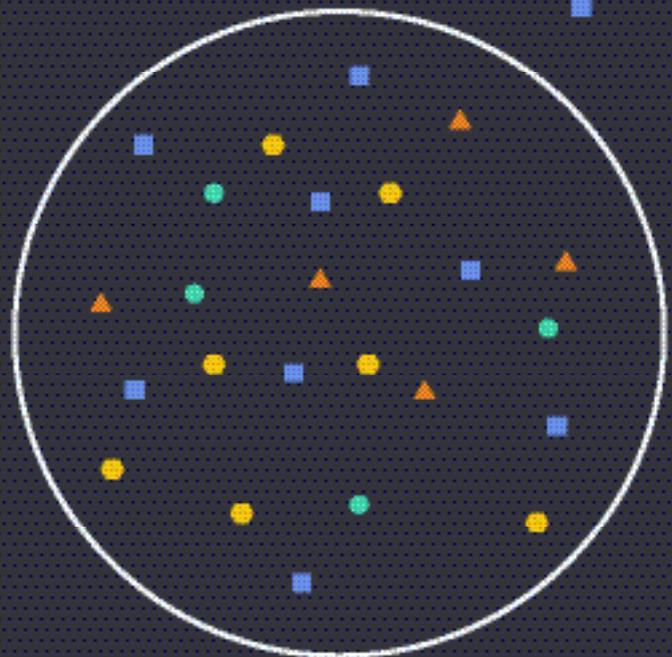# Custom Data Import Documentation

Hello, future Rexpert

The following documentation outlines the process and requirements for importing data from your existing system into your Rex account. For onboarding and existing Rex clients, we will require you to send us a copy of the data you want imported at least 3 weeks prior to the date of import. This allows us time to interpret, quote, transpose and import the data.

Please make sure you read and fully understand the following before proceeding with your custom import. Failure to do so may increase the time it takes for your data to be imported into Rex.

We will cover

1. How the import process works

2. Which records we can import into Rex

3. What happens with excess data that can't be imported

4. Specific information we require to complete the quote and why

5. How the costing works

6. The expected format of final data received

How the import process works

1. We receive a copy of data and your specific requirements as to how you would like the data imported 3 weeks prior to import

2. Our import team quote the cost of interpreting, transposing and importing the data

3. We relay this quote back to you

4. Quote is then accepted or declined

If the quote is accepted

1. We receive the final export of the data from you in the same format that was agreed upon in the initial review phase (please note any changes to the specification will set the time of import back)

2. We schedule our developers to interpret and write the necessary code to map your custom data into a format compatible with our system

3. We import the data

If the quote is declined

1. No further action needs to be taken

Which records we can import into Rex

The following records can be imported into Rex:

- Properties
- Contacts
- Match Profiles
- Appraisals
- Reminders

Associated notes may also be attached to properties, contacts and listings if a clear indication of how the note attaches to each record is provided.

For example:

If a spreadsheet containing properties and notes per row is provided, as is shown in the following table, we're able to directly infer that a relation exists between each item sharing the same row.

People-With-Notes.csv

ID	Name(s)	Note
1	Julie and Andrew Bloggs	Julie is the best point of contact

If records are however separated across multiple sheets, it may be possible to create a relation between the two datasets provided a clear relational indicator is provided. The following tables demonstrate this example. Note that the ID column has a matching value of "1" between People.csv and People-Notes.csv, this means the records are related and the notes are attached to the contact (Julie and Andrew) created from the first row.

People.csv

ID	Name(s)
1	Julie and Andrew Bloggs

People-Notes.csv

ID	Notes
1	Julie is the best point of contact
1	They're actually looking to move into a large house

Keeping in mind the methods described for relating contacts to notes, the same methods are also applicable for combining other data sets such as contracts and commissions.

It's also possible to mix differing data sets together such as contacts and properties.

In this case, the following example outlines a more complex relationship than provided above.

People.csv

ID	Name(s)
1	Julie and Andrew Bloggs

Properties.csv

ID	Related Contact	Street Number	Street name	...
A	1	29	Helen Street	...

In this case, a property record is created with an ID of 'A', while the contact with ID of '1' is attached as a relation. Note that in this example, a relationship type isn't specified so we'll need confirmation that the relationship is that the contact owns the property. We can't determine the relation on a contact by contact basis with the given data - however, if there are multiple types of relations, the data will need to be provided in an extra column specifying these details.
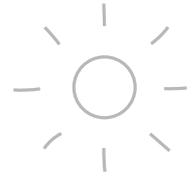
What happens with excess data that can't be imported

While we try our best to map as much data into Rex as possible, there's no 100% guarantee that this is always possible.

If incompatible data is supplied that has no way of being mapped to standard fields within the system, we can opt to accommodate this data as Notes. If the custom data contains meaningful information about records (metadata), they can instead be added as Tags (for example: Appraised, Landlord, Surveyor, Buyer, Tenant, etc.). When records are tagged, all records sharing the same tag(s) can be identified using the filter functionality in Rex.

Specific information we require from you

During this process we require specific information from you as to how you expect the data to be imported. Giving us precise instructions allows us to quote and work on exactly what data you expect to be able to access in Rex at the completion of the import, and will nullify any uncertainty in our interpretation of mapping the data.

Data quality requirements

In order to successfully import your data, it's extremely important that your data spreadsheets comply with these requirements:

- Proper column / data sets across multiple sheets. Please double check the spreadsheet(s) you are about to send through have consistent headings and data in the corresponding columns.

- Any data in your spreadsheets that is irrelevant should be completely removed from the spreadsheet before submission, otherwise we will quote on the extra time necessary to interpret and map the excess data.

- Orphaned data that makes no sense can't be interpreted by our software - for example some systems might provide a "Property Type" in the form of "A1,A2,A3" which makes no sense to us whatsoever. If we're to interpret this, a separate table containing these details should be provided or the values should all be replaced with their equivalent values (A1=>Residential, A2=>Rural, A3=>Commercial).

- Please note that data specified in separate sheets of the same spreadsheet will be ignored. Only columns and rows presented in the first sheet will be interpreted by the import software.

Other requirements

- We need you to inform us of exactly how you want the data imported. For example; What type of records do you want created? Do you want to relate the records to each other (eg. should contacts relate to properties)?

- If any data interpretations remain unclear we'll need to clarify these issues before import.

- We need you to inform us of which Rex user(s) these records are to be assigned to. Failure to make this clear will result in data being assigned to Rex Software Support Team by default.

- We need you to let us know what to do under the circumstance of finding a duplicate record in the import. We can either skip the duplicate detected, import the record as a new record, or merge the records together.

- Once both parties are clear on the EXACT format of what is to be imported, both parties will need to sign off on what's going to be worked on to ensure all expectations are met.

How the costing works

The costing for custom imports starts at $400+ GST for up to 6 hours included work. As a guide, a single spreadsheet with uncomplex data would fall under this category. All further work is charged at a rate of $100+GST per hour. The complexity of the import, and the amount of time it will take us to interpret, transpose and import your data will affect the costing of the quote. We base our quotes on experience - through previous imports we have conducted.

As a guide, the time it takes for an analysis of 20 columns takes roughly an hour. The more columns, the more time it is going to take us to analyse, and hence the higher the quote will be. We'll always assume you want as much data imported as possible, and will aim for that to happen. Failure to specify beforehand if not all data needs to be imported will obviously increase the quote.

The expected format of final data received

Once you are clear on the above and the quote has been relayed and accepted, we expect the final format of data to be in the exact format as quoted on. If it's an updated copy of the data we have quoted on please double check it is in the same format before sending it through to us.

Any other formats we receive will NOT be included in this import. However, they can be included in a separate new custom import request at a later date. Everything else provided in future related to this agreed import needs to be EXACTLY as agreed on initially, with no exceptions.