Veco Administration Guides –

Estate Import

Introduction

"Veco" has a facility to import estate details into the "Veco" database from different systems.

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

Veco can import the following information in relation to estate management properties:

- Freeholder Details

- Estate Details

- Leaseholder Details

- Property/Unit Details

CSV File Import

To import estate information into "Veco" the details first have to be stored in a CSV (comma separated value) file.
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 "Estate"

3. Click […] at the end of the "Import File" line and select a CSV file

4. Click "Import Estates". 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 details are correct

6. Select / Unselect the details to be imported

7. Click "Process"

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.

The actual names of the headings in the file are irrelevant as long as the order is the same as below. Details should be provided on a "row by row" basis. For each property/unit listed where the freeholder and estate are the same the freeholder and estate details must be repeated, but will only be imported once. However, if the same freeholder or leaseholder is imported in a different CSV file duplicates will be created.

Freeholder Reference
Freeholder Title (Mr, Mrs, etc)
Freeholder First Name
Freeholder Surname
Freeholder Company
Freeholder Unit Name
Freeholder Building Name
Freeholder Town
Freeholder House Number
Freeholder Street
Freeholder Locality
Freeholder Town
Freeholder County
Freeholder Postcode
Freeholder Country
Freeholder Main Contact Number
Freeholder Second Contact Number
Freeholder Email Address

Estate Reference
Estate Name
Estate Unit Name
Estate Building Name
Estate Town
Estate House Number
Estate Street
Estate Locality
Estate Town
Estate County
Estate Postcode
Estate Country
Estate Service Charge Year Start Date
Estate Service Charge Year End Date

Leaseholder Reference
Leaseholder Title (Mr, Mrs, etc)
Leaseholder First Name
Leaseholder Surname
Leaseholder Company
Leaseholder Unit Name
Leaseholder Building Name
Leaseholder Town
Leaseholder House Number
Leaseholder Street
Leaseholder Locality
Leaseholder Town
Leaseholder County

Leaseholder Postcode
Leaseholder Country
Leaseholder Main Contact Number
Leaseholder Second Contact Number
Leaseholder Email Address

Property Reference
Property Unit Name
Property Building Name
Property Town
Property House Number
Property Street
Property Locality
Property Town
Property County
Property Postcode
Property Country
Property Ground Rent Amount
Property Ground Rent Frequency ("Monthly", "Quarterly", "Six Monthly", "Annually")

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