

Importing

Data can be imported from

standard file formats but must

have column headers in row one

Title First Name Surname Position Telephone Website Email1 ID Company Notes Address1 Address2 Address3

mport File

elect File

Spreadsheet OCSV OTxt

Browse... Test Import List (Small).xl

atch columns to import

FIRST NAME SURNAME POSITION IPANY NAME ADDRESS1 ADDRESS3 ADDRESS4 POSTCODE WEBSITE EMAIL TELEPHONE

The import file header

ch columns to import

columns appear on the left

Automatic	matching
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Importing your list data to USP 0

> Drag and drop the target column names and click the box when matched ensures the columns you require are imported

Title First Name Surname Company M Position Telephone Email1 Notes Address1 Website Address2 Address3

Import your own data, automatically match this to USP data and append the latest figures using a TEMPLATE you define allowing exported data to be in the format you require. Review companies selected by your screening selections and refine these results using keyword searches

Keyword searches and the green selection indicato allows fine list refinement

Refining

Exporting

Templates are created and selected from the list View settings menu

elect columns to import

nported Columns	Company Details		Report Data		Directors & Shareho	
] Title	Company Name		Year End	5 ~	Director Name	7 -
] First Name	Company Number		Consolidated	5 ~	Shareholder Name	7 ~
] Surname	Registered Address1		Number of Months	5 ~	Director Title	7 ~
] Position	Registered Address2		Number of Employees	5 ~	Director First Name	7 ~
] Telephone	Registered Address3		Total Tangible Assets	5 ~	Director Surname	7 ~
] Website	Registered Address4		Intangible Assets	5 ~	Director Date of Birth	h 7 v
Email1	Registered Telephone		Total Fixed Assets	5 ~	Director Position	7 ~
) ID	Incorporation Date		Stock	5 ~	Properties	
Notes	Auditor		Debtors	5 ~	Property Title Numb	er 10 ~
Address1	Previous Name		Cash & Liquid Assets	5 ~	Property Tenure	10 ~
Address2	Business Description		Other Current Assets	5 ~	Property Address	10 ~
Address3	Website		Total Current Assets	5 ~	Property Price Paid	10 ×
Address4	Report Title	10 ~	Trade Creditors	5 ~		
Address5	Main Trading Address1		Bank Loans & Overdrafts	5 ~		
Poetcode	Main Trading Addrese?		Cother Current Liabilities	E		
				Templa	te Name A	dd Template

The required columns and column order and number of occurrences are defined for a template you name here

ID	Website	Company Name	Company Number	Year End	Turnover	Operating Profit
				Year1	Year1	Year1
201	http://www.lgseeds.co.uk/	Limagrain (asuk) Limited	00024499	30-06-2021		
202	http://www.sun-valley.co.uk	Sun Valley Poultry Limited	00040149	31-05-2020	672,000	1,000
203	http://www.henrycole.co.uk	Henry Cole & Company Limited	00047791	30-04-2021		
204	http://www.ebsgroup.co.uk. /not_on_server.html	Edward Billington And Son Limited	00059883	30-08-2020	319,728,000	1,574,000
205	http://www.forfarmers.co.uk	Forfarmers Uk Limited	00062904	31-12-2020	524,316,000	718,000
206	https://www.toomers.co.uk/	John Toomer And Sons,limited	00067133	31-03-2021		
207	http://www.soham.org	Clark & Butcher Limited	00067791	30-06-2021		
208	http://www.tateandlyle.com/home	Tate & Lyle Public Limited Company	00076535	31-03-2021	2,419,827,586	247,413,793
209	http://www.carrsgroup.com	Carr's Group Plc	00098221	31-08-2021	417,254,000	13,024,000
210		Roche Products Limited	00100674	31-12-2020	1,049,390,000	49,724,000
211	https://www.trouwnutrition.co.uk/	Frank Wright Limited	00111524	31-12-2020	129,608,000	1,212,000
212		W.h.ottley,limited	00117217	30-06-2021		

Once defined your Template can be used against any list of companies visible in the List View. The resulting view of the specified data can be exported in a spreadsheet

			List	view (17)		
			Shor Sear	v 50 v entries ch:		
ny Number	Esti		8	Company Name	Company Number	Estim
	0			ADMIRALTY CHARTS LIMITED	04679094	
	o			B.COOKE & SON,LIMITED	00224604	
	o			CHARITY & TAYLOR (ELECTRONIC SERVICES) LIMITED	01264283	
	o	View		EURONAV LIMITED	03120472	
	o	List		GLOBAL NAVIGATION SOLUTIONS LIMITED	08192239	
	o	E		GNS 2015 LIMITED	08281100	
	o	a Fir		IMRAY,LAURIE,NORIE & WILSON,LIMITED	00082340	
		File		KELVIN HUGHES LIMITED	01030135	23,651,
		5		L.H.D.LIMITED	00384158	25,635,
		ß		MERIDIAN CHARTWARE LTD	03090766	
				NOVACO LIMITED	02486168	
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