

# Navigating the client page in Client Engager

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

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Created by

Johann Goree

Creation Date

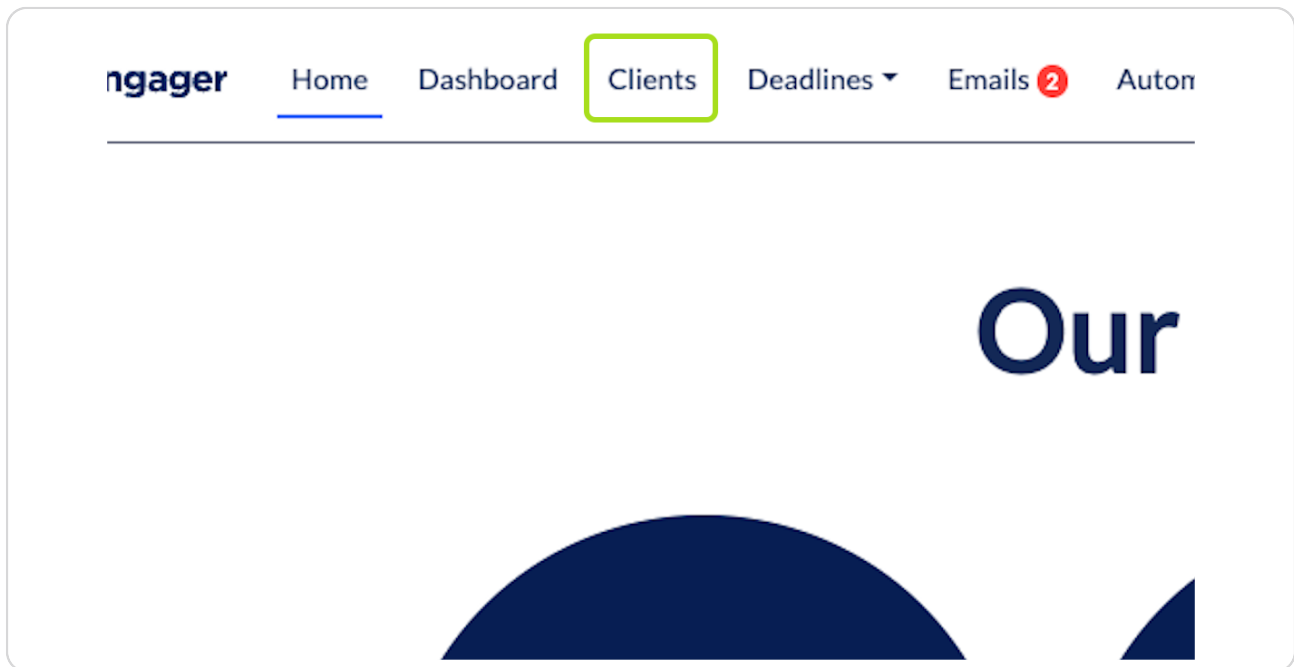
June 3, 2023

Last Updated

June 3, 2023

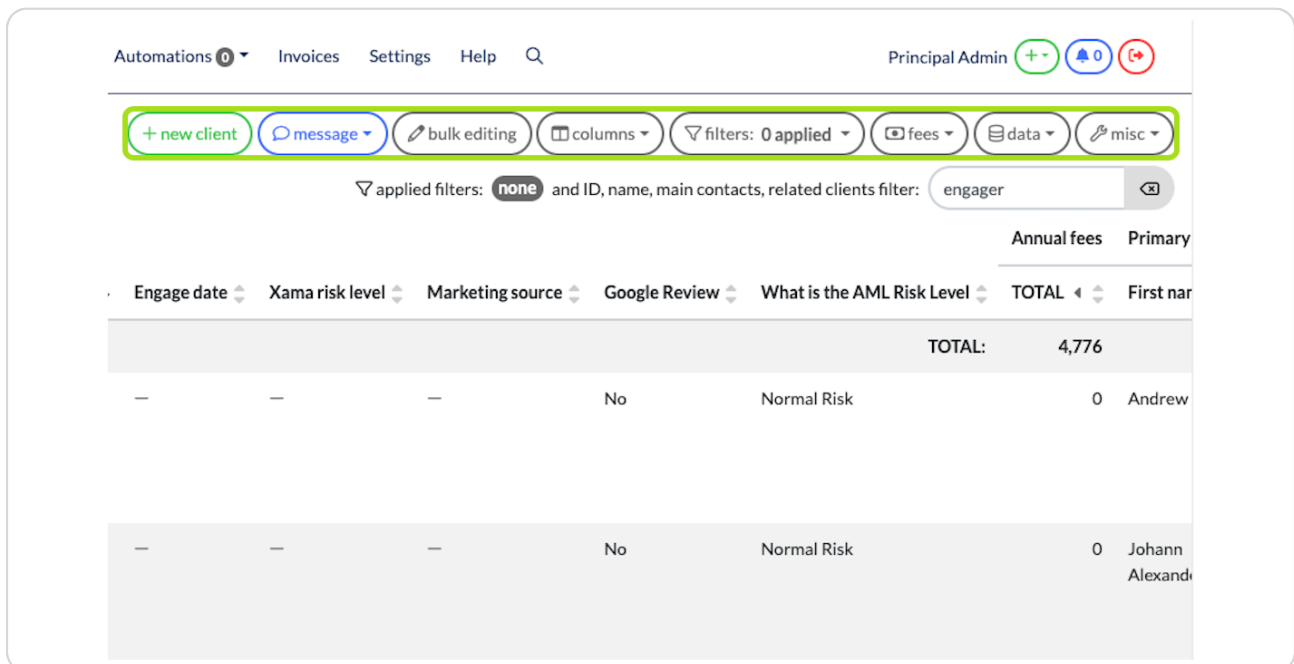
## STEP 1

### Click on Clients



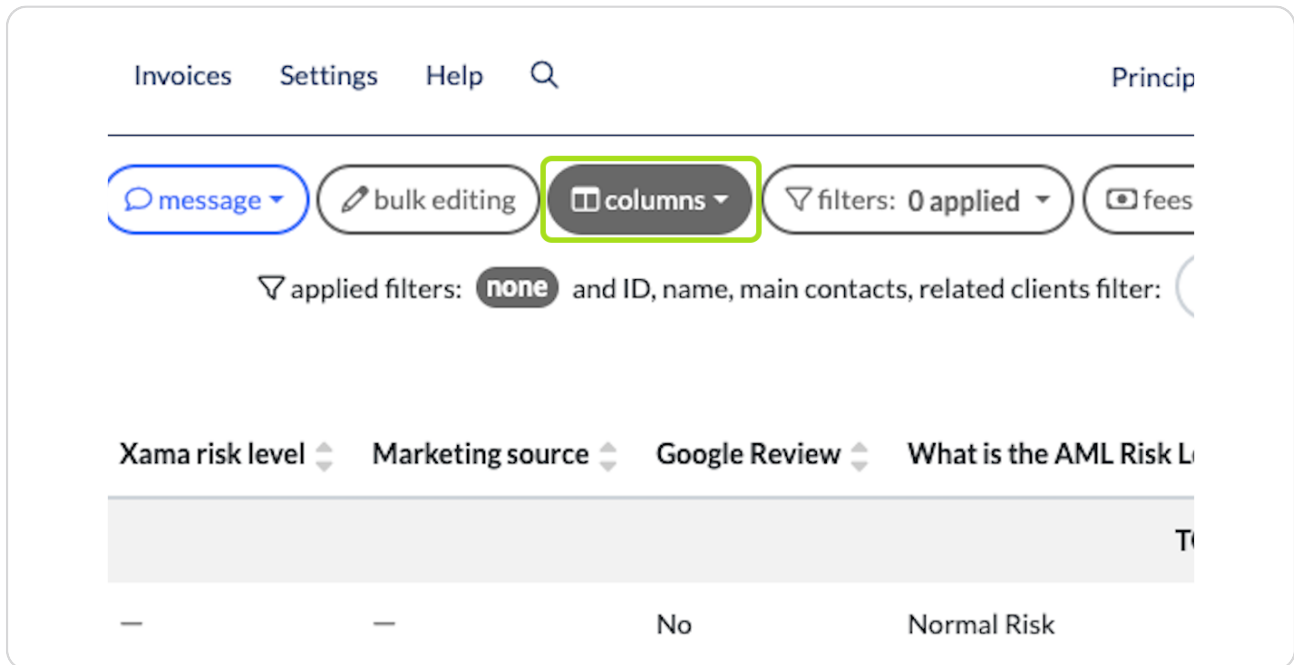
## STEP 2

### You have various tools along the top



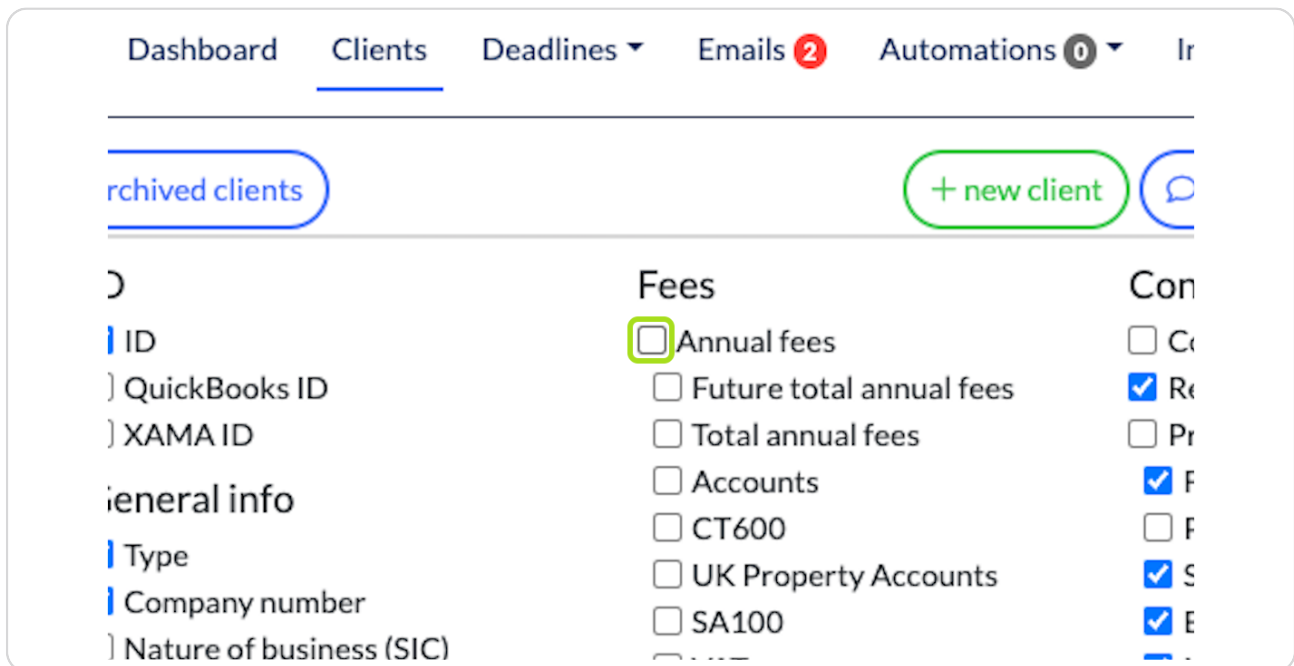
### STEP 3

Click on **columns**



### STEP 4

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



## STEP 5

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

115 - / current / 108 total

Type Company number

Contact Only

Individual or Sole Trader

Contact

Client info

Type

Company number

Engage date

Trading address

Registered office address

Director **click to edit**

Manager

Has relationships

Xama risk level

Services

Staff (A/Cs or SA100 preparation)

Due date (A/Cs or SA100 filing)

VAT quarter ended

Fees

Future total annual fee

Total annual fee

Accounts annual fee

CT600 annual fee

UKPA annual fee

SA100 annual fee

VAT annual fee

CIS annual fee

PAYE annual fee

PAE annual fee

Pension Renewal annual fee

CS01 annual fee

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

adlines Emails Automations Invoices Settings Help

Principal Admin

+ new client message bulk editing columns filters: 0 applied data misc

applied filters: none and ID, name

by client type by service type

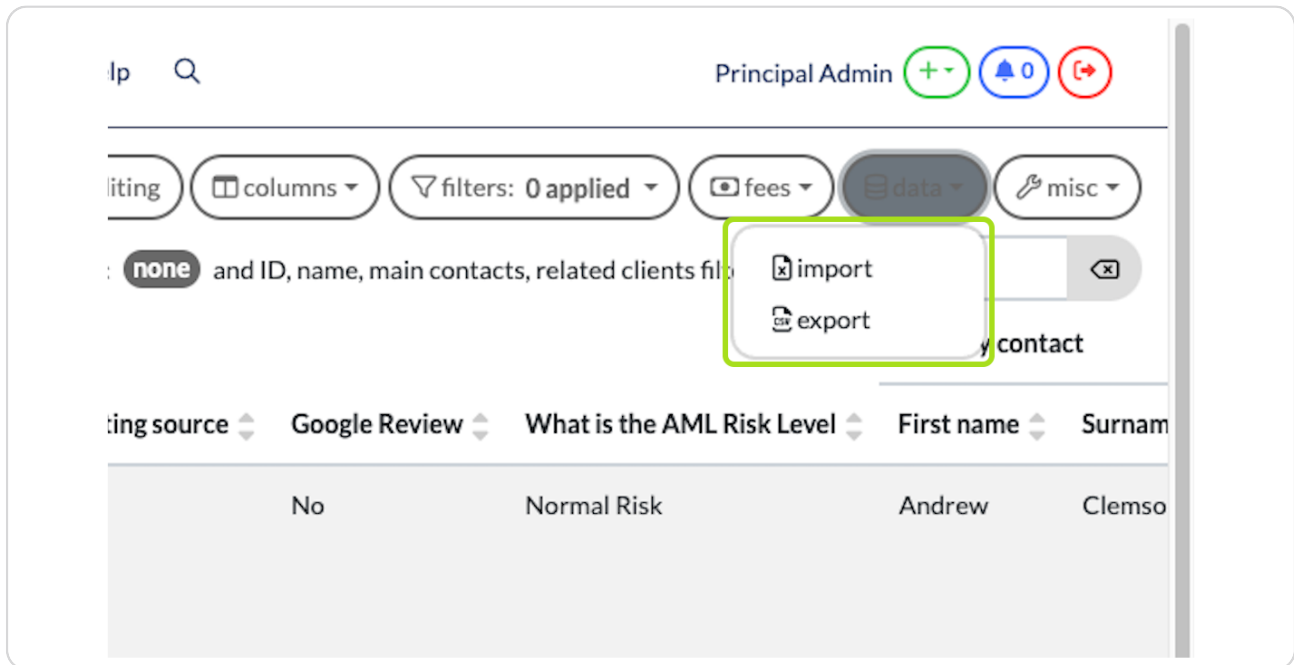
Client type	Fees
Limited Company	£4,416
Limited Liability Partnership	£0
Partnership	£0
Charity	£0
Trust	£0
Individual or Sole Trader	£360
Contact Only	£0
<b>TOTAL</b>	<b>£4,776</b>

Primary contact

First name	Surname
Andrew	Clemso
Johann Alexander	Goree
Stuart Emlyn	Maddox

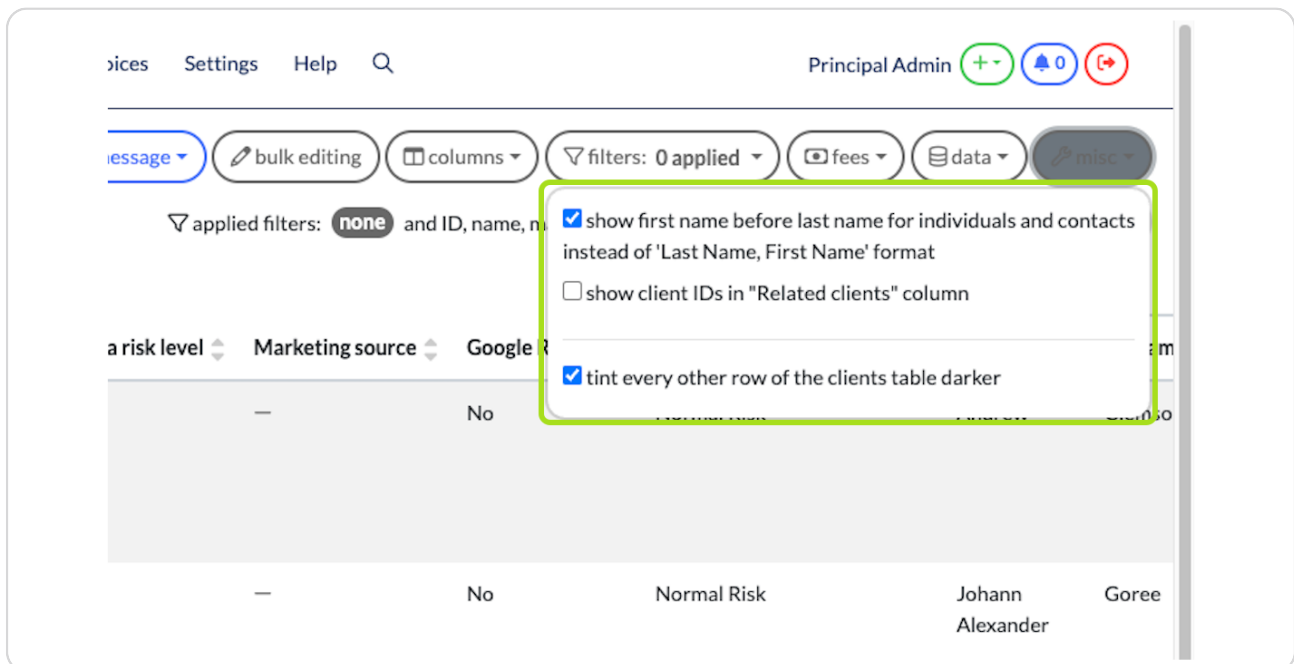
## STEP 7

You can import data and export it by clicking data



## STEP 8

Under Misc you can tailor how certain information displays



*Tango*

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