

# Navigating the client page in Client Engager

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Created by

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Creation Date

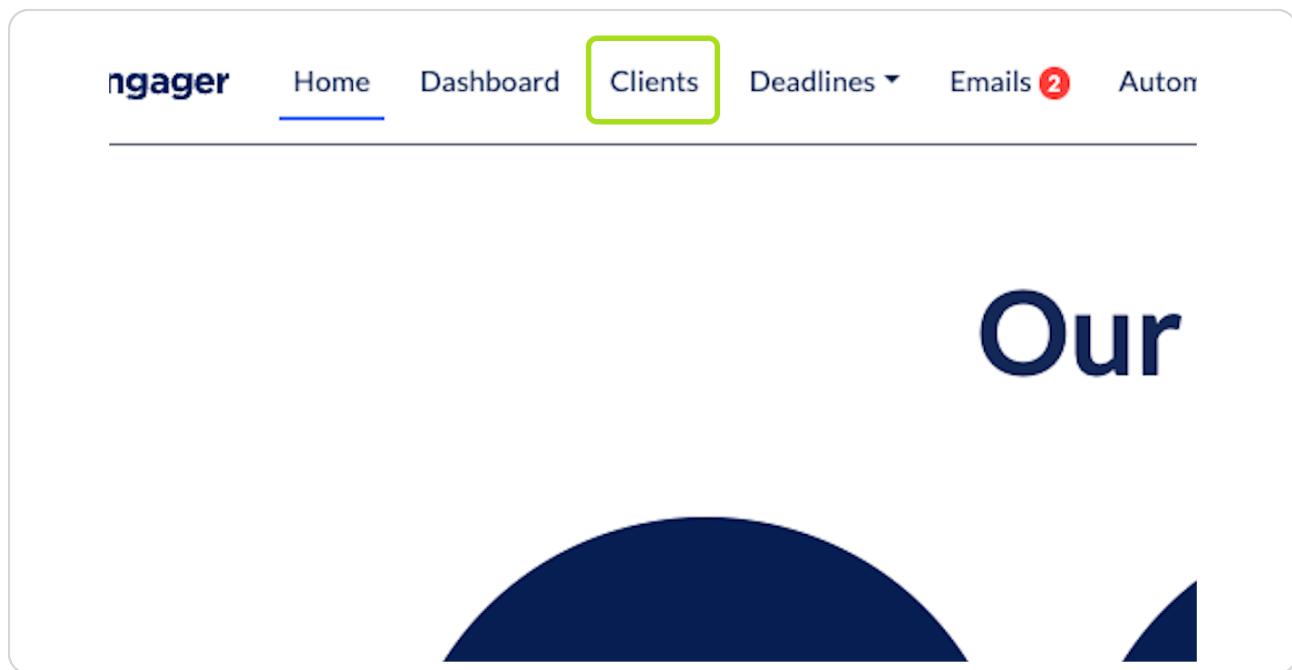
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## STEP 1

### Click on Clients



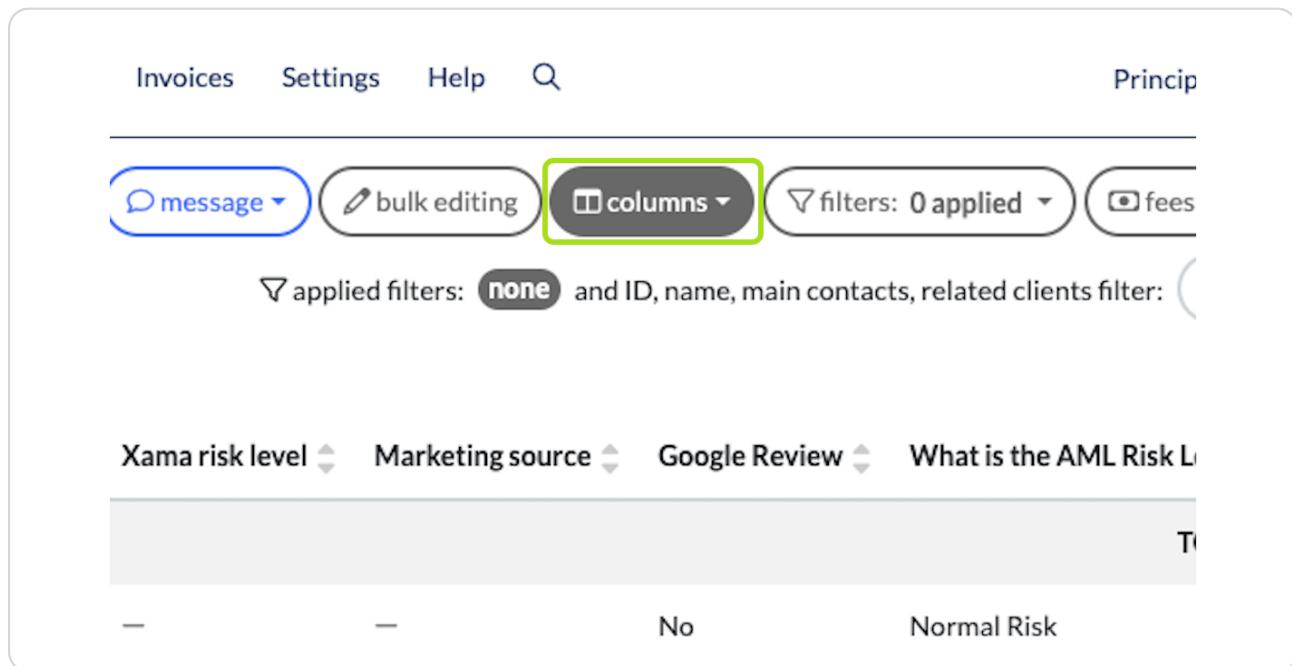
## STEP 2

### You have various tools along the top

A screenshot of the Engager software interface showing the 'Clients' tab. The top navigation bar includes 'Automations' (with a '0' badge), 'Invoices', 'Settings', 'Help', and a search icon. On the right are 'Principal Admin' buttons and a user icon. Below the navigation is a toolbar with buttons for '+ new client', 'message', 'bulk editing', 'columns', 'filters: 0 applied', 'fees', 'data', and 'misc'. A filter bar shows 'applied filters: none' and a search input 'engager'. The main area displays a table of client data with columns for 'Engage date', 'Xama risk level', 'Marketing source', 'Google Review', 'What is the AML Risk Level', 'TOTAL', and 'First name'. The table shows two rows of data: one for 'Andrew' with a total of 4,776 and another for 'Johann Alexander'.

## STEP 3

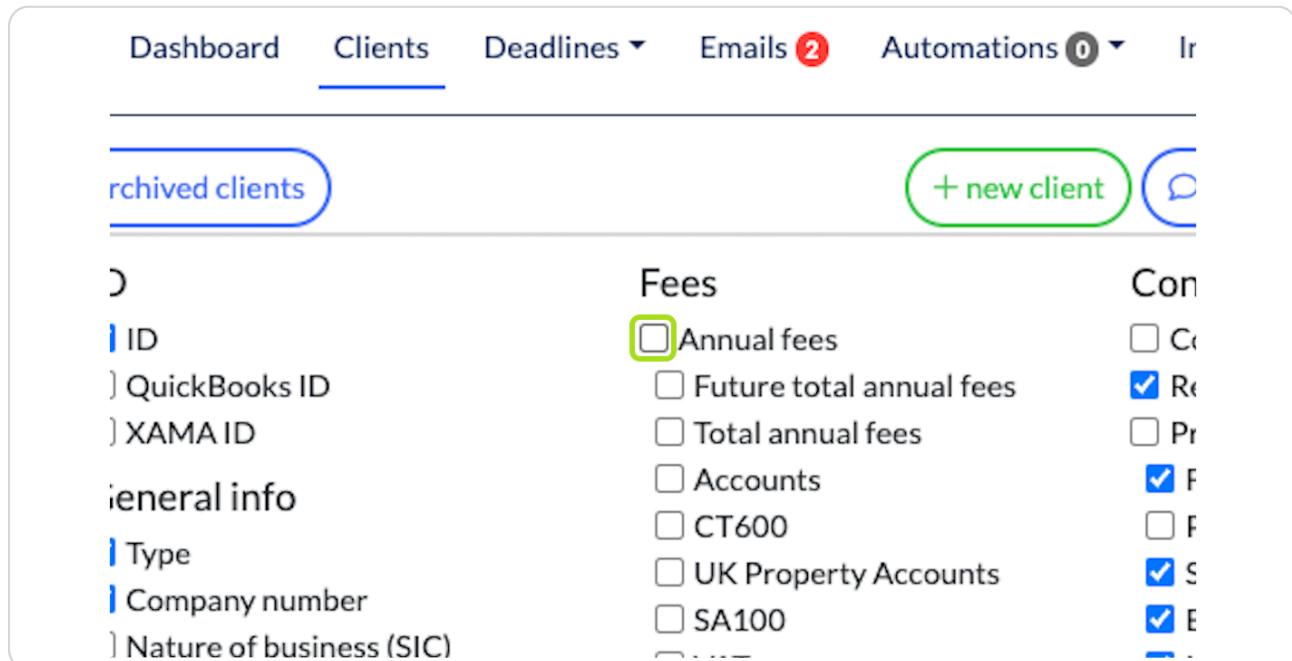
### Click on columns



The screenshot shows a software interface with a navigation bar at the top. The 'Columns' button, which is highlighted with a green box, is located in the top right corner of the toolbar. Below the toolbar, there are several filter and search options, including 'message', 'bulk editing', 'filters: 0 applied', and 'fees'. A message at the bottom indicates 'applied filters: none' and 'and ID, name, main contacts, related clients filter: ( )'. Below the toolbar, there are dropdown menus for 'Xama risk level', 'Marketing source', 'Google Review', and 'What is the AML Risk Level?'. The 'Xama risk level' dropdown is set to 'Normal Risk'.

## STEP 4

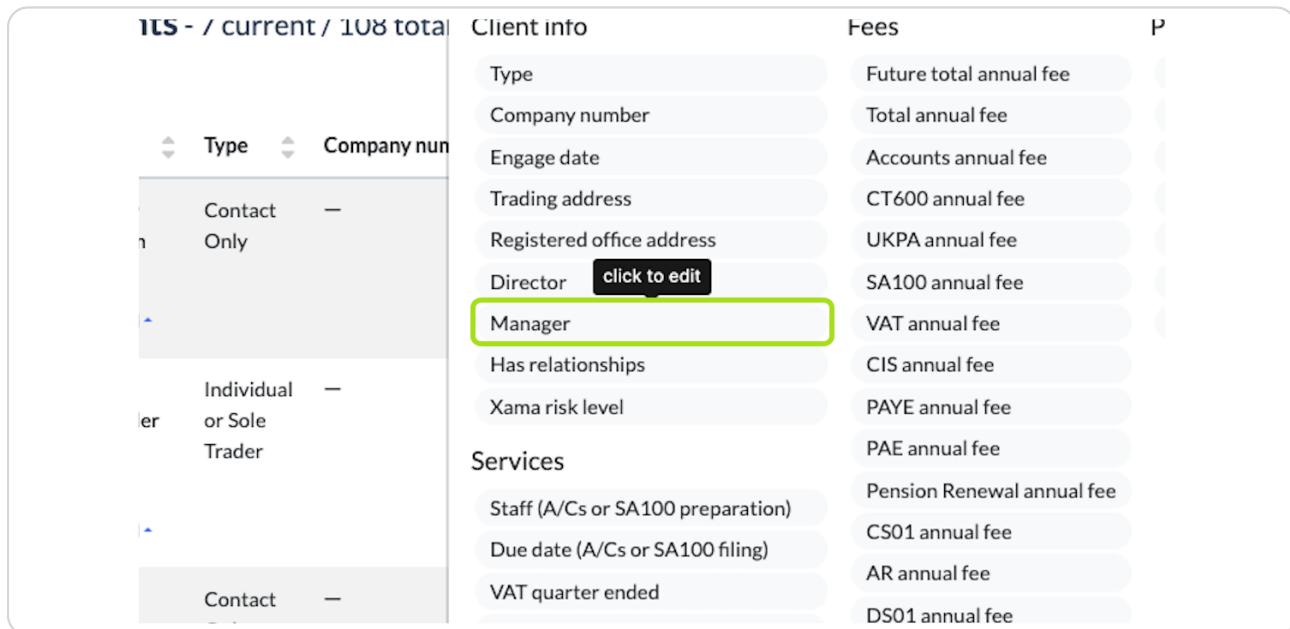
This gives you the ability to choose which columns to see in the client list



The screenshot shows a software interface with a navigation bar at the top. The 'Clients' tab is selected. Below the navigation bar, there is a 'Clients' section with a 'Archived clients' button and a '+ new client' button. To the right of this section is a 'Columns' dropdown menu. The 'Fees' section of the dropdown is highlighted with a green box. The 'Fees' section contains several checkboxes for selecting columns: 'Annual fees' (checked), 'Future total annual fees', 'Total annual fees', 'Accounts', 'CT600', 'UK Property Accounts', 'SA100', and '...'. To the right of the 'Fees' section, there is a 'Con' section with several checkboxes: 'C' (unchecked), 'Re' (checked), 'Pr' (unchecked), 'F' (checked), 'F' (unchecked), 'S' (checked), 'E' (checked), and '...'. The 'General info' section on the left is partially visible, showing fields for 'ID', 'QuickBooks ID', 'XAMA ID', 'Type', 'Company number', and 'Nature of business (SIC)'.

## STEP 5

Click on filter and this gives you the ability to filter information similar to on excel

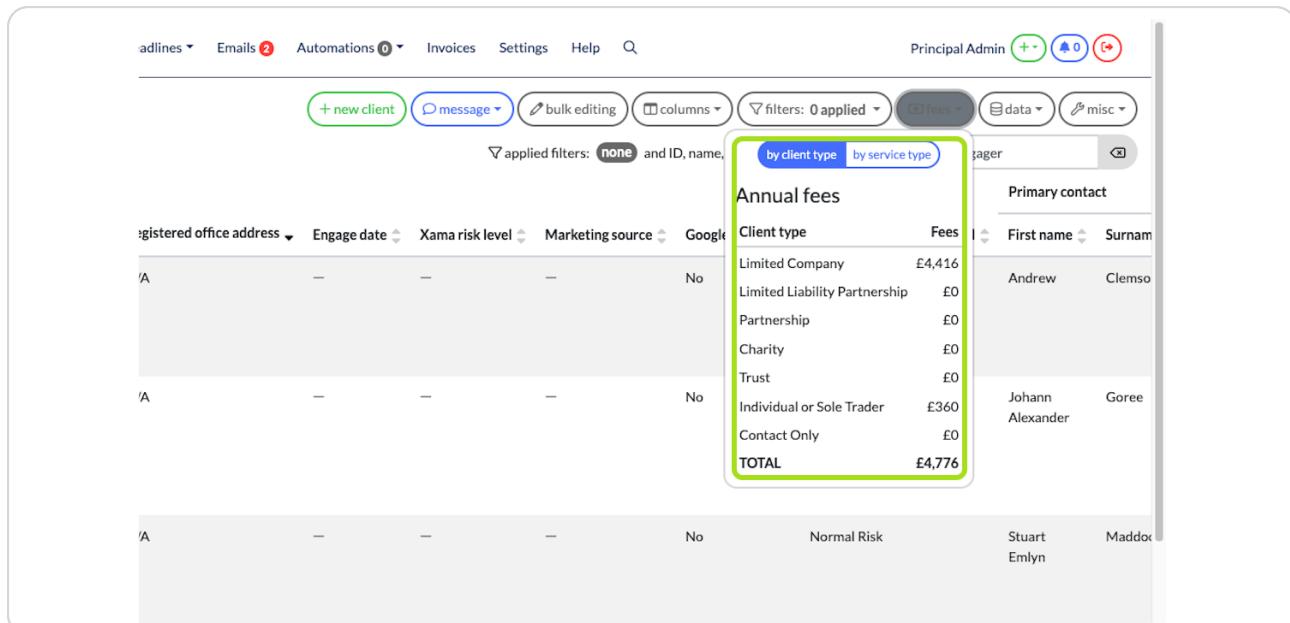


The screenshot shows a client filtering interface. On the left, there's a sidebar with a 'Type' dropdown set to 'Contact Only', a 'Client number' dropdown set to 'Individual or Sole Trader', and a 'Contact' dropdown set to '—'. The main area is titled 'Client info' and lists various client details. A filter for 'Manager' is highlighted with a green border. The list includes:

Client Info	Fees
Type	Future total annual fee
Company number	Total annual fee
Engage date	Accounts annual fee
Trading address	CT600 annual fee
Registered office address	UKPA annual fee
Director	SA100 annual fee
Manager	VAT annual fee
Has relationships	CIS annual fee
Xama risk level	PAYE annual fee
<b>Services</b>	
Staff (A/Cs or SA100 preparation)	Pension Renewal annual fee
Due date (A/Cs or SA100 filing)	CS01 annual fee
VAT quarter ended	AR annual fee
	DS01 annual fee

## STEP 6

Click on fees and if you are recording fee in Client Engager this will show you a break down of fees in services and client type

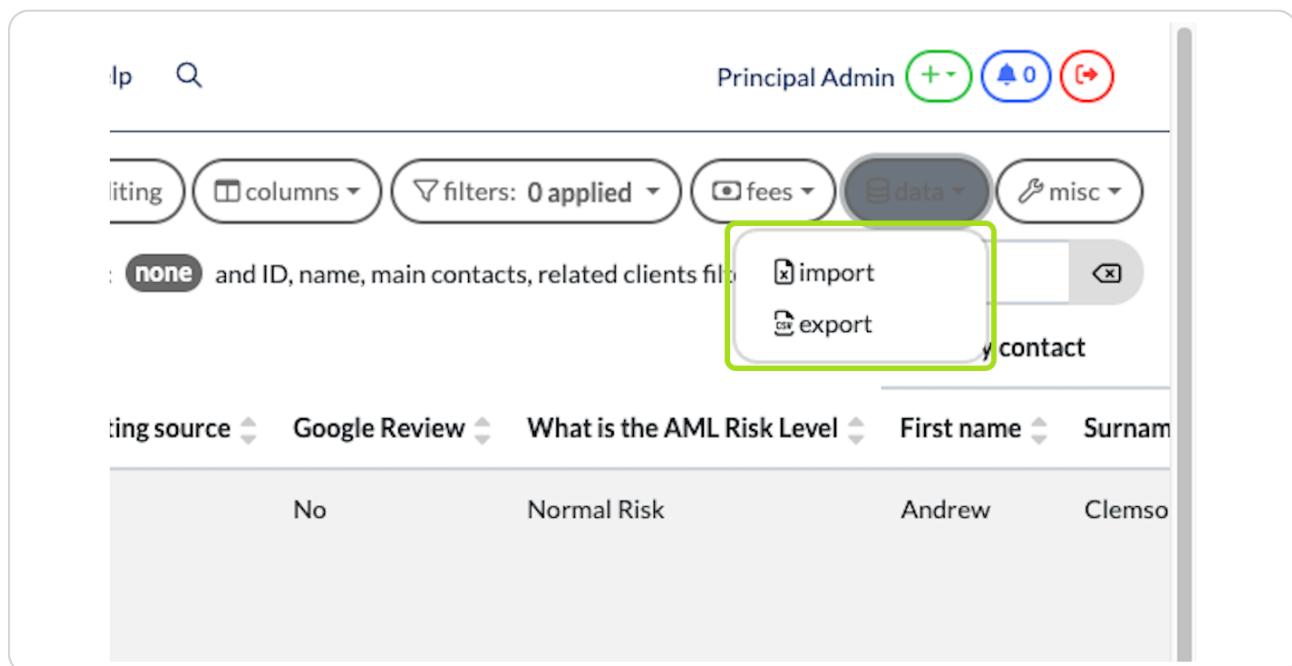


The screenshot shows the Client Engager interface. At the top, there are navigation links for 'Emails', 'Automations', 'Invoices', 'Settings', 'Help', and a search bar. The top right shows 'Principal Admin' with a green plus icon, a blue user icon, and a red refresh icon. Below the navigation, there are buttons for '+ new client', 'message', 'bulk editing', 'columns', 'filters: 0 applied', 'fees', 'data', and 'misc'. The main area shows a list of clients with columns for 'Registered office address', 'Engage date', 'Xama risk level', 'Marketing source', 'Google', 'Primary contact', 'First name', and 'Surname'. A modal window titled 'Annual fees' is open, showing a breakdown by client type. The data is as follows:

Client type	Fees
Limited Company	£4,416
Limited Liability Partnership	£0
Partnership	£0
Charity	£0
Trust	£0
Individual or Sole Trader	£360
Contact Only	£0
<b>TOTAL</b>	<b>£4,776</b>

## STEP 7

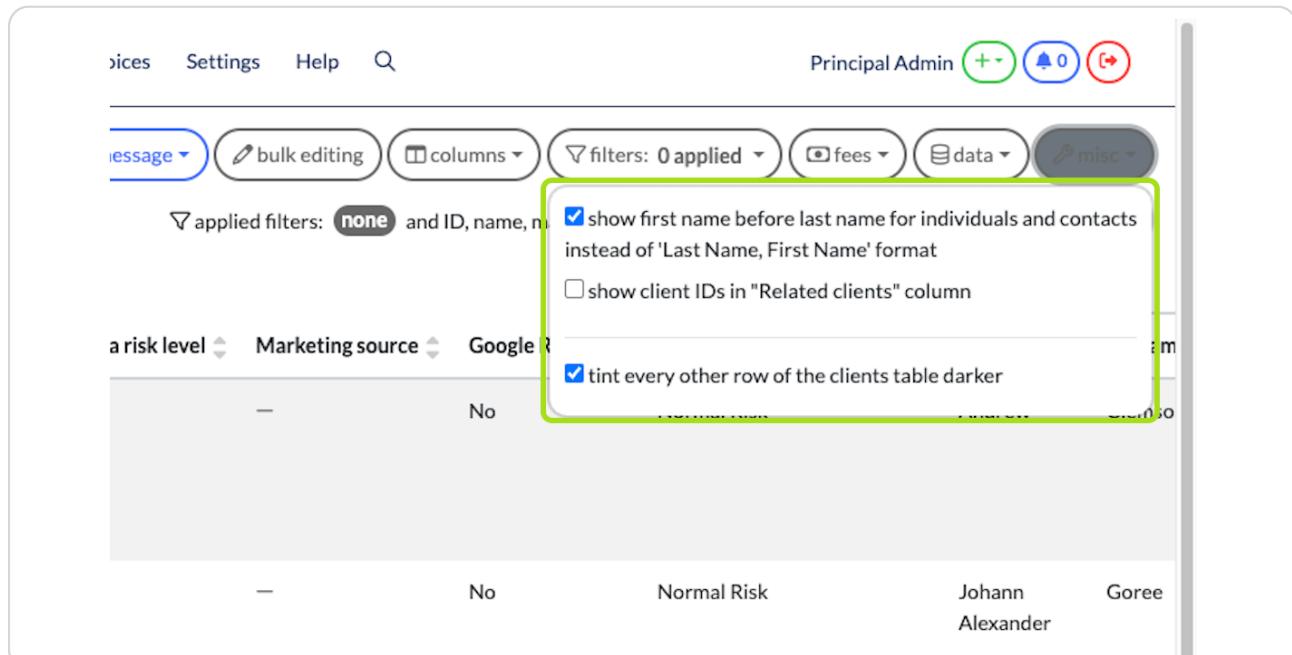
You can import data and export it by clicking data



The screenshot shows a client management software interface. At the top, there is a search bar with 'Ip' and a magnifying glass icon. To the right of the search bar are three circular buttons: a green one with a '+' sign, a blue one with a bell icon, and a red one with a refresh icon. Below the search bar is a navigation bar with several buttons: 'listing', 'columns', 'filters: 0 applied', 'fees', 'data' (which is currently selected and highlighted in grey), and 'misc'. A dropdown menu is open under the 'data' button, showing 'import' and 'export' options. The main content area displays client data in a table with columns for 'Marketing source', 'Google Review', 'What is the AML Risk Level', 'First name', and 'Surname'. The first row of data is visible.

## STEP 8

Under Misc you can tailor how certain information displays



The screenshot shows a client management software interface. At the top, there is a navigation bar with 'voices', 'Settings', 'Help', and a magnifying glass icon. To the right of the navigation bar are three circular buttons: a green one with a '+' sign, a blue one with a bell icon, and a red one with a refresh icon. Below the navigation bar is a dropdown menu for 'applied filters' with the text 'none' and 'and ID, name, main contacts, related clients fil'. A large green box highlights a section of the interface. This section contains three checkboxes: one checked with the text 'show first name before last name for individuals and contacts instead of 'Last Name, First Name' format', another unchecked with the text 'show client IDs in "Related clients" column', and a third checked with the text 'tint every other row of the clients table darker'. The main content area displays client data in a table with columns for 'Marketing source', 'Google Review', 'What is the AML Risk Level', 'First name', and 'Surname'. The first row of data is visible.

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