

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

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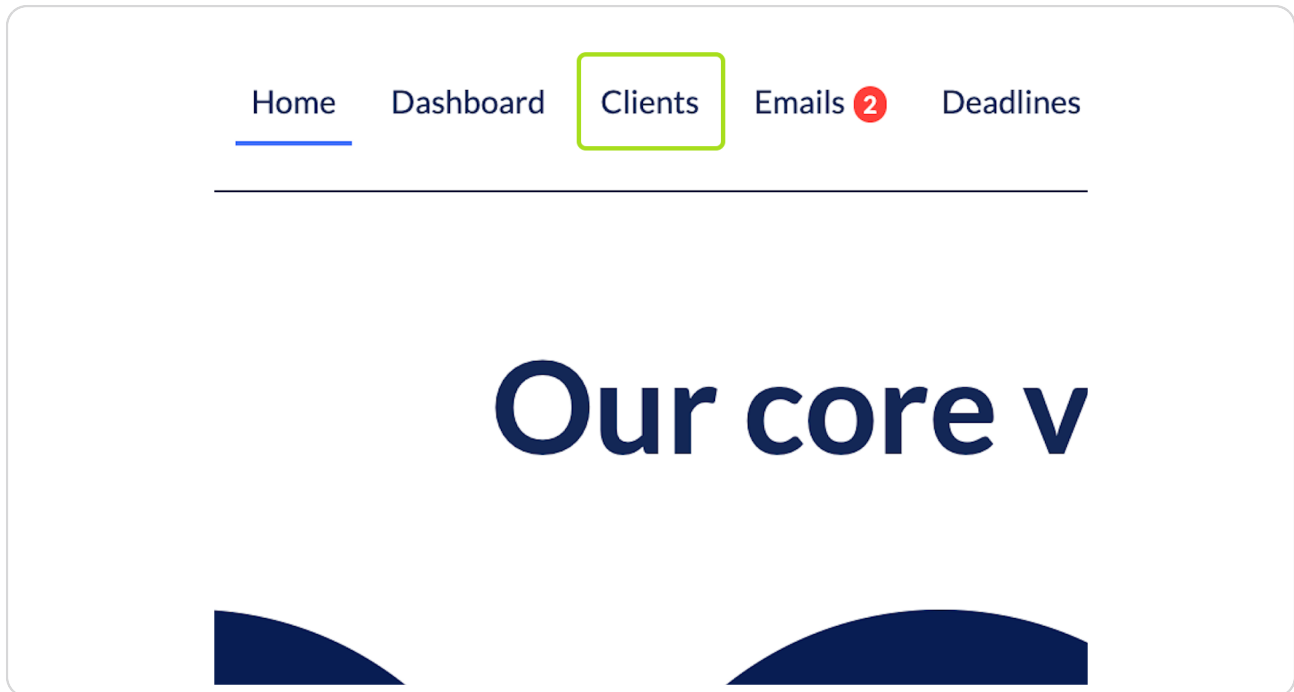
Johann Goree

Creation Date

May 23, 2023

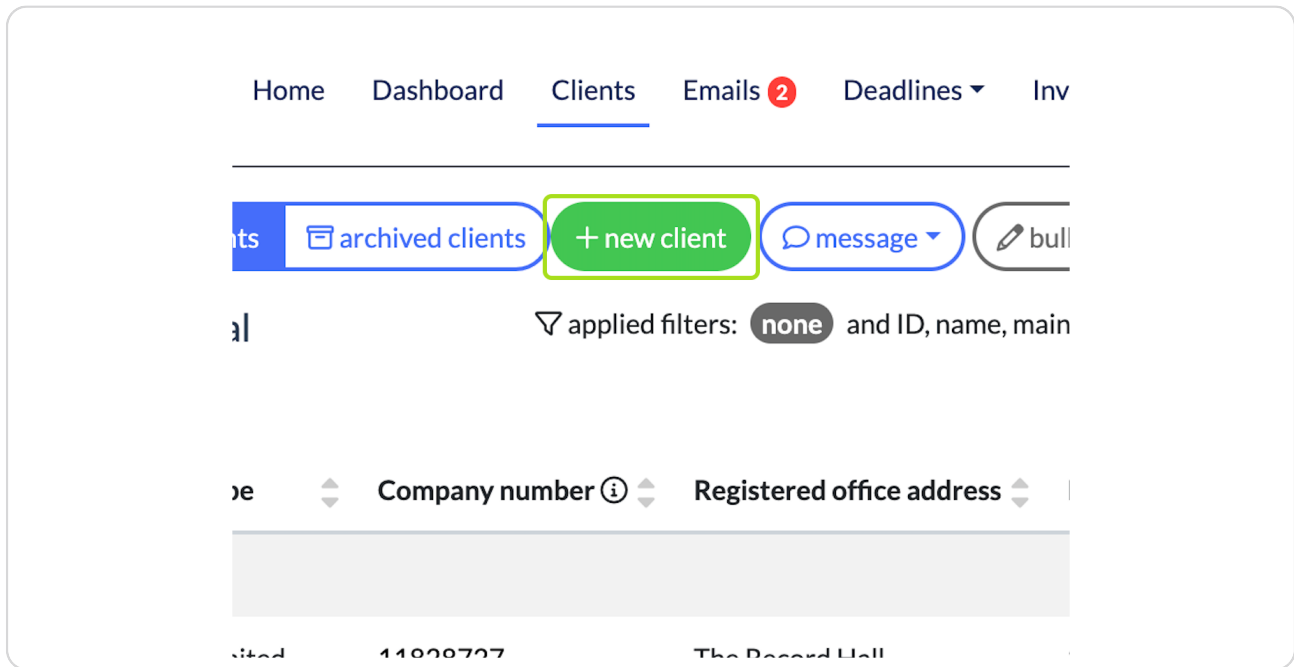
Last Updated

May 23, 2023

STEP 1**Click on Clients**

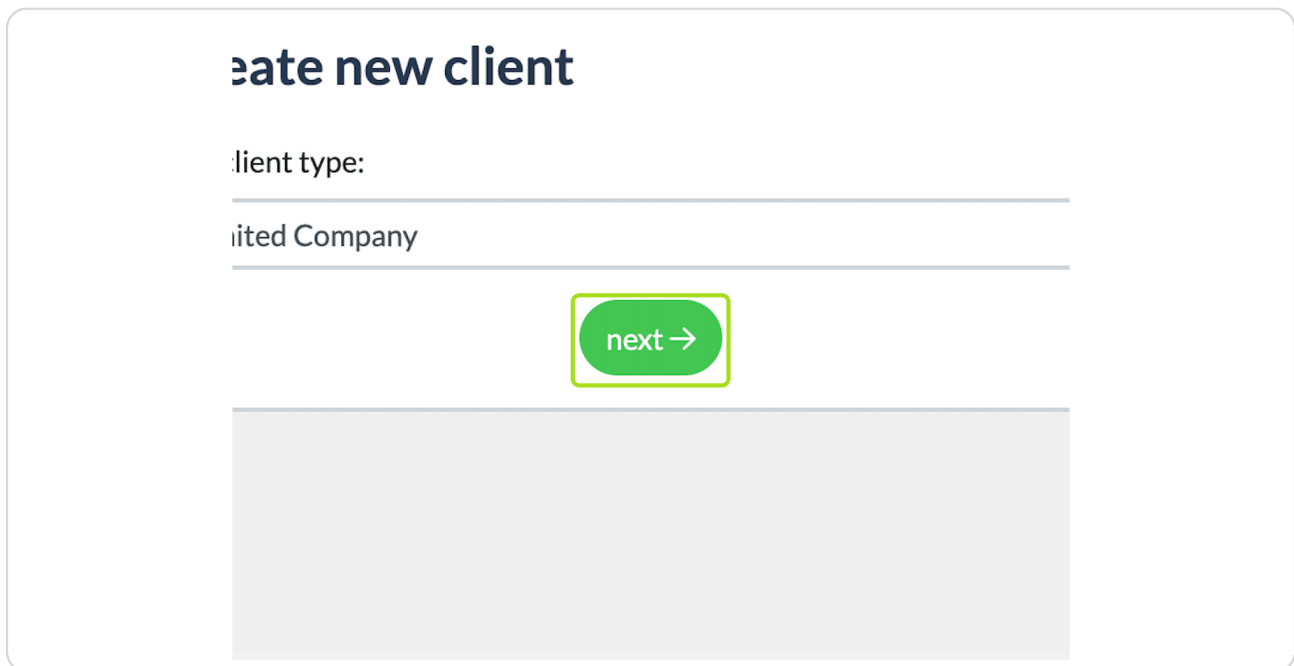
STEP 2

Click on **new client**



STEP 3

Select the client type, click on 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 QuickBooks

☒ Link with Xero ☒ not linked

Name:

Company number:

Companies House authentication code:

STEP 5

Type the company name or number

Related individuals & contacts

Related businesses

Services & pricing

Step 5: Service details

Manual AML check

External systems

Step 8: Terms

General info

ID: (will be assigned automatically)

Client type: **Limited Company**

Search Companies House

Enter company name or number:

☐ show dissolved (0 found)

Company number:

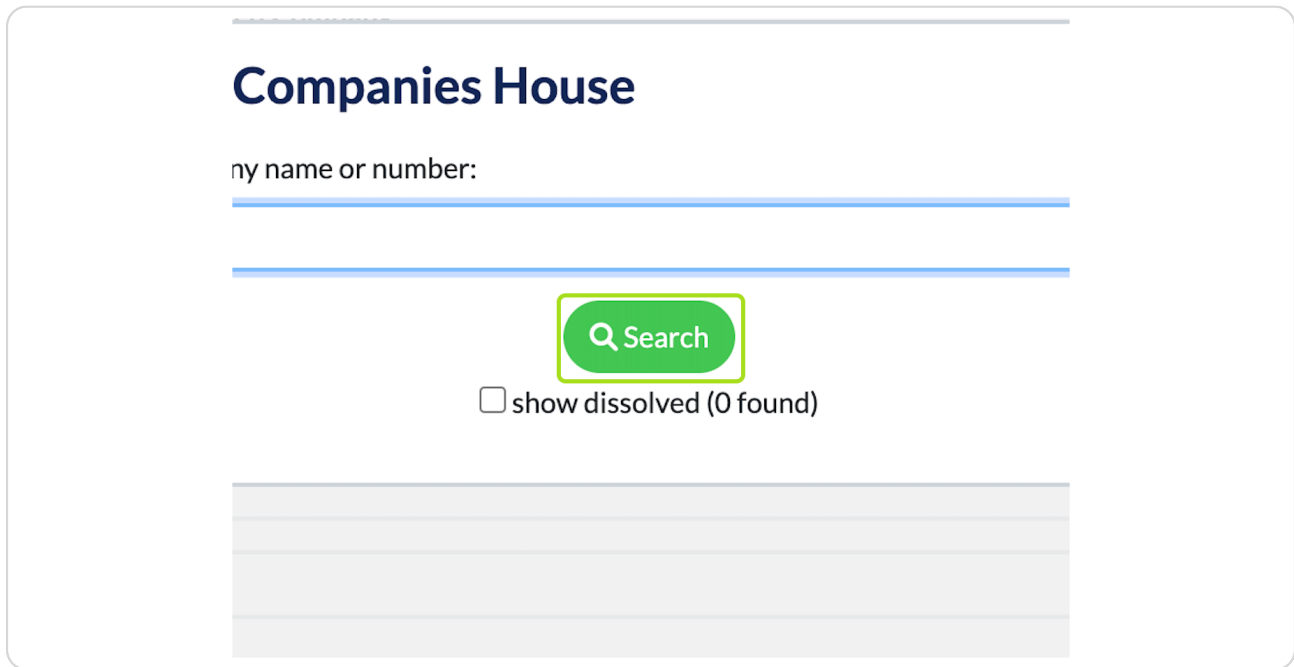
Companies House authentication code:

E-reminder: ☒ subscribed ☐ not subscribed

Registered office address:

STEP 6

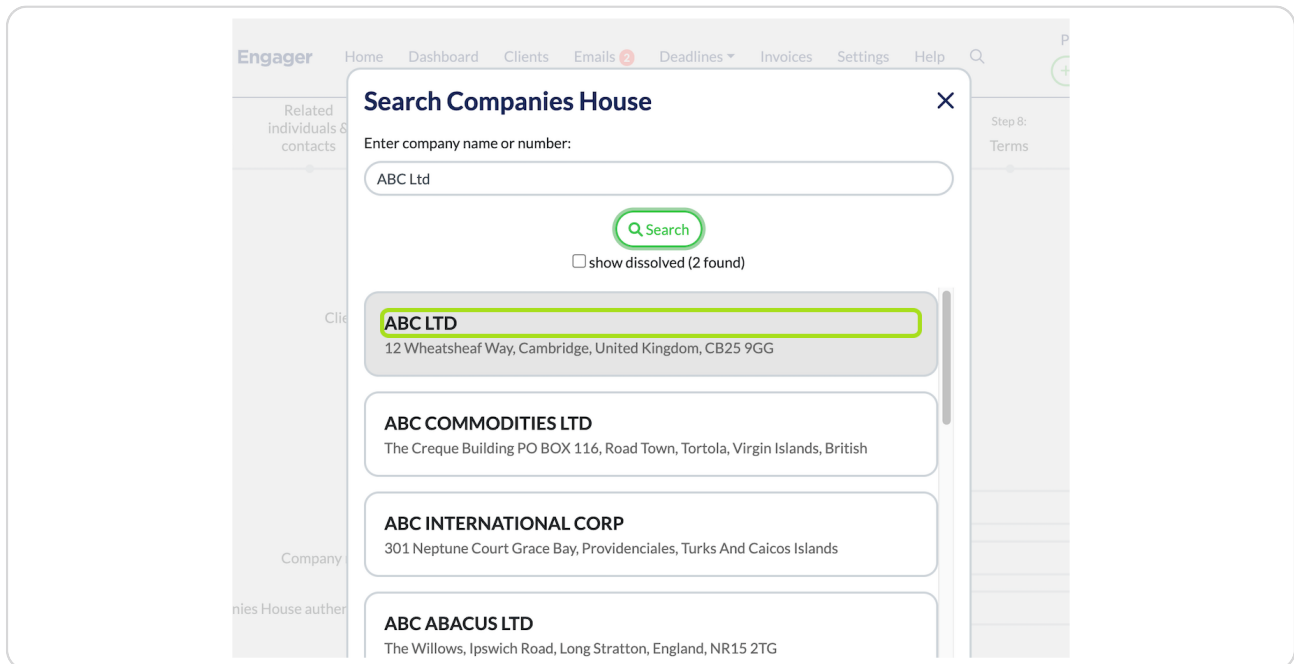
Click on Search



The image shows the Companies House search interface. At the top, the text "Companies House" is displayed in a large, bold, dark blue font. Below this, there is a search input field with the placeholder text "Enter company name or number:". The input field is a simple white box with a thin blue border. Below the input field, there is a green button with a white magnifying glass icon and the text "Search". To the right of the button, there is a checkbox labeled "show dissolved (0 found)". Below the search area, there is a list of search results, which is currently empty.

STEP 7

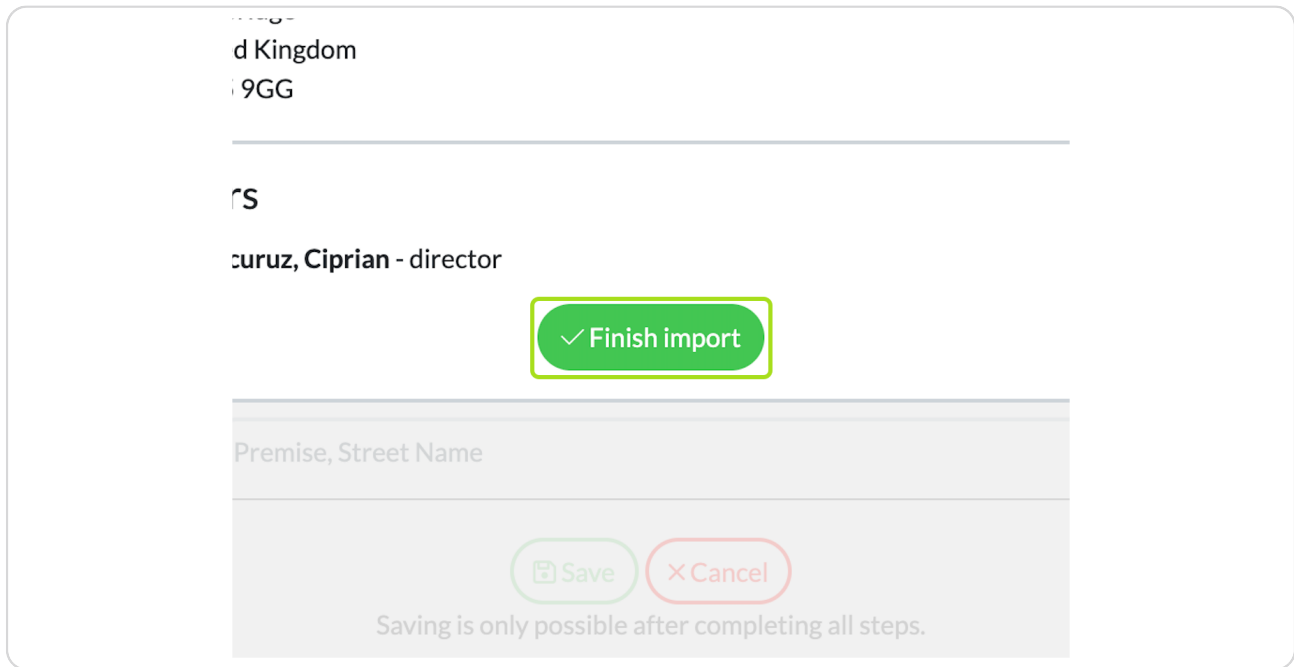
Click on the company you want to add



The image shows the Engager search interface. At the top, the text "Engager" is displayed in a bold, dark blue font. Below this, there is a search input field with the placeholder text "Enter company name or number:". The input field is a simple white box with a thin blue border. Below the input field, there is a green button with a white magnifying glass icon and the text "Search". To the right of the button, there is a checkbox labeled "show dissolved (2 found)". Below the search area, there is a list of search results. The first result is highlighted with a green border and contains the text "ABC LTD" and "12 Wheatsheaf Way, Cambridge, United Kingdom, CB25 9GG". The other results are "ABC COMMODITIES LTD", "ABC INTERNATIONAL CORP", and "ABC ABACUS LTD".

STEP 8

Click on **Finish import**

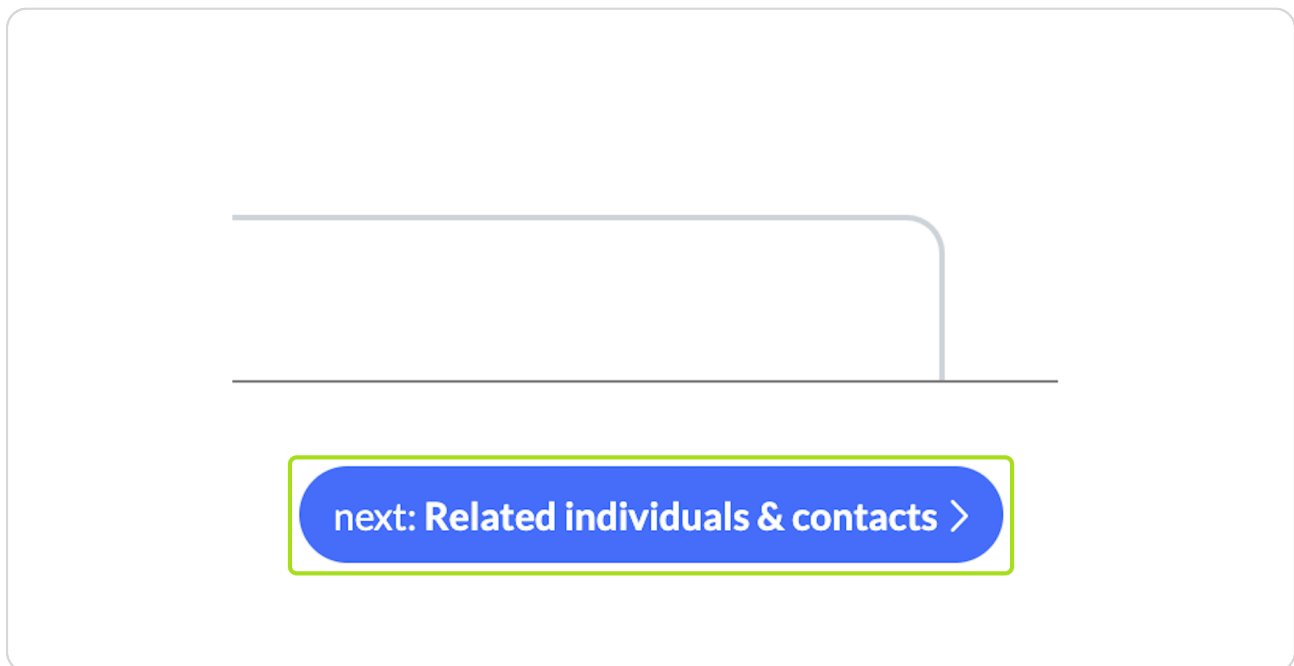


The screenshot shows a form with the following fields and elements:

- Country: United Kingdom
- Postcode: 9GG
- Company Name: S
- Director: curuz, Ciprian - director
- A green button labeled "✓ Finish import" is highlighted with a green box.
- A section for "Premise, Street Name" is visible below the director field.
- At the bottom, there are "Save" and "Cancel" buttons, with a message: "Saving is only possible after completing all steps."

STEP 9

Click on **next: Related individuals & contacts**



The screenshot shows a form with the following elements:

- A blue button labeled "next: Related individuals & contacts >" is highlighted with a green box.

STEP 10

Click on **add**

The screenshot shows a progress bar at the top with three stages: "External systems", "Terms", and "Summary". The "External systems" stage is currently active. Below the progress bar is a large text input field containing the letter "S". To the right of the input field is a green button with a white plus sign and the text "+ add".

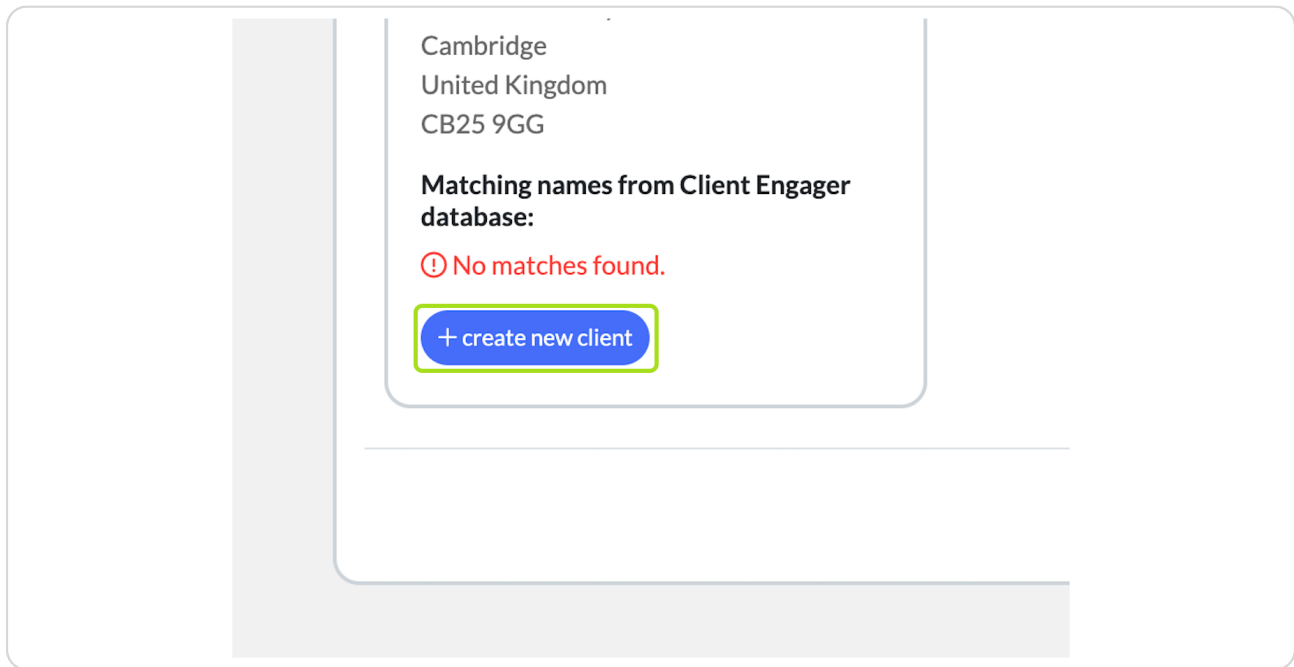
STEP 11

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

The screenshot shows the "Create new client" form. At the top, there is a progress bar with seven steps: "Step 1: Personal details", "Step 2: Business details", "Step 3: Related businesses", "Step 4: Services & pricing", "Step 5: Service details", "Step 6: Manual AML check", and "Step 7: External systems". The "Step 4: Services & pricing" step is currently active. Below the progress bar, the text "Individual" is displayed. There are three options for adding an individual, each in a blue button with a white border and a green highlight: "use officers imported from Companies House", "find existing individual in Client Engager database", and "create new individual manually". Below these options is a green button with a white checkmark and the text "done".

STEP 12

Click on **create new client**



Cambridge
United Kingdom
CB25 9GG

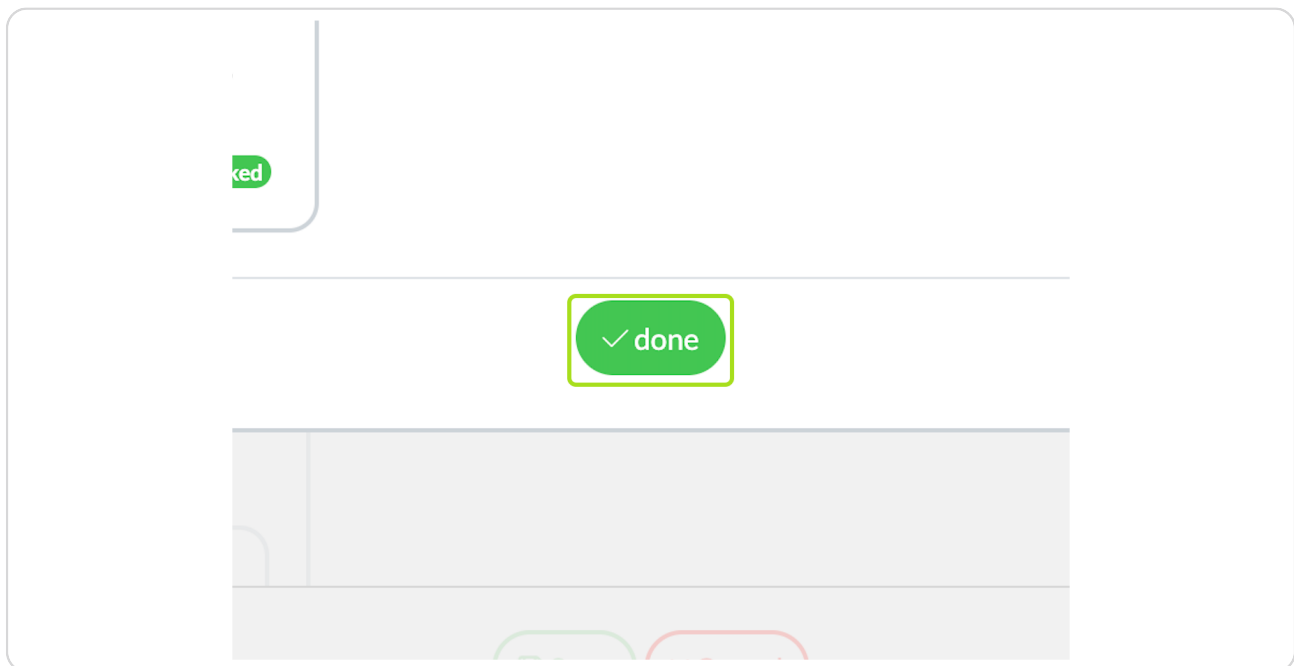
Matching names from Client Engager database:

⚠ No matches found.

+ create new client

STEP 13

Click on **done**



ked

✓ done

Enter email address

☒ Trading address:

12

Wheatsheaf Way

Cambridge	County / District
CB25 9GG	United Kingdom

☒ Email:

☒ Mobile:

☒ Telephone:

For current business, this individual is:

☐ not a contact ☒ primary contact ☐ secondary contact

Enter Mobile number

Wheatsheaf Way	
Cambridge	County / District
CB25 9GG	United Kingdom

☒ Email:

☒ Mobile:

☒ Telephone:

For current business, this individual is:

☐ not a contact ☒ primary contact ☐ secondary contact

new individual [unlink](#)

STEP 16

Enter Telephone number

The screenshot shows a contact form with the following elements:

- Postcode: CB25 9GG
- Country: United Kingdom
- Checkboxes for contact types: ☒ Email, ☒ Mobile, ☒ Telephone.
- Input fields for Email, Mobile, and Telephone. The Telephone field is highlighted with a green border.
- Section: For current business, this individual is:
- Buttons: not a contact, primary contact (highlighted with a green border), secondary contact.
- Buttons: new individual (highlighted with a green border), unlink (highlighted with a red border).
- Navigation: < previous: General info (blue button), Save (green button), Cancel (red button).
- Footer: Saving is only possible after complete

STEP 17

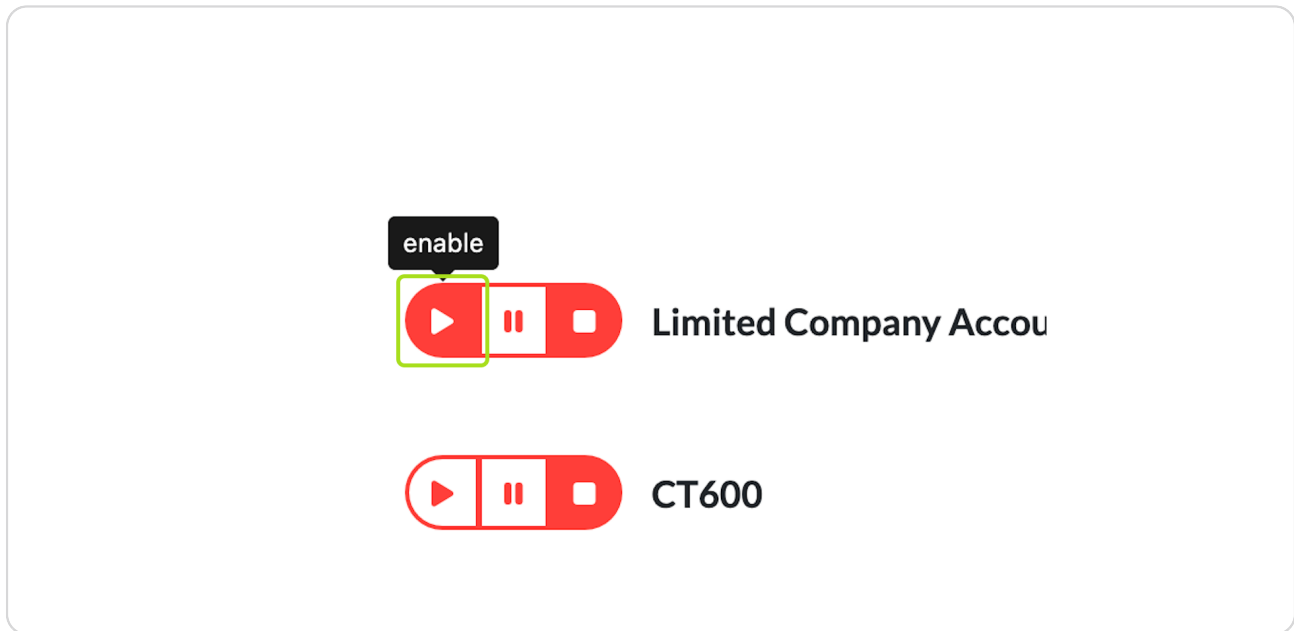
Click on next: Related businesses, link businesses if any, then click next

The screenshot shows a contact form with the following elements:

- A large blue button labeled next: Related businesses > (highlighted with a green border).
- A vertical scrollbar on the right side of the form.

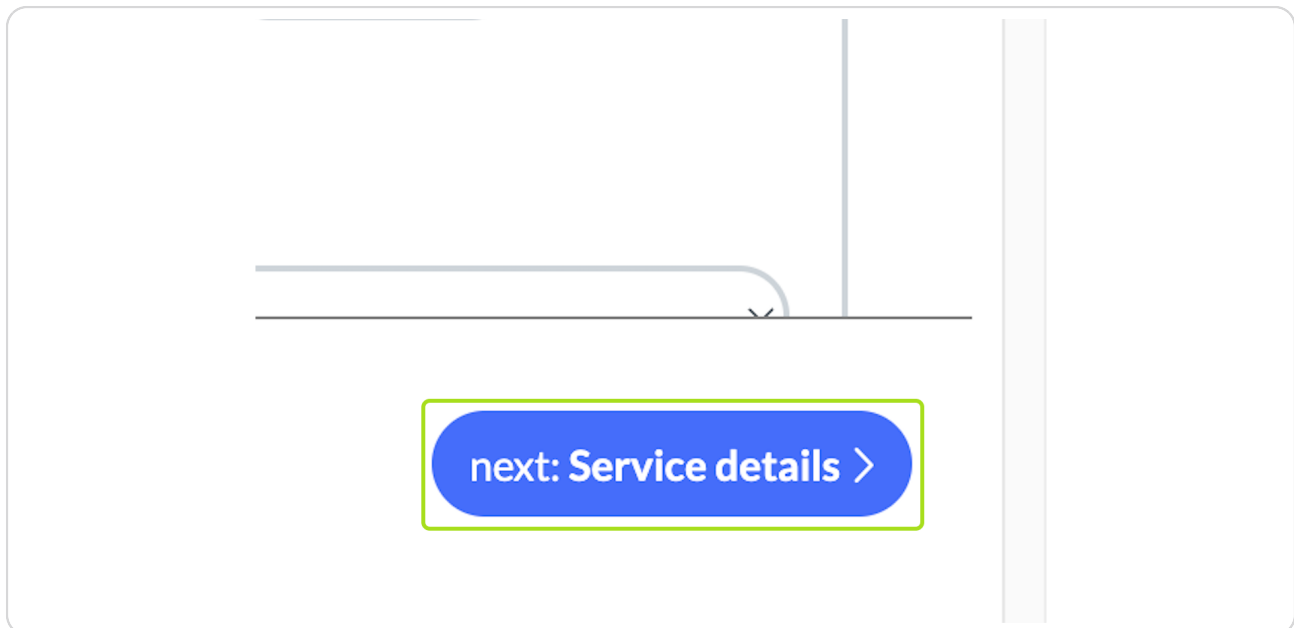
STEP 18

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



STEP 20

Click on Save

TOTAL

Service details

Accounts Reference Date: May 31

Active services

Limited Company Accounts

Save

Cancel

STEP 21

Click on Yes

No

Yes

TOTAL

£0

£0

£0

£0

av 31

CS01 Date: May 11

Tango

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