



Add-ons Launched.

Imports 'Made Easy' Guide

This guide covers the following questions with no jargon...

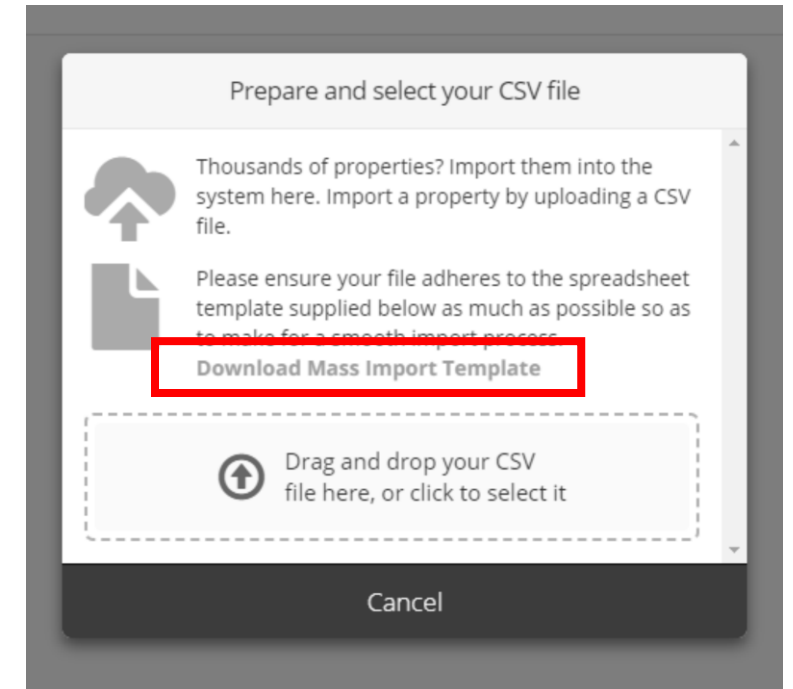
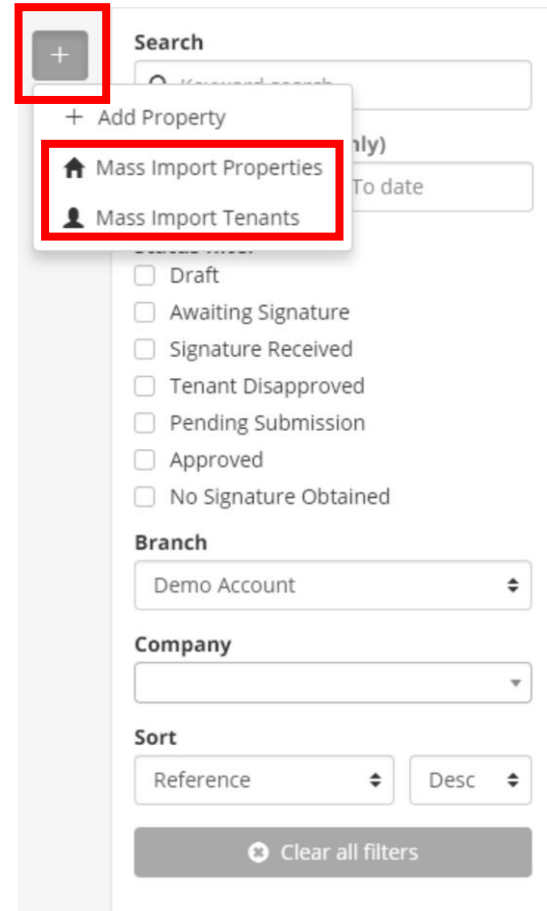
1. How do I create my file ready for importing?
2. How do match the fields to check my import will be accurate?
3. How do I choose a template with each import?

Download our import templates...

First off, it's important to use the layout of our templates when exporting, or copying/pasting your property and tenant data.

To find the templates, simply click the '[+]' icon and choose 'Mass Import Properties' or 'Mass Import Tenants'.

You will then be taken to a separate modal screen entitled 'Prepare and select your CSV file'. Simply click to 'Download Mass Import Template'.



Copy/Paste columns accurately...

As shown in the example template on the right, it's important that the right information is copied to match our template.

It's self-explanatory, for instance, 'address_postcode_ZIP*' should contain the postcodes of the property data you're looking to import and so on.

Only the fields with * are compulsory fields (eg you don't have to add 'address_2' data if you don't have it).

TIP: The 'property_feed_ref*' column is important if you're looking to 'Mass Import Tenants' into properties, because this is the common reference used in both imports to match the two (eg place the tenant into the correct property).

	A	B	C	D	E	F	G	H
	property_feed_ref*	house_no_name*	address_1	address_2	address_town	address_county	address_postcode_ZIP*	address_country*
A1		123	Example Road	Example Estate	Example Town	Exampleshire	EG123	England
A2		124	Example Road	Example Estate	Example Town	Exampleshire	EG124	England
A3		125	Example Road	Example Estate	Example Town	Exampleshire	EG125	England
A4		126	Example Road	Example Estate	Example Town	Exampleshire	EG126	England
A5		127	Example Road	Example Estate	Example Town	Exampleshire	EG127	England
A6		128	Example Road	Example Estate	Example Town	Exampleshire	EG128	England
9								
10								
11								

Drag & Drop or select CSV file...

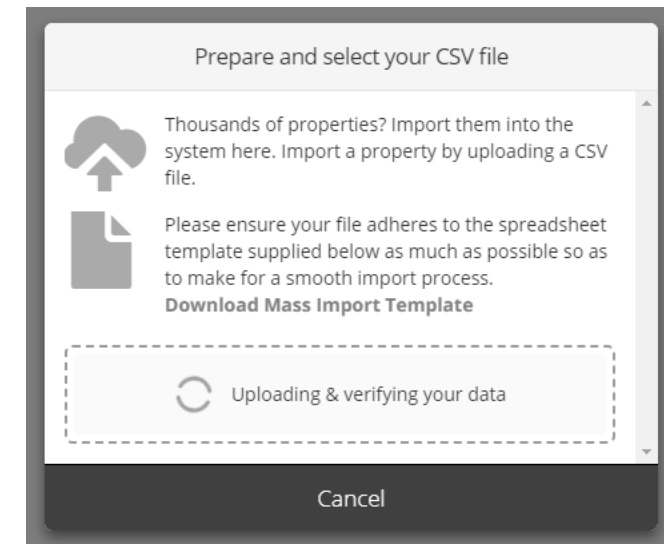
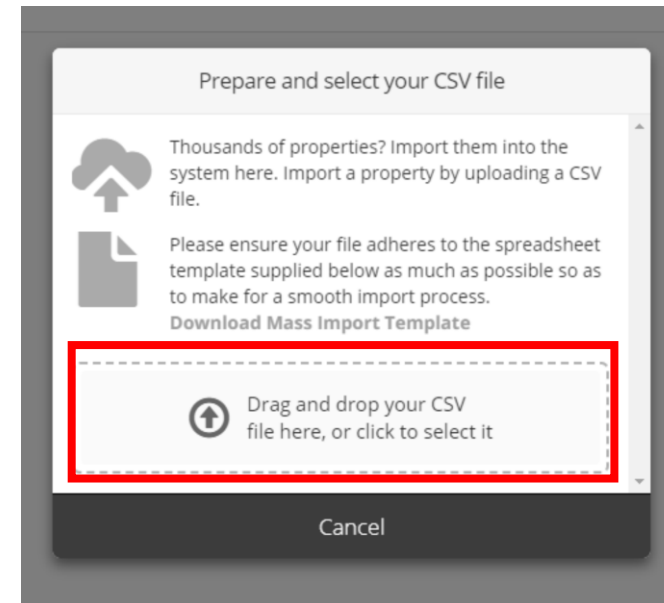
After you have prepared your data files, simply drag and drop, or select them appropriately.

A message will be displayed to say **'Uploading & verifying your data'**. You should then be taken to a 'Property Mass Import' screen, as shown overleaf.

TIP: If an error message displays saying the following...

Error: *The given file format is not supported. Please upload a file in CSV format.*

...then it's likely the wrong file type has been chosen/saved. To confirm, it must be a .csv file.



Check the fields match...

The fields on the 'Left' show those from your CSV file.

The fields on the 'Right' show those from within the inventory software.

If there are any matches still required, it will show in the 'Right' at the top (eg 1 matches still required). See the blue highlighted example (explained in more detail overleaf).

Associate Data Import Options Import Preview

Property Mass Import

Please review and associate your data below.

Right

Inventory Hive data	Hive system data (* required) 1 matches still required
property_feed_ref* A1 A2	Belongs to: Ref ID * Automatically matched
house_no_name* 123 124	Belongs to: None (Skip)
address_1 Example Road Example Road	Belongs to: Address 1 Automatically matched
address_2 Example Estate Example Estate	Belongs to: Address 2 Automatically matched

Left Cancel Import or Apply associations

Check the fields match...

If a field requires matching, it's simply a case of selecting where the data should go from the drop-down menu on the 'Right'. See example whereby 'House No/Name' has been matched to 'house_no_name*' from the CSV file.

Property Mass Import

Please review and associate your data below.

Inventory Hive data

property_feed_ref*
A1
A2
house_no_name*
123
124
address_1
Example Road
Example Road
address_2
Example Estate
Example Estate

Right

Hive system data (* required)
1 matches still required

Belongs to:
Ref ID *
Automatically matched

Belongs to:
None (Skip)
None (Skip)
Ref ID *
House No/Name *
Address 1
Address 2
Town/City
County/State
Postcode *
Country *

Belongs to:
Address 2
Automatically matched

Cancel Import or **Apply associations**

Choose 'Apply associations' ...

After you have matched all the fields a message will be displayed to say 'All matched!'

Check the field data once more, to be sure it's accurate and then select 'Apply associations'.

Associate Data Import Options Import Preview

Property Mass Import

Please review and associate your data below.

Inventory Hive data	Hive system data (* required) All matched!
property_feed_ref*	Belongs to: Ref ID * Automatically matched
A1	
A2	
house_no_name*	Belongs to: House No/Name * Automatically matched
123	
124	
address_1	Belongs to: Address 1 Automatically matched
Example Road	
Example Road	
address_2	Belongs to: Address 2 Automatically matched
Example Estate	
Example Estate	

Cancel Import or **Apply associations**

Select branch & choose template...

You can now choose which branch you wish to import the property data too by selecting from the left hand drop down. If you wish to import a relevant template also, please select from the right hand drop down.

It's not essential to add a general exterior photo. However, this is particularly useful, especially if the import relates to an apartment block for instance and may therefore save time.

When complete, please choose 'Apply options'.

Associate Data → Import Options → Import Preview


Property Mass Import

Please select your import options below.

Area/office that you wish to import into Main Branch	Pre-defined template that will be applied to all properties Furnished House (Good Master Copy)
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Assign an image to all of your properties within this import ?

Select photo from library



< Previous Step Cancel Import Apply options


Check & delete CSV header columns...

The final screen allows you to check the data. A red warning symbol will be displayed from the CSV header. Simply check the left hand box from this column and then choose 'Delete selected'. When complete, choose 'Complete Import'.









Associate Data > Import Options > Import Preview

Property Mass Import

Please check the data below is correct and make adjustments as necessary.

Branch: Main Branch **Template:** Furnished House (Good Master Copy) **Property Image:** 

Delete selected

<input type="checkbox"/>	Ref ID ⓘ	House No/Name ⓘ	Address 1 ⓘ	Address 2 ⓘ	Town/City ⓘ	County/State ⓘ	Postcode ⓘ	Country ⓘ	Actions
<input checked="" type="checkbox"/>	 property_feed_ref*	house_no_name*	address_1	address_2	address_town	address_county	address_postcode_ZIP*	address_country*	
<input type="checkbox"/>	A1	123	Example Road	Example Estate	Example Town	Exampleshire	EG123	England	
<input type="checkbox"/>	A2	124	Example Road	Example Estate	Example Town	Exampleshire	EG124	England	
<input type="checkbox"/>	A3	125	Example Road	Example Estate	Example Town	Exampleshire	EG125	England	
<input type="checkbox"/>	A4	126	Example Road	Example Estate	Example Town	Exampleshire	EG126	England	
<input type="checkbox"/>	A5	127	Example Road	Example Estate	Example Town	Exampleshire	EG127	England	
<input type="checkbox"/>	A6	128	Example Road	Example Estate	Example Town	Exampleshire	EG128	England	

1-7 of 7 Previous 1 Next

< Previous Step Cancel Import or Complete Import >

Import Complete...

A final message will be displayed to confirming the import is complete. Simply click 'View Properties' to view the new addition to your property reporting portfolio.

