# Importing a new client from Companies House and adding related information in the system

21 Steps     [View most recent version on Tango.us](#) ↗

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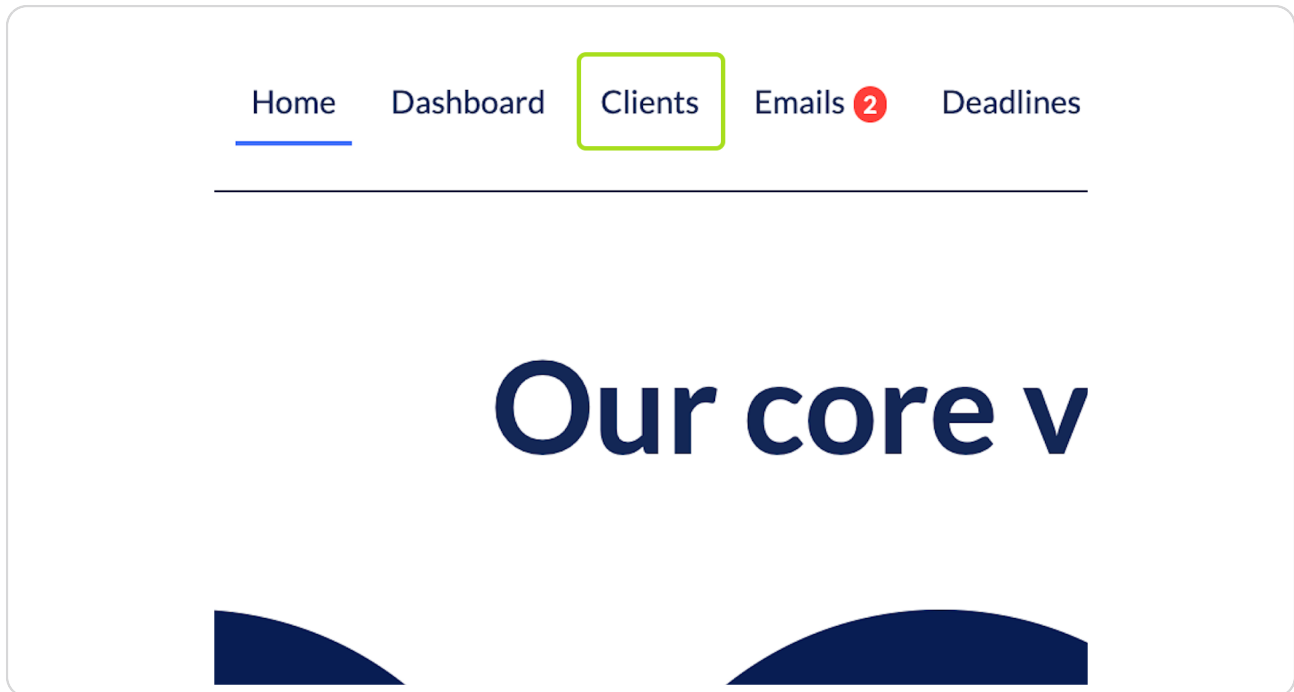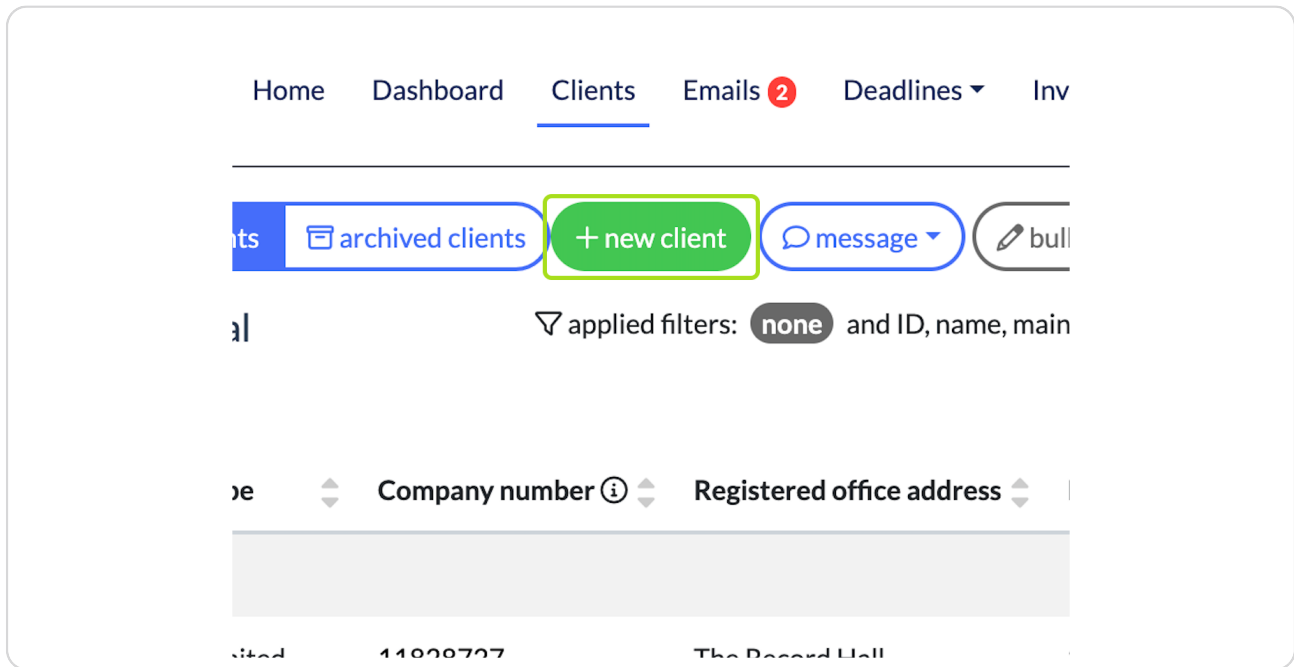
| Created by | Creation Date | Last Updated |
|---|---|---|
| Johann Goree | May 23, 2023 | May 23, 2023 |

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

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STEP 1

## Click on Clients

**STEP 2**

**Click on  new client**

Home    Dashboard    Clients    Emails **2**    Deadlines ▾    Inv

nts    🗁 archived clients    **+ new client**    💬 message ▾    ✏ bull

🔽 applied filters:    none    and ID, name, main

al

be    ⇅    **Company number** ⓘ ⇅    **Registered office address** ⇅
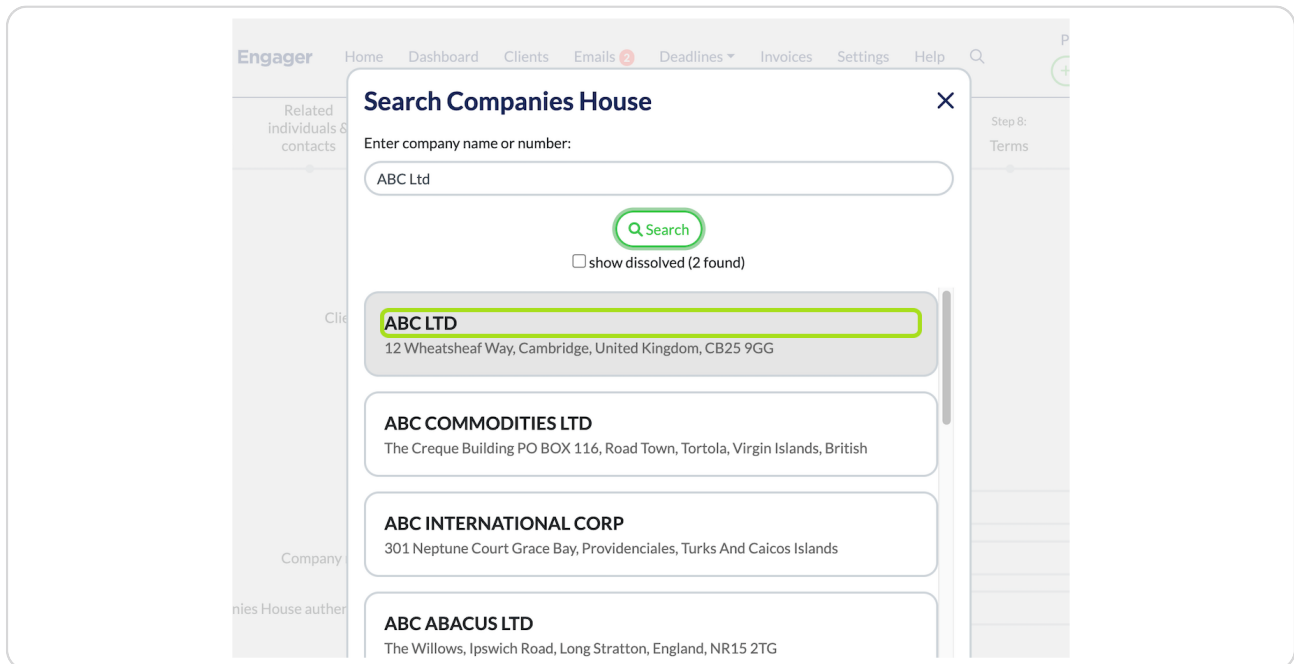
ited    11828727    The Record Hall

**STEP 3**

**Select the client type, click on next**

eate new client

lient type:

ited Company

next →
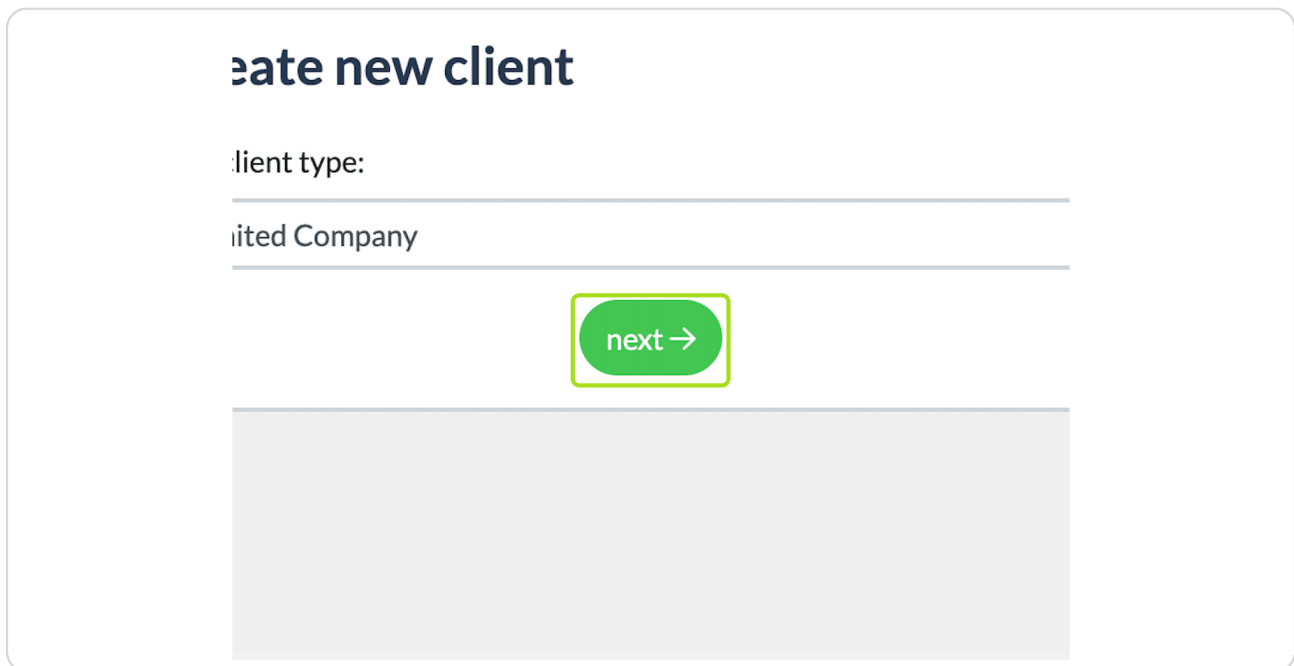
# STEP 4

## 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 QuickBool

ⓧ Link with Xama | ✕ not linked

Name:

Company number:

es House authentication code:

# STEP 5

## Type the company name or number



**Search Companies House**  ✕

Enter company name or number:

ABC Ltd

🔍 Search

☐ show dissolved (0 found)

**STEP 6**

## Click on  Search



**STEP 7**
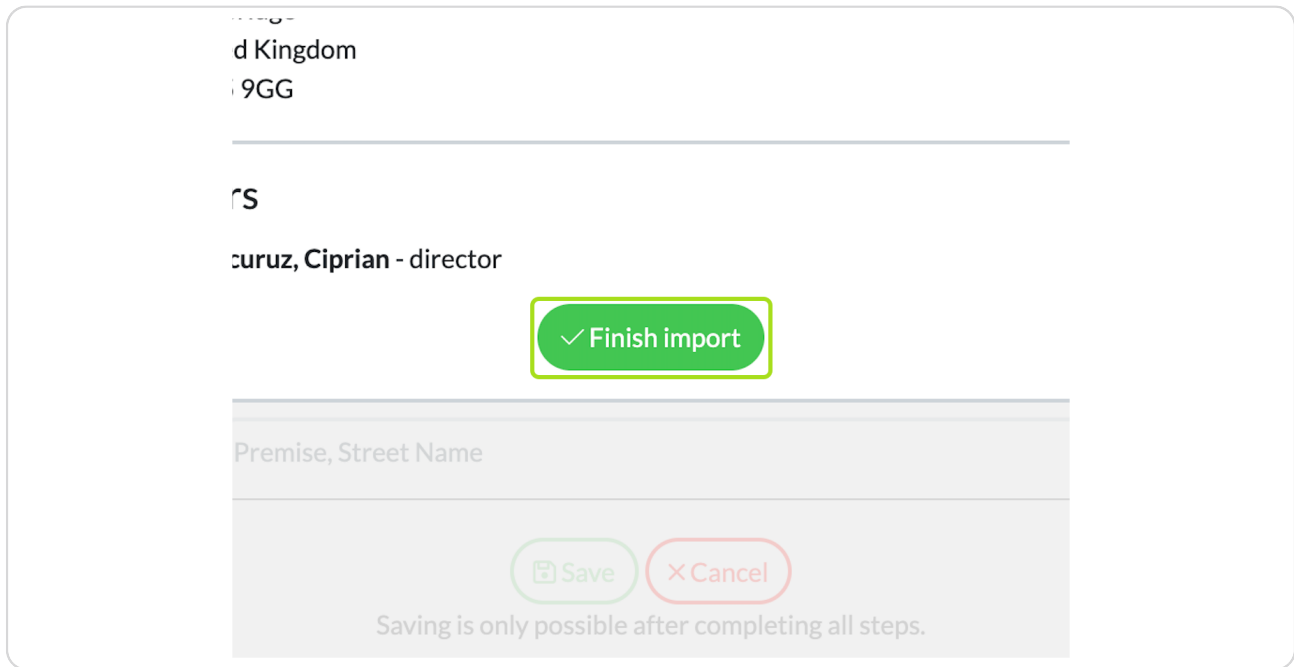
## Click on the company you want to add

**STEP 8**

## Click on  Finish import
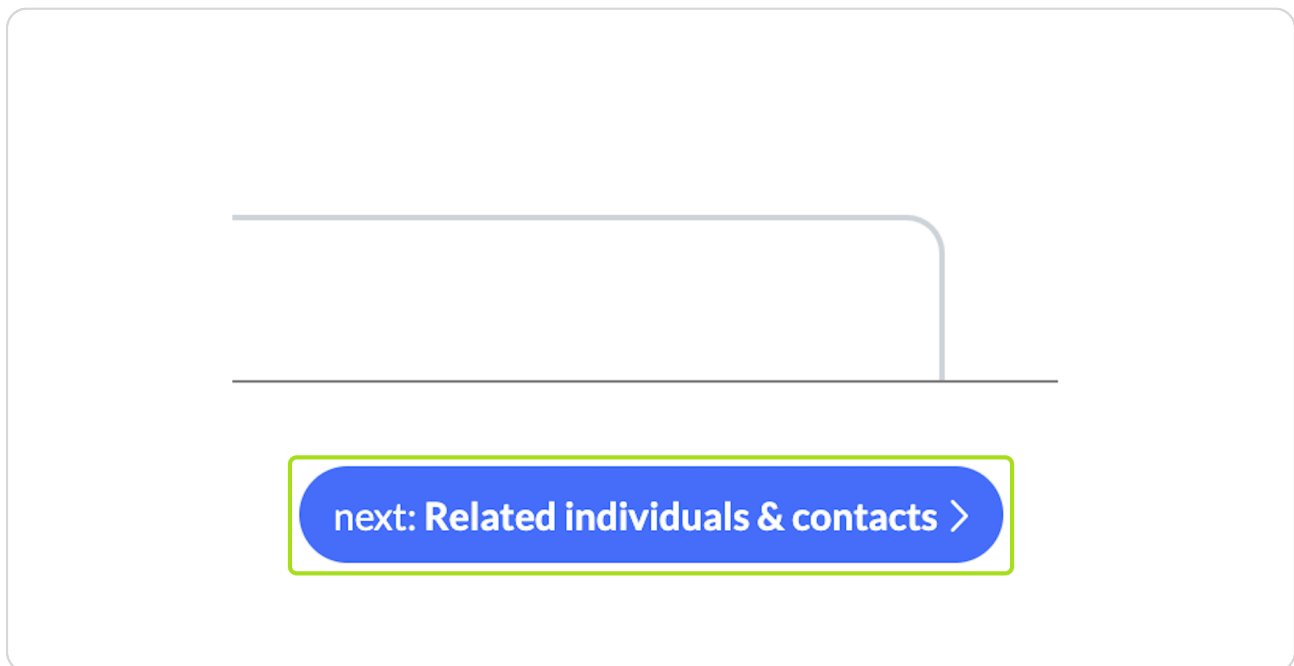


**STEP 9**

## Click on next: Related individuals & contacts

**STEP 10**

## Click on  add

s

+ add
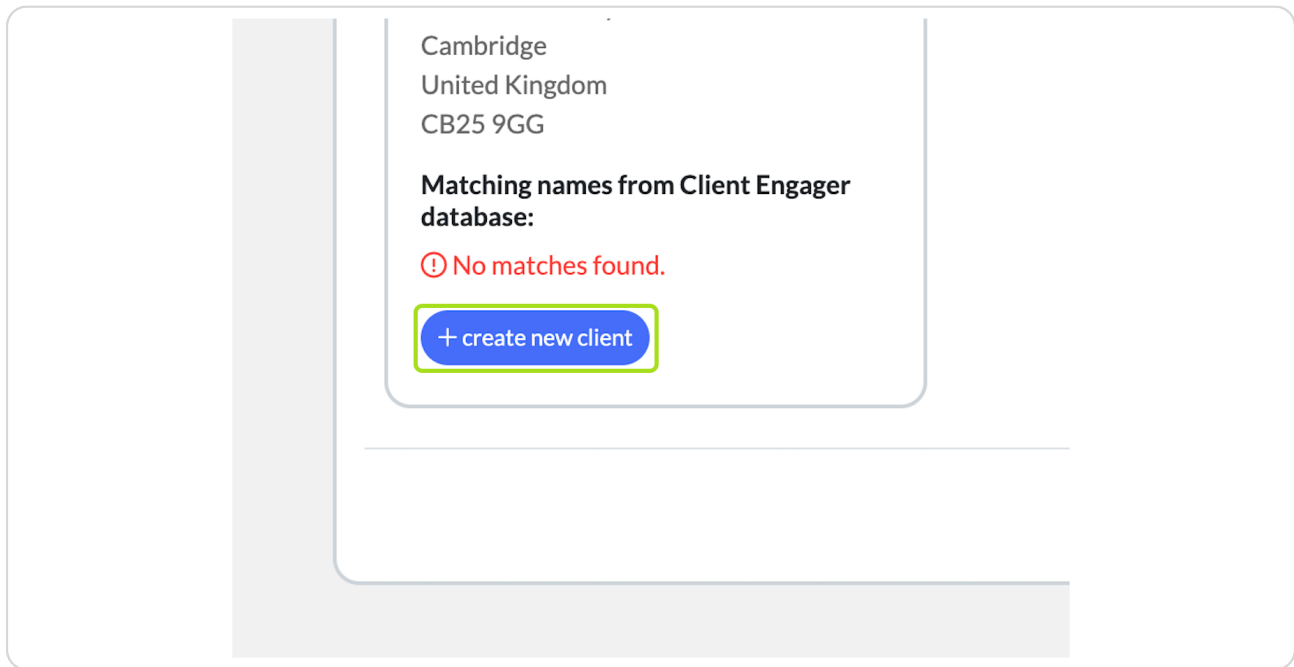
**STEP 11**

## Click on  use officers imported from Companies House

Create new client

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

individual

👤 use officers imported from Companies House

OR

🔍 find existing individual in Client Engager database

OR

+ create new individual manually

✓ done

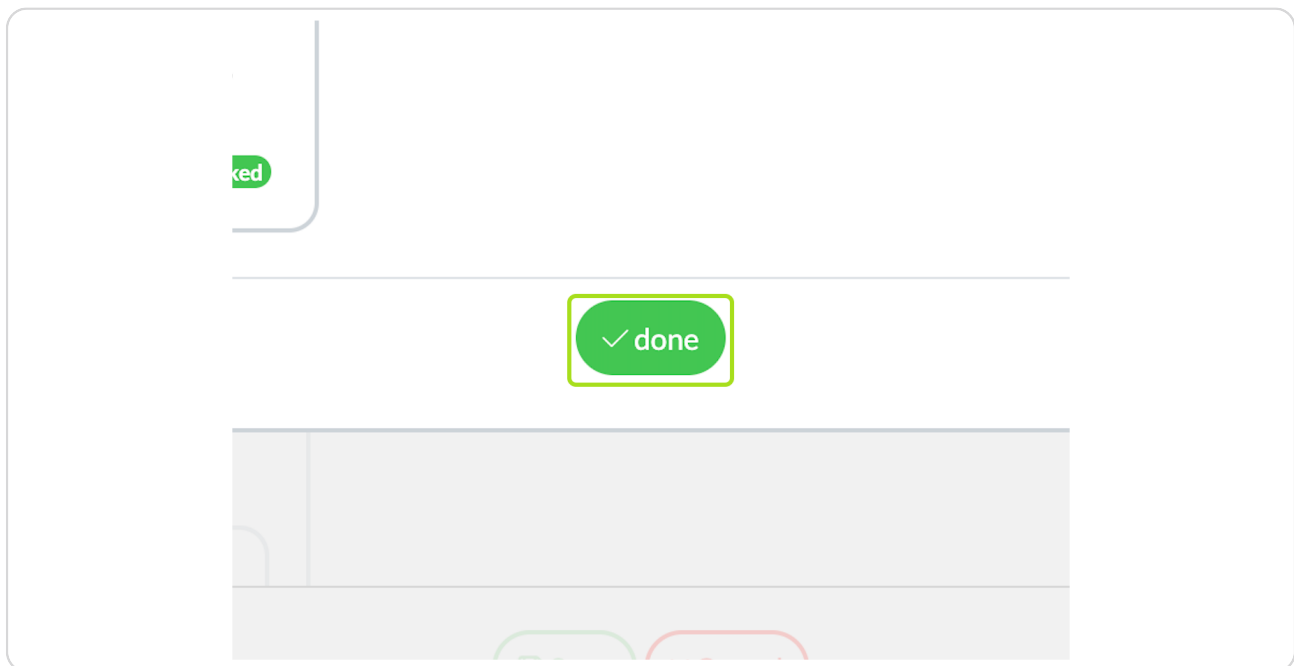## Click on  create new client

Cambridge
United Kingdom
CB25 9GG

**Matching names from Client Engager database:**

⊘ No matches found.

+ create new client

## Click on  done

ked

✓ done

## Enter email address

## Enter Mobile number

## Enter Telephone number

## Click on next: Related businesses, link businesses if any, then click next
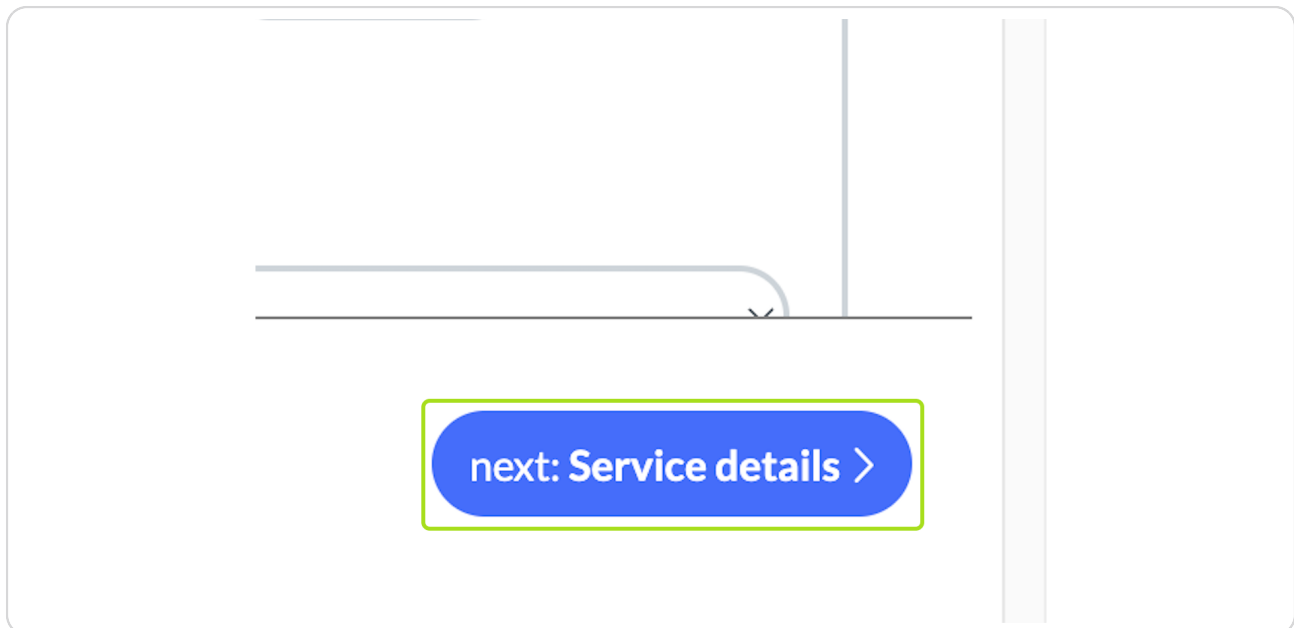
STEP 18

**Click play on any services you need turning on for the client and enter the price you want to charge and frequency of charging**
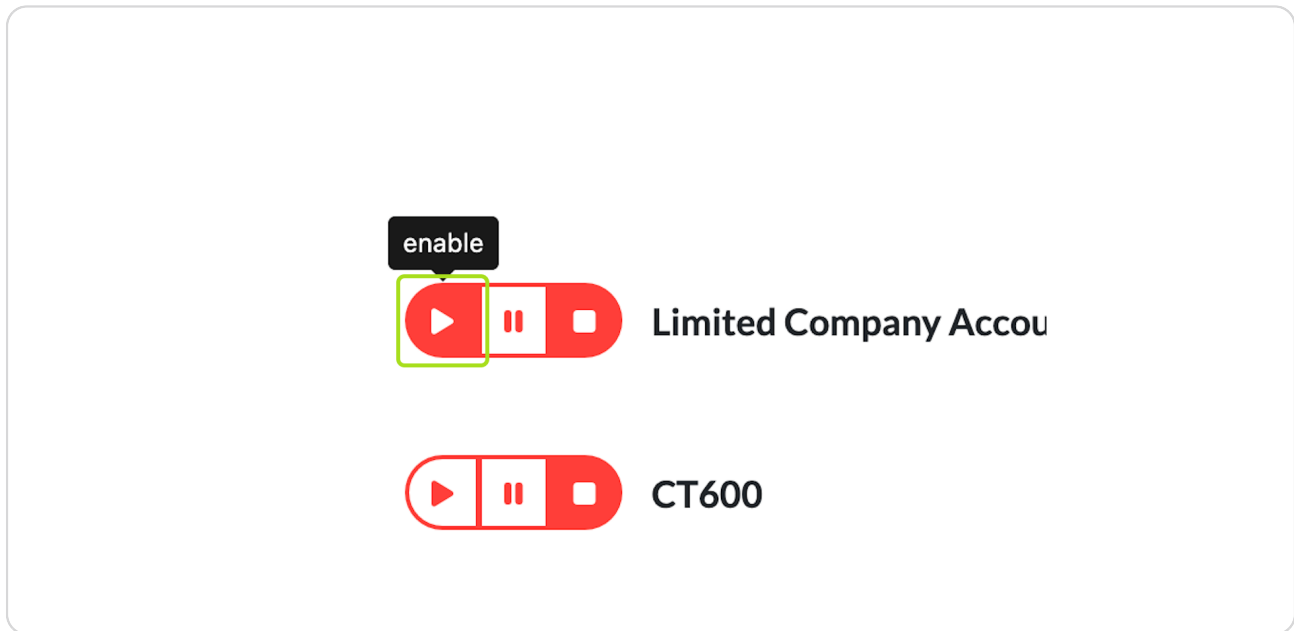


STEP 19

**Click on next: Service details, i normally skip this step and following steps to the end until the client agrees to the Letter of Engagement**



Created with *Tango*

**Click on  Save**

**Click on Yes**

Never miss a step again. Visit Tango.us