

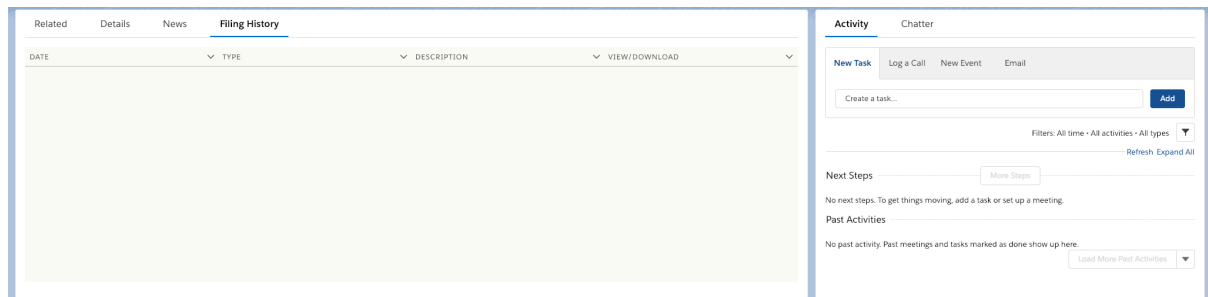
Installation Guide

- 1) Install the AppExchange Package
- 2) Register on [Companies House](https://api.companieshouse.gov.uk) and create an application which will provide you with an API key. You will need to create a 'live' application with a Rest API Key.
- 3) Locate the custom setting "Company House", click 'Manage' and 'New' to create a record to store the API Key from step 2.

- 4) Add an entry to the Remote Site Settings for "https://api.companieshouse.gov.uk"

- 5) Add the 'Company House' quick action to the relevant Account Page Layout
- 6) Create a section on the Account Page Layout for Company House details, and add the fields: Company Number, Company Status, Company Type, Company Creation Date, Company Jurisdiction, SIC

- 7) Modify the Account Record Page using the Lightning App Builder, create a new tab called 'Filing History' and drag the 'CompanyHouse_FilingHistory' lightning component into the page beneath that tab



Notes

The managed package now also contains a Template version of the Companies House Flow, which will allow you to create new Flows using the same components and customise them as you see fit. Just navigate to Setup > Flows, and create a New Flow and base it on the 'Companies House Flow Template' to get started.