engager software interface. The top navigation bar includes links for Home, Dashboard, Clients (which is the active tab), Deadlines, Emails, Automations, Invoices, Settings, Help, and a search bar. On the far right, there are user profile icons for 'Principal Admin' and a red 'Logout' button.

The main content area displays the details for 'Client Engager Online Limited - Limited Company'. The left sidebar lists various client management options: Client info (selected), Tax References, Xama AML, Letters of Engagement & Disengagement, Professional Clearance Letters, Deadlines, Invoices, Payments, Bank Fetch, Files, Signing requests, Messages, Memos, Tailored checklists, and Service auto reminders. The 'Client info' section is expanded, showing the client's ID (153), Type (Limited Company), and Status (active). The client's name is Client Engager Online Limited, and the company number is 11652499, with a note to visit Companies House. There is a reminder about Companies House authentication.

The main content area also shows the total annual fees: £4,416. Below this, there are three tables: 'Annual fees' (SA100: £180), 'Quarterly fees' (VAT: £135), and 'Monthly fees' (CT600: £42, Payroll: £150, CS01: £6, Bookkeeping: £0, Processing Sales Invoices: £120, Loyalty Bonus: -£10, TOTAL: £308). The 'Service details' section includes accounts reference date (Mar 31), CS01 date (Oct 30), and active services. The 'Limited Company Accounts' section shows fees (£795), dates (Next due date: 31/07/2022, Last due date: 21/04/2023), and phases (1 Collect Balance due, 21/04/2023). A note indicates 'one-off job; enabled'.

STEP 2

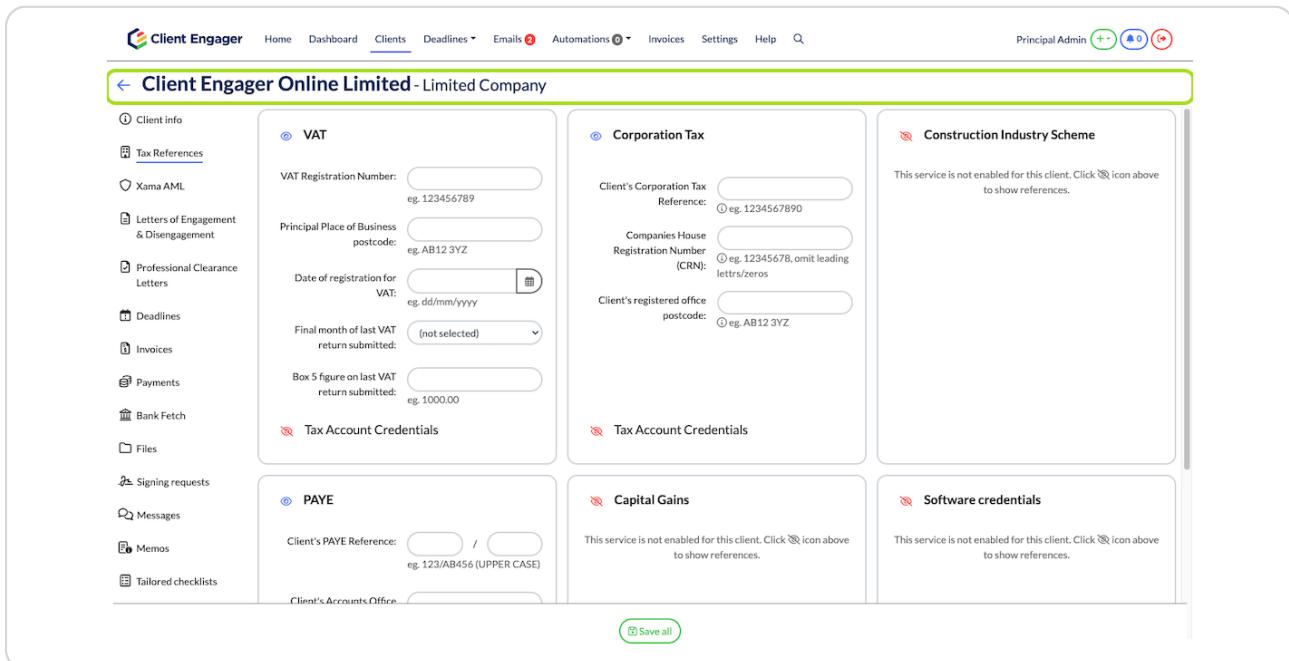
Tax References



The screenshot shows the Client Engager software interface. At the top, there is a navigation bar with links: Home, Dashboard, Clients (which is the active tab), Deadlines, Emails (with a red notification badge), and Autom. Below the navigation bar, the title 'Client Engager Online Limited - Limited Company' is displayed with a back arrow. A horizontal progress bar indicates the current step: Step 1: General info (highlighted in blue), Step 2: Related individuals & contacts, and Step 3: Related busin. On the left, a sidebar lists several client-related documents: Client info, Tax References (highlighted with a green box), Xama AML, Letters of Engagement & Disengagement, and Professional Clearance Letters. The main content area is titled 'General info' and shows the following details: ID: 153, Type: Limited Company, Status: active, and Client name: Client Engager Online Limited.

STEP 3

Here you can view and add UTRS etc



The screenshot shows the 'Tax References' section of the Client Engager interface for the same client. The sidebar on the left includes: Client info, Tax References (highlighted with a green box), Xama AML, Letters of Engagement & Disengagement, Professional Clearance Letters, Deadlines, Invoices, Payments, Bank Fetch, Files, Signing requests, Messages, Memos, and Tailored checklists. The main content area is divided into several sections: VAT (VAT Registration Number, Principal Place of Business, Date of registration for VAT, Final month of last VAT return submitted, Box 5 figure on last VAT return submitted, Tax Account Credentials), Corporation Tax (Client's Corporation Tax Reference, Companies House Registration Number (CRN), Client's registered office, Tax Account Credentials), PAYE (Client's PAYE Reference), Capital Gains (disabled for this client), and Software credentials (disabled for this client). A green 'Save all' button is located at the bottom right.

STEP 4

Xama AML

← Client Engager Online Limited - Limited Company

Client info

Tax References

Xama AML

Letters of Engagement & Disengagement

Professional Clearance Letters

Deadlines

VAT

VAT Registration Number: eg. 123456789

Principal Place of Business postcode: eg. AB12 3YZ

Date of registration for VAT: eg. dd/mm/yyyy

Final month of VAT:

STEP 5

Here you will see an overview of the Risk Assessments and client ids stored on Xama if you have linked the accounts

Home Dashboard Clients Deadlines Emails 2 Automations 0 Invoices Settings Help Principal Admin + 0 0 refresh

ger Online Limited - Limited Company

AML process powered by:  Client Engager listens to data changes in Xama and updates them automatically. To refresh manually, click on the button. refresh manually

Started	Status	Risk level	Completed
26/02/2023	COMPLETED	NORMAL	26/02/2023

Risk assessments for this client + new @ view in Xama

Contacts linked to Client Engager

Wainwright, Andy

Onboarding	not started	+ new @ view in Xama
AML check	not started	+ new @ view in Xama

Sinclair-Ford, Ian Andrew

Onboarding	not started	+ new @ view in Xama
AML check	not started	+ new @ view in Xama

Muzyczuk, Piotr

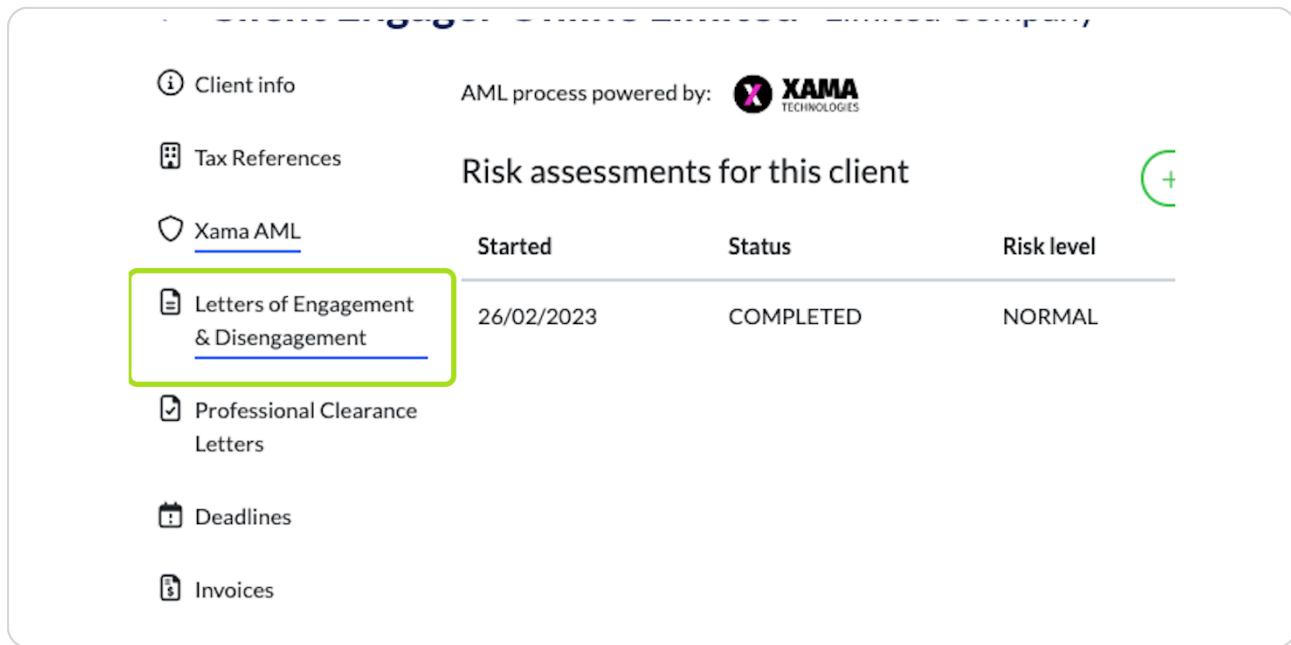
Onboarding	not started	+ new @ view in Xama
AML check	not started	+ new @ view in Xama

Maddocks, Stuart Emlyn

Onboarding	not started	+ new @ view in Xama
AML check	not started	+ new @ view in Xama

STEP 6

Letters of Engagement & Disengagement



Client info AML process powered by: **XAMA TECHNOLOGIES**

Tax References Risk assessments for this client +

Xama AML

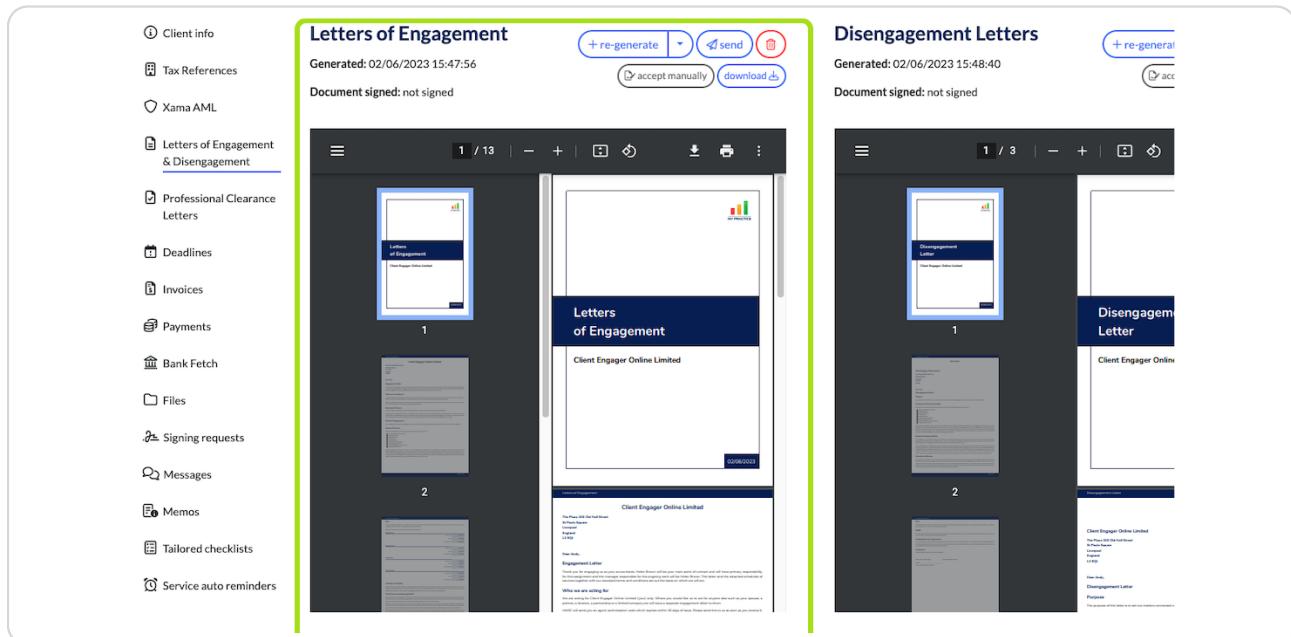
	Started	Status	Risk level
Letters of Engagement & Disengagement	26/02/2023	COMPLETED	NORMAL
Professional Clearance Letters			

Deadlines Invoices

STEP 7

Here you see and generate letters of engagement and disengagement

There's a more detailed guide on this area in the guide list



Letters of Engagement
Generated: 02/06/2023 15:47:56
Document signed: not signed

Disengagement Letters
Generated: 02/06/2023 15:48:40
Document signed: not signed

STEP 8

Professional Clearance Letters

Tax References Generated: 02/06/2023 15:47:56

Xama AML Document signed: not signed

Letters of Engagement & Disengagement

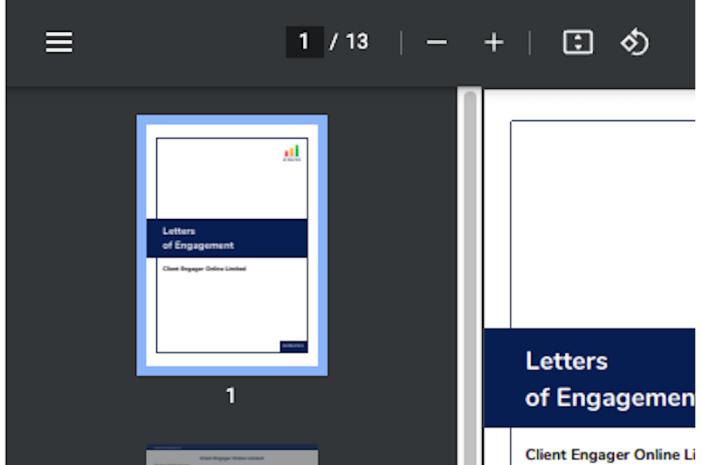
Professional Clearance Letters

Deadlines

Invoices

Payments

Bank Fetch





STEP 9

Here you can view and generate Professional letters of clearance

There's a more detailed guide on this area in the guide list



[← Client Engager Online Limited - Limited Company](#)

Client info **Previous accountant details**

Tax References Firm name: Andrew Wainwright

Xama AML Firm address: Faversham House
Old Hall Road

Bromborough Wirral
CH62 3NX United Kingdom

Letters of Engagement & Disengagement

Professional Clearance Letters

Deadlines

Invoices

Payments

Bank Fetch

Files

Signing requests

Messages

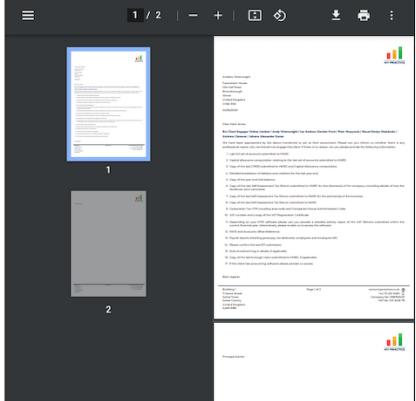
Memos

Tailored checklists

Service auto reminders

Professional Clearance Letters

Generated: 02/06/2023 15:49:26



STEP 10

Deadlines

<input checked="" type="checkbox"/> Xama AML	Firm address:		Faversham House Old Hall Road
<input type="checkbox"/> Letters of Engagement & Disengagement	Bromborough		Wirral
<input checked="" type="checkbox"/> Professional Clearance Letters	CH62 3NX		United Kingdom
Contact person:		Mark Jones	
If left empty, [PreviousAccountantContact] place "Sir/Madam".			
E-mail:		info@wainwrightsaccountants.co.uk	
<div style="text-align: right;"><input checked="" type="button"/> Save</div>			
<input type="checkbox"/> Deadlines			
<input type="checkbox"/> Invoices			
<input type="checkbox"/> Payments			
<input type="checkbox"/> Bank Fetch			
<input type="checkbox"/> Files			

STEP 11

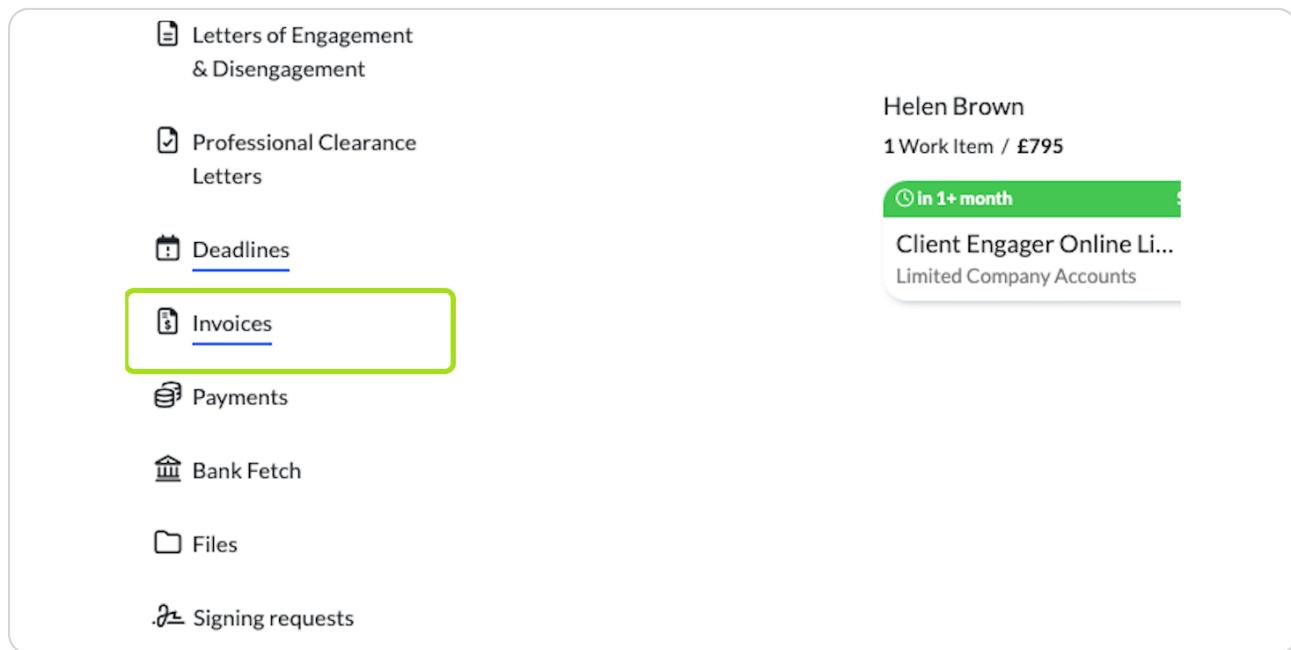
Here you can see deadlines specific to this client

The screenshot shows the Client Engager software interface with the following details:

- Client Info:** Client Engager Online Limited - Limited Company
- Tax References:** Due state: Overdue / Due very soon / Due soon / OK, Days forward: 60, Job types: all job types, Status: any, Staff member: all staff members, Manager: all staff members.
- Xama AML:** Letters of Engagement & Disengagement
- Professional Clearance Letters:**
- Deadlines:** The selected tab, showing three items:
 - Helen Brown: 1 Work item / £795, Due in 1 month, Statutory, Client Engager Online Li... HB, Limited Company Accounts
 - Steve Jones: 2 Work items / £150, Due in 6 days, Statutory, Client Engager Online Lim... SJ, Payroll
 - (staff member not set): 1 Work item / £0, Due in 4 days, Statutory, Client Engager Online Lim... ??, Bookkeeping
- Invoices:**
- Payments:**
- Bank Fetch:**
- Files:**
- Signing requests:**
- Messages:**
- Memos:**
- Tailored checklists:**
- Service auto reminders:**

STEP 12

Invoices, if linked to a bookkeeping solution such as QBO the invoices related to this client show here



Letters of Engagement & Disengagement

Professional Clearance Letters

Deadlines

Invoices

Payments

Bank Fetch

Files

Signing requests

Helen Brown

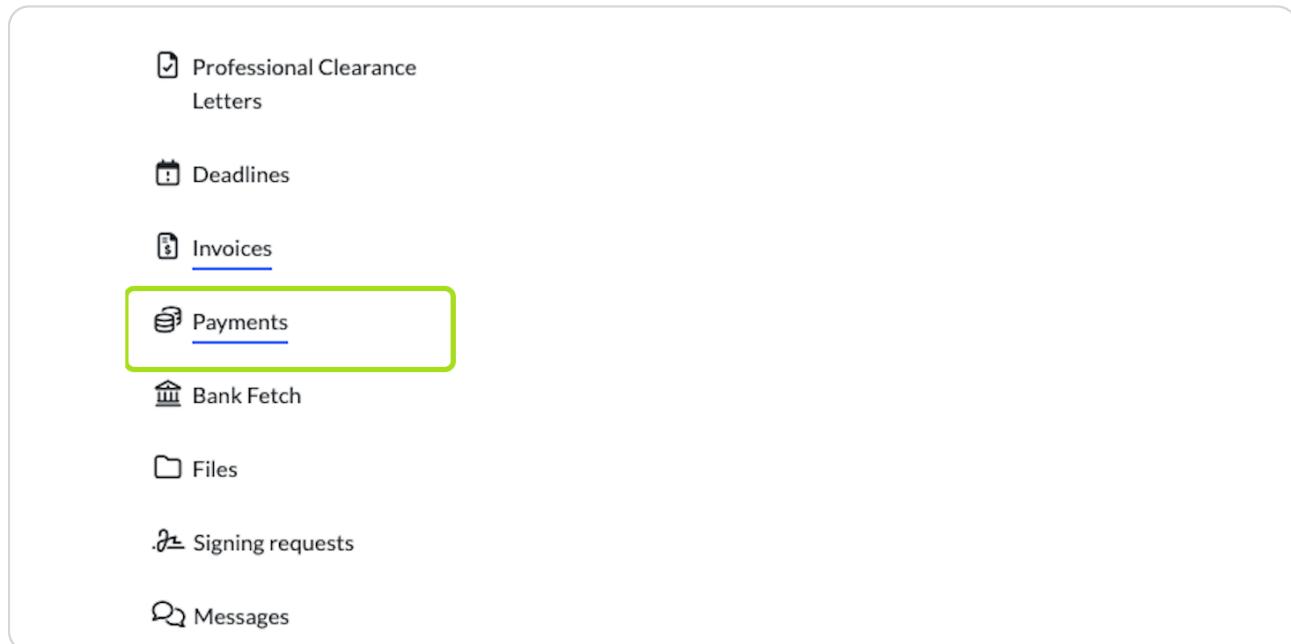
1 Work Item / £795

in 1+ month

Client Engager Online Li...
Limited Company Accounts

STEP 13

Payments



Professional Clearance Letters

Deadlines

Invoices

Payments

Bank Fetch

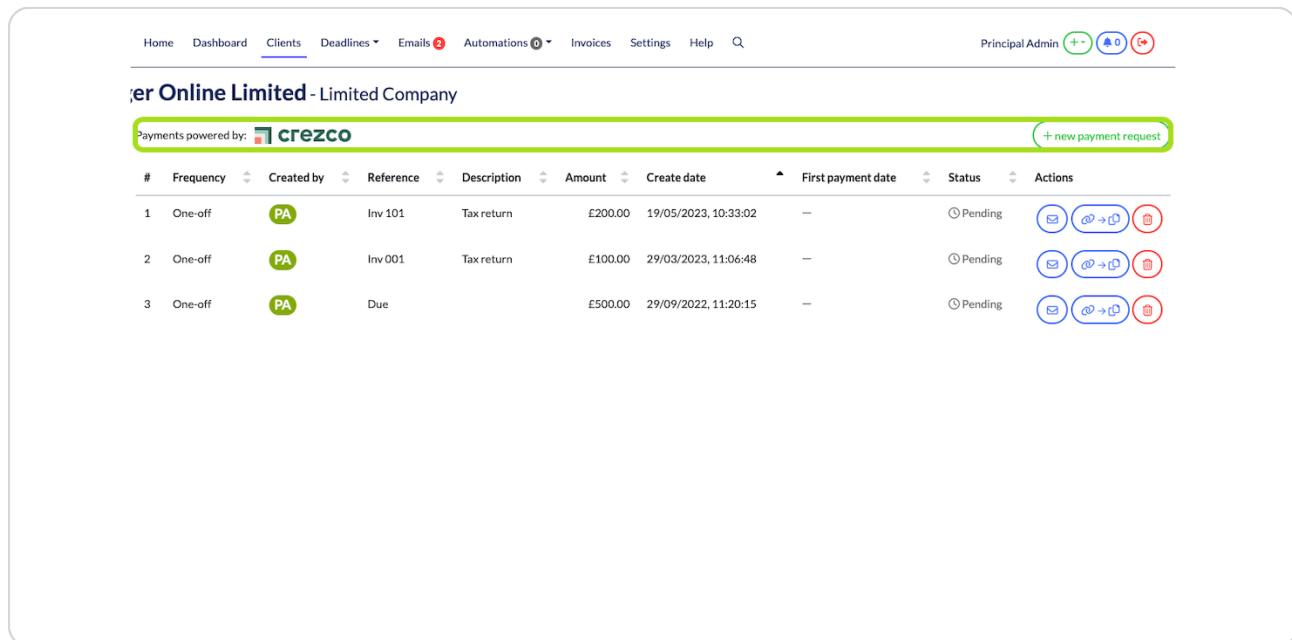
Files

Signing requests

Messages

STEP 14

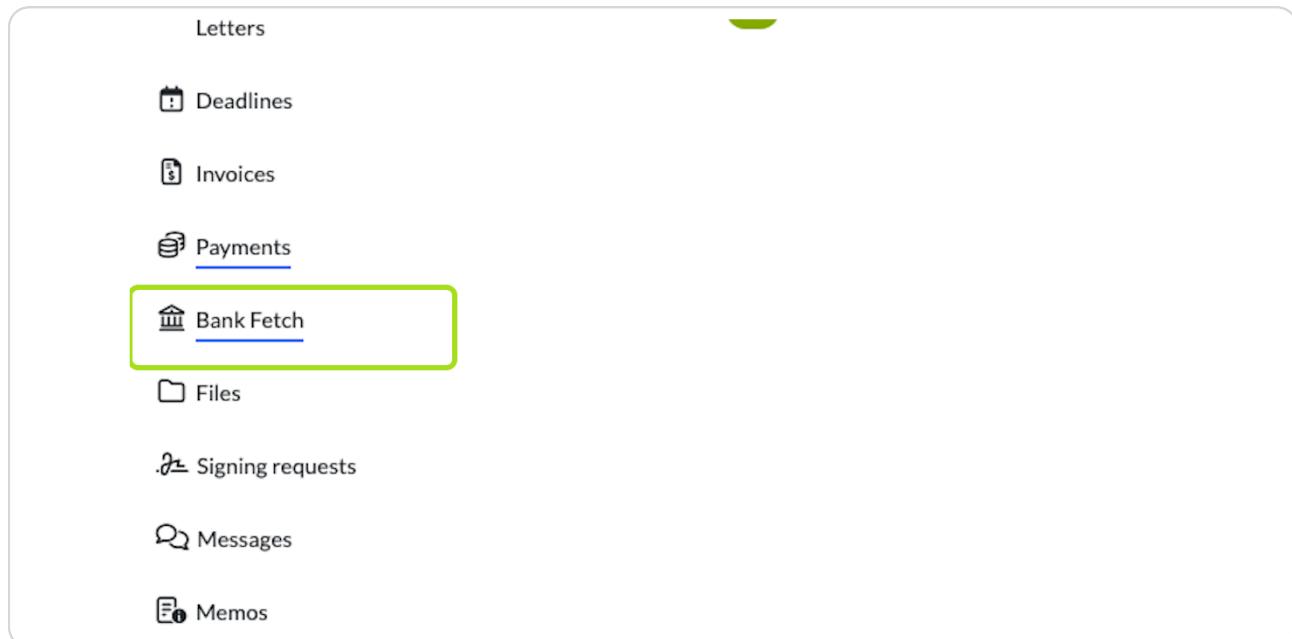
Here you can create and send payment request links powered by Crezco
There's a more detailed guide on this area in the guide list



#	Frequency	Created by	Reference	Description	Amount	Create date	First payment date	Status	Actions
1	One-off	PA	Inv 101	Tax return	£200.00	19/05/2023, 10:33:02	—	Pending	  
2	One-off	PA	Inv 001	Tax return	£100.00	29/03/2023, 11:06:48	—	Pending	  
3	One-off	PA	Due		£500.00	29/09/2022, 11:20:15	—	Pending	  

STEP 15

Bank Fetch



- Letters
- Deadlines
- Invoices
- Payments
 - Bank Fetch**
- Files
- Signing requests
- Messages
- Memos

STEP 16

Here you can request bank fetch data from the client and see and download a list of bank fetch reports requested in the past

There's a more detailed guide on this area in the guide list

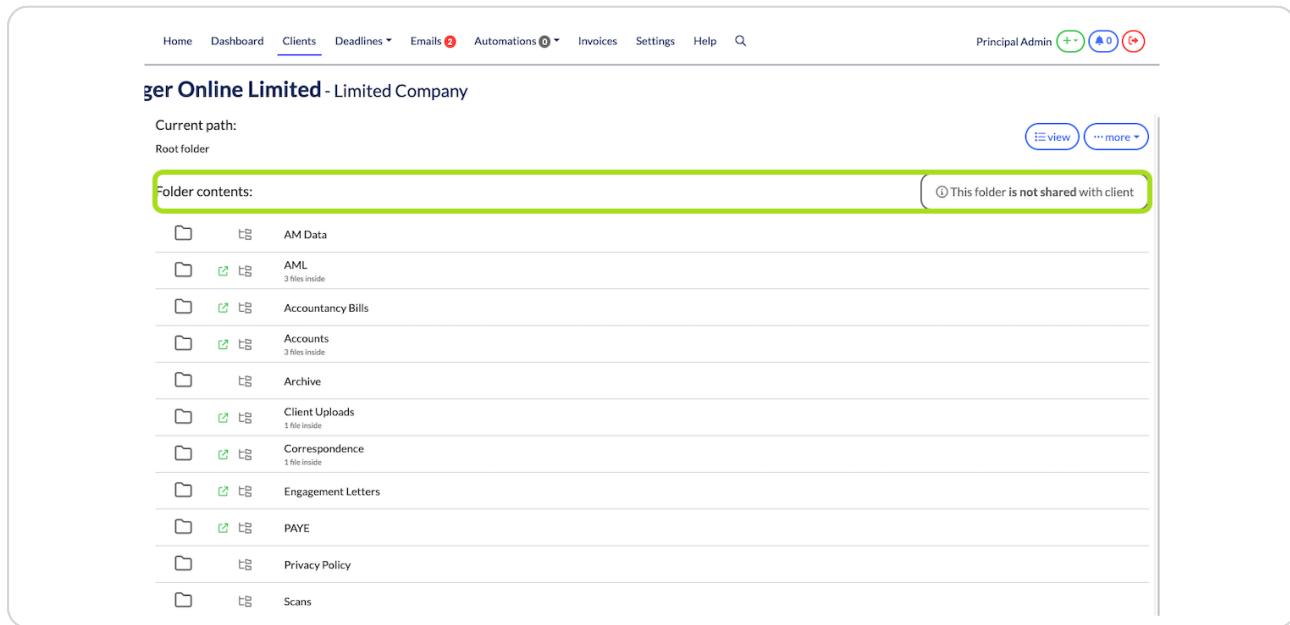
STEP 17

Files

STEP 18

Here you can view and upload files to the client records

There's a more detailed guide on this area in the guide list



The screenshot shows a file management interface for a client named "Myer Online Limited - Limited Company". The top navigation bar includes links for Home, Dashboard, Clients (which is the active tab), Deadlines, Emails, Automations, Invoices, Settings, Help, and a search icon. On the right, there are user profile icons for "Principal Admin" and a notification badge showing "0".

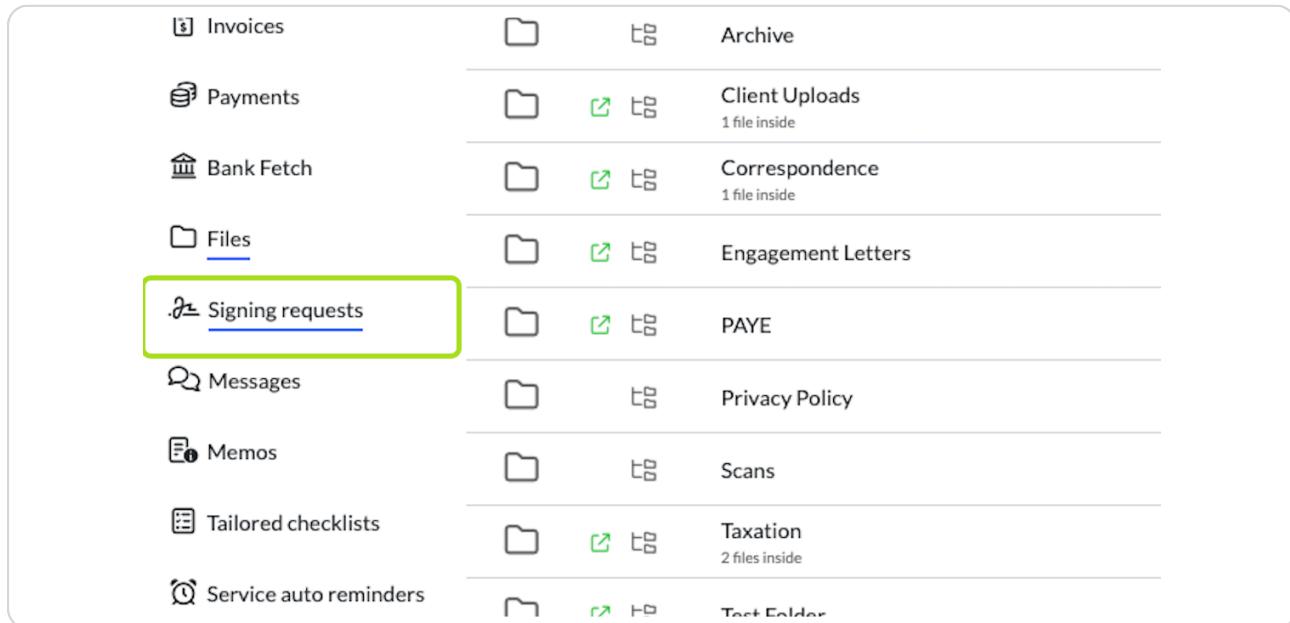
The main area displays the "Root folder" with the following folder structure:

- AM Data
- AML (3 files inside)
- Accountancy Bills
- Accounts (3 files inside)
- Archive
- Client Uploads (1 file inside)
- Correspondence (1 file inside)
- Engagement Letters
- PAYE
- Privacy Policy
- Scans

A note on the right side of the list states: "This folder is not shared with client".

STEP 19

Signing requests - here you can see all signing requests sent to the client and each status

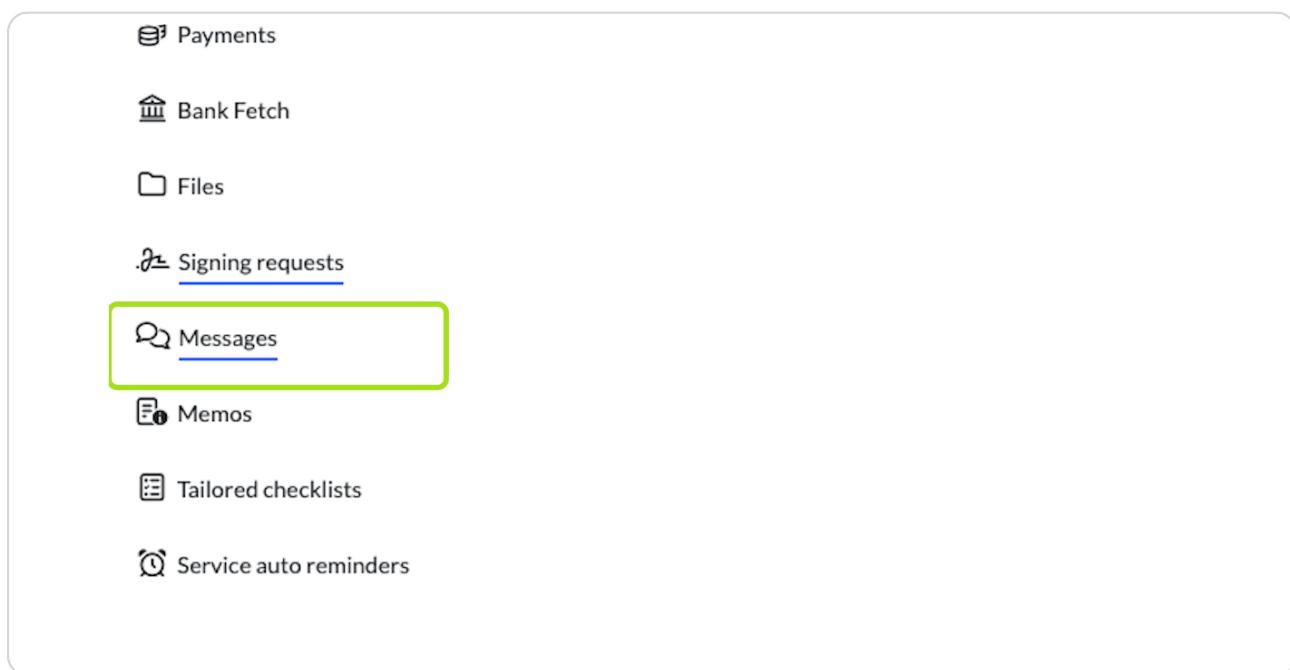


The screenshot shows a list of items under the "Files" section, with the "Signing requests" item highlighted by a green box.

 Invoices	 Archive
 Payments	 Client Uploads 1 file inside
 Bank Fetch	 Correspondence 1 file inside
 Files	 Engagement Letters
 <u>Signing requests</u>	 PAYE
 Messages	 Privacy Policy
 Memos	 Scans
 Tailored checklists	 Taxation 2 files inside
 Service auto reminders	 Text Folder

STEP 20

Messages



STEP 21

Here you can see all emails and texts sent via Client Engager

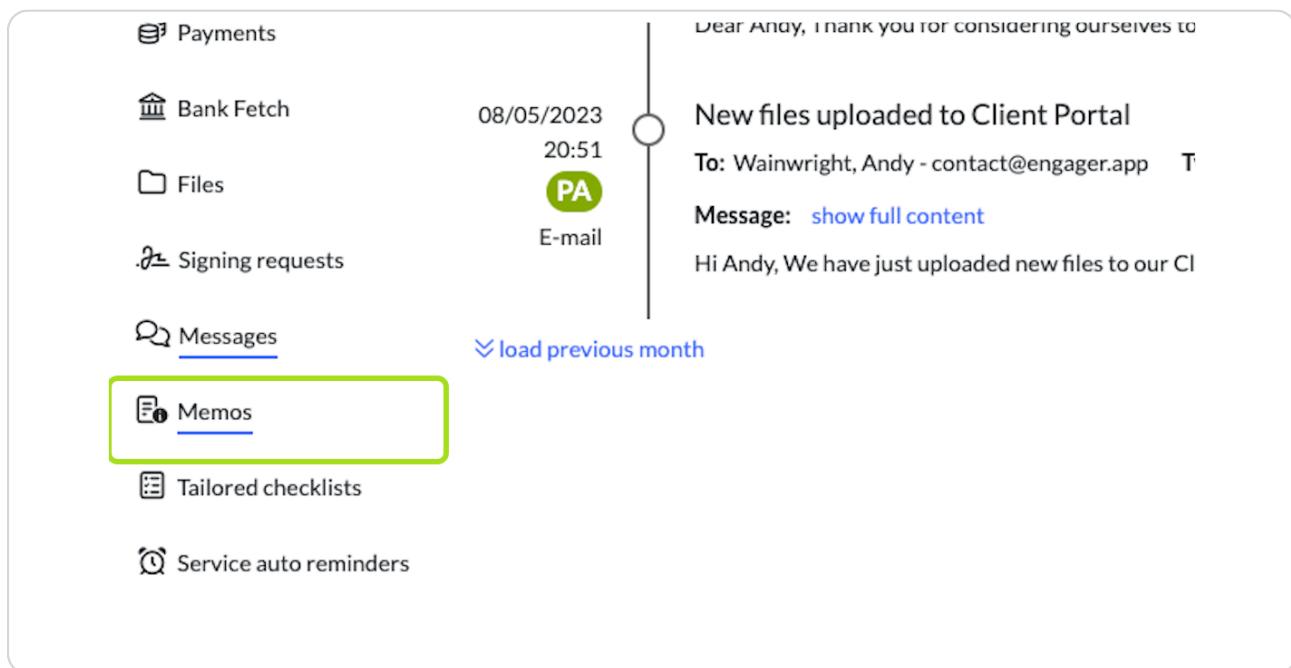
The screenshot shows the Client Engager inbox for May 2023. The messages are listed as follows:

- 19/05/2023 19:39 PA E-mail: Quotation (To: Wainwright, Andy - contact@engager.app, Type: information, Message: show full content)
- 19/05/2023 19:37 PA E-mail: Quotation (To: Wainwright, Andy - contact@engager.app, Type: information, Message: show full content)
- 08/05/2023 20:51 PA E-mail: New files uploaded to Client Portal (To: Wainwright, Andy - contact@engager.app, Type: information, Message: show full content)

At the bottom of the list, there are links for 'load previous month', 'Messages', 'Memos', 'Tailored checklists', and 'Service auto reminders'.

STEP 22

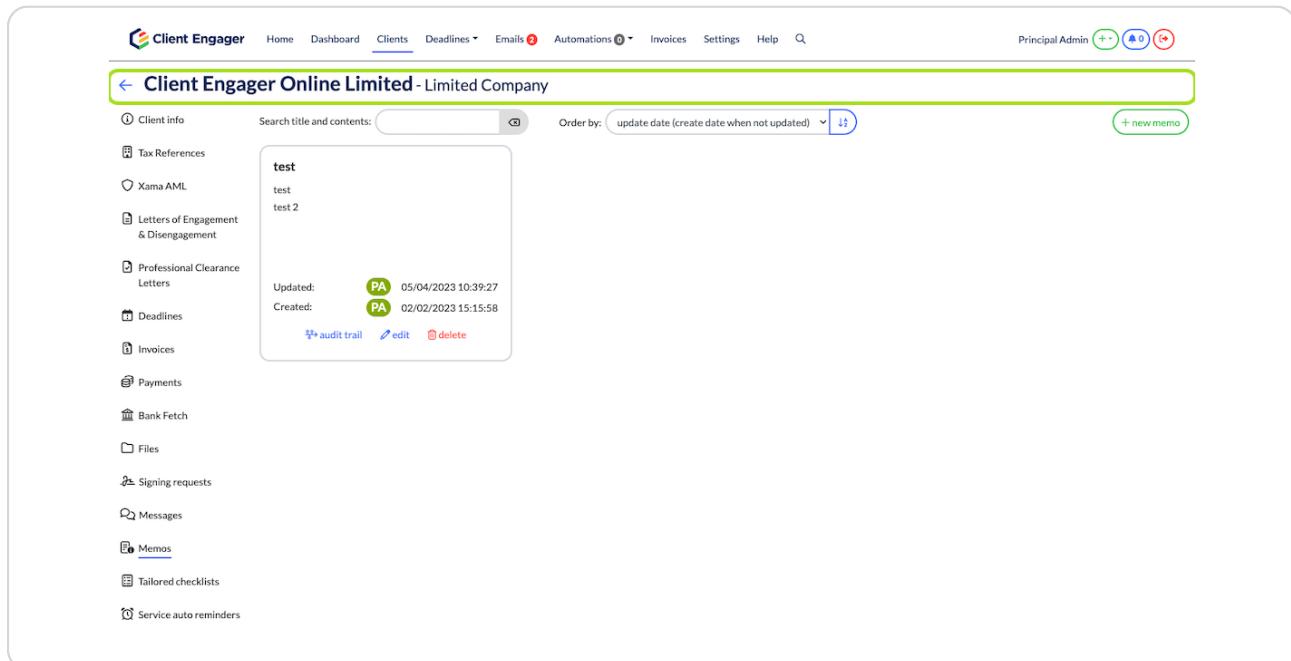
Memos



The screenshot shows the Client Engager interface with a sidebar on the left and a main content area on the right. The sidebar contains several icons with labels: Payments, Bank Fetch, Files, Signing requests, Messages, Memos (which is highlighted with a green box), Tailored checklists, and Service auto reminders. The main content area shows a message from 'PA' (Principal Admin) to 'Wainwright, Andy' on 08/05/2023 at 20:51. The message content is partially visible, showing 'Dear Andy, Thank you for considering ourse...' and 'New files uploaded to Client Portal'. Below the message, there is a link to 'load previous month'.

STEP 23

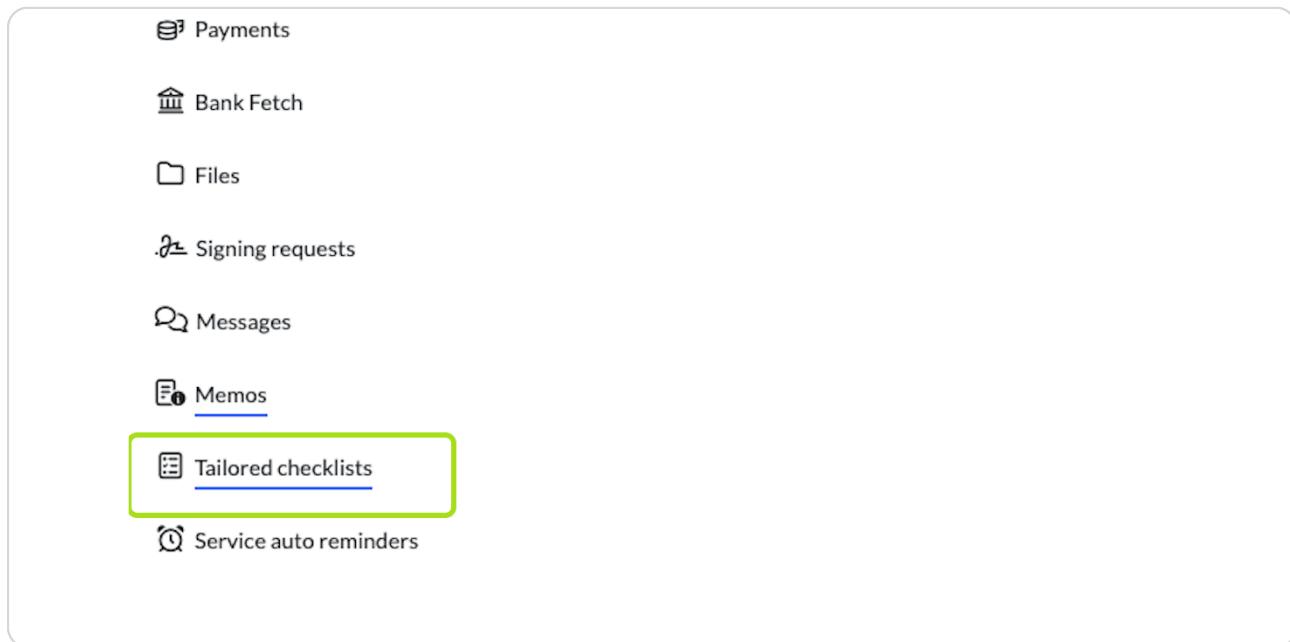
Here you can add and view memos/notes on this client



The screenshot shows the Client Engager interface with a sidebar on the left and a main content area on the right. The sidebar contains icons for various client management tasks. The main content area shows a list of memos for 'Client Engager Online Limited - Limited Company'. There is one memo titled 'test' with contents 'test' and 'test 2'. The memo was updated on 05/04/2023 10:39:27 and created on 02/02/2023 15:15:58. There are buttons for 'audit trail', 'edit', and 'delete'.

STEP 24

Tailored checklists



STEP 25

Here you can see and edit checklists for this specific client

There's a more detailed guide on this area in the guide list

The screenshot shows the 'Tailored checklists' section for 'Client Engager Online Limited - Limited Company'. It lists various services with their generic and tailored checklist versions, and the checklist to use. The 'Tailored checklists' section is highlighted with a green box.

Service	Generic checklists	Tailored checklists	Checklist to use
Limited Company Accounts	Version 7 - name: (not specified) - created: 31/03/2023, 14:08:37	Version 3 - name: (not specified) - created: 20/04/2023, 10:12:04 (edit)	default - tailored overrides generic
CT600	Version 2 - name: (not specified) - created: 22/08/2022, 16:50:56	+ create	none - checklist disabled
Payroll	(none defined)	Version 1 - name: (not specified) - created: 25/01/2023, 08:23:45 (edit)	none - checklist disabled
CS01	(none defined)	+ create	default - tailored overrides generic
VAT	Version 3 - name: (not specified) - created: 11/01/2023, 12:22:18	Version 1 - name: (not specified) - created: 09/03/2023, 10:28:19 (edit)	always generic
Bookkeeping	Version 2 - name: (not specified) - created: 13/09/2022, 18:22:17	+ create	default - tailored overrides generic
SA100	Version 1 - name: (not specified) - created: 18/10/2021, 17:31:29	+ create	default - tailored overrides generic
Loyalty Bonus	(none defined)	+ create	default - tailored overrides generic
Onboarding	Version 1 - name: (not specified) - created: 10/04/2023, 11:32:37	+ create	default - tailored overrides generic

STEP 26

Service auto reminders

 Payments		12:22:18
 Bank Fetch	Bookkeeping	Version 2 - name: (not specified) - created: 1 18:22:17
 Files	SA100	Version 1 - name: (not specified) - created: 1 17:31:29
 Signing requests		
 Messages	Loyalty Bonus	(none defined)
 Memos	Onboarding	Version 1 - name: (not specified) - created: 1 11:32:37
 Tailored checklists		
 Service auto reminders		

STEP 27

Here you can add or tailor automatic email reminders for this specific client

There's a more detailed guide on this area in the guide list

Customer Online Limited - Limited Company			
Set up reminders to send automated e-mails to clients.			
Service name	Global reminders	Client-specific reminders	Actions
Limited Company Accounts	(none yet)	(none yet)	
CT600	(none yet)	(none yet)	
Payroll	(none yet)	(none yet)	
CS01	0 enabled out of 1 total	(none yet)	
VAT	(none yet)	(none yet)	
Bookkeeping	(none yet)	1 enabled out of 1 total	
SA100	(none yet)	(none yet)	
Processing Sales Invoices	(none yet)	(none yet)	
Loyalty Bonus	(none yet)	(none yet)	
Onboarding	(none yet)	(none yet)	

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