

Veco Administration Guides – Applicant Import

Introduction

“Veco” has a facility to allow applicant details and requirements to be imported via a CSV file or by direct insertion into the “Veco” database.

This facility can be used to allow applicants to register directly from a website, although the website mechanism is not provided by Eurolink.

CSV File Import

To import applicant data from a CSV file, the CSV file (or files) should be stored in the “Applicant Import” folder which can be found in the “Veco” root folder.

The CSV file can be created from your own CRM system or website, but must contain the relevant information as specified in the table below, and in the field order specified. Any number of CSV files can be created in this folder, and they can have any name.

The CSV files are processed as follows:

1. Click “Admin : Import Applicants” from the Veco main menu.
2. Click the button “Import Applicants”.
3. The grid will display the details contained within the CSV files.
4. Some records on the grid may contain highlighted fields to indicate that the applicant contains missing or invalid information. Before processing the list, all applicants must be checked to ensure that all data is valid.
5. After ensuring that the applicants listed are not “bogus” or do not already exist within Veco, select the applicants that need to be imported by ticking the box to the left of each record.
6. Click “Process Applicants”. The new applicants will be entered into the main “Veco” database.
7. After processing the CSV files will be renamed to ensure they are not processed again.

Direct Data Import

As an alternative to creating a CSV file, the applicant details can be entered directly into the “Veco” SQL Server 2005 database.

As with the CSV file mechanism the applicants must be checked for validity prior to becoming live applicants by using the “Admin : Import Applicants” routine.

To use this import mechanism, data should be stored in the “ImportApplicants” table.

After processing, the “ImportApplicants” table will be cleared.

Required Fields for Data Import

The following fields of information need to be provided:

Field Number	Description	Optional or Mandatory	Notes
1	Registering Office Name	O	If not supplied must be selected manually
2	Applicant Type	M	“Sales” or “Lettings”
3	Applicant Reference	O	Automatically generated by Veco if not supplied
4	Title	M	“Mr”, “Mrs”, “Miss” etc
5	First Name or Initials	O	
6	Surname	M	
7	Sub Building Name	O	The component parts of the address should be specified.
8	Building Name	O	To conform to the Royal Mail standards.
9	Building Number	O	
10	Street	O	
11	Locality	O	
12	Post Town	O	
13	County	O	
14	Postcode	O	
15	Telephone Number	O	At least one contact number/e-mail address is required
16	Mobile Number	O	
17	E-mail Address	O	
18	Property Type	M	“House” or “Flat” for Lettings , or any valid Sales types
19	Furnished		Optional for Sales; Mandatory for Lettings (“Furnished”, “Unfurnished”, “Part Furnished”, “Any”)
20	Budget	M	
21	Minimum Budget	M	
22	Maximum Budget	M	
23	Rent Period		Mandatory for Lettings: “Per Month” or “Per Week”
24	Minimum Bedrooms	M	
25	Maximum Bedrooms	M	
26	Notes	O	Optional notes to be recorded against the applicant record
27	Company Name	M	MUST match the same Company name in “Veco”

ALL fields listed above are required, although only the mandatory fields need to contain data.