fibreCRM

HEART OF THE PRACTICE

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Import Filing History Documents

You can import filing history/documents from Companies House to the CRM by the Companies House add on. To select and import filing history/ documents navigate to the Organisation record and in the Actions Menu select the Import Filing History option.



2. The Filing History pop up box will then appear and contain all the documents and filing history available. At the top of the pop up box you can filter by categories by selecting the tick box of the categories you'd like to see and then select the Filter button.

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3. The documents are ordered by date with the most recent first. In the list you'll be able to see the type, a description and given an option to view or import. If you click View on a document you'll be taken to the document on the companies house website.

Date	Туре	Description	View / Import
01-11-2022	MR04	Satisfaction of charge {charge_number} in full	View / Import(1 page)
28-09-2022	AA	Total exemption full accounts made up to 31-12-2021	View / Import(10 pages)
13-07-2022	RESOLUTIONS	Resolutions	View / Import(1 page)
08-07-2022	SH01	Statement of capital following an allotment of shares $\mbox{on}\xspace\{date\}$	View / Import(3 pages)
10-06-2022	PSC04	$\label{eq:change} Change of details for Mr Simon Martin Leek as a person with significant control on 10-06-2022$	View / Import(2 pages)

4. To import a document into CRM click **Import** another pop up box will appear asking if you'd like to import the document, click Ok. Once imported the pop up box will show what document has been imported. Click **Ok** again.

Date	Туре	Description	View / Import
01-11-2022	MR04	Satisfaction of charge {charge_number} in full	View / Import 1 page)
28-09-2022	AA	Total exemption full accounts made up to 31-12-2021	View / Import(10 pages)

5 Once a document has been imported to the CRM you'll see a message in the description field of the document in the document list. You'll be able to view the document record in the CRM by selecting the **Click Here** option. Documents that have been imported are also available to click and view in the **Documents Subpanel**.

Date	Туре	Description			View / Import	
01-11-2022	MR04	Satisfaction of charge { Document already impo	charge_number} in full rfed Click Here		View / Import(1 page)	
28-09-2022	AA	Total exemption full acc Document already impo	rted Click Here		View / Import(10 pages)	
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