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?

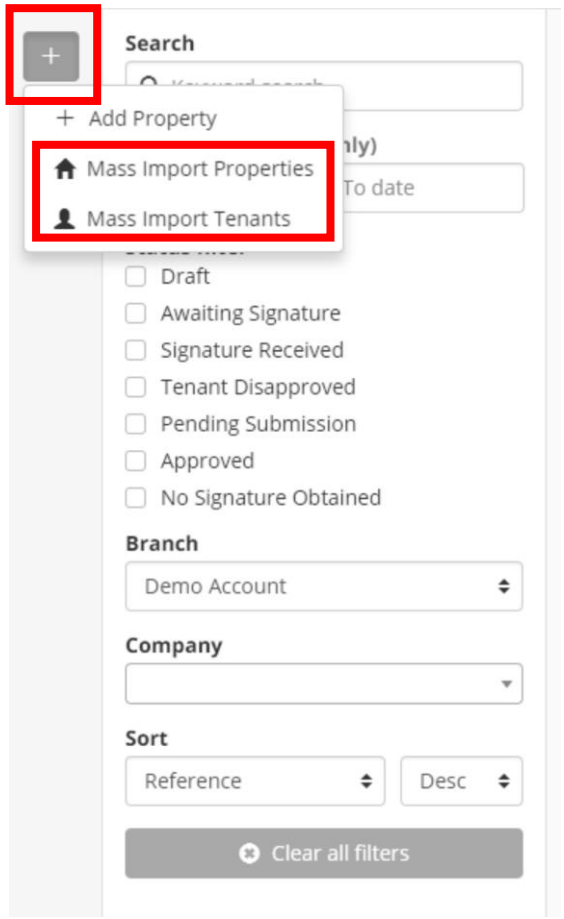
3. How do I choose a template with each import?

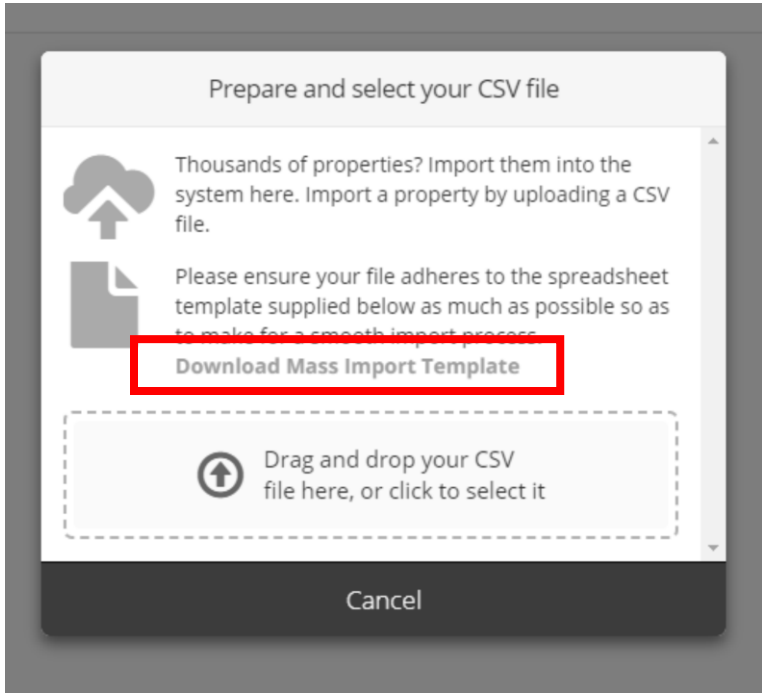
# Download our import templates…

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**'.



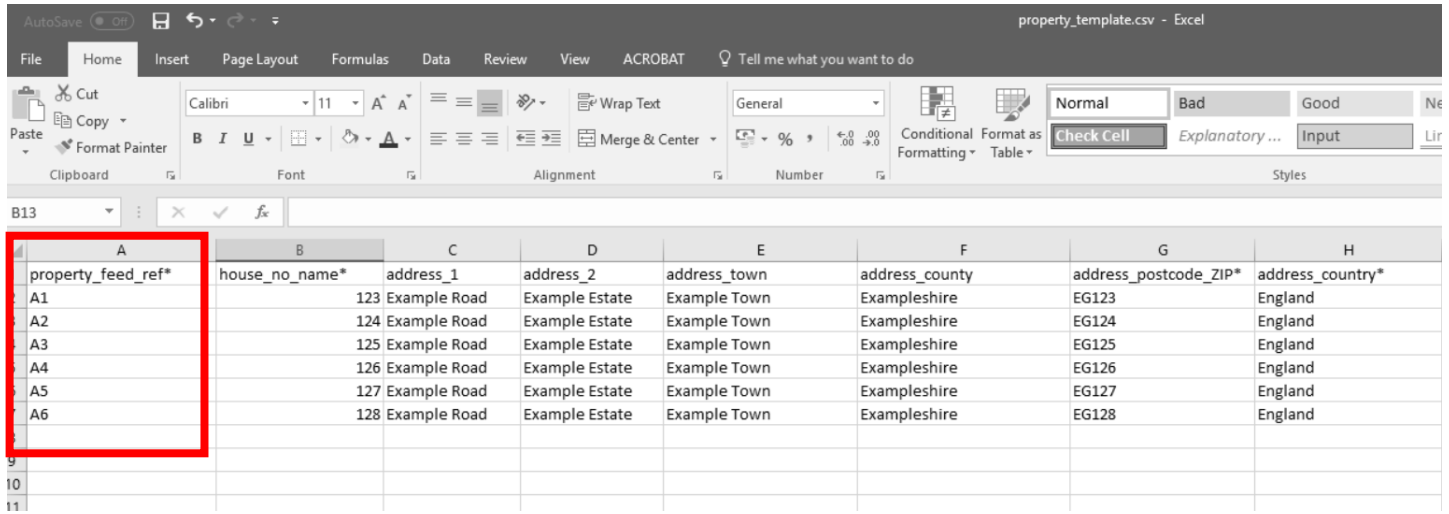
# Copy/Paste columns accurately…

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).




| 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 |

# Drag & Drop or select CSV file…

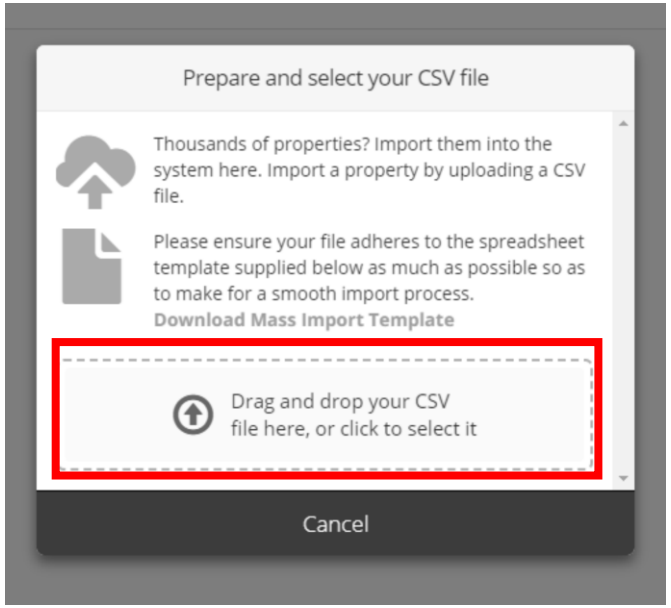
After you have prepared your data files, simply drag and drop, or select them appropriately.

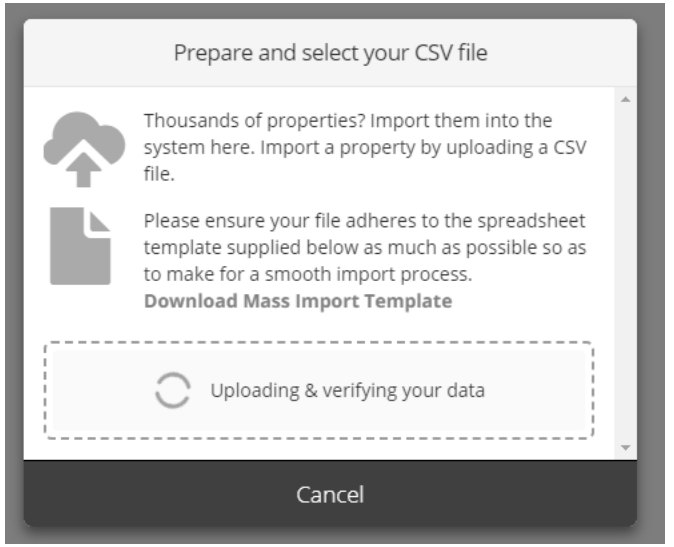
A message will be displayed to say '**Uploading & verifying your data**'. You should then be taken to a 'Property Mass Import' screen, as shown overleaf.

**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.



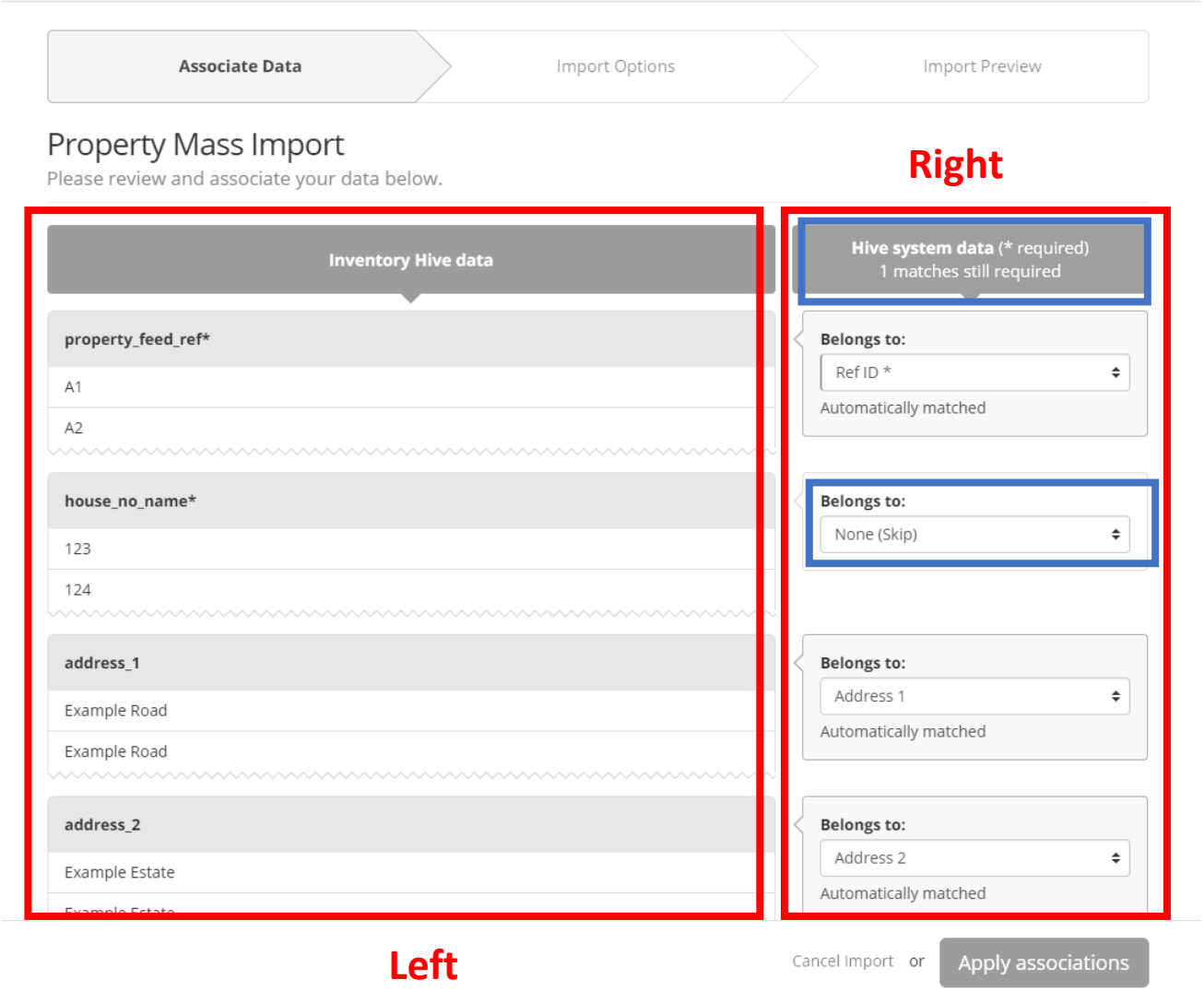



# Check the fields match…

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

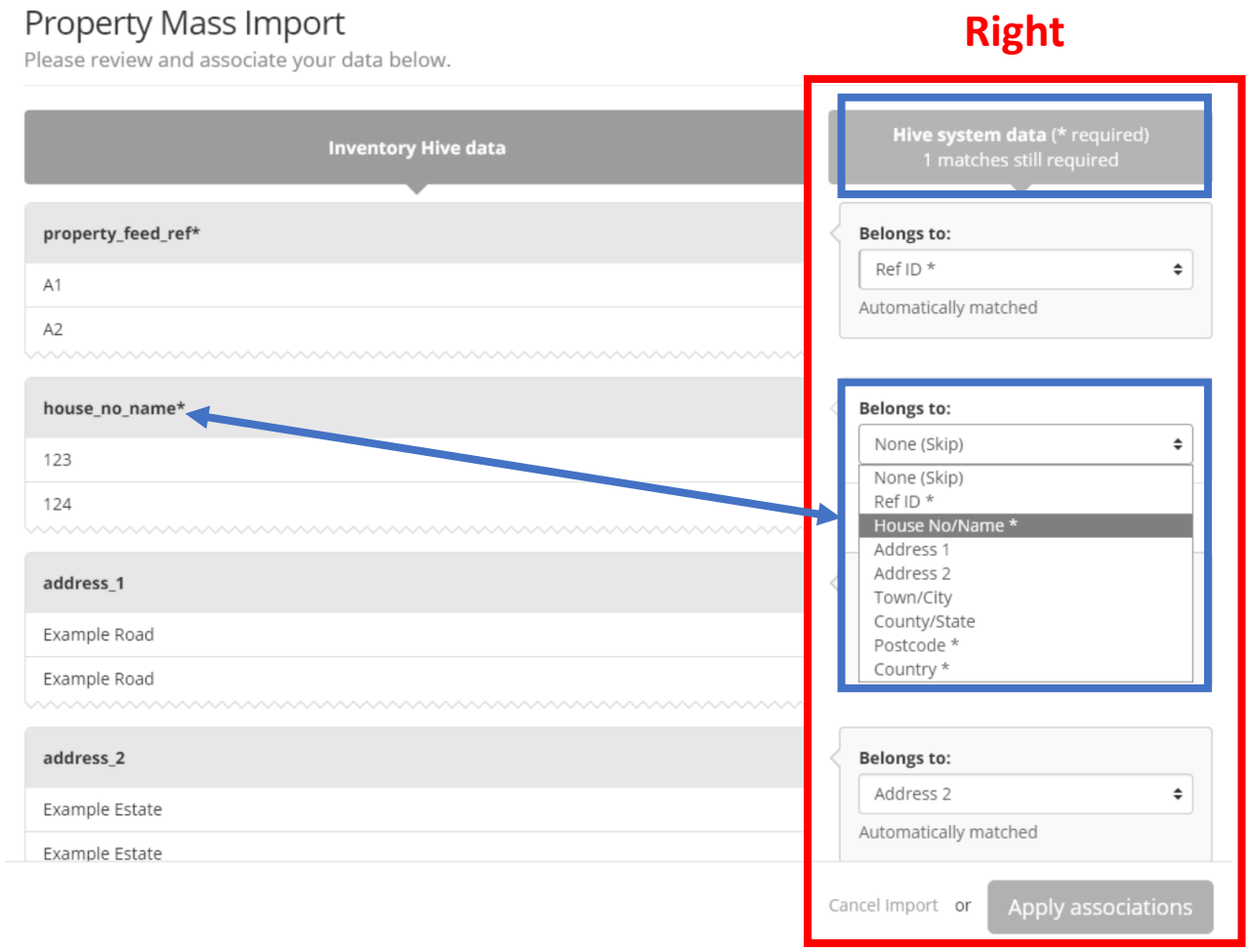
The fields on the ‘Right’ show those from within the inventory software.

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).



# Check the fields match…

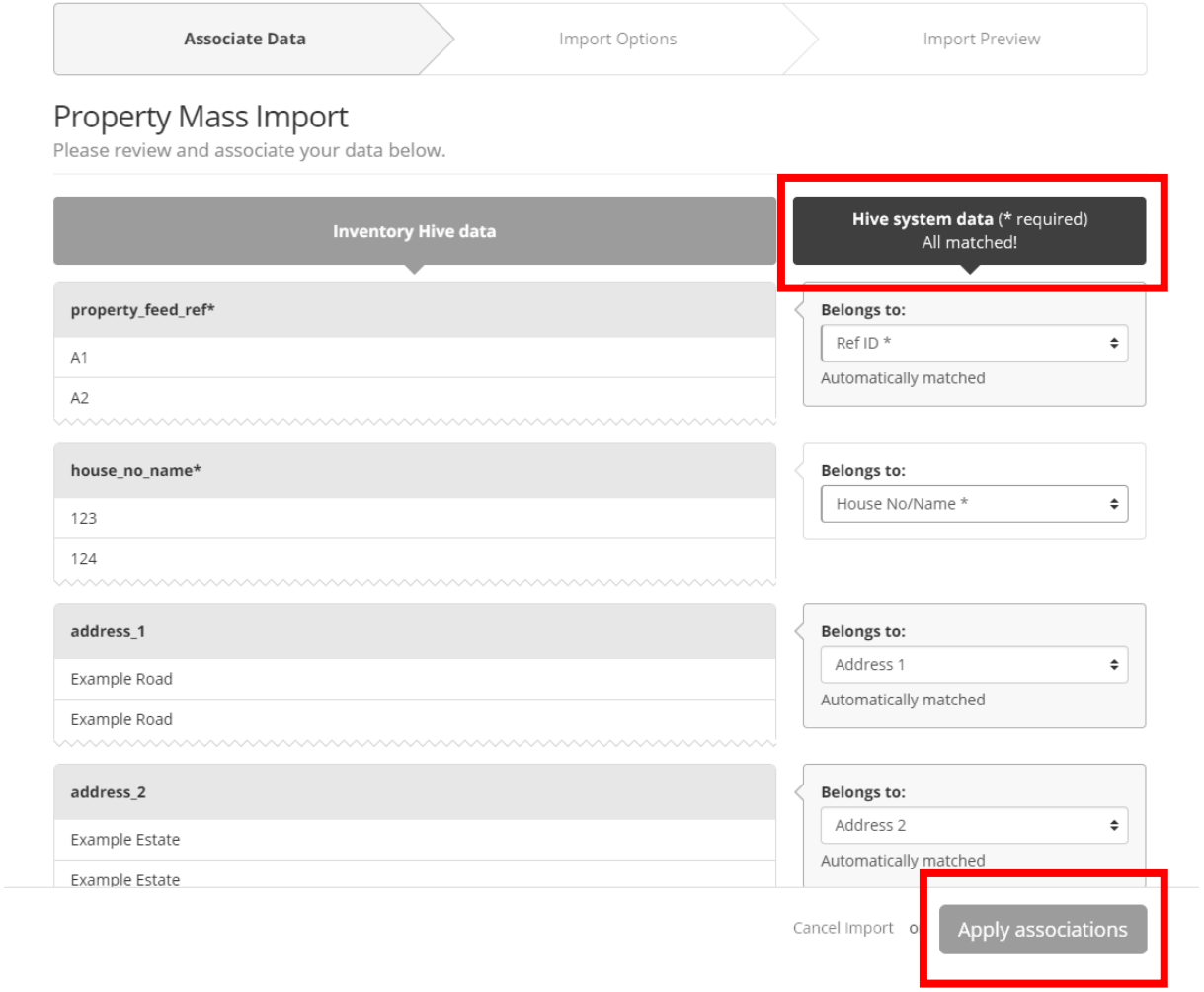
If a field requires matching, it's simply a case of selecting where the data should go from the drop-down menu on the 'Right'. See example whereby 'House No/Name' has been matched to 'house_no_name*' from the CSV file.



# 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’.

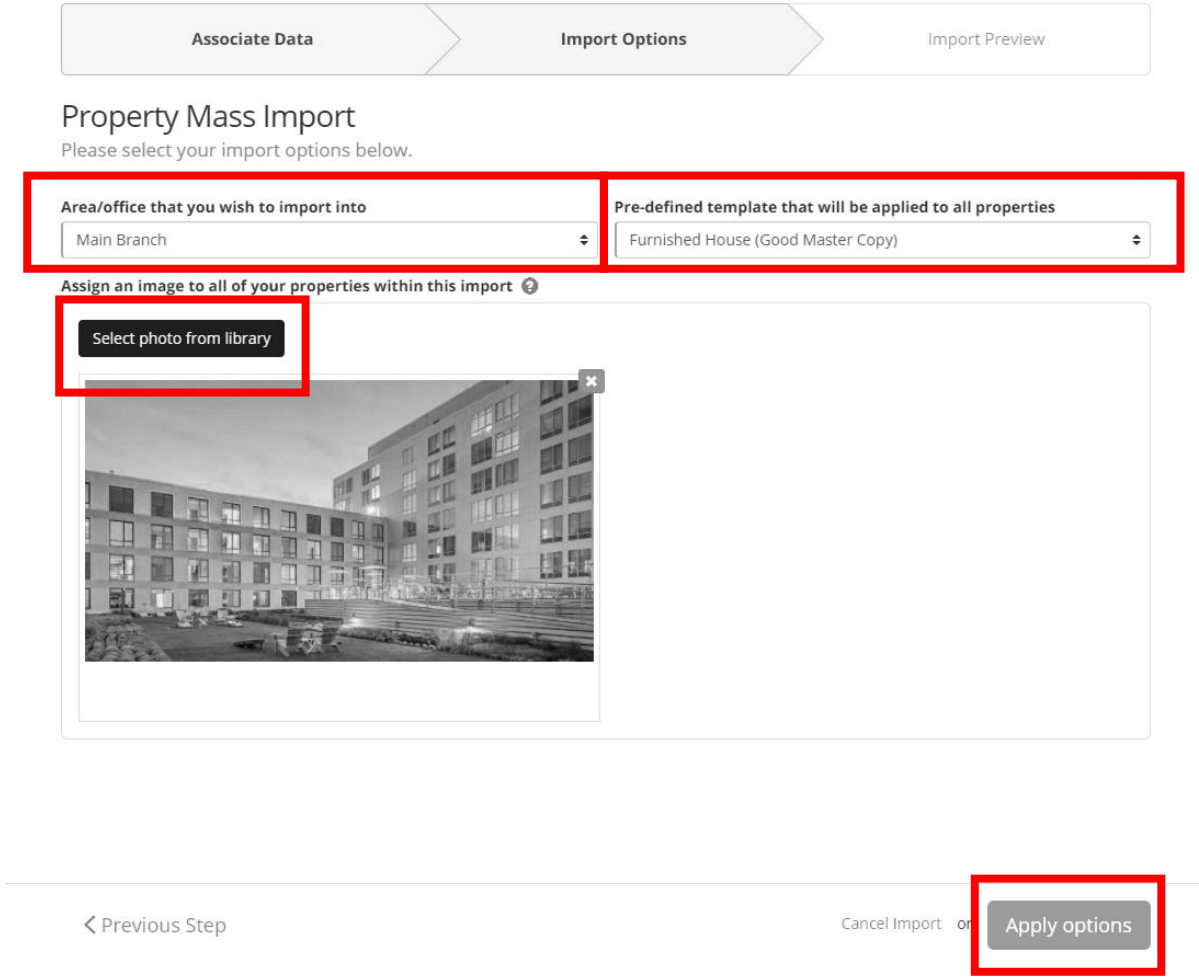


# Select branch & choose template…

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.

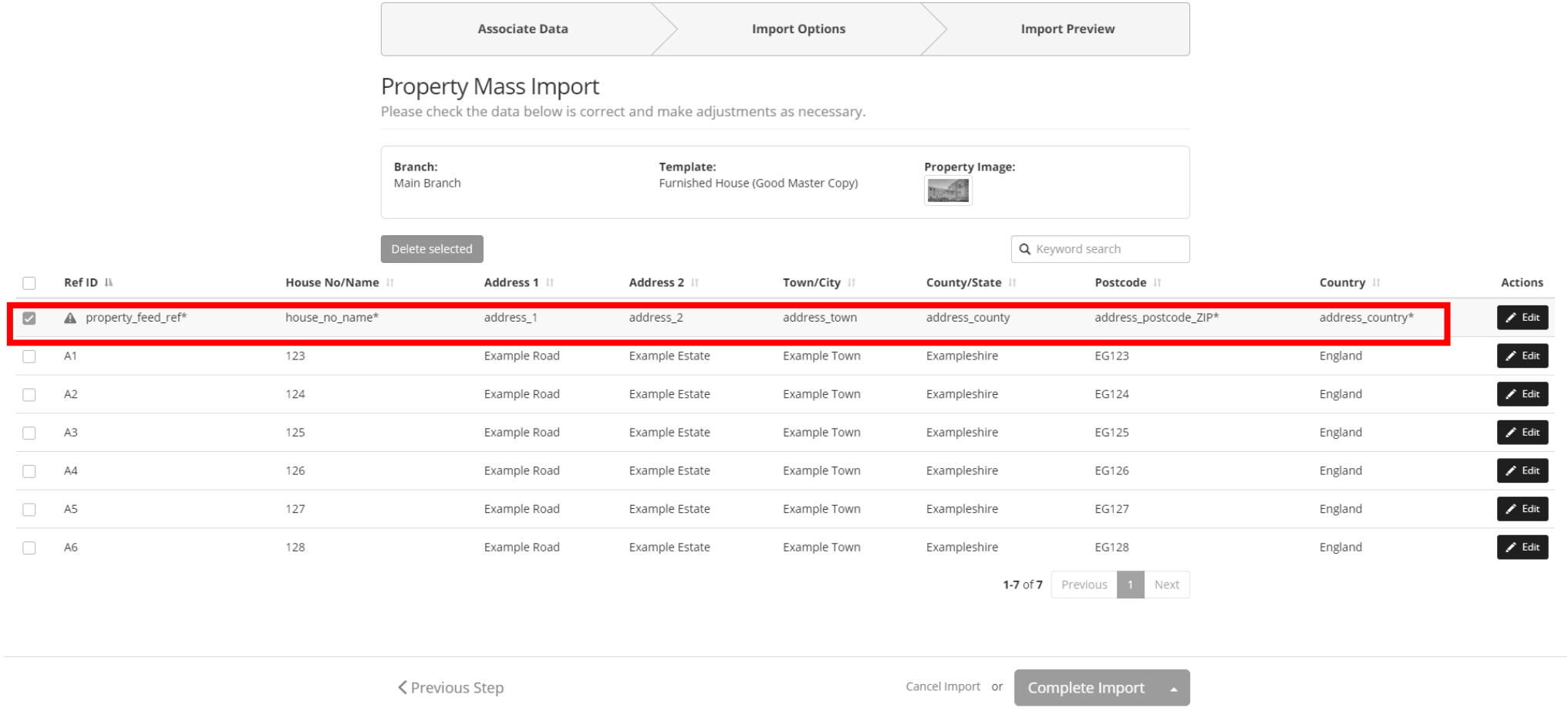
It's not essential to add a general exterior photo.  However, this is particularly useful, especially if the import relates to an apartment block for instance and may therefore save time.

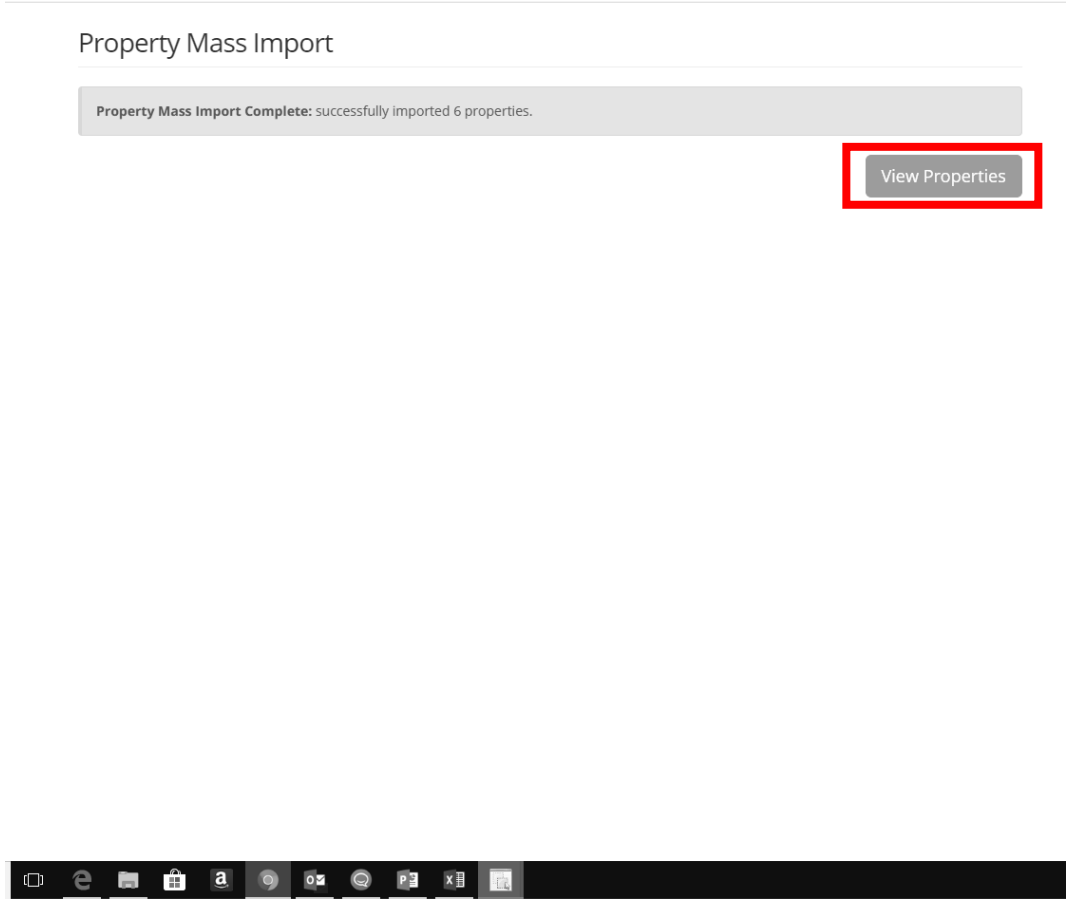
When complete, please choose 'Apply options'.



# 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’.



# 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.