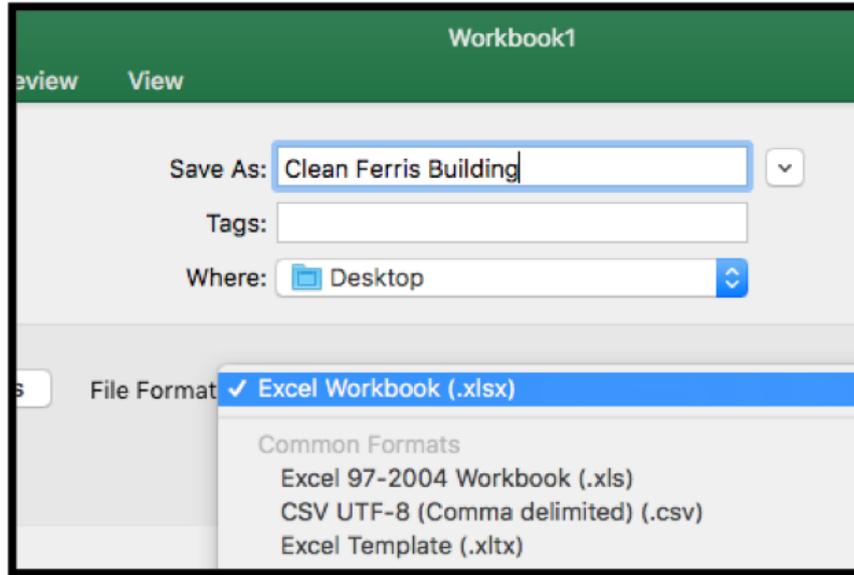# DASHFLOW CLEAN IMPORT GUIDE

Follow these steps to create an Excel rent roll file that will be imported by Dashflow.

1. Open the Microsoft Excel application

2. Create a new Workbook (which will have only one worksheet).

3. Save this Workbook as "Clean [Rent Roll FileName].**xlsx"**

4. In cell A1 insert the Building Name.

5. In Row 2, copy & paste the Rent Roll headers from your original Rent Roll file.

6. You can keep the same order of headers as in the original, but modify the header labels so that they are near-identical to the labels shown here:

Tenant Name	**Area**	**Lease Start Date**
Rent pa	**Rent psf/psm**	**Lease Expiry Date**
ERV pa	**ERV psf/psm**	**Break Date**
&		**Rent Review Date**
*Rent increase %		**Fixed Uplift Date**
*(from v1.15.0)		**Fixed Uplift Rent**

Other column headers that will be recognized include car park info tied to unit leases:
Car park spaces; Total car park rent pa; Car park rent per space pa
and a **Comments** column will be imported as well.

Dashflow will import a wide variety of alternative names for these headers, but the goal in this exercise is to be 100% secure: that is why it is a good idea to fix names.

The country of the property is set in the NEW DEAL screen, and that will determine how the area is treated (square foot, square metre, tsubo, pyeong) and what currency symbol is used.

You may have copied other column headers from the original to the clean file, and this does not matter subject to one restriction: only copy plain text within single cells i.e. no special formatting, no colours, no merged cells, no hidden columns, no graphics &c.

7. Copy and paste data for the first tenant lease from the original rent roll file into Row 3, for the second tenant lease into Row 4, and so on.

8. Proceed lease by lease and row by row, ensuring:
   a. all cells containing dates are formatted within Excel as "Date";
   b. no date cell has more than one date; no cell is messy in other ways;
   c. you are pasting values only i.e. remove any special formatting;
   d. no single tenant/lease has multiple rows, merged cells &c;
   e. you do not copy non-lease information like licenses etc.

9. Do not include any rows with non-lease items of income like billboard revenue, utility licenses etc because they cannot be imported. The app has an "Other Income" screen where those streams or lump sums can be entered. If there are rows showing car park info tied to leases, convert these into a column format.

10. Check that every tenant has a value in the cell corresponding to:
   Tenant Name, Area, & either **Rent pa** or **Rent psf/psm**
   ● If a value is missing in any cell in these three columns, insert an artificial value to ensure existing details are imported.
   ● Values missing in other columns can be ignored.
   ● Vacancies must show a Market Rent (ERV) with the Rent value cells blank.

   If your spreadsheet is now looking something like this, the job is done.

	Tenant	Units	Area	Lease Start Date	Rent Review Date	Break Date	Lease Expiry Date	Rent pa	ERV psf	ERV pa	Rent psf		Comments
2	Tolkien Enterprises	Units 1-3	19718	3/01/17			2/01/25	228,870	15.09	297,531	£	11.61	Tenant currently seeking to negotiate contract renewal.
3	Shakespeare & Co	Units 4-6	30408	12/05/18	12/05/22	12/05/23	11/05/35	356,940	15.26	464,022	£	11.74	Tenant's 2023 break option subject to a minimum 12 months notice.
4	VACANT	Unit 7	10287						18.00	185,166	£	-	Vendor to provide 18 month rents, rates and S/C guarantee
5	Browning Inc	Unit 8	6223	12/10/16	12/10/22	12/10/22	11/10/25	79,900	16.69	103,870	£	12.84	Lease includes a schedule of condition. Tenant break option
6	Milton Ltd	Unit 9	5503	25/12/15			24/02/23	67,400	15.92	87,620	£	12.25	Renewal negotiations currently underway.
7	Chaucer Foods Ltd	Unit 10-11	12744	18/01/14	18/01/21	18/01/21	17/12/24	188,800	19.26	245,440	£	14.81	Tenants 2021 break option subject to a minimum of 6 months notice.
8	Donne Clothing	Unit 12a	21035	20/12/16	20/12/21		19/02/26	228,364	14.11	296,873	£	10.86	Lease includes a schedule of condition.
9	Kerouac & Sons	Unit 12b	20043	2/11/15	2/11/22	2/11/22	1/11/25	204,500	13.26	265,850	£	10.20	Lease includes a schedule of condition.
10	Wordsworth Books	Unit 12c	27629	9/07/16	24/07/22		7/07/23	250,750	11.80	325,975	£	9.08	Current rent of 250750 includes 2 car parking spaces.

11. Save this file, then exit Excel and send this clean rent roll file to the user who wishes to import the data into Dashflow. (Do not forget to inform the user of any artificial values that were inserted, break dates that were removed &c, because these issues can be easily fixed within Dashflow.)