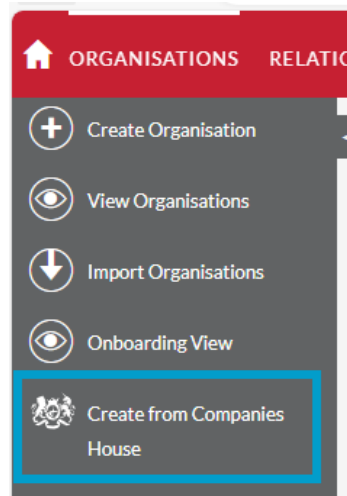


Visit support.fibrecrm.com for more info or contact your CRM Manager

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. 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. 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.

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 people you've imported as **Person Records** and set as **involvements** for the imported **Organisation**.