

# Preparing the Import List

## What you need to consider

Use our "casavi\_Import Example" template for reference.

Additionally, you can find a blank template where you can enter your data for the import. casavi requires a set of information for the import, which must be included in the import list.

These sections are marked with color in the template. The following three levels are essential and can be included in one or more lists: Properties, Units, and Contacts.

**For your *properties*, you should import at least the following fields:**

- Reference ID (property) - This unique reference number will be reused for future imports or automatic assignment to a unit. It is usually assigned by your current system.
- Name - The name of the property is a mandatory field.

**For your *units*, you should import at least the following fields:**

- Reference ID (unit) - This unique reference number will be used for future imports or automatic updates.
- Name - The name of the unit is a mandatory field.
- Property ID - To ensure that your residential units are assigned to the correct property, the property's ID must always be provided.
- Address - Each unit is also assigned an address. This can be the street, including the house number, or simply a building designation like Building A.

**For your *contacts*, you should import at least the following fields:**

- Reference ID (contact) - This unique reference number will be used for future imports or automatic assignment to a unit. It is usually assigned by your current system. If you don't have a uniform ID, you can also use the contract number or a combination of various fields, but you need to build this beforehand in Excel.
- Name - The last name is a mandatory field. If possible, also provide the first name, as it is used in automated messages.
- Email - Invitations are sent automatically via email addresses, so you should provide as many email addresses as possible.

**WARNING:** The email address must have a valid format for automatic invitations to be sent. If you enter multiple email addresses in the field or include spaces/free text, the contact will not be imported, and an error will be displayed after the import.

Please note that we are also happy to handle the initial import for you. Send us the prepared list for this at: [onboarding@casavi.de](mailto:onboarding@casavi.de)