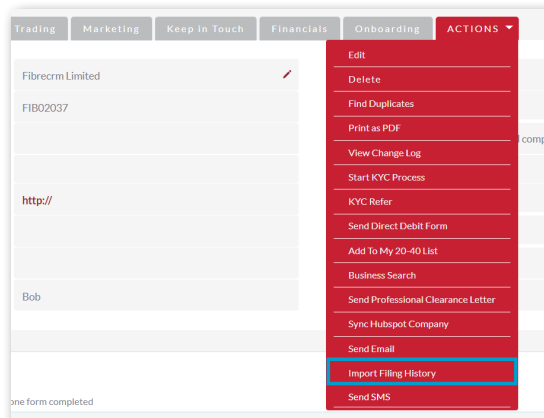


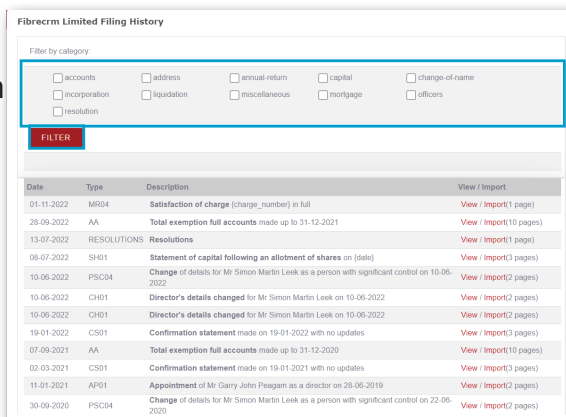
Visit support.fibrecrm.com for more info or contact your CRM Manager

Import Filing History Documents

1. 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.



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	Type	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 on {date}	View / Import(3 pages)
10-06-2022	PSC04	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	Type	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	Type	Description	View / Import
01-11-2022	MR04	Satisfaction of charge (charge_number) in full Document already imported Click Here	View / Import(1 page)
28-09-2022	AA	Total exemption full accounts made up to 31-12-2021 Document already imported Click Here	View / Import(10 pages)

6. In the **Document Record** you can view/download a **PDF** copy of the document, you can also view other information relating to the document.

