

Creating users and importing owners

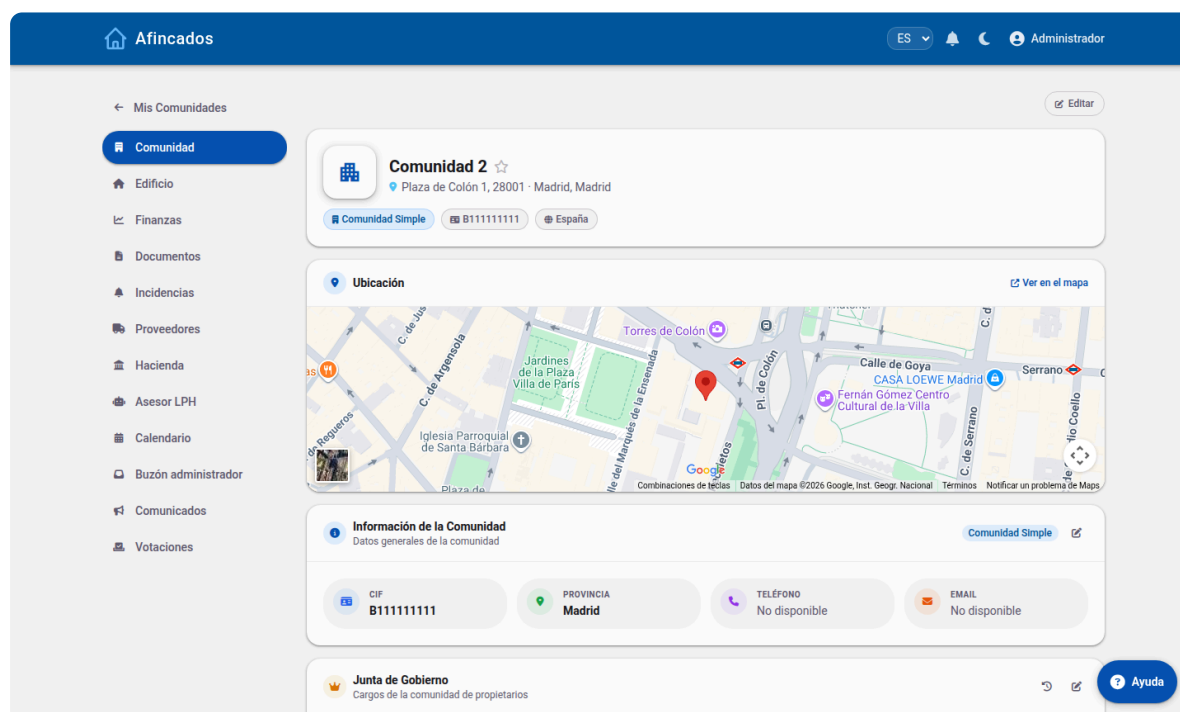
Create users one by one or import them in bulk from CSV and send them their credentials.

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Users are the people who can access the community. You can create them one at a time or import the whole list of owners at once from a spreadsheet.



Users and owners are managed from the Community tab.

Creating a user

1. Open the community and go to the **Users** tab.
2. Click **Create user**.
3. Fill in **name**, **email address** and **phone number**.
4. Give them a **role** within the community: resident, president, vice-president, board member or administrator.
5. Link them to their **property** or properties.
6. Save. The system generates a password and emails them their credentials.

Importing owners from CSV

If the community is new, importing the full list is by far the quickest route.

1. On the **Users** tab, click **Import**.
2. Download the **template** the application provides. Keep the columns as they are and do not change the header row.
3. Fill in one row per owner with their name, email, phone number and the property they own.
4. Upload the file. You will see a **preview** with the detected rows and any errors found.
5. Fix whatever is needed and confirm the import.

The application does not duplicate users: if an email address already exists in the community, its details are updated instead of creating a second account.

Sending and resending credentials

Every user receives their credentials by email when their account is created. If a resident cannot find them or their email address has changed, open their record and click **Resend credentials**: a new password is generated and sent again.

Editing or removing

- **Edit**: lets you change contact details, the role and the linked properties.
- **Delete**: removes the user from the community. You can select several and delete them in bulk.

When a home is sold, the usual approach is to remove the previous owner and create the new one, linking them to the same property so the fee history stays attached to the unit.