

fibrecrm

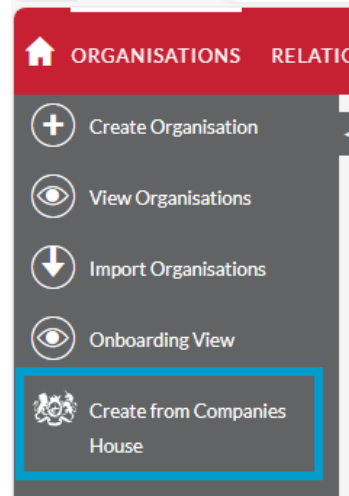
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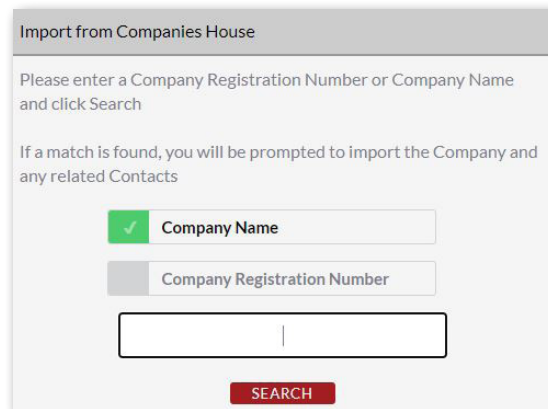
Companies House Importer

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.

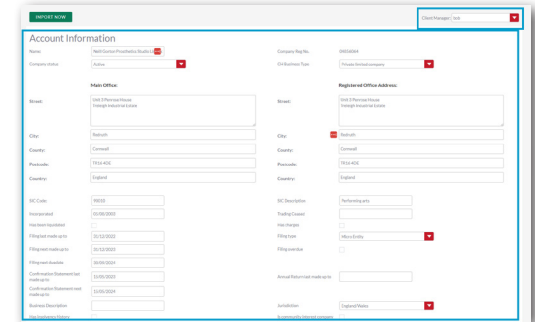
To create an Organisation from Companies House, start by navigating to the Organisation module. Then select the Create from Companies House option on the left hand side.



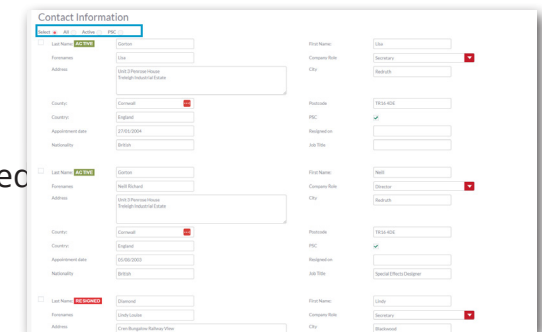
2. A Pop Up Box will then appear which will let you either search by the Company Name or the Company Registration Number.



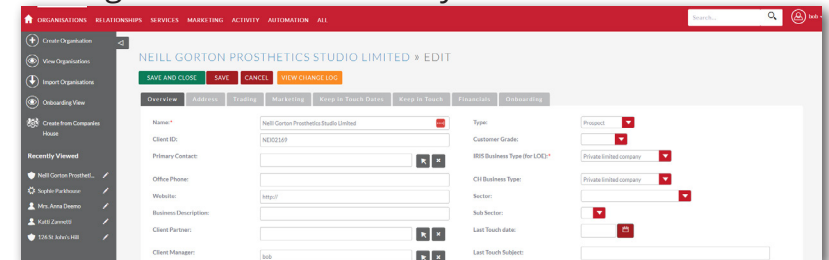
3. The information that is available from Companies House will then be shown on screen. In the top right hand corner you've got the Client Manager field where you can assign who will be the client manager of the new client. In the Account Information section you will see all the information populated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

