Veco Migration –

Tenancy Name Details

Introduction

Due to the many differences between the Eurolink software and Veco the migration process attempts to transfer details in as logical a way as possible. In doing so we assume that information has been entered into Eurolink in a uniform and consist manor. This short paper explains the migration process in respect of tenant details.

Main Differences between Eurolink and Veco Tenant Details

Eurolink allows the recording of a single "Tenant" record together with individual "Reference" details. The tenant details effectively represent the tenancy and will list the occupier names for agreement purposes, while the "reference" details represent the names of the individual tenants within the tenancy together with their respective employer, guarantor, referee, and previous addresses, if relevant.

Veco has a main "Tenancy" record to which are attached individual "Tenant Contact" records. Each individual contact will have "Related Contacts" for guarantor, employer, etc, and "Related Addresses" for previous address, forwarding address, etc.

For the most part the migration process transfers Eurolink fields into equivalent Veco fields, but it is import to note the following:

Eurolink Details….	Migrated to Veco as….
Tenant	Tenancy
Tenant Occupiers Name	Tenancy Occupiers Names
Tenant Full Names	Tenancy Occupiers Full Names
Tenant Reference Name	Tenant Contact
Tenant Reference Guarantor	Tenant Related Contact
Tenant Reference Employer	Tenant Related Contact
Tenant Reference Referee	Tenant Related Contact
Tenant Reference Referee	Tenant Related Contact
Tenant Reference Previous Address	Tenant Related Address
Tenant Reference Forwarding Address	Tenant Related Address

The migration process tries to interpret the Eurolink details according to the following rules:

Occupiers Names

The names in the Eurolink Tenant "Occupiers Name" field are separated out into individual tenant names.

Each individual name is translated into a Veco Tenant Contact and attached to the Veco Tenancy.

As Eurolink does not have separate fields for title, first name and surname, these are interpreted as best as possible.

Examples:

Eurolink		Veco		
Occupiers Names		Title	First Name	Surname
Mr John Smith	Becomes a single contact	Mr	John	Smith
John Smith	Becomes a single contact		John	Smith

Mr J Jones & Miss B Green	Entered on same line, becomes two contacts	Mr Miss	J B	Jones Green
John Smith Miss Beccy Green	Entered on separate lines, becomes two contacts	Miss	John Beccy	Smith Green
Mr A Harrison and Mr Paul Wilson & Derek Johnson	Entered on separate lines, becomes three contacts	Mr Mr	A Paul Derek	Harrison Wilson Johnson

Reference Details

Should reference details be entered into Eurolink these will take priority over the Occupiers Names explained above because they may each have employer, and guarantor details. In these cases, the name entered into the "Tenant Name" field on the Reference Details page of Eurolink will create the Veco Tenant Contact.

The employer, guarantor, referee, and previous addresses will become Veco "Related Contacts" and "Related Addresses".

Even if the Eurolink "Occupiers Names" field consist of two or three names, these are ignored in favour of the Reference Details because it is assumed that there will be separate Reference Details for each of the two or three tenants.

So, an Occupiers Name of…. "Mr John Smith and Mrs Julie Smith" but a single Reference name of…. "J Smith"

will only create a single Veco Tenant Contact (Title, First Name, Surname) of "J" "Smith"

Note in this example that one of the tenants has been ignored because the program has to assume that there will be both sets of Reference Details. The system cannot know that a reference of "J Smith" refers to "John" or "Julie", and would not know which contact was missing.

In this example the missing tenant would have to be entered manually into Veco, otherwise the tenancy details are not full and correct.

Veco Tenancy Occupiers Names

As shown in the first table above, the Eurolink "Occupiers Names" and "Full Names" are migrated into the Veco fields "Occupiers Names" and "Occupiers Full Names" on the Tenancy Details. This always happens regardless of how the contact details are migrated.

However, natively within Veco these fields are automatically completed from the Veco Tenant Contact names and cannot be entered directly. So, if the Contacts in Veco after migration have a slightly different spelling to the Eurolink "Occupiers Names" field you may find that the Veco "Occupiers Names" field is changed automatically. This is entirely correct because Veco has to assume that the Tenant Contact details are correct regardless of what has been initially migrated into this field.

Updating Veco Contacts

Other than companies, all Veco Contacts are required to have a "Title" (eg Mr, Mrs, Miss, etc).   However, migrated details may not have this information depending on how names are entered in Eurolink. Although this will not cause an immediate problem, contact names should be corrected at some point. When contact names are updated it is useful to ensure that the "File As" and "Address Title" fields are also updated because these are used at various points and on information grids.

Also, bear in mind that changing tenant contact details will cause the tenancy Occupiers Names field to be updated accordingly.

Migration Choices

If reference details have not been entered at all for any particular tenancy then the migration process will create contacts of every tenant named as "Occupiers". However, as mentioned above, if reference details exist for one tenant of a multi-tenant occupancy then they have to exist for every tenant even if it is just a name and no employer or guarantor details.

Where Eurolink details have not been fully completed there are two choices:

1. Ignore all Reference Details and migrate all tenant Occupier Names as separate Veco contacts and manually enter employer, guarantor, and referee details.

2. Migrate any existing employer, guarantor, and referee details, but manually enter any missing tenant occupiers for tenancy where there is more than a single tenant.