Propman Import Tools

December 2024

Grosvenor
Systems

Propman Data Import Tools	
Client Fee Codes	Used to add client fee codes or *update* existing client codes
Estate	For new record creation
Estate/Property/Unit Areas	Used to add estate/property/unit area breakdown or update existing estate/property/unit area breakdown
Property/Head Lese/Landlord/Agent	Allows active or inactive properties to be imported Allows active or inactive head leases to be imported Allows one rent charge and up to two service charges per head lease to be imported Allows periodic rent review dates based in a frequency to be imported Allows one landlord and one managing agent supplier (per head lease) plus the correspondence and accounts contacts of the suppliers to be imported
Head Lease Rent Reviews	Used to add or update individual rent review records with full rent review information
Supplier	Used to add non-head lease supplier accounts or add or update existing supplier details
Supplier Contacts	Used to add or update supplier contacts
Unit	Used to add or update unit details (including unit S/C schedule percentage/fraction details)
Unit/Tenant/Tenant	For new record creation Allows active or inactive units to be imported Allows active or inactive tenancies to a single unit to be imported Allows one rent charge and up to two service charges per tenancy to be imported Allows periodic rent review dates based on a frequency to be imported Allows one tenant (per tenancy) plus the correspondence and account contacts to be imported
Tenancy Rent Charges	Used to add additional rent charges per tenancy
Tenancy Service Charges	Used to add or *update* individual service charges per tenancy
Tenancy Rent Reviews	Used to add or *update* individual rent review records with full rent review information

Tenancy Changes	Used to *update* limited information on existing tenancy records, including tenancy deactivation, tenancy assignments, amending the tenancy expiry date/holding over flag, future tenancy activation etc
Tenant	Used to add non-tenancy/tenant accounts or add or update existing tenant accounts (tenancy or non tenancy)
Tenant Contacts	Used to add or amend unlimited contacts per tenant
S/C Schedules and Expense Types	Used to add or *update* existing estate/unit and property/unit schedules and expense types
Estate/Property/Unit Fixed Assets	For new record creation
Jobs	Used to add or *update* of existing job records
Contracts	For new record creation
S/C Budgets	Used to load estate and/or property S/C budgets
Propety/Unit Capital Valuations	For new record creation
Property/Unit Meters	Used to add or *update* of existing meter records
Communications	For new "inbound" communciation records
Entity System User	Used to add or *update* the Manager/Accounts/Administrator users on Client/Estate/Property/Unit records
Tenant Table DD Dates & Values	Used to add tenant or tenancy table type direct debit dates/values for tenants flagged for collection by table direct debit

Propman Transaction Import Tools	
Non Tenancy Invoices & Credit Notes	For new record creation
Tenant Supplementary Charges/Credits	For new record creation
Tenant Receipts	Import allowed where receipt value is <= value of outstanding invoices on the tenant account. Allocation rules are the same as the AUTO ALLOC button when manually entering receipts. Receits where the receipt value is > value of the O/S invocies on the tenanct account providing the required additional information is specified and it is flagged as unallocated
Tenant Opening Balances	For new record creation
Supplier Opening Balances	For new record creation
Purchase Invoice Register	For new record creation
Supplier Invoices/Credit Notes	For new record creation
Client Sundry Income	For new record creation
Client Sundry Expenditure	For new record creation
S/C Period Tranactions	For new record creation
Property/Unit Meter Readings	For new meter readings – either the reading or the usage can be imported