



Companies House Sync

Sync Companies House data with your business accounts in Salesforce



CUSTOMER OVERVIEW

Predictive Insight Ltd is a Salesforce Consultancy & Appexchange partner that offers a wide range of consulting services for financial services industries. We have the necessary tools and expertise to help you manage and grow your Salesforce implementation. We partner with our clients to develop engaging business strategies, design high quality and scalable solutions, and build rich user experiences.

CUSTOMER COMPANY PROFILE

LOCATION:	London, UK
EMPLOYEES:	2-10
INDUSTRY:	Financial Services
Solution(s):	Sales Cloud, Service Cloud etc.
GO LIVE DATE:	06 - March - 2017, last update Jan'2020

Challenge	Solution	Results
<ul style="list-style-type: none"> • Salesforce customers spend a lot of time. manually searching, and updating the Companies houses information, to enrich their Salesforce business accounts • This leads to inaccuracy and problem of keeping Account data in Sync with the latest information from Companies House database 	<ul style="list-style-type: none"> • Seamless support for Lightning experience UI • Quick setup to authenticate your Companies House database account in Salesforce • Setup sync preferences in Lightning Tabs, to start background scheduled jobs, which will auto populate and sync Salesforce accounts with relevant information from Companies Houses via RESTful API. • Ability to manually enrich any account, via Lighting actions, and embedded components for Account lightning pages. 	<ul style="list-style-type: none"> • Saves time by 80% since the information is auto-populated • Increases accuracy and freshness of companies house data in Salesforce • Apart from automatic, manual(on-demand) account data enrichment easily possible. • PAID AppExchange Listing: https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EFmsgUAD



Additional Detailed Information and Quantitative Results

Optional Commentary and Notes about Details of Deal or Implementation



Notes

- N/A

Quantitative Results if Available

- N/A



Solution Details



Additional Details	
Competitors of Salesforce engaged in sales cycle:	N/A
Previous technology replaced by Salesforce:	N/A
Salesforce products deployed:	Sales Cloud
Customer Business Model (B2B, B2C, or Both)	B2B, B2C
Salesforce Product features:	Enrich Salesforce Account data automatically or manually via Company Houses Database.
If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.)	
Integrations:	Company Houses Database (UK)
AppExchange Apps/Partners	Predictive Insight Ltd - London, United Kingdom



Screenshots of app or implementation (if applicable)



Related **Details** News

Retrieve Latest Information Choose Another Company

Company Information Officers Filing History

Company Name HSBC UK BANK PLC	Company Number 09928412
Status Synced	Last Sync Date 03-04-2019 9:52:29 PM
Company Status Active	Company Type Public limited company
Incorporated On 23-12-2015	SIC Codes 64191
Address 1 Centenary Square, Birmingham, United Kingdom, B1 1HQ	

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Companies House Setup

To generate the API Key, please register or sign-in to your Companies House account from [here](#). Once logged in, go to 'Your applications' page and click on 'Register an application'.

Companies House Key Save

Daily Companies House Sync (Optional)

Start Time Schedule Remove

Batch Size Save

DAILY COMPANIES HOUSE SYNC JOB IS NOT SCHEDULED!



Sharing Guidelines

These questions are required for your story submission to be accepted. We will not contact the customer without reaching out to you first.



Sharing Use Case	
Can Salesforce AEs share this story and overview slide in sales settings?	Y
Can Salesforce AEs mention the customer name in sales settings?	Y
Is this customer willing to act as a reference customer for prospects?	Y
Would the customer be willing to speak at Dreamforce or other events?	Y

Submitter Information (Partner Information here)	
Name of reference approver:	Abhinav Gupta
Title of reference approver:	CEO
Email of reference approver:	abhinav@concret.io