

SDS Sequelv6

How to Import Properties

The Property section of the Project Explorer contains all the Property information for your Project. The purpose of this section is to enable you to create individual records for each of your plots/properties, ready for exporting to your Housing Management systems.

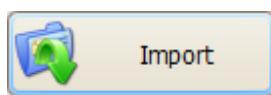
Properties are exported into Excel with as much detail filled as possible. We give you several tools to help with this but the main aid is to be able to arrange your properties in a hierarchical format. This allows any information stored in the attributes to filter down the hierarchical or tree format to any properties below the level where you fill in the details.

The source for the property details can either come from an Excel spreadsheet or from the import of a ProVal appraisal. I will tackle the ProVal appraisal method first as it is the most common method.

Lets get started

By now you must have at least imported the ProVal appraisal. The information that is contained in the appraisal can be viewed in the Appraisal Manager.

Select the Import Button
choose from the



this will open a dialog box and allow you to available properties see Figure 1

Import Properties from ProVal Appraisals

Select the appraisals to import properties from:

Units to Import	Appraisal Name	Import Date	Dwellin...	Equity ...	Floor A...	Ground ...	HC Pro...	HC Tar...	Is a flat?	Is exte...	Is newb...	Is shar...	Is shelt...
<input checked="" type="checkbox"/>	2 of 2	Training Mixed...	10/09/20...	4b House	0	96	0	MFRENT	103.28	False	False	False	False
<input checked="" type="checkbox"/>	2 of 2	Training Mixed...	10/09/20...	3b House	0.4000...	85	2.2997...	HBYNB	94.83	False	False	False	False
<input checked="" type="checkbox"/>	2 of 2	Training Mixed...	10/09/20...	2b House	0	76	0	MFRENT	84.53	False	False	False	False
<input checked="" type="checkbox"/>	2 of 2	Training Mixed...	10/09/20...	3b House	0	85	0	MFRENT	94.82	False	False	False	False
<input checked="" type="checkbox"/>	5 of 5	Training Mixed...	10/09/20...	2b House	0.4000...	76	2.2997...	HBYNB	84.53	False	False	False	False
<input checked="" type="checkbox"/>	8 of 8	Training Mixed...	10/09/20...	1b Flat	0	50	0	MFRENT	71.45	True	False	False	False
<input checked="" type="checkbox"/>	2 of 2	Training Mixed...	10/09/20...	3b House	0	85	0	MFRENT	94.82	False	False	False	False
<input checked="" type="checkbox"/>	2 of 2	Training Mixed...	10/09/20...	4b House	0	96	0	MFRENT	103.28	False	False	False	False
<input checked="" type="checkbox"/>	2 of 2	Training Mixed...	10/09/20...	2b House	0	76	0	MFRENT	84.53	False	False	False	False
<input checked="" type="checkbox"/>	2 of 2	Training Mixed...	10/09/20...	3b House	0.4000...	85	2.2997...	HBYNB	94.83	False	False	False	False
<input checked="" type="checkbox"/>	5 of 5	Training Mixed...	10/09/20...	2b House	0.4000...	76	2.2997...	HBYNB	84.53	False	False	False	False
<input checked="" type="checkbox"/>	8 of 8	Training Mixed...	10/09/20...	1b Flat	0	50	0	MFRENT	71.45	True	False	False	False

Figure 1

By default all property types are selected but you can tick or untick as you wish to alter what sequence to import.

Then select the import button in the bottom right hand corner and all the selected properties will import. They will be grouped by property type into a folder. Click on the + to open the tree and see the individual properties identified by the house icon.  Figure 2



Figure 2

The properties need to be now arranged in a tree structure to aid filling in common information such as address details so here are the easiest steps to take this forward:-

1. Select New on the side buttons.



Figure 3

2. Click on the name New Property and call it something meaningful to you such as "Project Head"

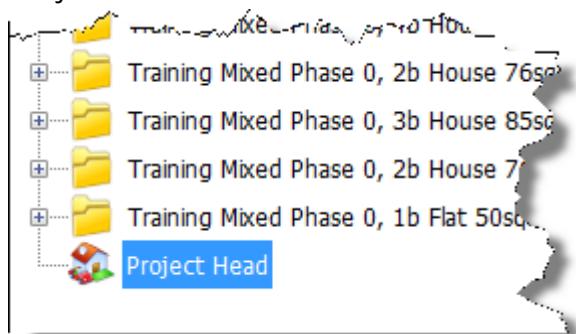


Figure 4

3. Select the folder/property button to toggle the new Project Head to be a folder. See Figure 5

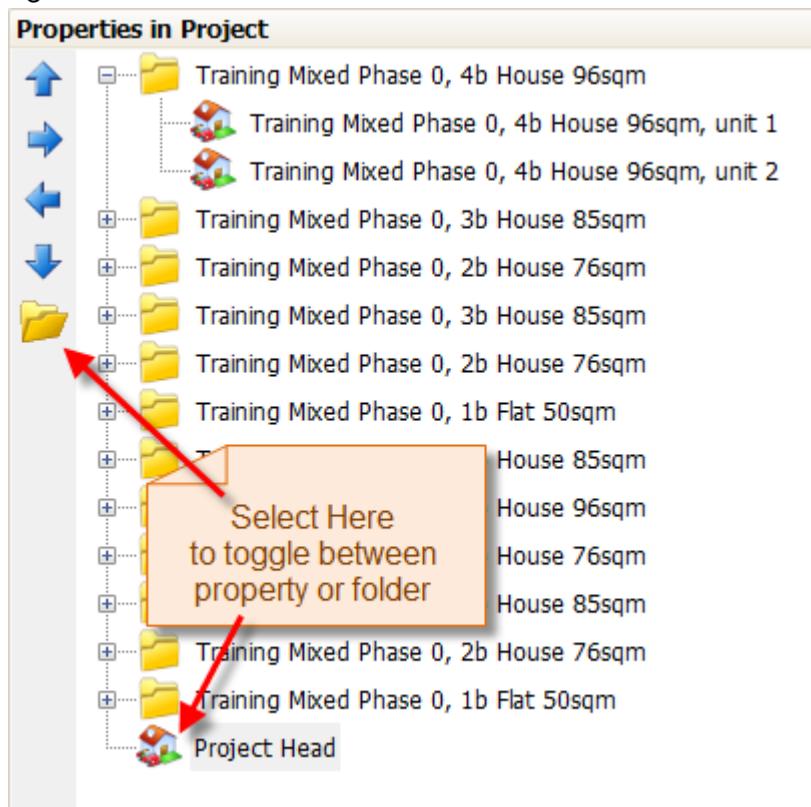


Figure 5

4. Using the side blue arrows move the Project Head Folder up to the top.

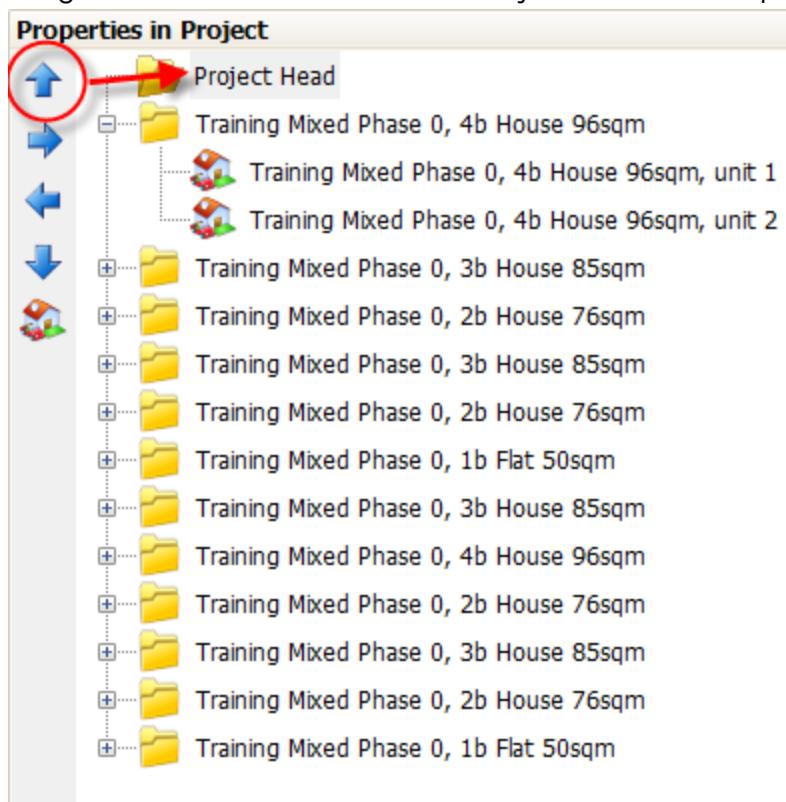


Figure 6

5. Then click on one of the other folders letting the mouse button go, then click again dragging that folder onto the Project Head folder. See Figure 7 this shows the first property folder is now a child of the parent folder Project Head. Repeat this for all the remaining folders. See Figure 8.

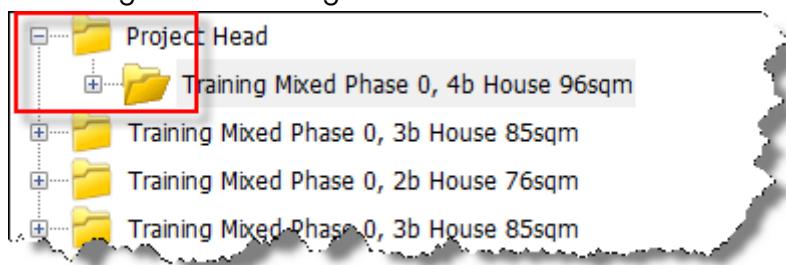


Figure 7

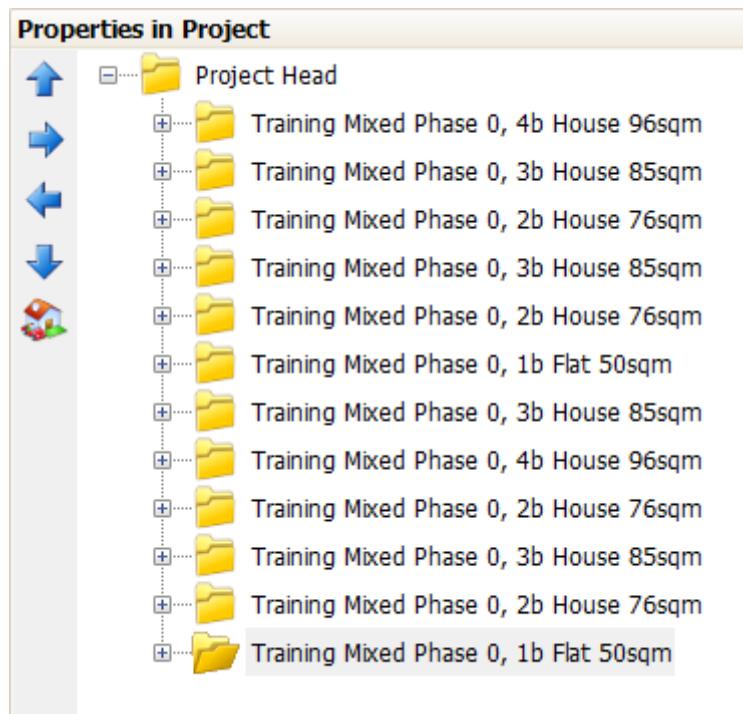


Figure 8

6. Now selecting the folder Project Head fill in the attributes in the centre panel that belong to each property but do not fill in any attributes that are individually different on each property. A typical example would be the local authority is common to all so fill that in but weekly rent is usually unique to a particular property so leave that type of detail out. When you have filled in each attribute that you need to at this level select the Save button just above the attributes. This only has to be done when making adjustments at folder level. When adjusting individual property attributes they are saved automatically when you go to the next attribute.

The screenshot shows the 'Property Attributes' dialog box. At the top, there are buttons for 'Save' and 'Cancel'. Below this is a table with two columns: 'Attribute' and 'Value'. The table is organized into sections:

- Property Attributes** section:
 - Project Name & Address** section:
 - Dwelling Description
 - Plot Reference
 - Building / Block Name
 - Address 1**: Delightful Lane
 - Address 2
 - Address 3
 - Postal Town/City: Guildford
 - County: Surrey
 - Post code: GU1 xxx
 - Sales and Marketing** section:
 - Purchaser Name
 - Handover Date - Development: 13/01/2010
 - Marketing Reservation
 - Marketing Commenced
 - Legal Completion
 - Equity Share Percentage-Budget

Figure 9

When a Sequel installation is new, a proper stock must be taken of the installed attributes as most housing management software is able to import data in some form or another, so a matching attribute must be available to input data.

Property attributes can be linked to ProVal data so when the appraisals are imported the relevant data is already filled in. This saves time and makes the data more accurate.

When the project is nearing completion or at any other time you wish to export data please see the article "How to Get Started with Quick Reports".