

# Overview of what the menus on the client info page are

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Creation Date

June 3, 2023

Last Updated

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 displays the 'Client Engager' software interface. At the top, there is a navigation bar with the following items: Home, Dashboard, Clients (selected), Deadlines, Emails (with a red notification icon), Automations (with a dropdown arrow), Invoices, Settings, and Help. On the right side of the navigation bar, it shows 'Principal Admin' with three status icons: a green circle with a plus, a blue circle with a person, and a red circle with a minus.

The main content area is titled 'Client Engager Online Limited - Limited Company'. Below this title is a progress bar with nine steps: Step 1: General info, Step 2: Related individuals & contacts, Step 3: Related businesses, Step 4: Services & pricing, Step 5: Service details, Step 6: Manual AML check, Step 7: External systems, Step 8: Terms, and Step 9: Summary. The 'General info' step is currently selected.

On the left side of the main content area, there is a sidebar menu with the following items: 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 'General info' section contains the following details:

- ID: 153
- Type: Limited Company
- Status: active
- Client name: Client Engager Online Limited
- Company number: 11652499 - visit Companies House >
- Companies House authentication code: >
- E-reminder: < not subscribed
- Registered office address: The Plaza 100 Old Hall Street, Liverpool, England, L3 9QJ
- Trading address: (same as registered office)
- Date of incorporation: 31/10/2018
- Engage date: 09/06/2022
- Nature of business (SIC): 58290 - Other software publishing
- Additional info

Below the 'General info' section, there are three tables showing fees:

Annual fees		Quarterly fees		Monthly fees	
SA100	£180	VAT	£135	CT600	£42
				Payroll	£150
				CS01	£6
				Bookkeeping	£0
				Processing Sales Invoices	£120
				Loyalty Bonus	-£10
TOTAL	£180	TOTAL	£135	TOTAL	£308

Below the fee tables, there is a 'Service details' section with the following information:

- Accounts Reference Date: Mar 31
- CS01 Date: Oct 30
- Active services
- Limited Company Accounts
- one-off job; enabled
- Phases
- Next due date: 31/07/2023
- Collect Records: 21/04/2023

At the bottom of the 'General info' section, there is a button labeled '< previous: Terms'.

## STEP 2

### Tax References

Client Engager

[Home](#) [Dashboard](#) [Clients](#) [Deadlines](#) [Emails](#) 2 [Autom](#)

← Client Engager Online Limited - Limited Company

Client info

Tax References

Xama AML

Letters of Engagement & Disengagement

Professional Clearance Letters

General info

ID: 153

Type: Limited Company

Status: active

Client name: Client Engager Online Limited

Step 1:

Step 2:

Step 3:

General info

Related individuals & contacts

Related busin

## STEP 3

Here you can view and add UTRS etc

Client Engager

[Home](#) [Dashboard](#) [Clients](#) [Deadlines](#) [Emails](#) 2 [Automations](#) [Invoices](#) [Settings](#) [Help](#) [Q](#)

Principal Admin + 0 +

← Client Engager Online Limited - Limited Company

Client info

Tax References

Xama AML

Letters of Engagement & Disengagement

Professional Clearance Letters

Deadlines

Invoices

Payments

Bank Fetch

Files

Signing requests

Messages

Memos

Tailored checklists

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 last VAT return submitted:  (not selected)

Box 5 figure on last VAT return submitted:  eg. 1000.00

Tax Account Credentials

PAYE

Client's PAYE Reference:  /  eg. 123/AB456 (UPPER CASE)

Client's Accounts Office:

Corporation Tax

Client's Corporation Tax Reference:  eg. 1234567890

Companies House Registration Number (CRN):  eg. 12345678, omit leading lettrs/zeros

Client's registered office postcode:  eg. AB12 3YZ

Tax Account Credentials

Capital Gains

This service is not enabled for this client. Click icon above to show references.

Construction Industry Scheme

This service is not enabled for this client. Click icon above to show references.

Software credentials

This service is not enabled for this client. Click icon above to show references.

Save all

## 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

First month of effect 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 Automations Invoices Settings Help

Principal Admin

ger Online Limited - Limited Company

AML process powered by: **XAMA** Client Engager listens to data changes in Xama and updates them automatically. To refresh manually, click on the button. [refresh manually](#)

Risk assessments for this client

+ new

view in Xama

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

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

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## STEP 6

### Letters of Engagement & Disengagement

Client info

Tax References

Xama AML

Letters of Engagement & Disengagement

Professional Clearance Letters

Deadlines

Invoices

AML process powered by: **XAMA** TECHNOLOGIES

Risk assessments for this client

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

## 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

Client info

Tax References

Xama AML

Letters of Engagement & Disengagement

Professional Clearance Letters

Deadlines

Invoices

Payments

Bank Fetch

Files

Signing requests

Messages

Memos

Tailored checklists

Service auto reminders

Letters of Engagement

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

Document signed: not signed

+ re-generate

send

accept manually

download

1 / 13

1

2

Letters of Engagement

Client Engager Online Limited

Client Engager Online Limited

Engagement Letter

Disengagement Letters

Generated: 02/06/2023 15:48:40

Document signed: not signed

+ re-generate

accept

1 / 3

1

2

Disengagement Letter

Client Engager Online

Client Engager Online Limited

Disengagement Letter

## STEP 8

### Professional Clearance Letters

Tax References

Xama AML

Letters of Engagement & Disengagement

**Professional Clearance Letters**

Deadlines

Invoices

Payments

Bank Fetch

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

Document signed: not signed

1 / 13

Letters of Engagement

Client Engager Online Limited

1

Letters of Engagement

Client Engager Online Limited

## 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

Home Dashboard Clients Deadlines Emails Automations Invoices Settings Help

Principal Admin

Client Engager Online Limited - Limited Company

Client info

Tax References

Xama AML

Letters of Engagement & Disengagement

**Professional Clearance Letters**

Deadlines

Invoices

Payments

Bank Fetch

Files

Signing requests

Messages

Memos

Tailored checklists

Service auto reminders

Previous accountant details

Firm name: Andrew Wainwright

Firm address: Faversham House, Old Hall Road, Bromborough, Wirral, CH62 3NX, United Kingdom

Contact person: Mark Jones

E-mail: info@wainwrightsaccountants.co.uk

Save

Professional Clearance Letters

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

+ re-generate

send to previous accountant

download

1 / 2

1

2

## STEP 10

### Deadlines

	Xama AML	Firm address:	Faversham House Old Hall Road	
	Letters of Engagement & Disengagement		Bromborough	Wirral
	Professional Clearance Letters		CH62 3NX	United K
	Deadlines	Contact person:	Mark Jones	
	Invoices		If left empty, [PreviousAccountantContact] place "Sir/Madam".	
	Payments	E-mail:	info@wainwrightsaccountants.co.uk	
	Bank Fetch			
	Files			

## STEP 11

### Here you can see deadlines specific to this client

Client Engager

Home Dashboard Clients Deadlines Emails Automations Invoices Settings Help

Principal Admin

Client Engager Online Limited - Limited Company

Client info

Tax References

Xama AML

Letters of Engagement & Disengagement

Professional Clearance Letters

Deadlines

Invoices

Payments

Bank Fetch

Files

Signing requests

Messages

Memos

Tailored checklists

Service auto reminders

Auto-refresh in: 5:00. Click to disable refresh now ignore internal deadlines Group by: staff member Card layout switch to list export create task

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

Client or Task name: This client only.

Helen Brown  
1 Work Item / £795  
In 1+ month Statutory HB  
Client Engager Online Li...  
Limited Company Accounts

Steve Jones  
2 Work Items / £150  
In 6 days Statutory SJ  
Client Engager Online Lim...  
Payroll

(staff member not set)  
1 Work Item / £0  
In 4 days Statutory ??  
Client Engager Online Limi...  
Bookkeeping

In 1+ month Statutory HB  
Client Engager Online Li...  
Limited Company Accounts

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## 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

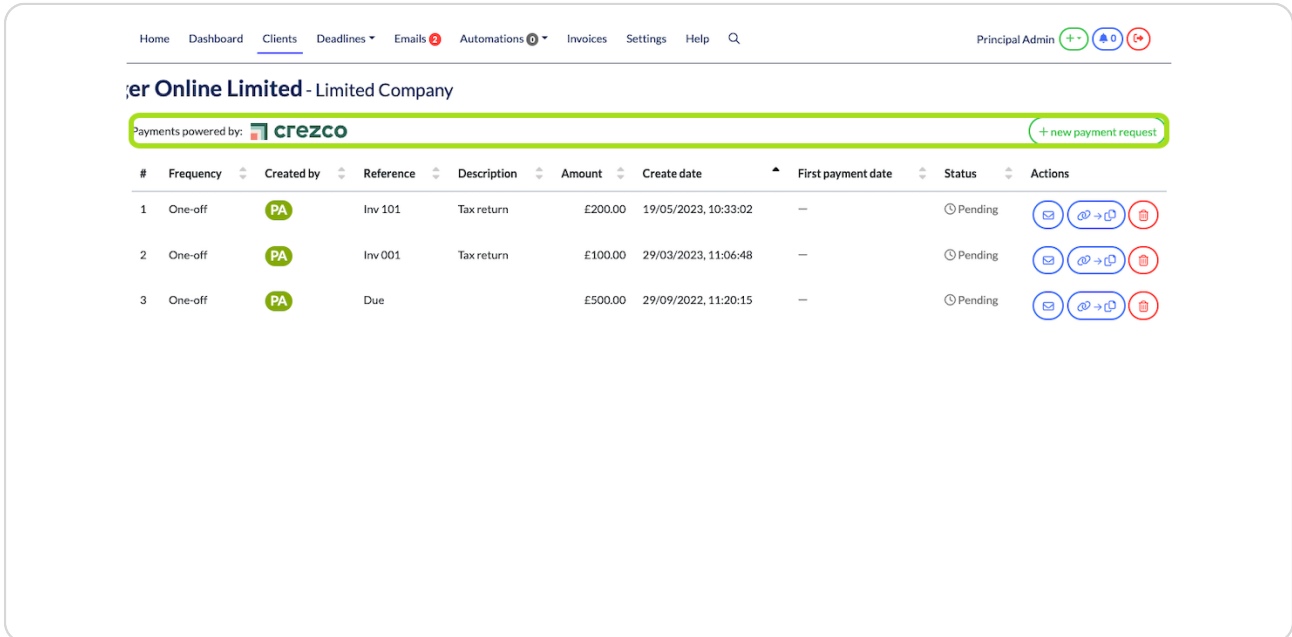
- Professional Clearance Letters
- Deadlines
- Invoices
- Payments**
- Bank Fetch
- Files
- Signing requests
- Messages



## STEP 14

Here you can create and send payment request links powered by Crezco

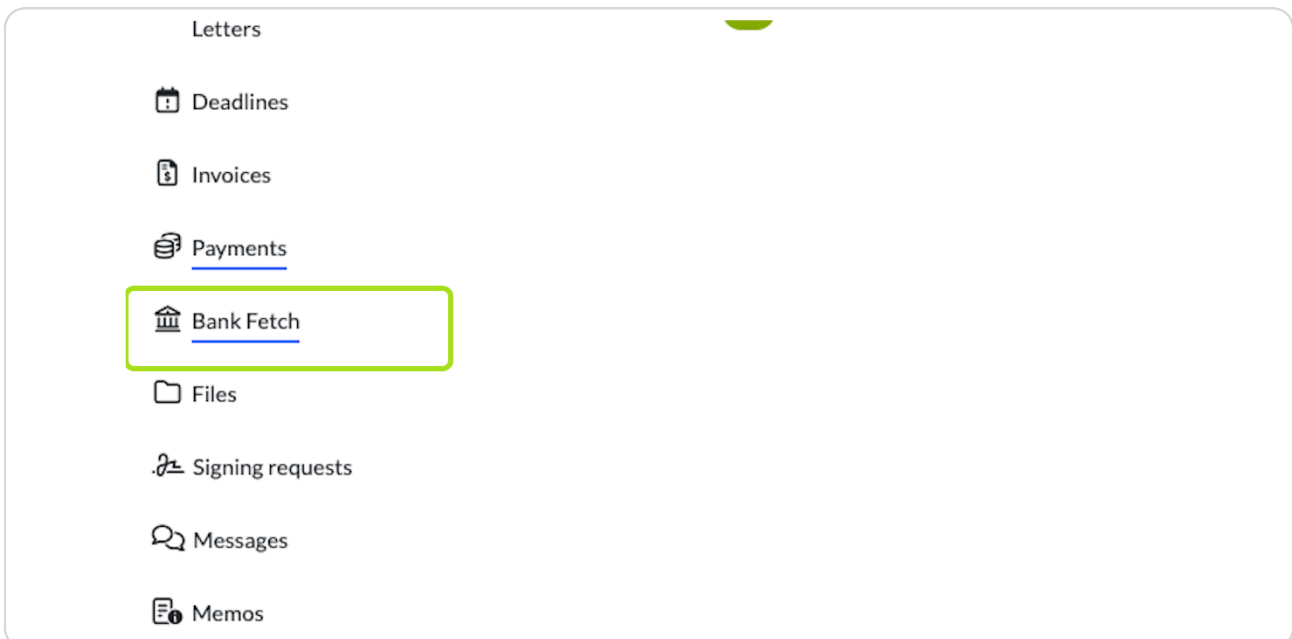
There's a more detailed guide on this area in the guide list



#	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	<a href="#">✉</a> <a href="#">🔄</a> <a href="#">📄</a> <a href="#">🗑</a>
2	One-off	PA	Inv 001	Tax return	£100.00	29/03/2023, 11:06:48	—	Pending	<a href="#">✉</a> <a href="#">🔄</a> <a href="#">📄</a> <a href="#">🗑</a>
3	One-off	PA	Due		£500.00	29/09/2022, 11:20:15	—	Pending	<a href="#">✉</a> <a href="#">🔄</a> <a href="#">📄</a> <a href="#">🗑</a>

## STEP 15

### Bank Fetch

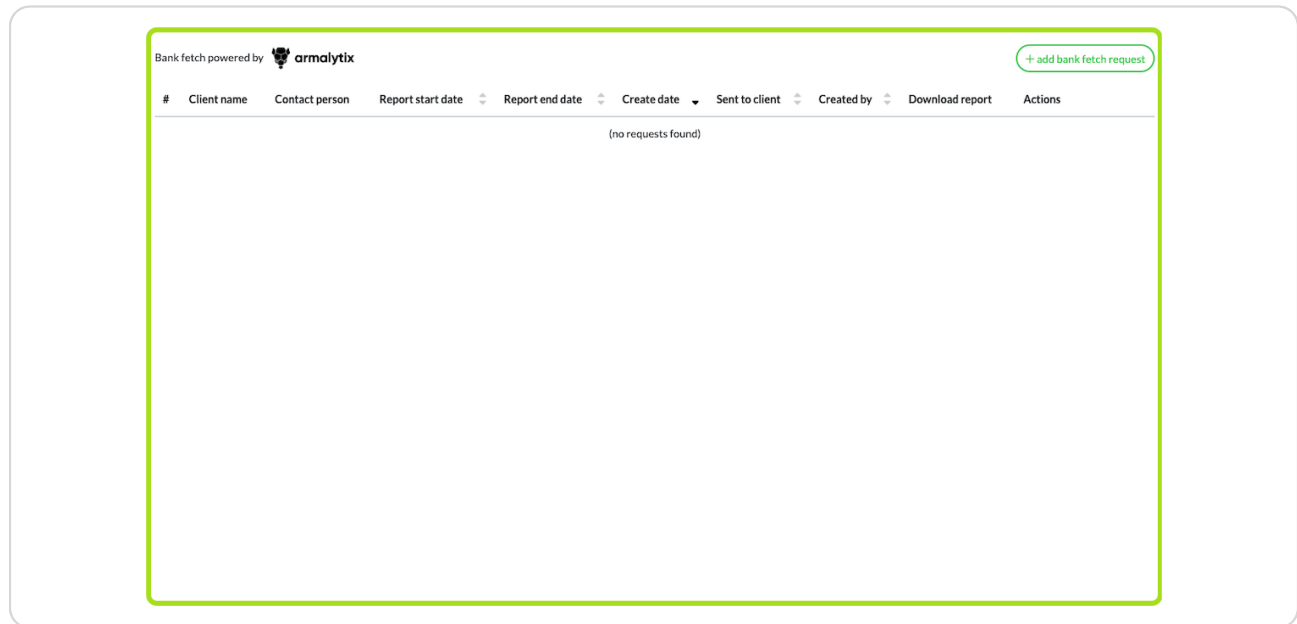


- Letters
- Deadlines
- Invoices
- Payments
- Bank Fetch**
- Files
- Signing requests
- Messages
- Memos

## STEP 16

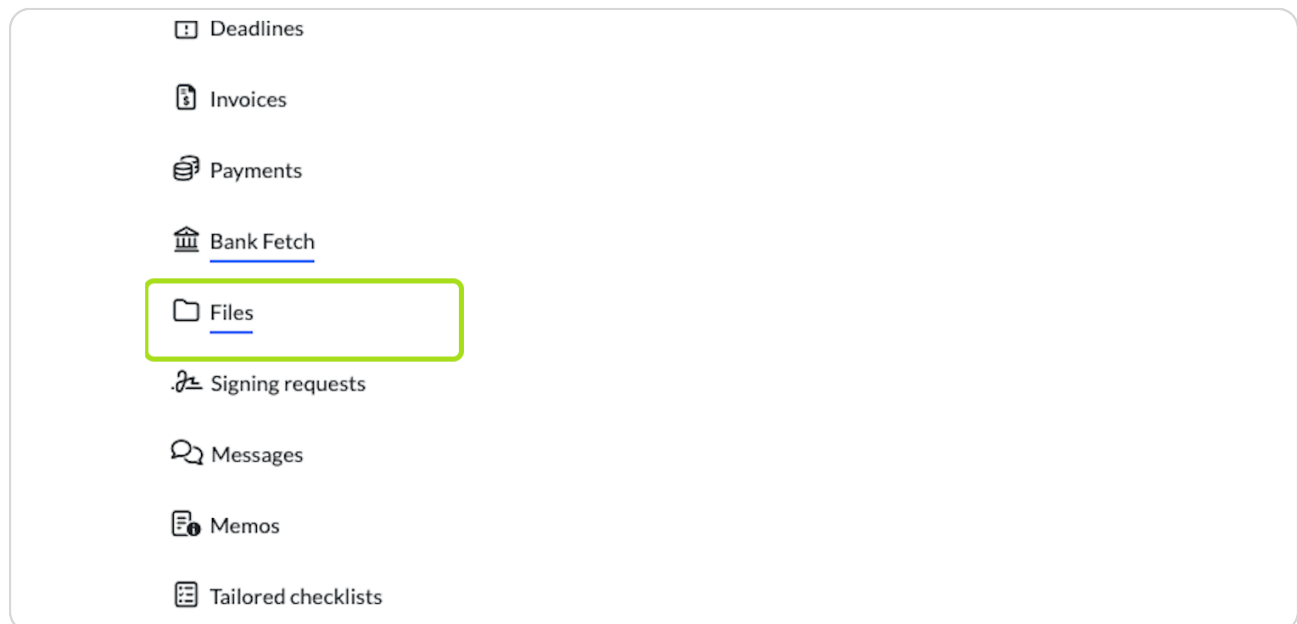
Here you can request bank fetch data from the client and see and download a list of bank fetch reports requested in the past

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



## STEP 17

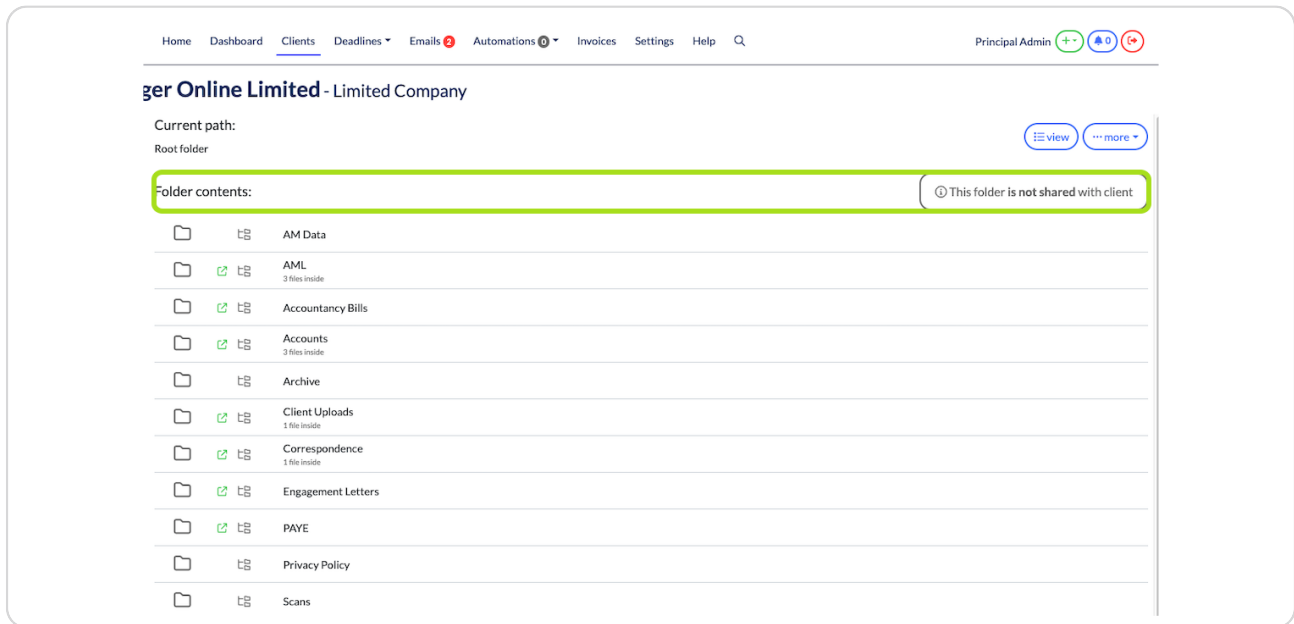
### Files



## STEP 18

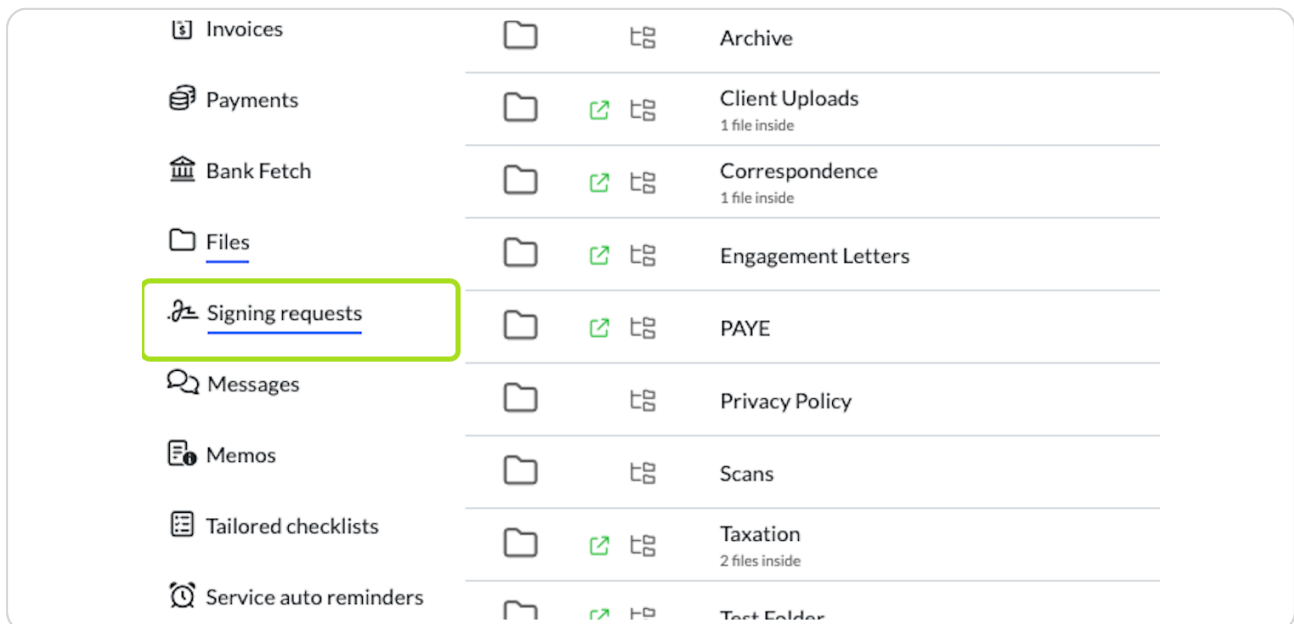
### Here you can view and upload files to the client records

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



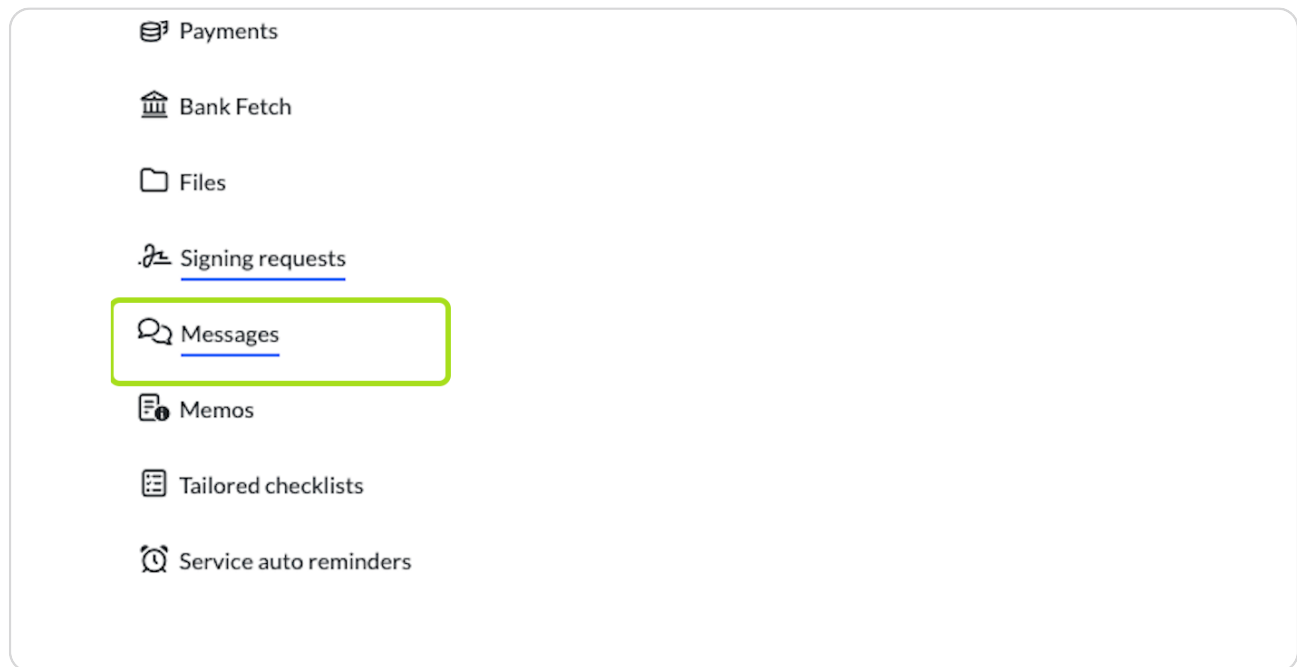
## STEP 19

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



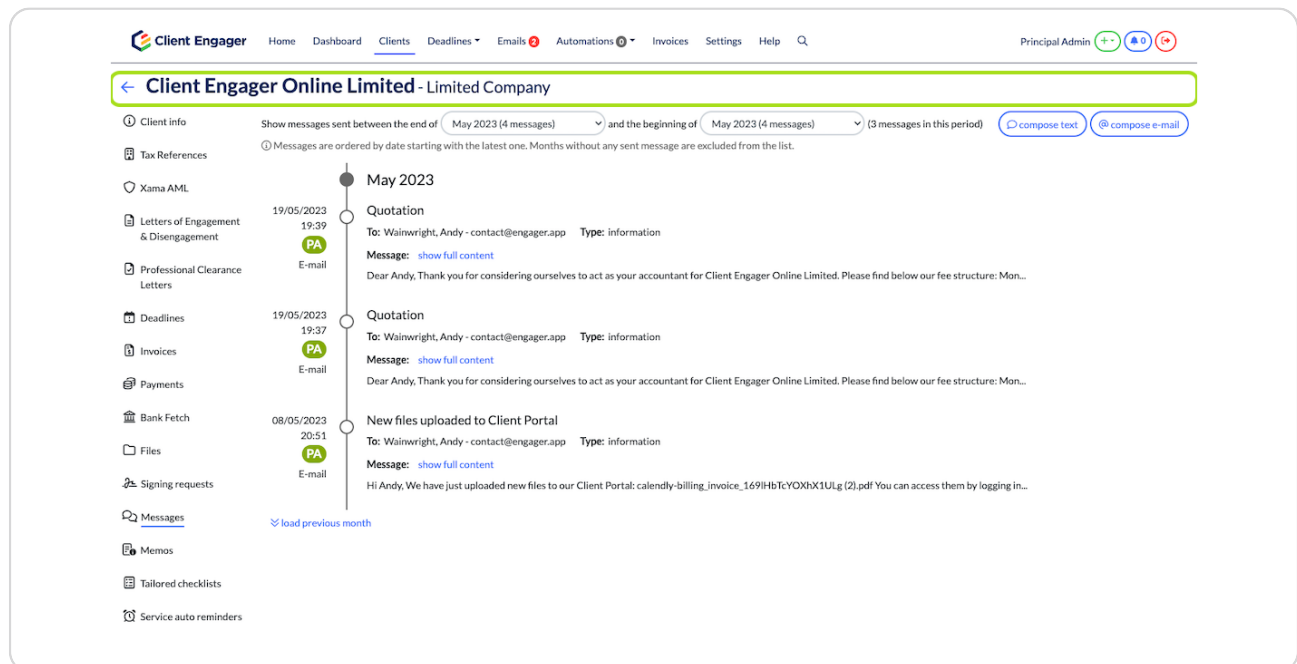
## STEP 20

### Messages



## STEP 21

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



## STEP 22

### Memos

The screenshot shows the left sidebar of the Client Engager application. The 'Memos' option, represented by a notepad icon, is highlighted with a green rectangular box. Other menu items include Payments, Bank Fetch, Files, Signing requests, Messages, Tailored checklists, and Service auto reminders. To the right of the sidebar, a vertical timeline shows a date and time '08/05/2023 20:51' next to a green circle containing the letters 'PA', with 'E-mail' written below it. Further right, a message preview is visible, starting with 'Dear Andy, I thank you for considering ourselves to' and 'New files uploaded to Client Portal'. Below the sidebar, there is a blue link that says 'load previous month'.

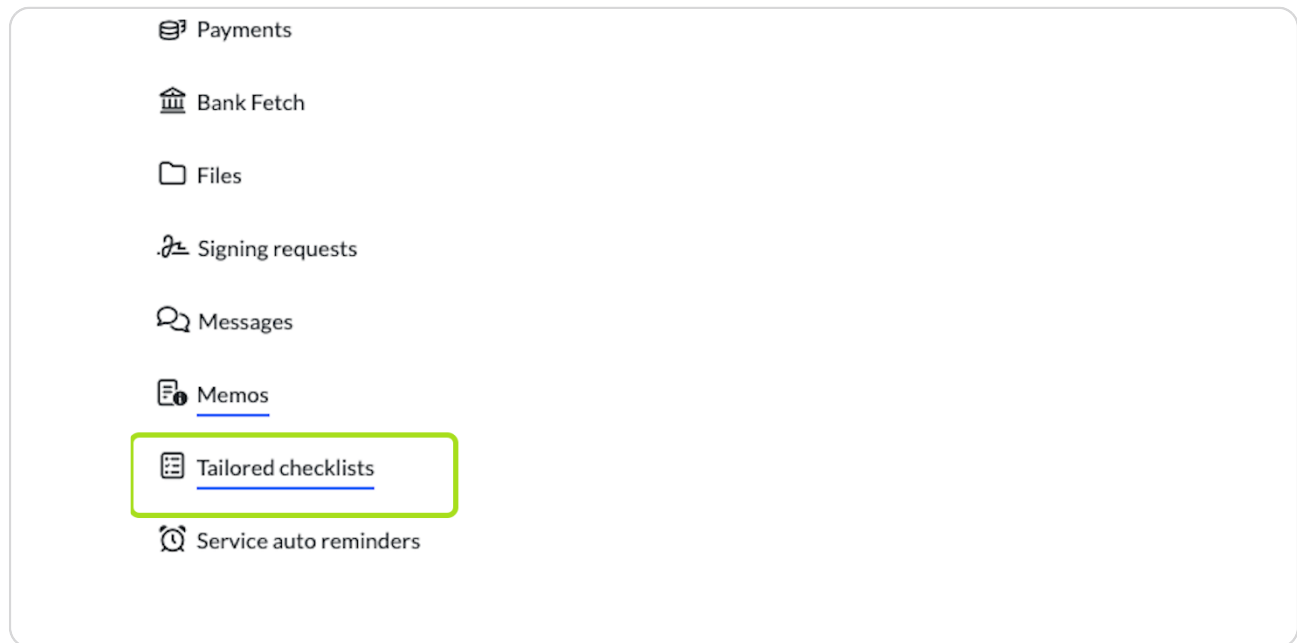
## STEP 23

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

This screenshot displays the 'Memos' page within the Client Engager application for the client 'Client Engager Online Limited - Limited Company'. The page features a left sidebar with various navigation options, including Client info, Tax References, Xama AML, Letters of Engagement & Disengagement, Professional Clearance Letters, Deadlines, Invoices, Payments, Bank Fetch, Files, Signing requests, Messages, Memos (which is currently selected), Tailored checklists, and Service auto reminders. The main content area shows a list of memos. The first memo is titled 'test' and contains the text 'test' and 'test 2'. It includes a green 'PA' status indicator and timestamps for 'Updated: 05/04/2023 10:39:27' and 'Created: 02/02/2023 15:15:58'. Below the memo text are three action links: 'audit trail', 'edit', and 'delete'. At the top right of the memo list, there is a '+ new memo' button. The top navigation bar includes links for Home, Dashboard, Clients, Deadlines, Emails, Automations, Invoices, Settings, and Help, along with a user profile for 'Principal Admin'.

## STEP 24

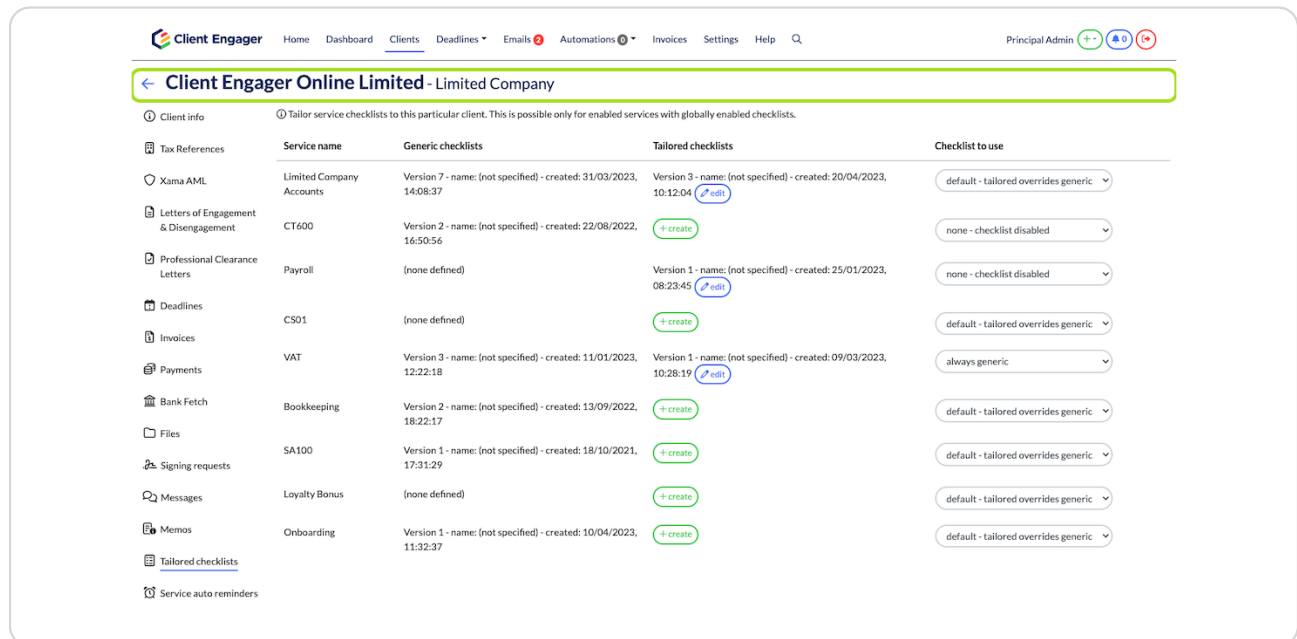
### Tailored checklists



## 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





## STEP 26


### Service auto reminders


 Payments


 Bank Fetch


 Files

 Signing requests

 Messages

 Memos

 Tailored checklists

 Service auto reminders

Bookkeeping

SA100

Loyalty Bonus

Onboarding

12:22:18

Version 2 - name: (not specified) - created: 18:22:17

Version 1 - name: (not specified) - created: 17:31:29

(none defined)

Version 1 - name: (not specified) - created: 11:32:37

## 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

Home Dashboard Clients Deadlines Emails 2 Automations 0 Invoices Settings Help Q

Principal Admin + 0 0 0

er 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)	<a href="#">edit</a>
CT600	(none yet)	(none yet)	<a href="#">edit</a>
Payroll	(none yet)	(none yet)	<a href="#">edit</a>
CS01	0 enabled out of 1 total	(none yet)	<a href="#">edit</a>
VAT	(none yet)	(none yet)	<a href="#">edit</a>
Bookkeeping	(none yet)	1 enabled out of 1 total	<a href="#">edit</a>
SA100	(none yet)	(none yet)	<a href="#">edit</a>
Processing Sales Invoices	(none yet)	(none yet)	<a href="#">edit</a>
Loyalty Bonus	(none yet)	(none yet)	<a href="#">edit</a>
Onboarding	(none yet)	(none yet)	<a href="#">edit</a>

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