

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

21 Steps

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

Created by

Johann Goree

Creation Date

May 23, 2023

Last Updated

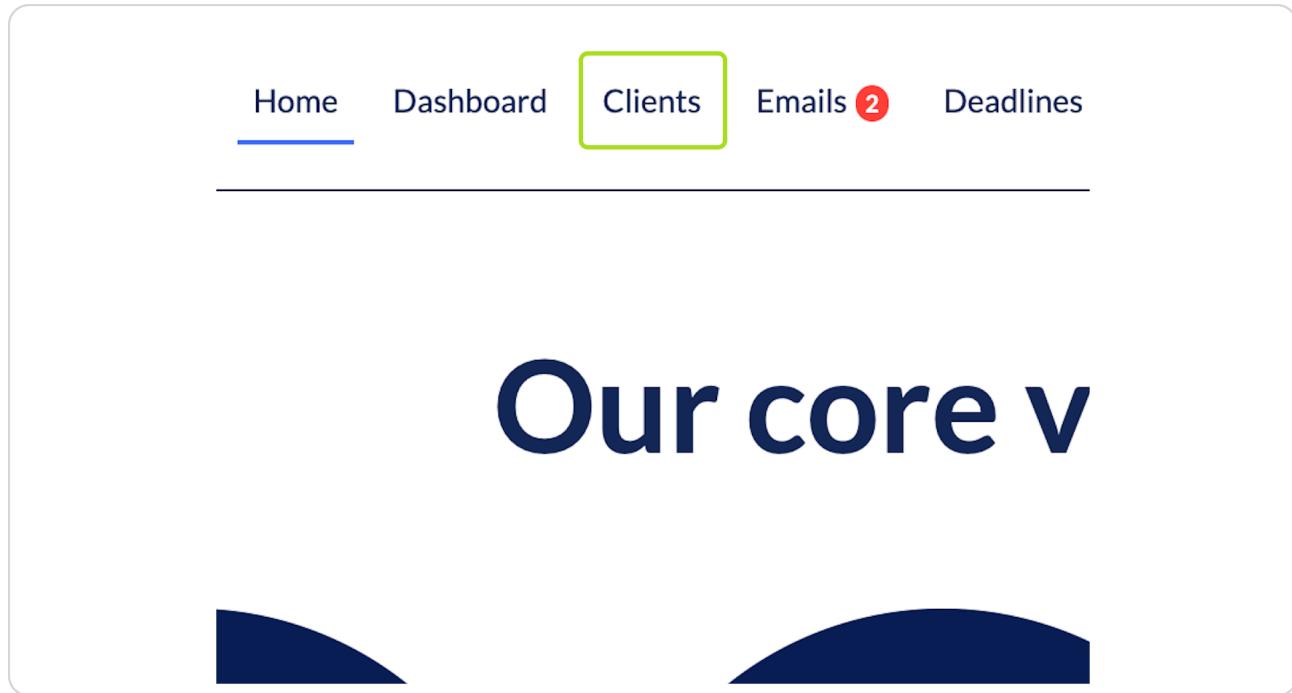
May 23, 2023



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

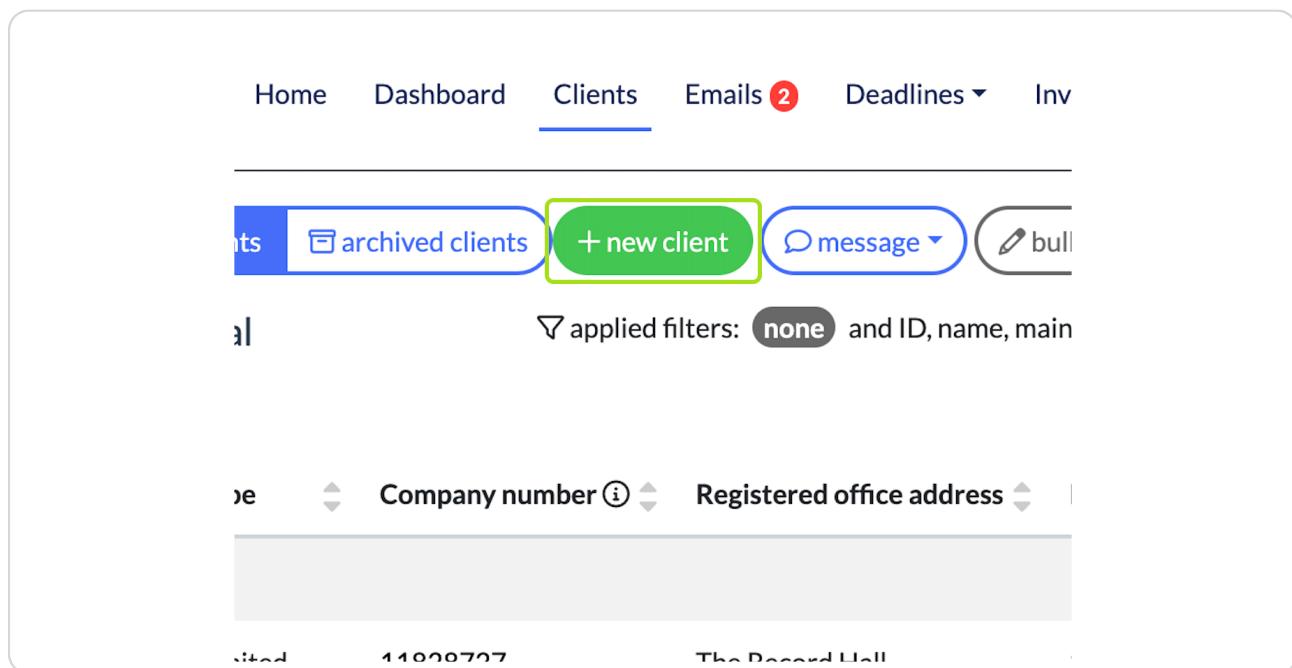
STEP 1

Click on Clients



STEP 2

Click on new client



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

Clients **+ new client** **archived clients** **message** **bulk**

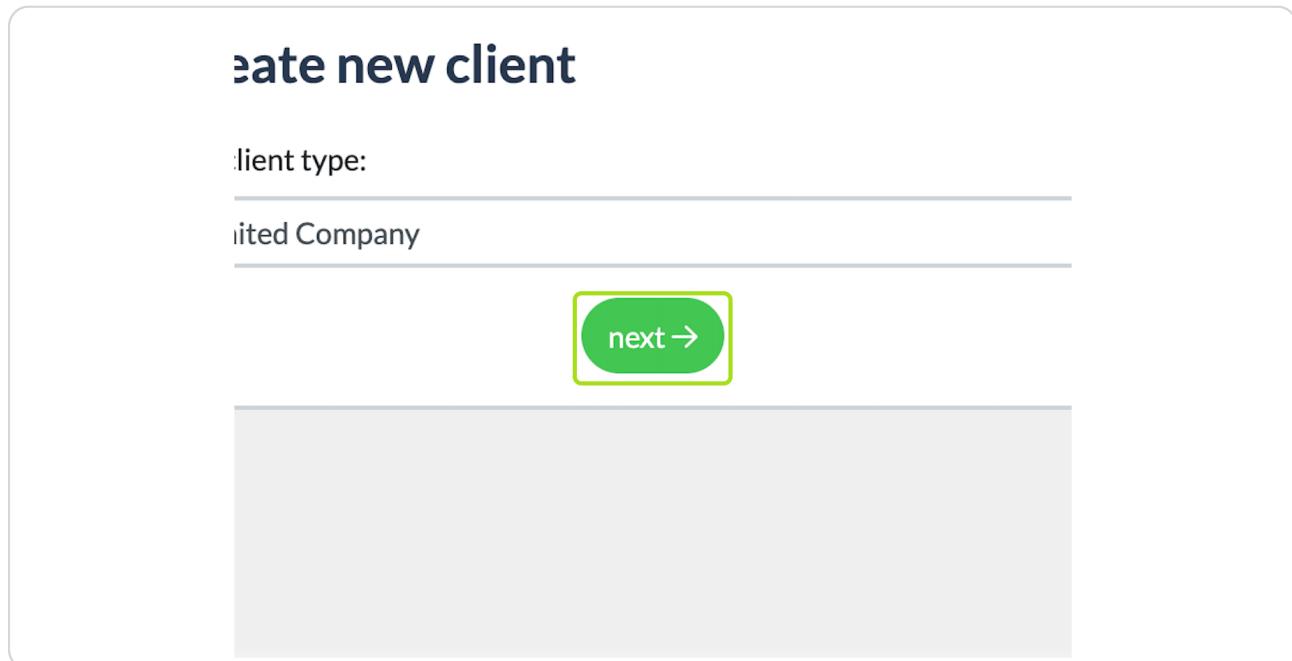
applied filters: **none** and ID, name, main

Company number ⓘ Registered office address ⓘ

United 11000707 The Record Hall

STEP 3

Select the client type, click on next



Create new client

Client type:

United 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:

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:
ABC Ltd

Company number:

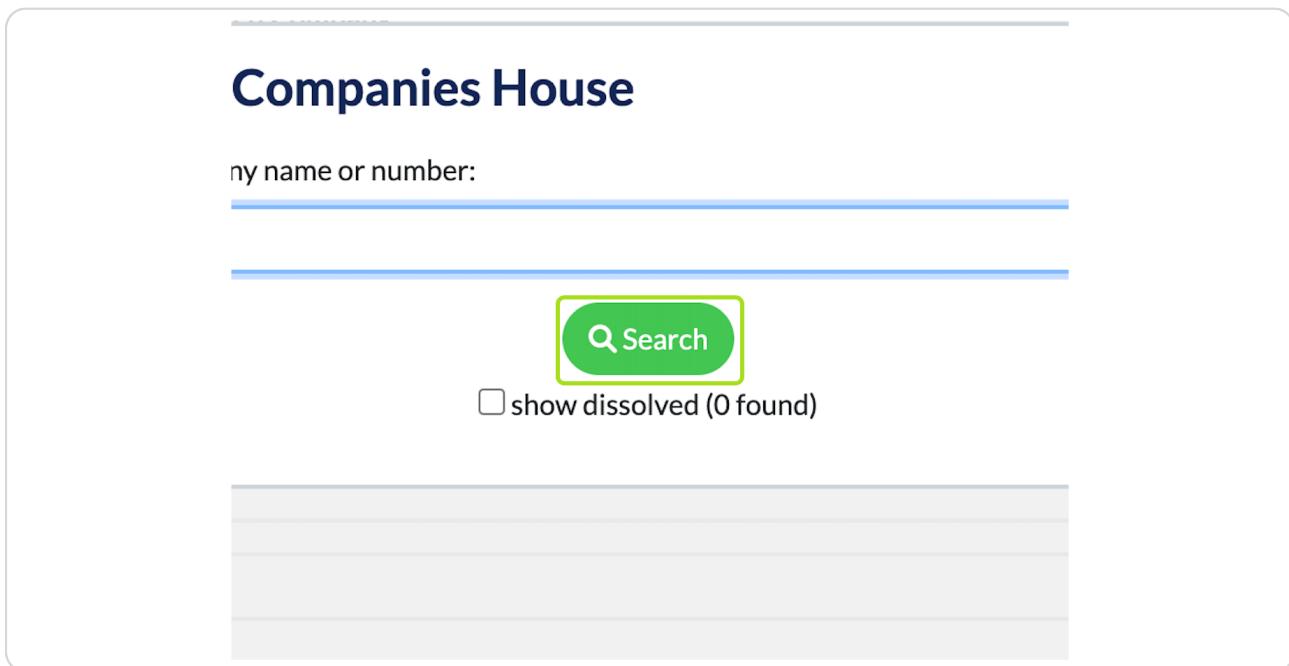
Companies House authentication code:

E-reminder: subscribed not subscribed

Registered office address: Premise, Street Name

STEP 6

Click on Search



STEP 7

Click on the company you want to add

Engager

Related individuals & contacts

Home Dashboard Clients Emails 2 Deadlines Invoices Settings Help

Search Companies House

Enter company name or number: ABC Ltd

show dissolved (2 found)

ABC LTD
12 Wheatsheaf Way, Cambridge, United Kingdom, CB25 9GG

ABC COMMODITIES LTD
The Creque Building PO BOX 116, Road Town, Tortola, Virgin Islands, British

ABC INTERNATIONAL CORP
301 Neptune Court Grace Bay, Providenciales, Turks And Caicos Islands

ABC ABACUS LTD
The Willows, Ipswich Road, Long Stratton, England, NR15 2TG

STEP 8

Click on Finish import

123456789, Kingdom, 19GG

curuz, Ciprian - director

✓ Finish import

Premise, Street Name

Save Cancel

Saving is only possible after completing all steps.

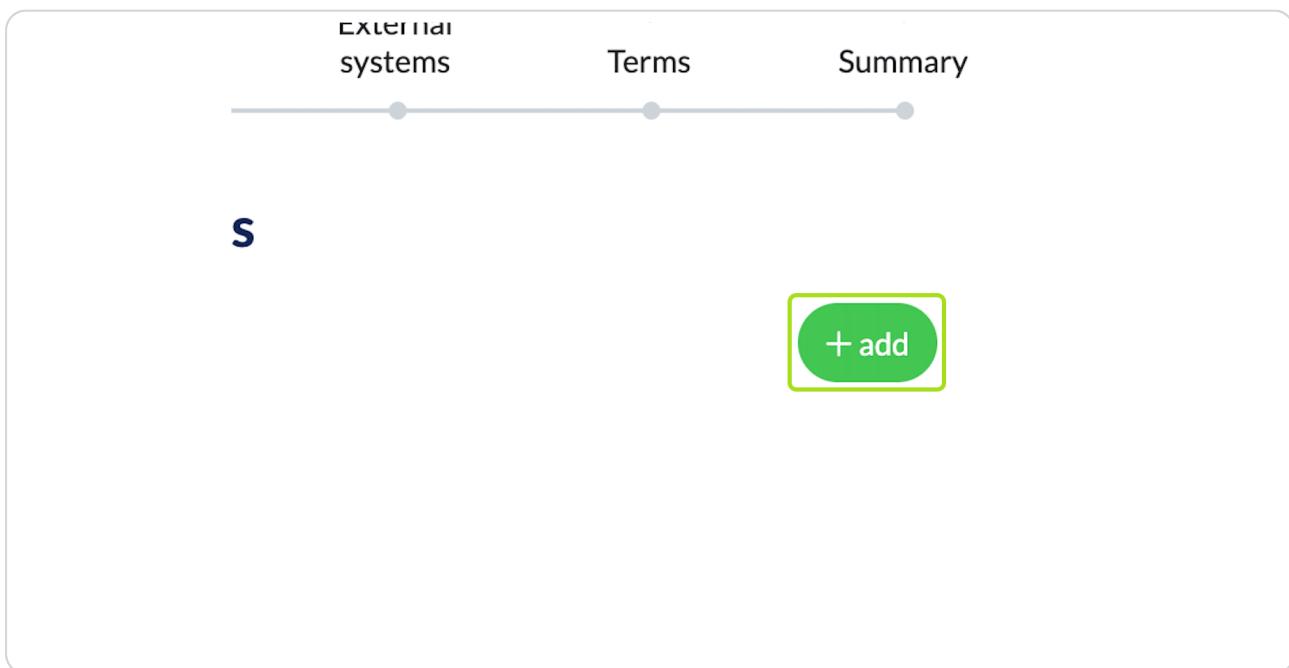
STEP 9

Click on next: Related individuals & contacts

next: Related individuals & contacts >

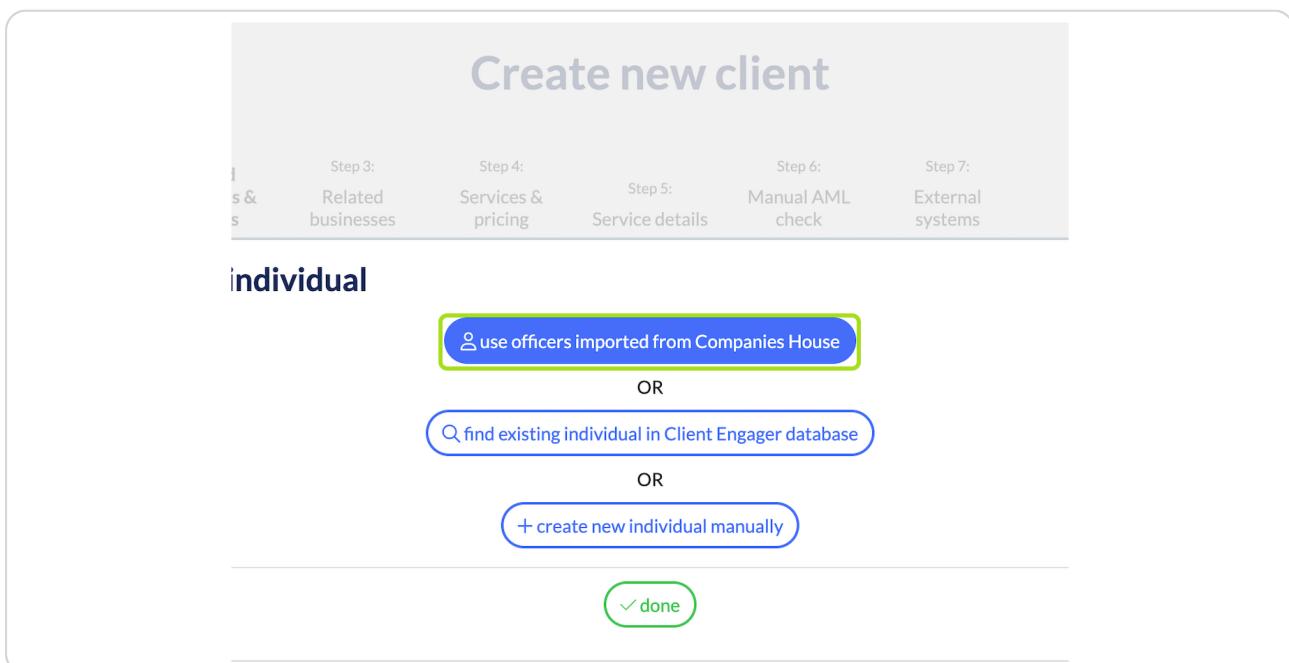
STEP 10

Click on **add**



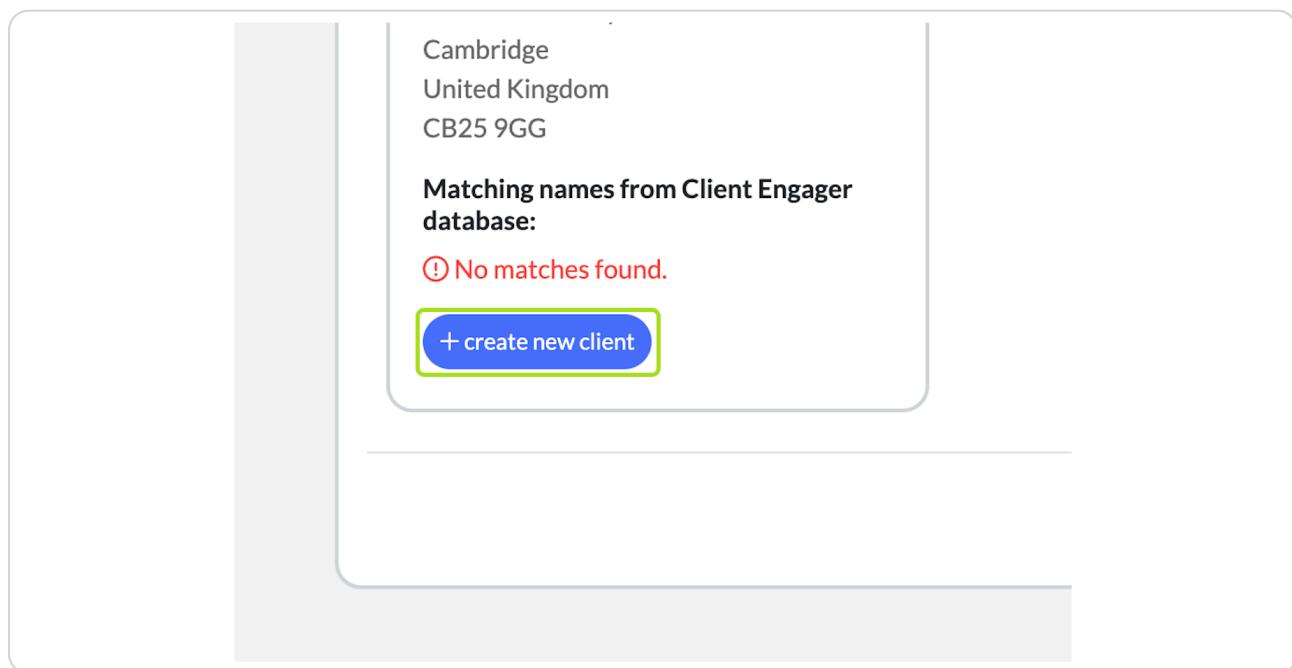
STEP 11

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



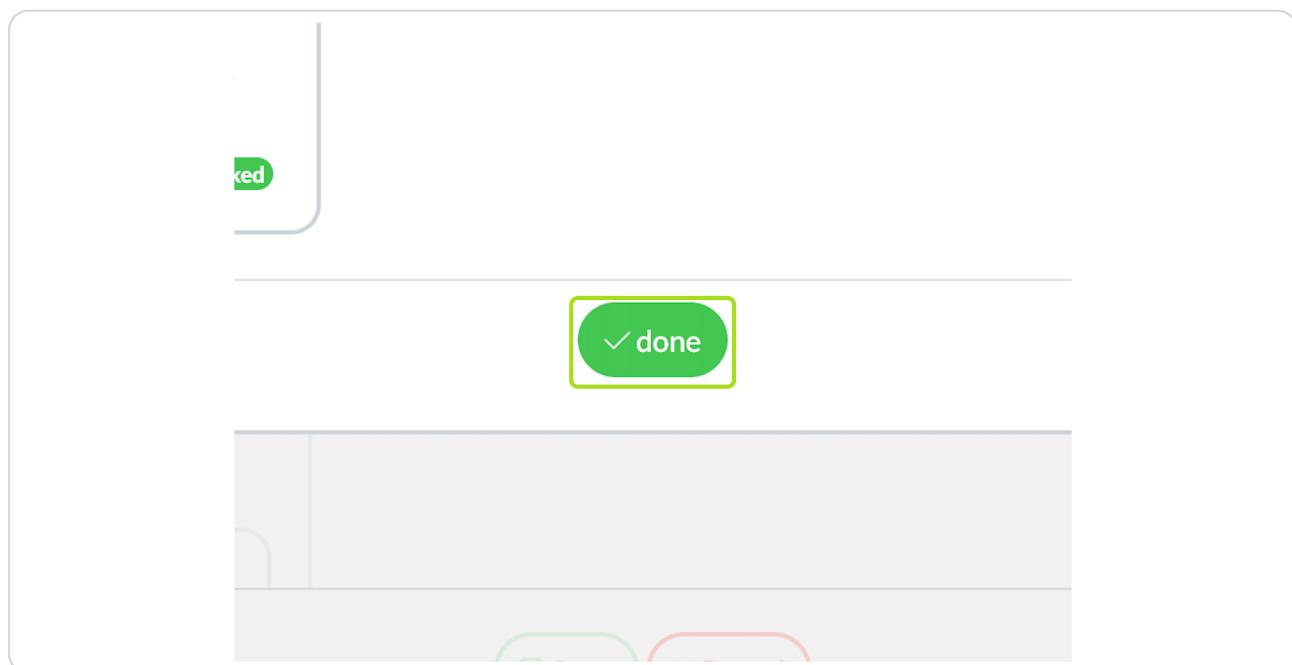
STEP 12

Click on **create new client**



STEP 13

Click on **done**



STEP 14

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

STEP 15

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

CB25 9GG United Kingdom

Email: _____

Mobile: _____ |

Telephone: _____

For current business, this individual is:

not a contact primary contact secondary contact

[new individual](#) [unlink](#)

Saving is only possible after completion

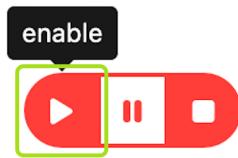
STEP 17

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

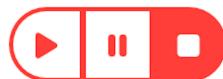
next: Related businesses >

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



Limited Company Accou



CT600

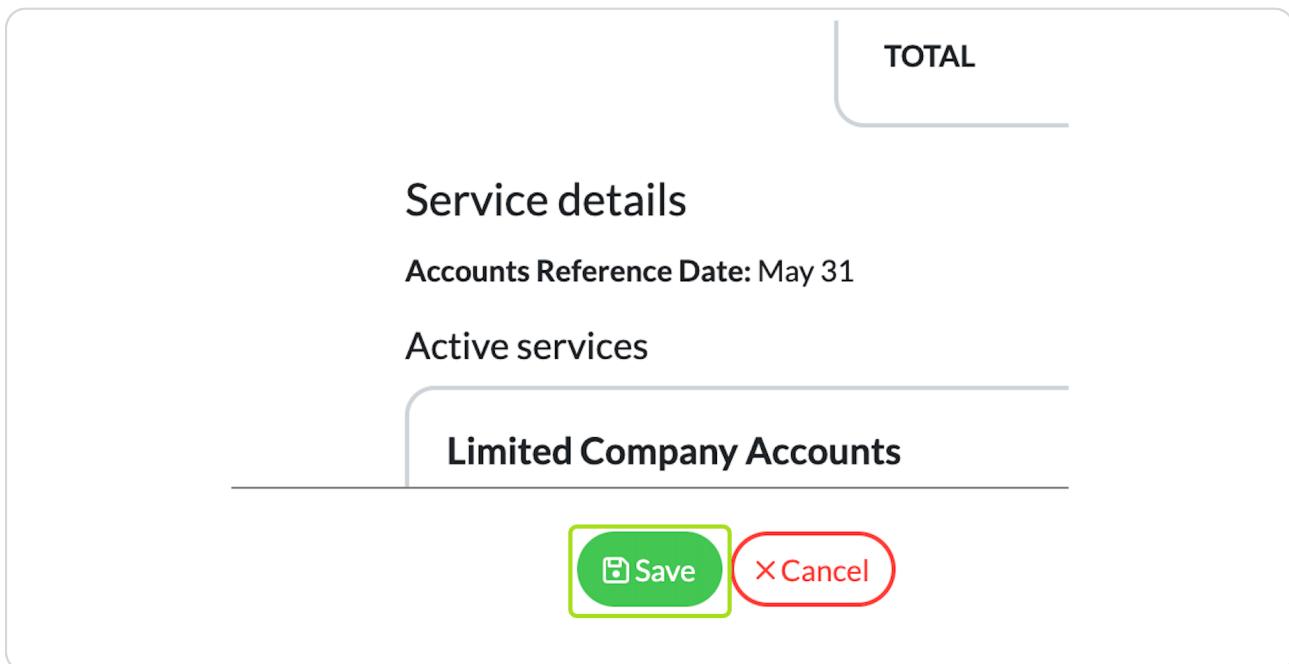
STEP 19

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

next: Service details >

STEP 20

Click on Save



STEP 21

Click on Yes



Tango

Never miss a step again. Visit Tango.us