

Veco Administration Guides – Contact & Property Import

Introduction

“Veco” has a facility to import contact and property details into the “Veco” database from different systems.

This is useful when moving from or merging one database system into “Veco”.

Categories

Contacts are categorised in “Veco” as one (or more) of:

- Owner (eg Landlord)
- Tenant
- Supplier
- Applicant

Properties are categorised as:

- Sales
- Management (including Lettings)
- Auction

This document focuses on the import of owners, tenants, suppliers, and properties. For details of importing applicants see the document “Veco Administration Guides – Applicant Import”.

CSV File Import

To import contact and property information into “Veco” the details first have to be stored as CSV (comma separated value) files - Separate files need to be created for contacts and properties. The easiest way to produce CSV files is to open the data in Excel and then use “Save As...” to save as CSV format.

The CSV files can be stored anywhere and can have any filename, but must have a file extension of .CSV.

To import the CSV file into “Veco”:

1. Click “Admin” from the top menu
2. Choose “Import” and select the type of data you wish to import
3. Click [...] at the end of the “Import File” line and select a CSV file
4. Click “Import Contacts/Properties”. This will import the details from the CSV file into a grid. At this stage it does not actually import the details into the “Veco” database.
5. Ensure the names and address details are correct
6. Select / Unselect the details to be imported
7. Click “Process Contacts/Properties”

Required Fields

The CSV files need to contain the following fields in the order shown.

Each field must be provided as separate columns. Where the information is not available a column should be left blank or a default value should be provided.

For example, if your system does not have a field for “Second Contact Number” this column must exist, but should be left blank. If “Payment Out Method” is not applicable, or does not exist in your existing system, the column must exist but a default should be entered, eg “Manual Cheque”.

Contact Import Fields

1. Type of Contact (“Owner”, “Tenant”, or “Supplier”)
2. Optional Unique Reference or Identifier

Name (as separate fields) –

3. Title
4. Initials or First Name
5. Surname
6. Company Name

Address (as separate fields) –

7. House Number
8. Street
9. Locality
10. Town
11. County
12. Postcode
13. Country
14. Main Contact Number
15. Second Contact Number
16. E-mail Address
17. Sort Code
18. Account Number
19. Payee Name
20. Payment Out Method (“Manual Cheque”, “Automatic Cheque”, or “BACS”)
21. Payment In Method (“S/Order”, “Manual”, “Cheque”, “Credit Card”, “Direct Debit”, “BACS”)

Property Import Fields

1. Property Category (“Sales”, “Management”, “Auction”)

2. Optional Unique Reference or Identifier

Address (as separate fields) –

3. House Number

4. Street

5. Locality

6. Town

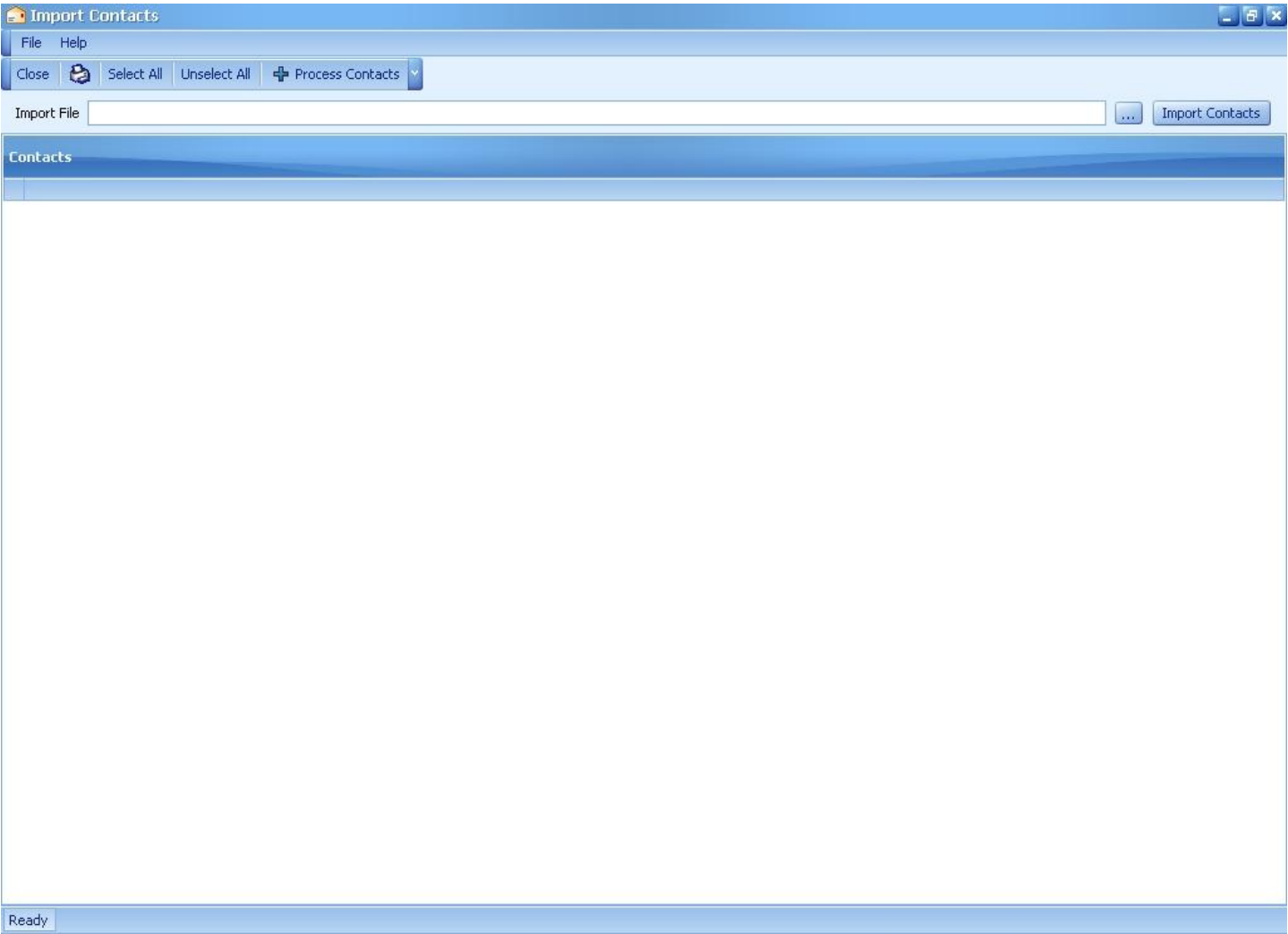
7. County

8. Postcode

9. Country

10. Office Name (must be a valid “Veco” office name)

Contact Import Screenshot



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