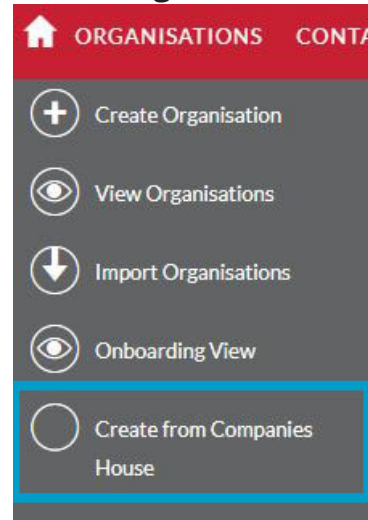


Visit support.fibrecrm.com for more info or contact your CRM Manager

Companies House Importer

1. The **Create from Companies House** add on is a great time saving way to create or update an **Organisation** in the CRM. This option gathers the latest information that is available on **UK Companies House** and then pulls the information across to the CRM.

To create an **Organisation** from Companies House, start by navigating to the **Organisation** module in the **Contacts** menu. Then select the **Create from Companies House** option on the left hand side.



2. A **Pop Up Box** will then appear which will let you either search by the **Company Name** or the **Company Registration Number**.

Import from Companies House

Please enter a Company Registration Number or Company Name and click Search

If a match is found, you will be prompted to import the Company and any related Contacts

Company Name

Company Registration Number

SEARCH

3. Once you've selected the correct company to import, the information will be pulled across from Companies House onto the CRM.

4. Contact Information about the Company officers relating to the Organisation can also be pulled across if required, which you can create as individual **Person** records. Both Active and Resigned officers information is available, so options such as **Import All Contacts**, **Pick Contacts to Import** or **Import Active Contacts** are there to help you select who'd you like to import.

5. When you're ready, select the **Import Now** button. This creates the company as an Organisation record and you'll be taken to the edit page. Check all the details are correct and when happy click **Save & Close**.

6. If you scroll down to the **Involvements Sub Panel** on the Organisation Record you'll see the officers you've imported as **Person** Records.

Contact Name	Phone	Mobile	Email	Role	Accounting Order (VIP)	Is Primary Organisation	Is Primary Person	Is Finance Person	Is Admin Person	Client Type	Partner Responsibility
Clive Patterson										Prospect	