fibrecrm

HEART OF THE PRACTICE

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

Companies House Importer

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. Then select the **Create from Companies House** option on the left hand side.



n organisations relation
Create Organisation
View Organisations
Import Organisations
Onboarding View
Create from Companies House

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 Registration Number
 1

3. The information that is available from Companies House will then be shown on screen. In the top right hand corner you've got the **Client Manager** field where you can assign who will be the client manager of the new client. In the **Account Information** section you will see all the information populated from companies house that will be imported .



4. In the Contact Information section you will see individuals listed on companies house for that company. Here you can select who you'd like to import and this will create them as a Person record. Both Active and Resigned officers information is available, so options such as Select, Active, All and PSC's options are there to help you select who'd you like to import.

Lint Name: AG TINE	Gorton	First Name:	Lha
Forenames	Use	Company Role	Secretary
Address	Unit 3 Penrase House Trategetindustrial Estate	City	Redruth
Country	Conwall	Postada	TR36-404
Country:	England	PSC	×
Appointment date	27/05/2004	Resigned on	
Nationality	Detain	Job Title	
Lat Name AGTINE	Gorton	First Name:	Nell
Forenames	Nell Richard	Company Role	Olembor
Address	Unit 3 Perrose House Tritelphindustrial Estate	Cty	Reduith
County:	Conwall	Postende	TR36406
Countrys	England	PSC	×
Repointment date	05/06/2003	Reignedon	
Nationality	British	Auto Titole	Special Effects Designer
Let Name RESIGNED	Diamond	First Name:	Lindy
Forenames	UndyLouise	Company Role	Secretary
		(Pr.	

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 all the details are correct and when happy click **Save & Close**.

0		,				
					Search	Q (2) 100 -
∞ ⊲						
15	NEILL GORTON PROS	THETICS STUDIO LIMITED * EDIT				
076	SAVE AND CLOSE SAVE CAN	CEL VIEW CHANGE LOG				
	Overview Address Trading	Marketing Keep in Touch Dates Keep in Touch	Financials Onboarding			
aries	Name.*	Nell Corton Prosthetics Studio Limited	Тура:	Prospect		
	Client ID:	NEJ02169	Customer Grade:	•		
	Primary Contact:	K ×	IRIS Business Type (for LOE):*	Private limited company		
- ×	Office Phone:		CH Business Type:	Private limited company		
1	Website:	http://	Sector:		-	
<u> </u>	Business Description:		Sub Sector:			
1	Client Partner:	K ×	Last Touch date:	—		
	Client Manager:		Last Touch Subject:			

6. If you scroll down to the **Involvements Sub Panel** on the Organisation Record you'll see the people you've imported as Person Records and set as involvements for the imported Organisation.

Actions 🗸						
Clive Patterson					Prospect	