

Resident Import Template - Instructions

Overview

This guide explains how to use the resident import CSV template to bulk import users into the system.

CSV Template Columns

REQUIRED FIELDS (Must be provided):

1. First Name

- User's first name
- Example: John

2. Last Name

- User's last name
- Example: Doe

3. Email

- Primary email address
 - Example: john.doe@email.com
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OPTIONAL FIELDS:

4. Lot No

- Lot number for the property
- Example: LOT001, L-123

5. Unit No

- Unit number (for apartments/condos)
- Example: 10A, Unit 205, A-12

6. Mobile

- Mobile phone number (include country code for best results)
- Example: +61412345678, +1234567890
- **Format:** Include country code (+ and country code) for international numbers

7. Owner Occupier

- Is the resident an owner-occupier (owns and lives in the property)?
- **Values:** Y (Yes) or leave blank
- Example: Y
- **Note:** Mark Y if the resident owns and occupies the property

8. Owner Investor

- Is the resident an owner-investor (owns the property but doesn't live there)?
- **Values:** Y (Yes) or leave blank
- Example: Y
- **Note:** Mark Y if the resident owns the property as an investment

9. Other

- Other resident type (e.g., Tenant, Renter, or other non-owner resident)
- **Values:** Y (Yes) or leave blank
- Example: Y
- **Note:** Mark Y if the resident doesn't fall into Owner Occupier or Owner Investor categories

Important Notes

- **Do not modify the header row** (first row with column names)
- If email already exists, the import will update that record
- Mobile phone format: Include country code (e.g., +61 for Australia, +1 for USA)
- **Resident Type:** Only mark Y in ONE of the three columns: Owner Occupier, Owner Investor, or Other
- Leave a resident type field blank if it doesn't apply
- Community/site is selected in the upload dialog before uploading the CSV
- Save the file as CSV format before uploading

Data Validation Checklist

Before uploading, please check:

- All required fields (First Name, Last Name, Email) are filled
- Email addresses are valid
- Each resident has only ONE Y marked among: Owner Occupier, Owner Investor, or Other
- Phone numbers include country codes where applicable

- No special characters that might break CSV format (extra commas, un-escaped quotes)
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Step-by-Step Guide

1. **Download** the CSV template file (`resident-import-template.csv`)
 2. **Open** the file in Excel, Google Sheets, or any spreadsheet application
 3. **Delete** the example rows (keep only the header row)
 4. **Fill in** your resident data following the format guidelines
 5. **Validate** your data using the checklist above
 6. **Save** the file as CSV format
 7. **Upload** the file through the import interface
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Need Help?

If you encounter any issues or have questions about the import process, please contact support or refer to the help center documentation.