Import Template

ADITO Software GmbH

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Screenshots

The UX design of ADITO is continuously optimized for you. There may therefore be deviations in the screenshots.

Agenda

- Overview
- Use Cases
- Procedure
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  - Executing import with import template
- Data basis: CSV file
  - Viewing CSV file outside of ADITO
  - Not formatted ways of communication
- Import template
  - New creation
  - View of the CSV file
  - Defining data structure
  - Defining fields
  - Defining mapping
    - Manually recording mapping
    - Manually recording mapping with CSV
  - Importing data
  - Undo import
  - Uploading new file
  - Download of import file
- Copy import template

CSV import using import template

"Overview"

- Use import templates to import CSV files. This creates connection points through which imports can occur regularly or less frequently. They are used, for example, to import purchased leads, data from trade fair organizers, or data from other systems.
- **Requirement** for creating an import template is **knowledge of ADITO development**, which can be possessed by an ADITO developer or a trained project member.
- Data from **random Contexts** with **all their fields** can be imported.
  * The import templates in the xRM can be extended for the Contexts Company, Contact, Offer, Activity, Campaign, Product and Receipt. The selection of the Contexts can be extended via Customizing.

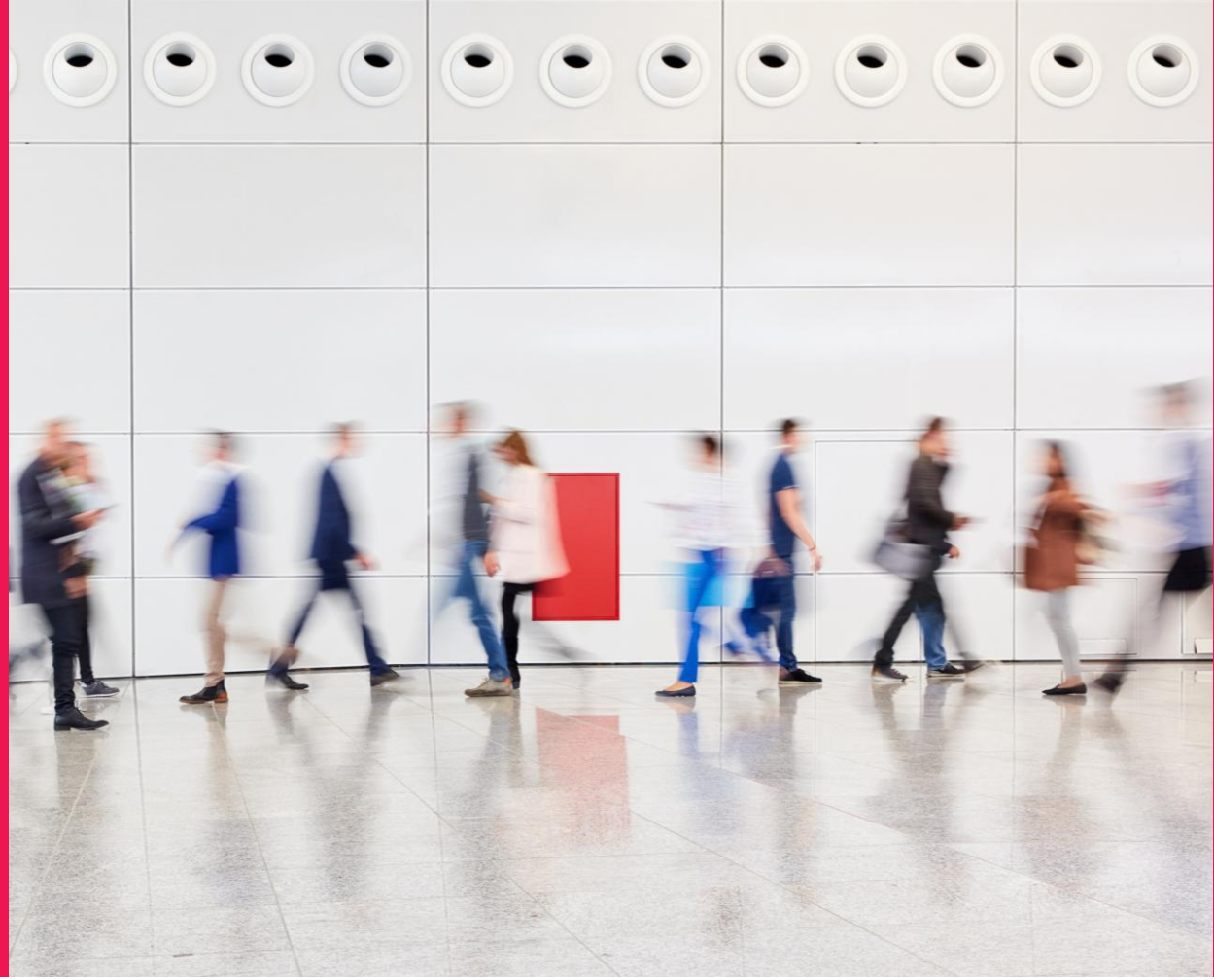
CSV import using import template

Use Case x

Structure of the presentation

The creation of import templates will be explained through two use cases. You can find the information on the right side of the slide indicating to which use case this information pertains.

Use Cases



Use Case

Use Case 1

Import of a file with "trade fair organizers"

Like every year, Tim Admin (IT department) receives the presenter-file of the trade fair from his colleagues from sales. They ask him if he can add these files into the CRM.

Therefore, Tim Admin uses the import template and checks the structure of the file in the first step.

It consists of: company name, salutation, country, industry, email address, language, ...

Use Case 2

Import of a file with "trade fair contacts"

Additionally, the Sales team has forwarded the trade fair contacts to Tim Admin in a CSV file for import.

The file includes the following information: letter salutation, company name, salutation, first name, last name, title, address, country, language, industry, relationship status, company phone number, personal phone number, and more.

Procedure

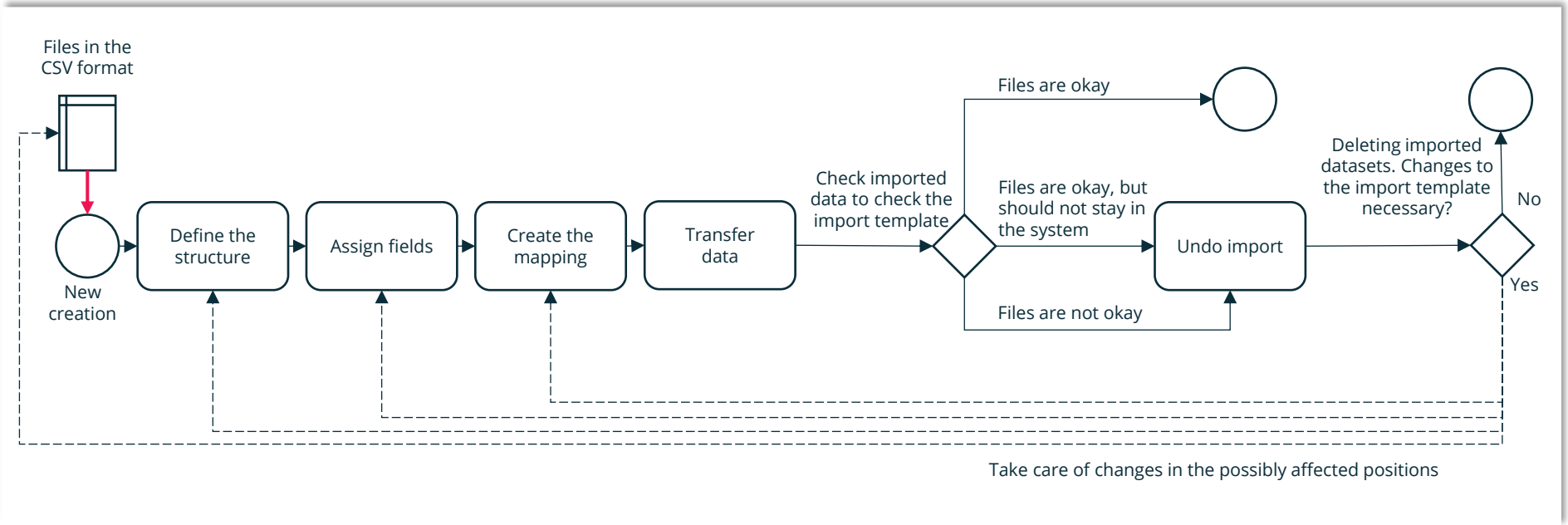
Procedure

General procedure

- Initial creation of import templates based on the CSV file, followed by the import of the files into the CRM.
- For the recurring import, such as the annual import of trade fair data, the plan is to create the import template once, ensuring that the structure of the CSV file remains consistent.
- To import CSV files with the same structure, you can use the copy function of the import templates to make slight adjustments to the new file.

Creating import template with CSV file

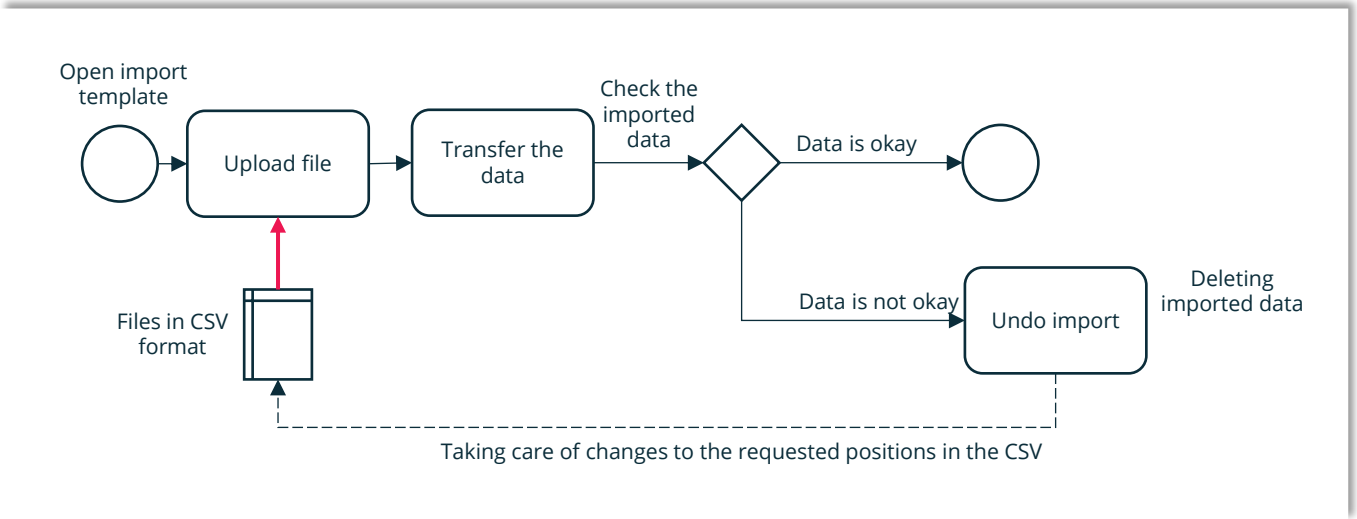
Requirement: The CSV file must be provided in the format in which it will be used in the future, including the names of the columns in the first line.



Perform the import with the import template

Regular import with the same import template

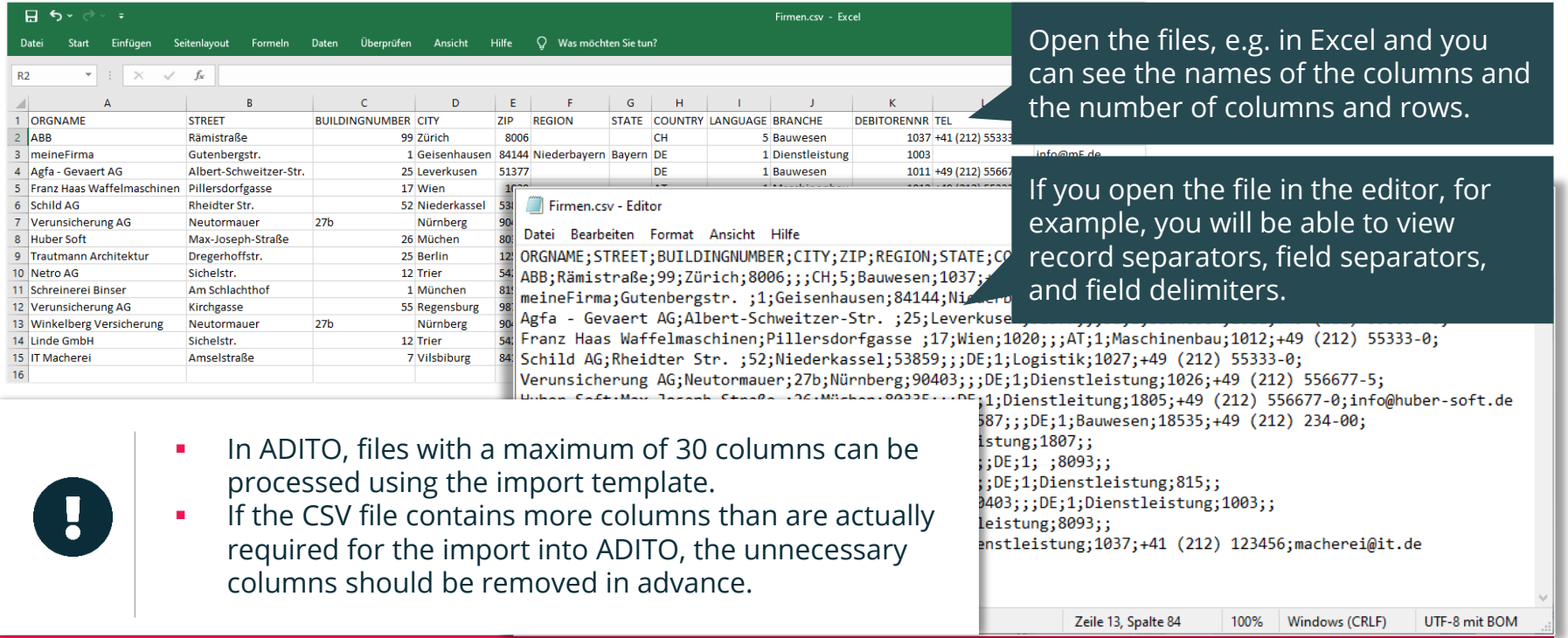
For the regular import, you must use an import template for a CSV file that maintains the same structure consistently. The same structure means identical column names in the same order.



Data basis: CSV File

Data basis: CSV file

Viewing CSV files outside of ADITO



Open the files, e.g. in Excel and you can see the names of the columns and the number of columns and rows.

If you open the file in the editor, for example, you will be able to view record separators, field separators, and field delimiters.

- In ADITO, files with a maximum of 30 columns can be processed using the import template.
- If the CSV file contains more columns than are actually required for the import into ADITO, the unnecessary columns should be removed in advance.

Data basis

Import of not formated communication methods

Communication data that deviates from the standard formatting is converted to the corresponding format during import and does not need to be uniformly formatted in the CSV file in advance. The formatting of the communication data is analogous to the logic employed by the user during input.

- If, for example, a website without "https://" is recorded, it is automatically added.
- If, for example, the country code is stored in the +XX format for telephone numbers, this information is used. If there is no country code in the field, it is determined based on the language of the user logged into the system.

It is advisable to include the correct country code in the CSV file for telephone numbers to ensure they are recorded accurately in the system; otherwise, an Austrian telephone number, for example, may have a German country code.

Example:

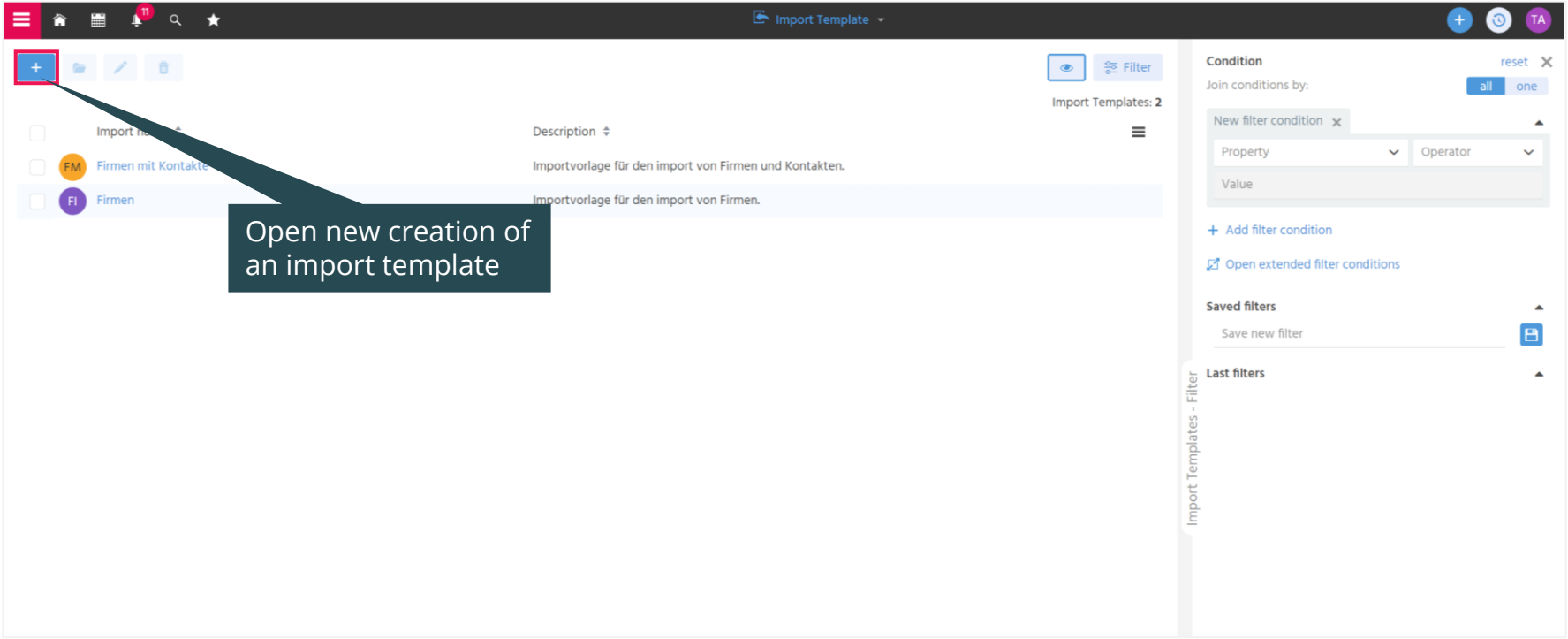
	Phone number	Website
In the CSV file is:	0180123456789	www.meineFirma.de
In the CRM, the following is taken over:	+49 180 1 23456789	https://www.meineFirma.de

Import template

New creation with CSV file

Import template

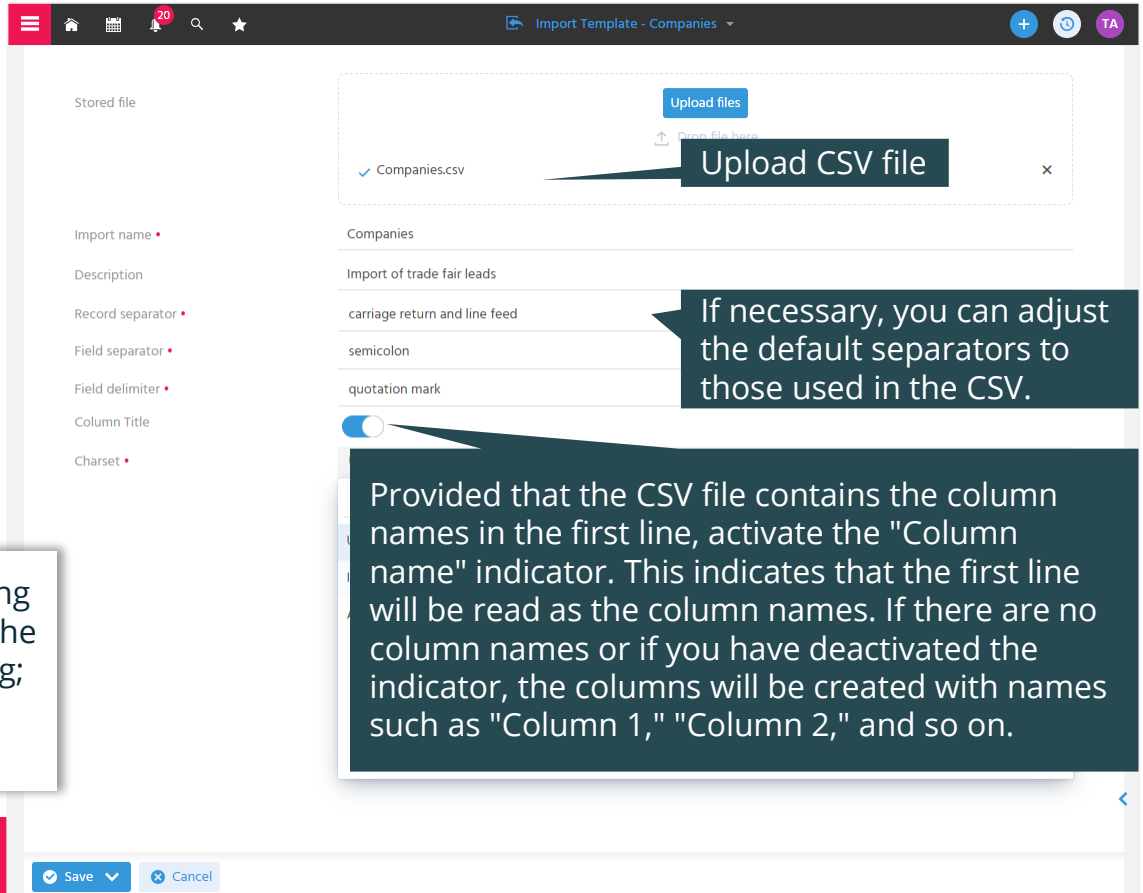
FilterView



Import template

Use Case 1

Creating an import template

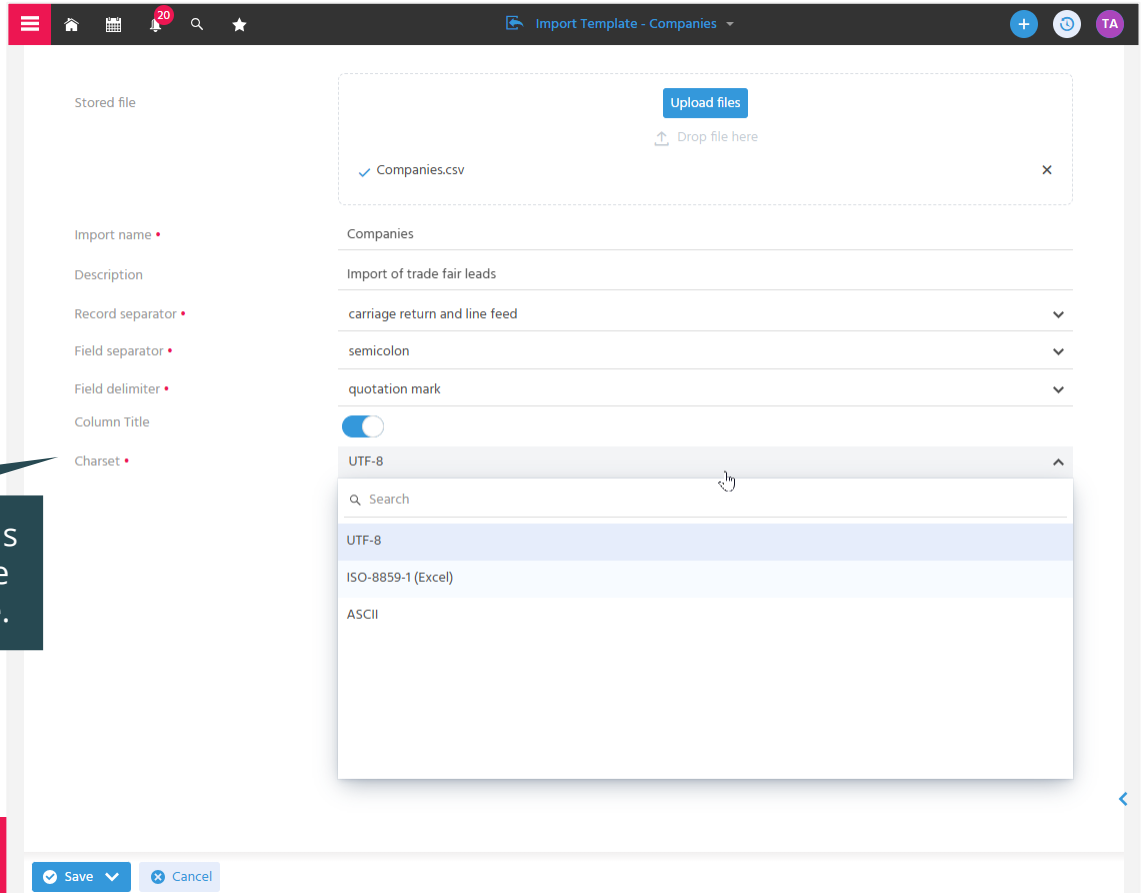


Upload the CSV file while creating the import template to import the column names for field mapping; otherwise, they will not be imported automatically.

Import template

Use Case 1

Creating an import template



UTF-8, ISO-8850-1, or ASCII can be used as the charset. This depends on whether the CSV file was created in Excel, for example.

Import template

Use Case 1

Tab "Database" – view the CSV file within ADITO

All data from the uploaded import file is displayed in the "Database" tab.

The "Database" tab is only displayed if a CSV file has been uploaded. If the initial creation was performed without an upload, the tab remains hidden.

Import Template - Firmen

FI

Firmen

Database | Data structure | Fields | Mappings | Imported data | Logs

Details

Description	Importvorlage für den import von Firmen.
Record separator	carriage return and line feed
Field separator	semicolon
Field delimiter	quotation mark
Column Title	Yes
Charset	UTF-8
Stored file	Firmen.csv

Database: 15

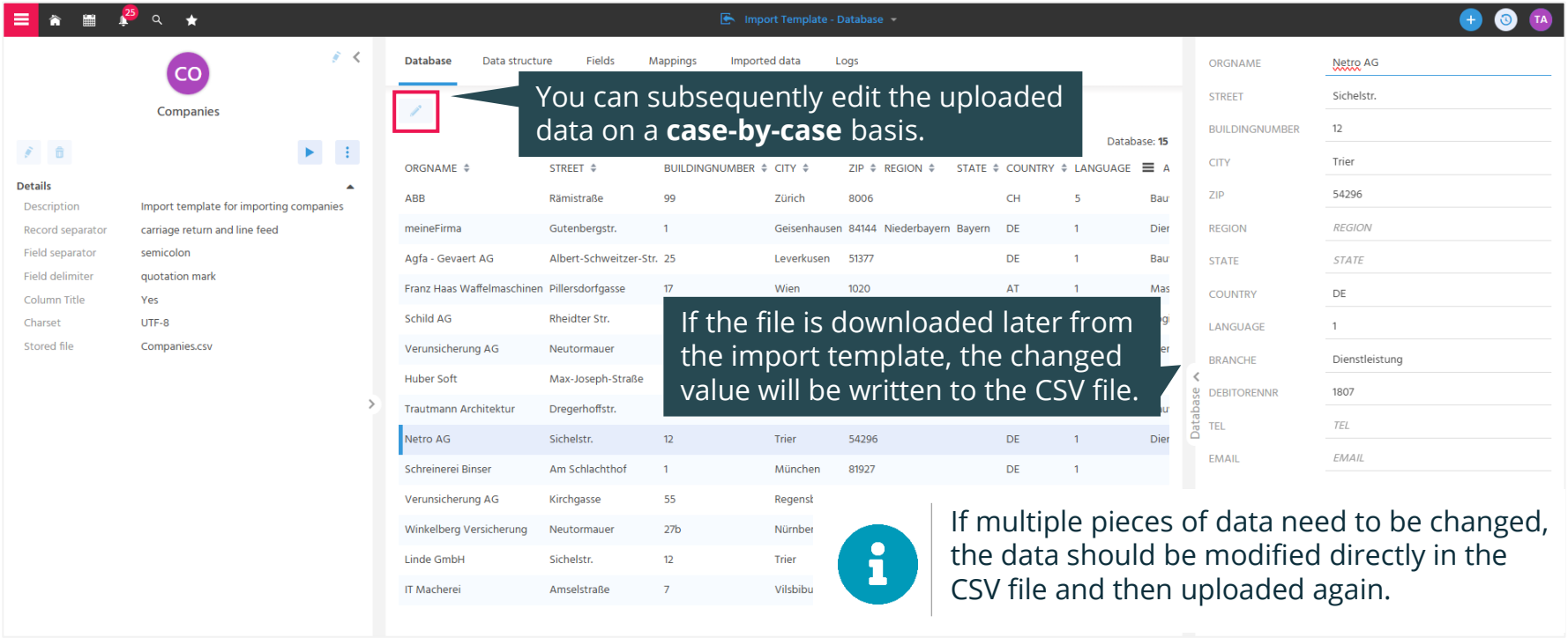
ORGNAME	STREET	BUILDINGNUMBER	CITY	ZIP	REGION	STATE	COUNTRY	LANGUAGE	BRANCHE	DEBITORENNR	TEL	EMAIL
ABB	Rämistraße	99	Zürich	8006					Bauwesen	1037	+41 (212) 55333-4	info@abb.com
meineFirma	Gutenbergstr.	1	Geisenhausen	84144	Niede							
Agfa - Gevaert AG	Albert-Schweitzer-Str.	25	Leverkusen	51377								
Franz Haas Waffelmaschinen	Pillersdorfgasse	17	Wien	1020			AT	1	Maschinenbau	1012	+49 (212) 55333-0	
Schild AG	Rheidter Str.	52	Niederkassel	53859			DE	1	Logistik	1027	+49 (212) 55333-0	
Verunsicherung AG	Neutormauer	27b										
Huber Soft	Max-Joseph-Straße	26										
Trautmann Architektur	Dregerhoffstr.	25										
Netro AG	Sichelstr.	12										
Schreinerei Binser	Am Schlachthof	1										

Column name from the CSV file if the "Column name" indicator has been activated.

In ADITO, files with a maximum of 30 columns can be processed using the import template.

Import template

Tab "Database"



If multiple pieces of data need to be changed, the data should be modified directly in the CSV file and then uploaded again.

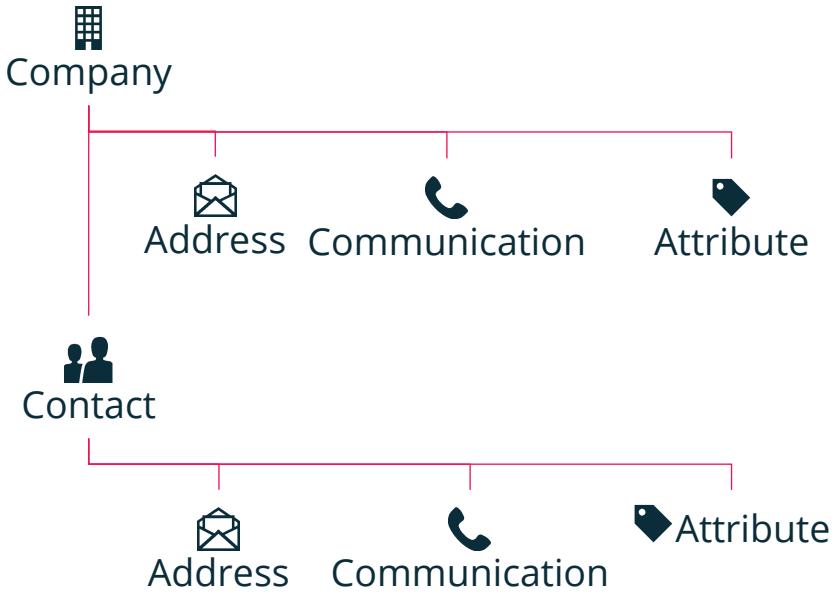
Define data structure for the import template

Data structure in the import template

Why is a data structure required?

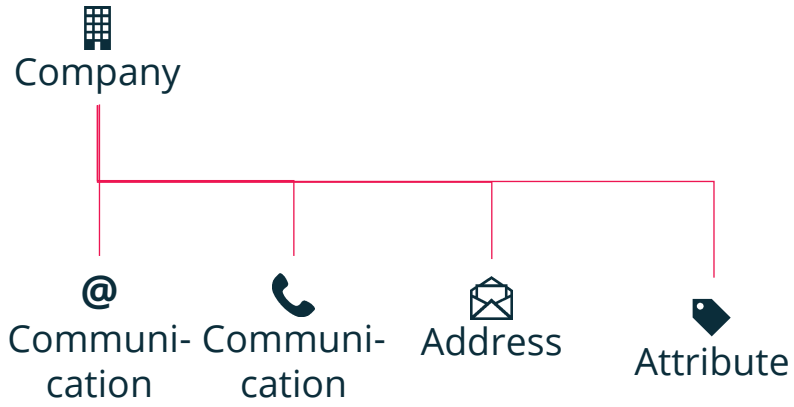
In the tab "Data structure", you define:

- The Contexts from which the fields are imported, as well as the relationship between those Contexts.
- Whether the data should be updated to prevent the creation of duplicates.

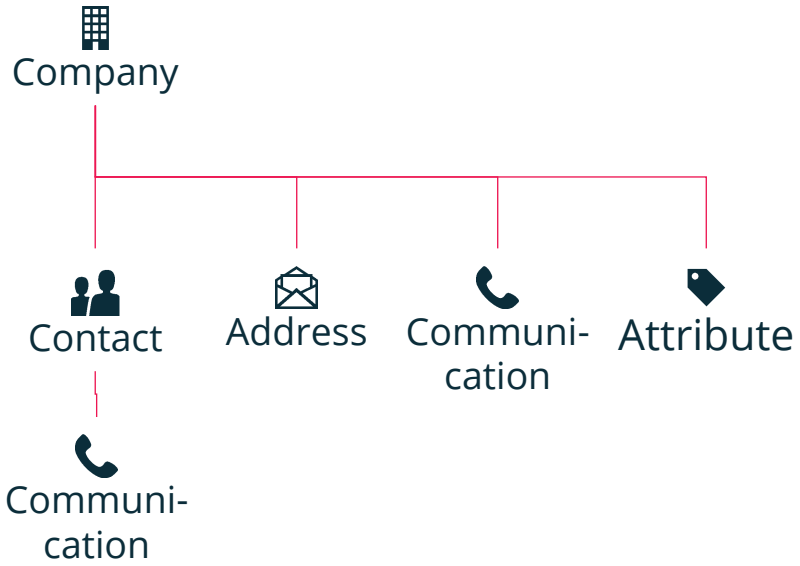


Data structure in the import template

Use Case 1

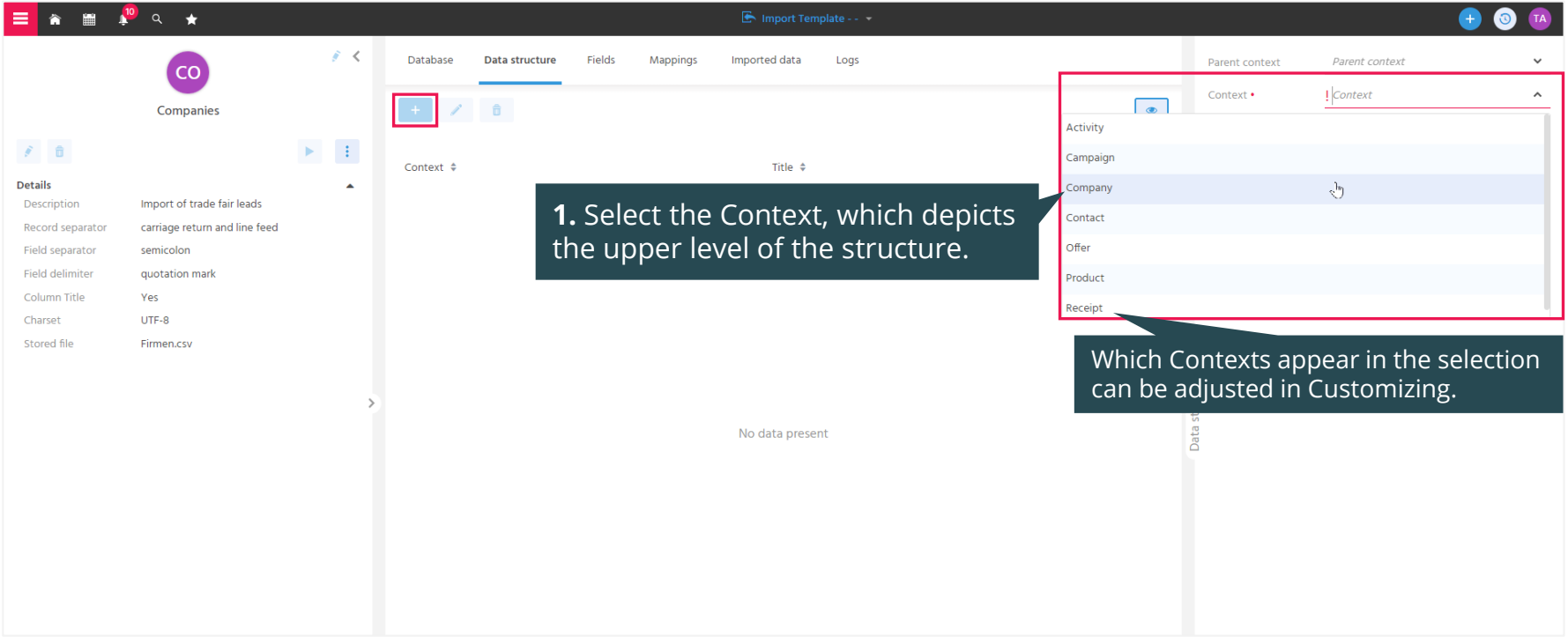


Use Case 2



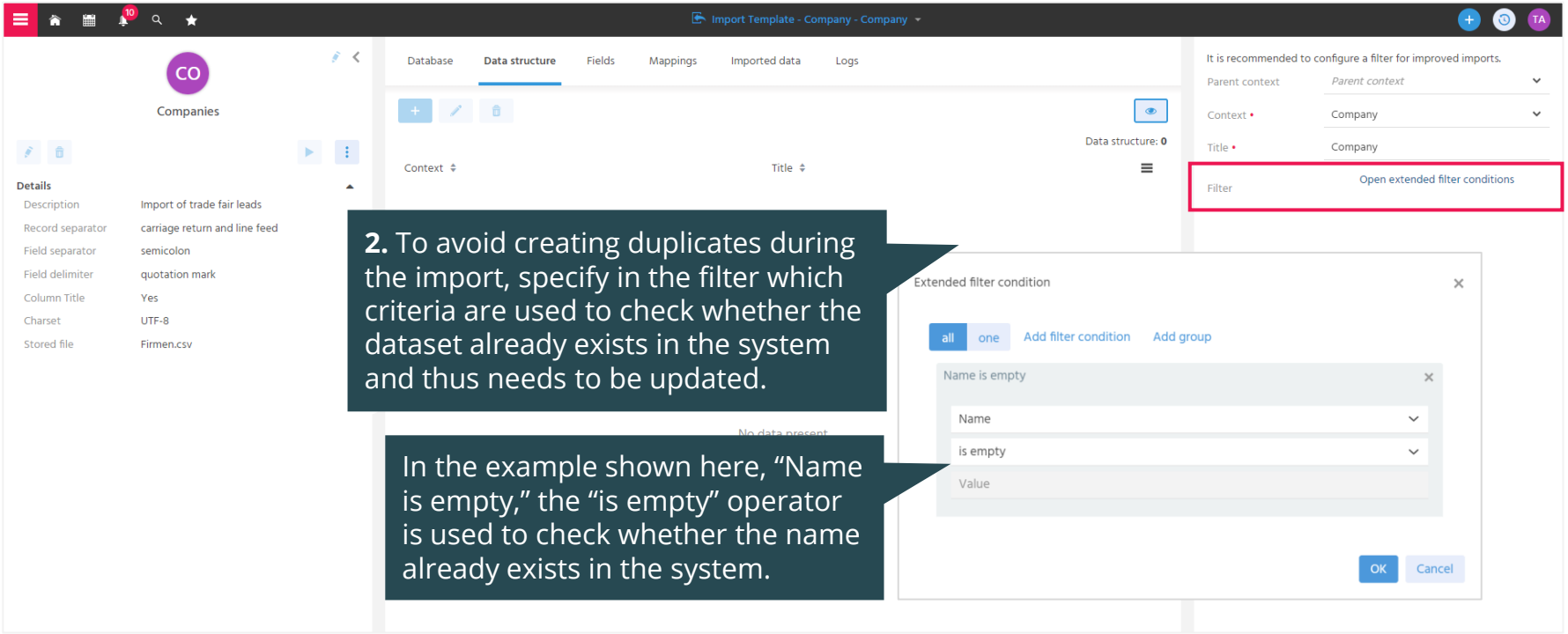
Data structure in the import template

Create first-level Context



Data structure in the import template

Creating Context of the first level: defining update handling



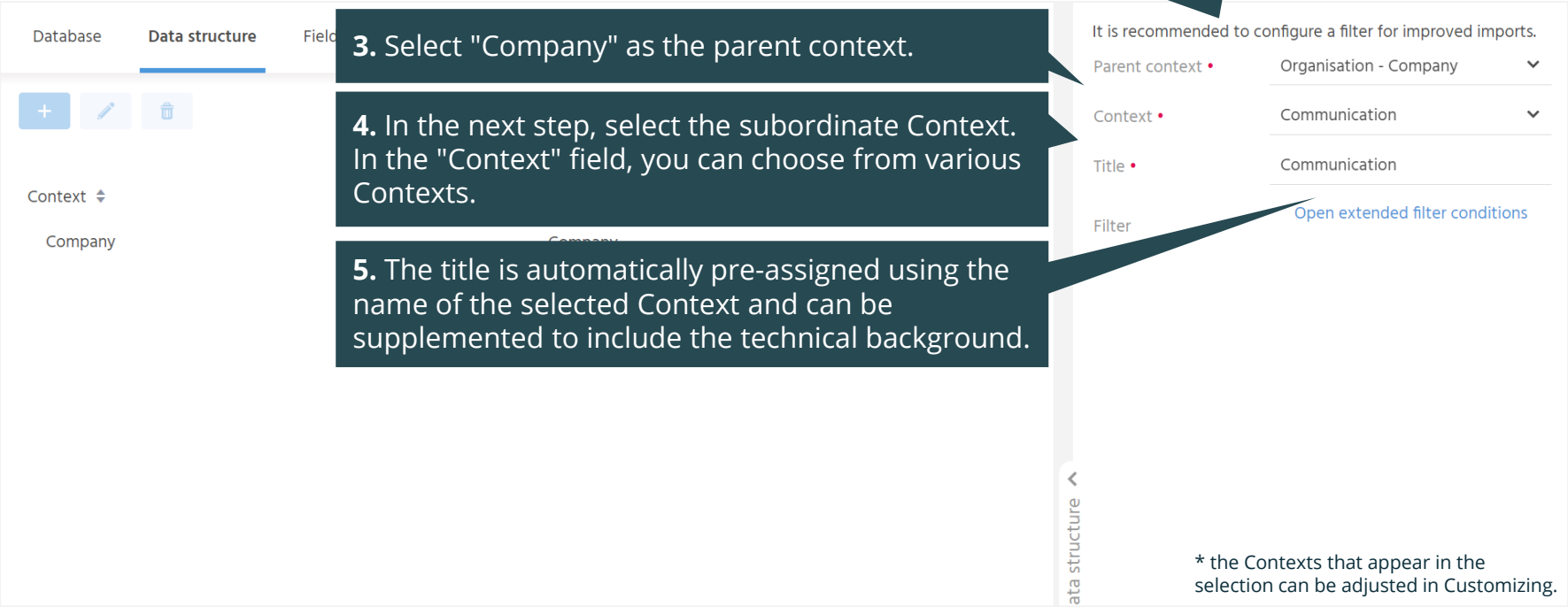
2. To avoid creating duplicates during the import, specify in the filter which criteria are used to check whether the dataset already exists in the system and thus needs to be updated.

In the example shown here, “Name is empty,” the “is empty” operator is used to check whether the name already exists in the system.

Data structure

Create subordinate Contexts.

Once the first level has been defined, the "Superordinate Context" field becomes mandatory, and the level that has already been created is available for selection.



3. Select "Company" as the parent context.

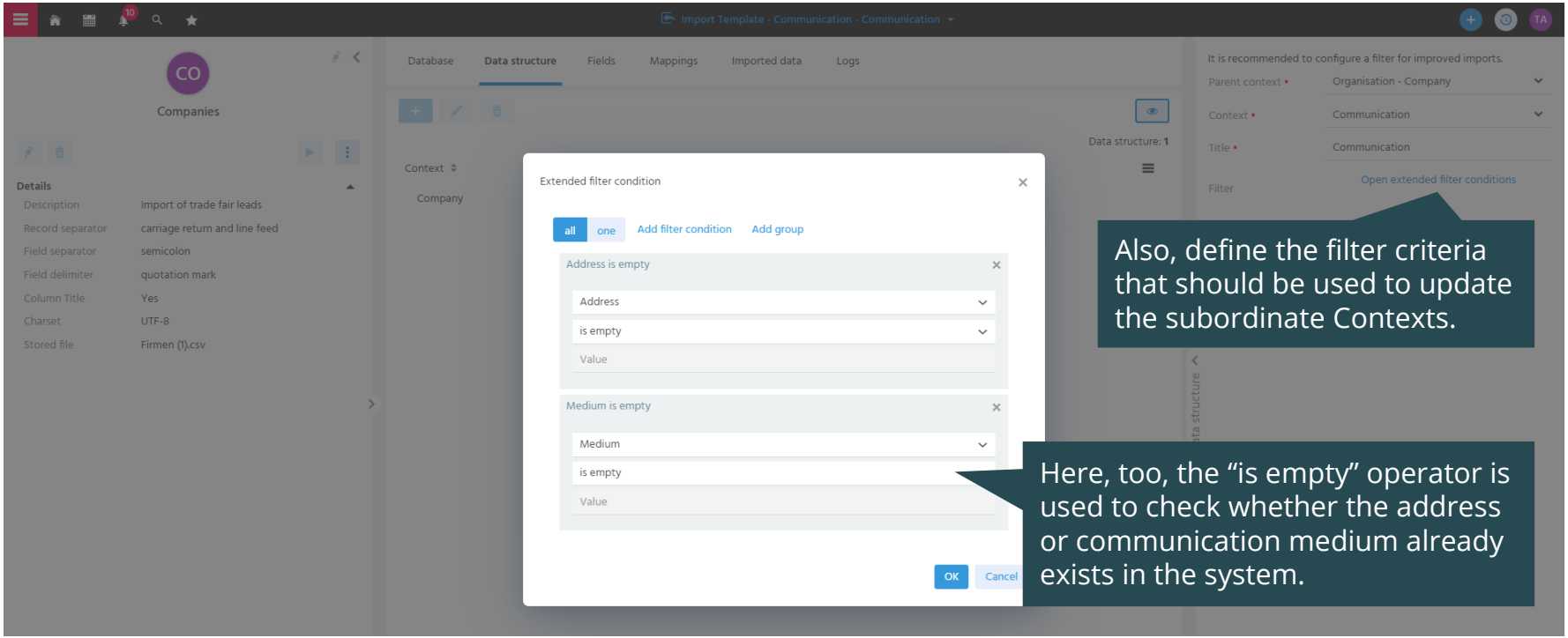
4. In the next step, select the subordinate Context. In the "Context" field, you can choose from various Contexts.

5. The title is automatically pre-assigned using the name of the selected Context and can be supplemented to include the technical background.

* the Contexts that appear in the selection can be adjusted in Customizing.

Data structure in the import template

Create subordinate Contexts: define update handling



Also, define the filter criteria that should be used to update the subordinate Contexts.

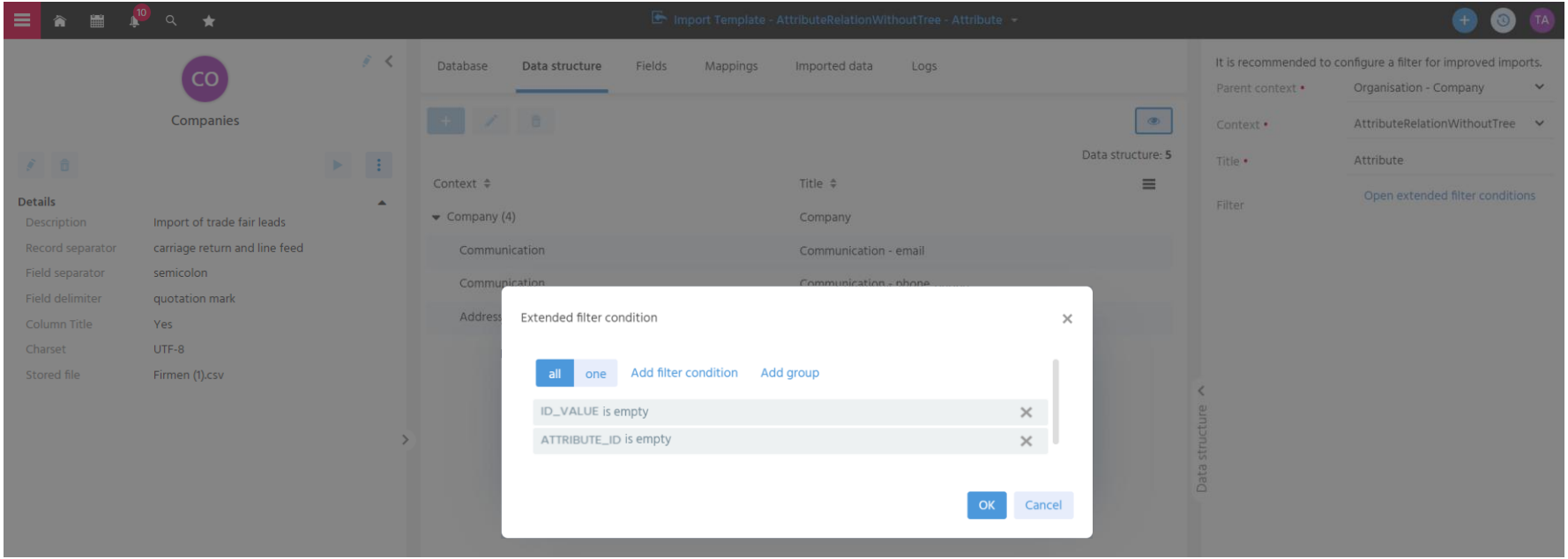
Here, too, the “is empty” operator is used to check whether the address or communication medium already exists in the system.

Data structure in the import template

Use Case 1

Create subordinate Contexts

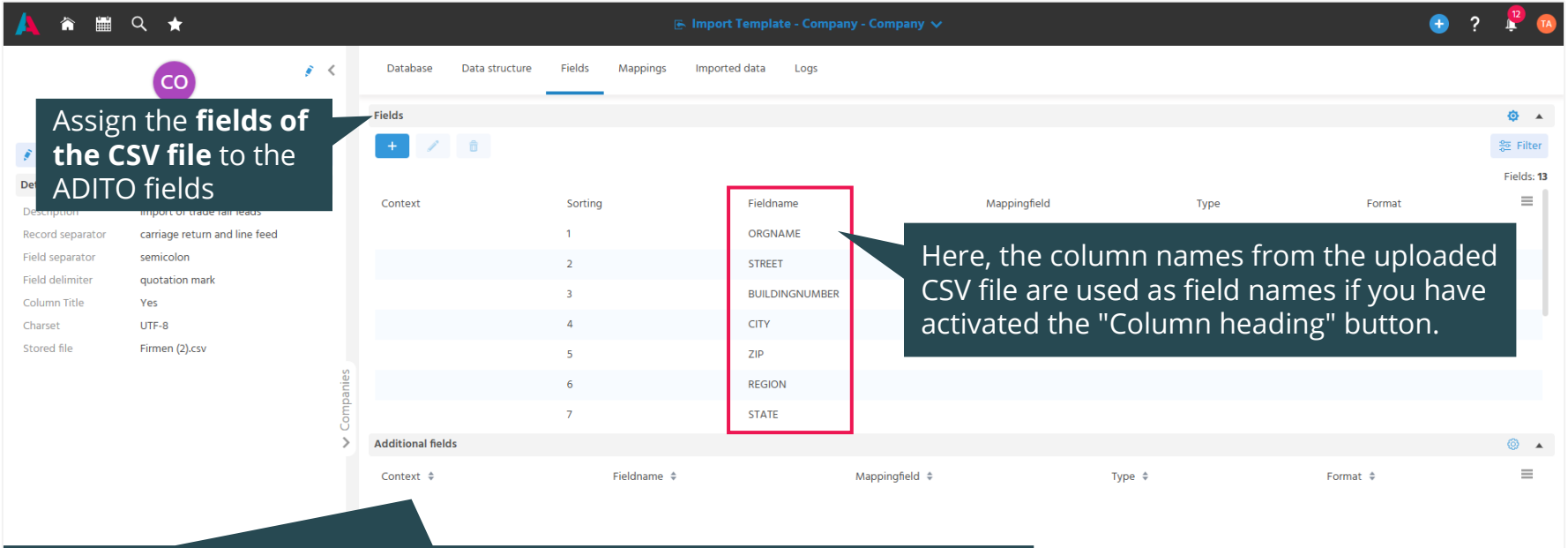
Use this procedure to define all subordinate Contexts and their update checks.



Assignment of fields in the Import Template

Fields in the import template

Tab "Fields"



Assign the **fields of the CSV file** to the ADITO fields

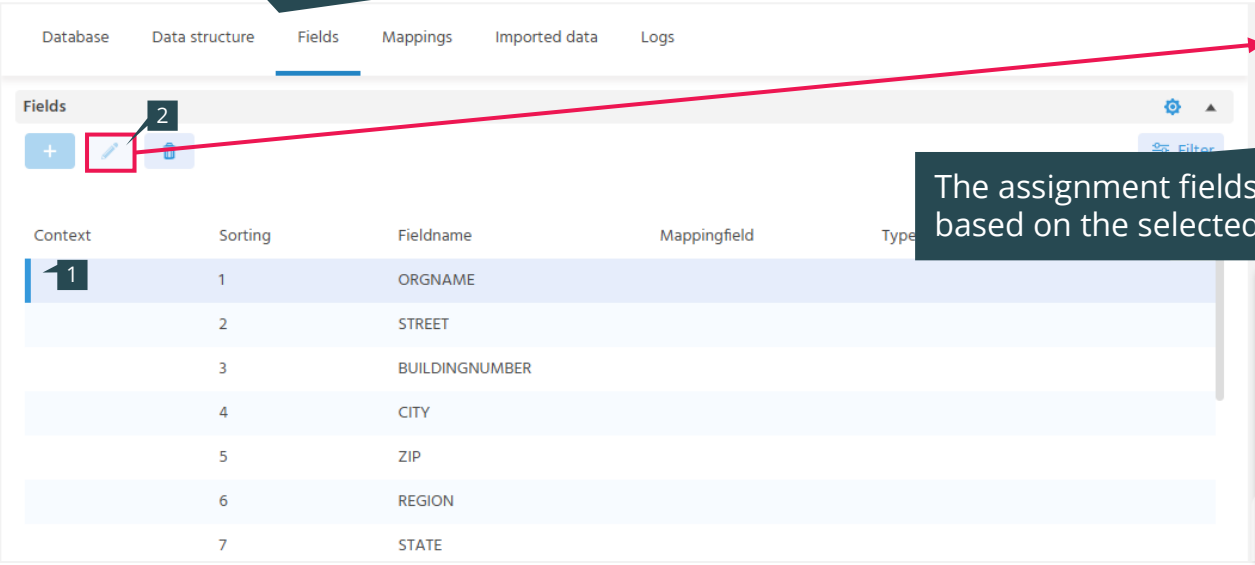
Here, the column names from the uploaded CSV file are used as field names if you have activated the "Column heading" button.

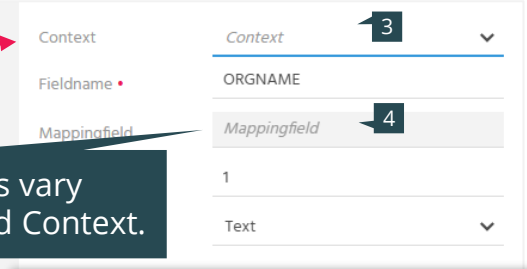
Fields that are not included in the CSV file but are required in ADITO due to mandatory field validation must be created here as additional fields.

Fields in the import template

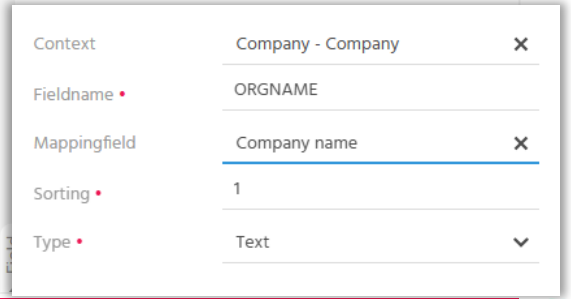
Assign the fields in the CSV file to the corresponding fields in the system

To assign the corresponding fields from the system to the assignment fields, select them (1) and click on the Edit button (2). Next, select the Context that you defined in the import structure (3) and assign the mapping field from the system (4).





The assignment fields vary based on the selected Context.



Fields in the import template

Assign fields of the CSV file to the fields in the system – type "Text"

Database | Data structure | Fields | Mappings | Imported data | Logs

Fields

Filter

Fields: 13

Context	Sorting	Fieldname	Mappingfield	Type	Format
	1	ORGNAME			
	2	STREET			
	3	BUILDINGNUMBER			
	4	CITY			
	5	ZIP			
	6	REGION			
	7	STATE			

Field

Context	*Context*
Fieldname •	ORGNAME
Mappingfield	*Mappingfield*
Sorting •	1
Type •	Text

The "Text" type is used when simple text is to be imported.

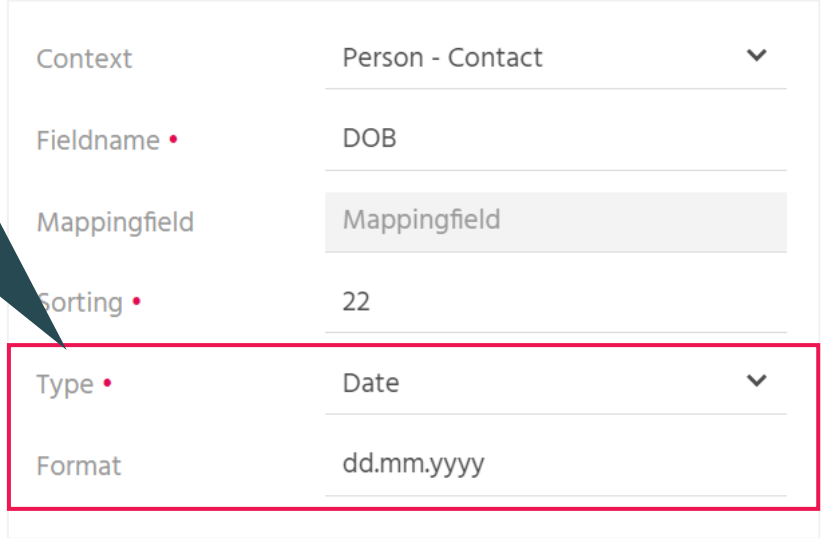
Fields in the import template

Assign fields of the CSV file to the fields in the system – type "Date"

The “Date" type is used when simple text is to be imported.

The "Format" field appears, in which the date formatting is specified.

Any formatting options can be specified, for example: dd.mm.yyyy, dd.mm.yyyy hh:mm.

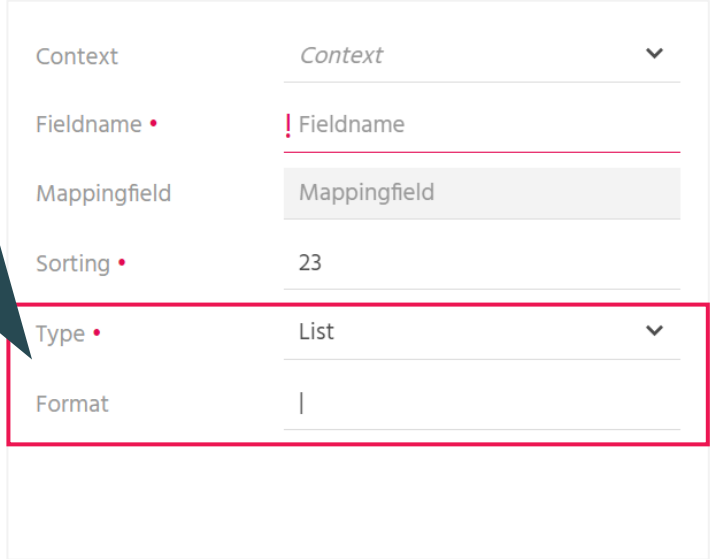


Fields in the import template

Assign the fields of the CSV file to the fields in the system by selecting the type "List"

The "List" type is used when a link needs to be imported, such as a connection between activities and a contact or company, among others.

The "Format" field is displayed, where, for example, "|" can be entered as the separator. The input is recorded as an array that can be "further processed" accordingly. The structure of the "further processing" must be defined in Customizing.



Fields in the import template

Assign the fields in the CSV file to the corresponding fields in the system for sorting

Database | Data structure | Fields | Mappings | Imported data | Logs

Fields

Filter

Fields: **13**

Context	Sorting	Fieldname	Mappingfield	Type	Format
Company - Company	1	ORGNAME	Company name	Text	
Addresses - Adresse	2			Text	
Addresses - Adresse	3			Text	
Addresses - Adresse	4			Text	
Addresses - Adresse	5			Text	
Addresses - Adresse	6			Text	
Addresses - Adresse	7	STATE		Text	
Addresses - Adresse	8	COUNTRY	Country	Text	
Company - Company	9	LANGUAGE		Text	

The sorting order corresponds to the sequence in the import file. You can change the order by adjusting the numbering in edit mode; however, the order of the CSV file is typically retained.

Fields in the import template

Use Case 1

Assign the fields in the CSV file to the corresponding fields in the system

Import Template - Fields

CO

Companies

Details

Description	Importvorlage für den import von Firmen.
Record separator	carriage return and line feed
Field separator	semicolon
Field delimiter	quotation mark
Column Title	Yes
Charset	UTF-8
Stored file	Firmen.csv

Firmen

Database | Data structure | Fields | Mappings | Imported data | Logs

Fields

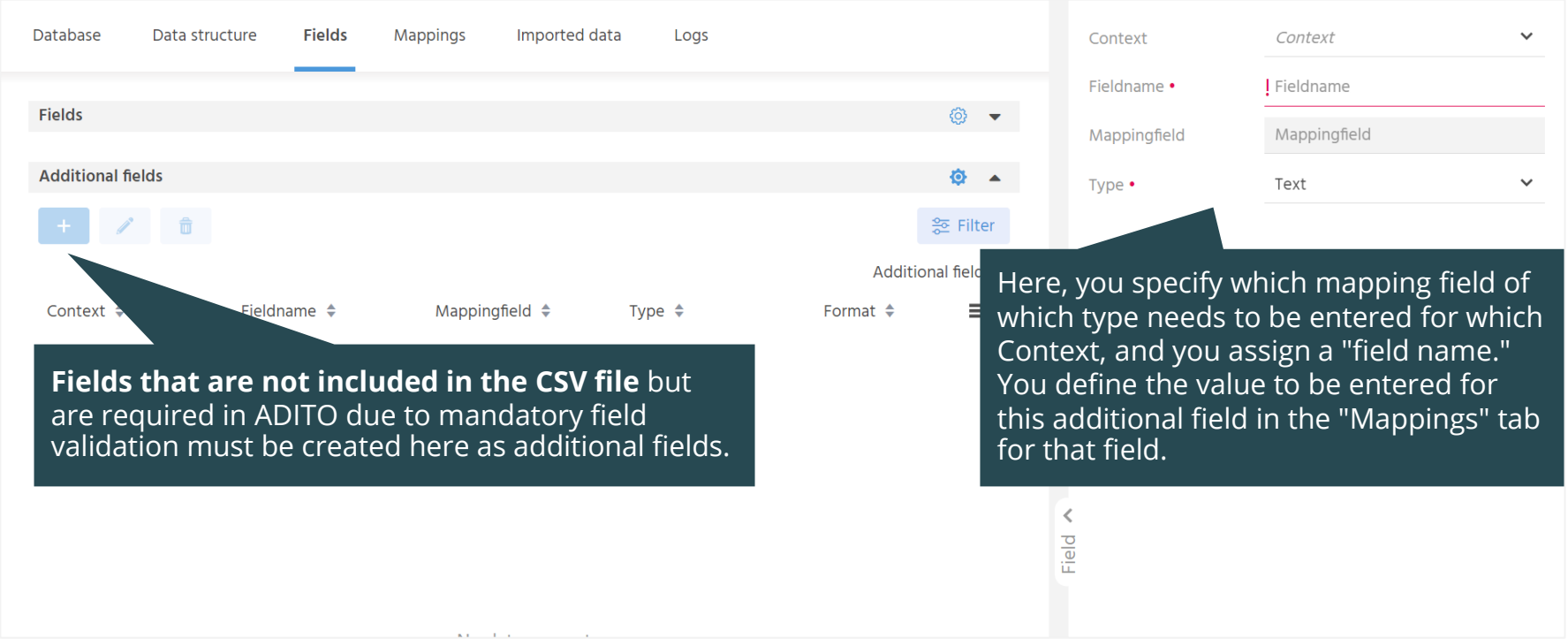
Filter

Fields: 13

Context	Sorting	Fieldname	Mappingfield	Type	Format
Company - Company	1	ORGNAME	Company name	Text	
Addresses - Adresse	2	STREET	Street	Text	
Addresses - Adresse	3	BUILDINGNUMBER	Building no.	Text	
Addresses - Adresse	4	CITY	City	Text	
Addresses - Adresse	5	ZIP	ZIP	Text	
Addresses - Adresse	6	REGION	Region	Text	
Addresses - Adresse	7	STATE		Text	
Addresses - Adresse	8	COUNTRY	Country	Text	
Company - Company	9	LANGUAGE		Text	
Attributes - Eigenschaften	10	BRANCHE		Text	
Company - Company	11	DEBITORENNR	Customer code	Text	
Communication - Kommunikation - Telefon	12	TEL		Text	
Communication - Kommunikation - E-Mail	13	EMAIL		Text	

Fields in the import template

Specify additional fields



Fields that are not included in the CSV file but are required in ADITO due to mandatory field validation must be created here as additional fields.

Here, you specify which mapping field of which type needs to be entered for which Context, and you assign a "field name." You define the value to be entered for this additional field in the "Mappings" tab for that field.

Fields in the import template

Use Case 1

Specify additional fields

Import Template - Companies

CO

Companies

Details

Description	Importvorlage für den import von Firmen.
Record separator	carriage return and line feed
Field separator	semicolon
Field delimiter	quotation mark
Column Title	Yes
Charset	UTF-8
Stored file	Firmen.csv

Database | Data structure | **Fields** | Mappings | Imported data | Logs

Fields

Additional fields

Filter

Additional fields: **3**

Context	Fieldname	Mappingfield	Type	Format
Communication - Kommunikation - Telefon	MEDIUM - TEL	Medium (MEDIUM_ID)	Text	
Communication - Kommunikation - E-Mail	MEDIUM - E-MAIL	Medium (MEDIUM_ID)	Text	
AttributeRelationWithoutTree - Eigenschafte	ATTRIBUTE - BRANCHE	ATTRIBUTE_ID	Text	

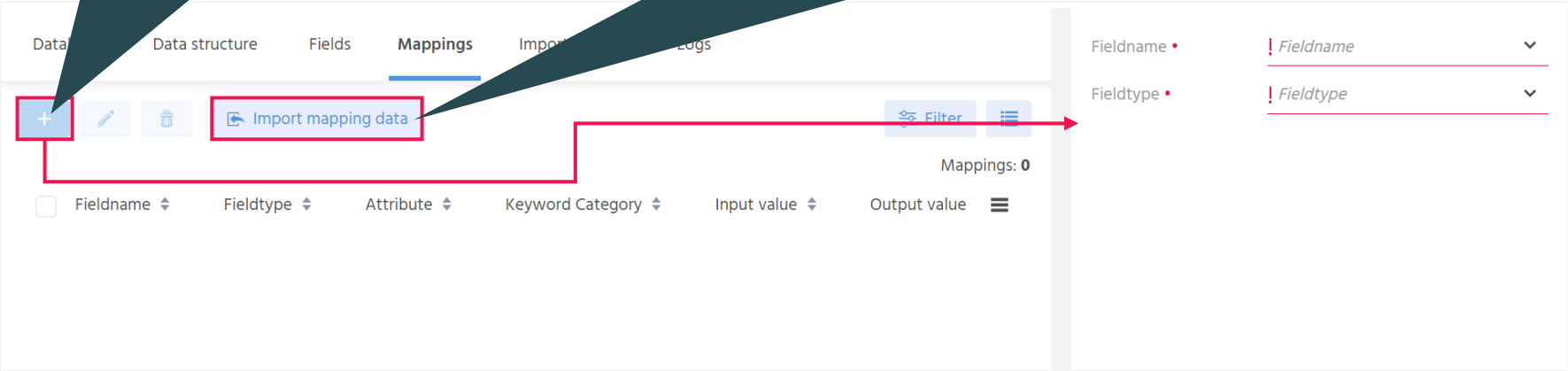
Mappings

Mappings

Creating "Mappings"

To define mappings for **individual fields**, please use the plus button.

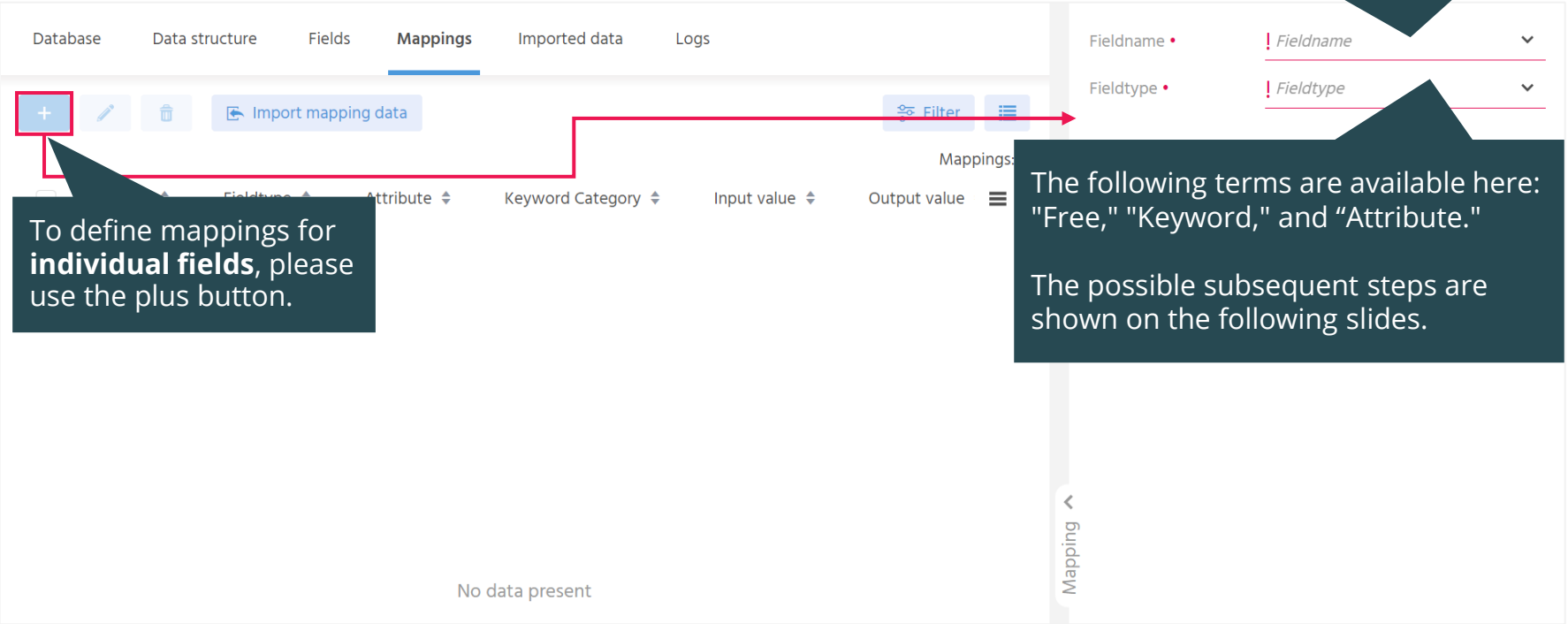
To define mappings for **multiple fields**, such as keywords, use the option to import CSV files in which you have defined the mappings.



Mappings

Create "Mappings" individually

The fields you defined in the "Fields" tab are available here, including both the "Import fields" and the "Additional fields.



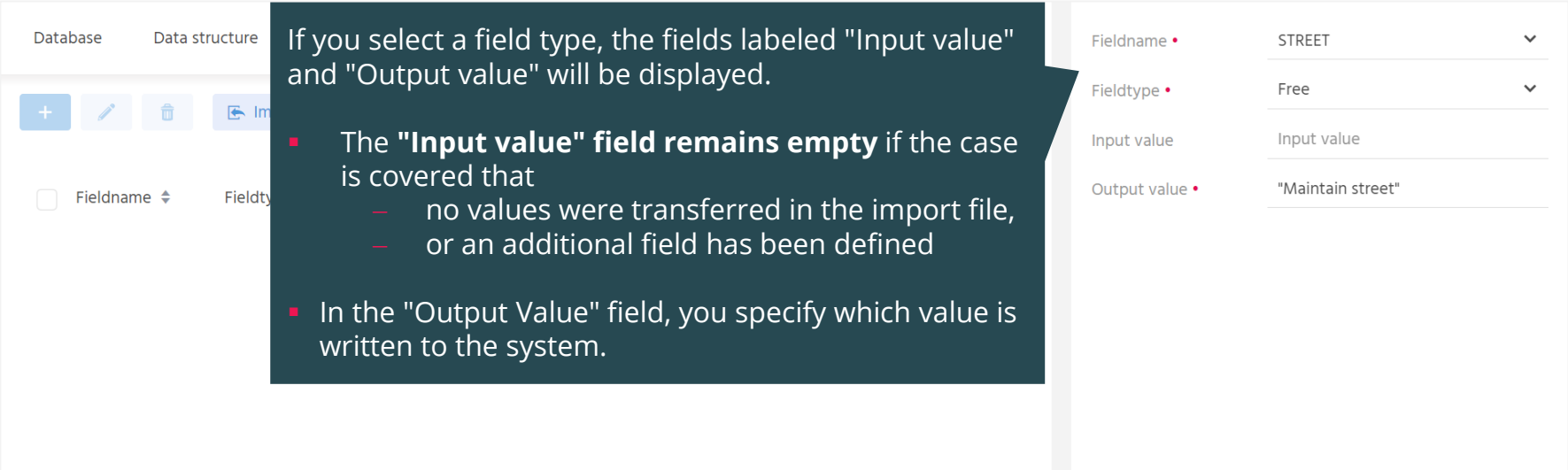
To define mappings for **individual fields**, please use the plus button.

The following terms are available here: "Free," "Keyword," and “Attribute."

The possible subsequent steps are shown on the following slides.

Mappings

Create "Mappings" individually – "Input value" is empty



If you select a field type, the fields labeled "Input value" and "Output value" will be displayed.

- The **"Input value" field remains empty** if the case is covered that
  - no values were transferred in the import file,
  - or an additional field has been defined
- In the "Output Value" field, you specify which value is written to the system.

Example:

- If the "Company street" field in the company data import file is empty, the system should display "Maintain street" instead of the company's street name.
- If an attribute has been entered as an additional field, please enter the value to be set for the attribute here.

Mappings

Create "Mappings" individually – "Input value" is "Free"

If you select the **"Free" field** type, the "Input Value" and "Output Value" fields will be displayed.

- The "Input value" field records the value used in the import file.
- In the "Output value" field, you specify the value that will be written to the system.

BRANCHE	Attribute	Contact_Industry		Logistik	Contact_Logistics
BRANCHE	Attribute	Contact_Industry		Maschinenbau	Contact_Mechanical engineering
BRANCHE	Attribute	Contact_Industry		Dienstleistung	Contact
LANGUAGE	Free			1	deu
LANGUAGE	Free			5	eng
MEDIUM - E-MAIL	Keyword		CommunicationMedium		E-Mail
MEDIUM - TEL	Keyword		CommunicationMedium		Phone

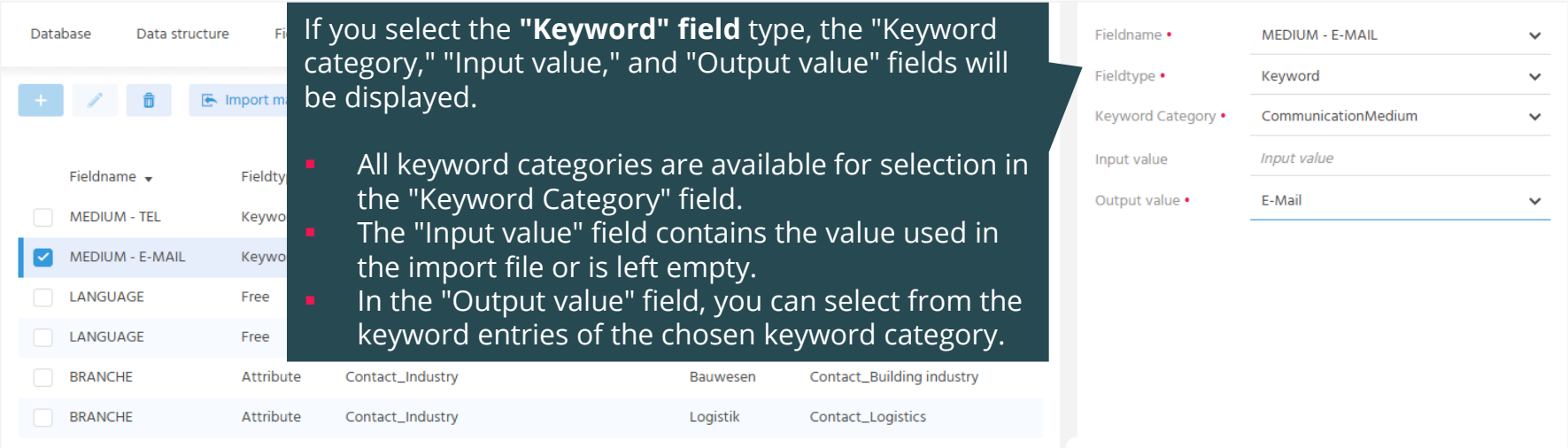
Fieldname •	LANGUAGE
Fieldtype •	Free
Input value	5
Output value •	eng

Example:

- If the "Country" field in the import file contains the values "Germany," "France," or "Italy," then these must be mapped to their corresponding ISO2 codes (DE, FR, IT, etc.)
- For example, the language was recorded with digits in the CSV file and must be mapped to the ISO 639-2 code (deu, eng).

Mappings

Create "Mappings" individually – "Keyword" field type



If you select the **"Keyword" field** type, the "Keyword category," "Input value," and "Output value" fields will be displayed.

- All keyword categories are available for selection in the "Keyword Category" field.
- The "Input value" field contains the value used in the import file or is left empty.
- In the "Output value" field, you can select from the keyword entries of the chosen keyword category.

Example:

– If the value "Customer" is entered in the "Company type" field when importing a company, it should be replaced by "Customer" in the system.

– The type of communication medium is mapped through the additional fields. Consequently, the input value is empty, while the output value is specified here (as shown in the screenshot).

Mappings

Create "Mappings" individually for the “Attribute" field type

If you select the **"Attribute" field** type, the "Input value" and "Output value" fields for the "Attribute" are displayed.

- All attributes are available for selection in the "Attribute" field.
- The "Input value" field records the value that is used in the import file.
- In the "Output value" field, select the subordinate attribute to be entered into the system.

LANGUAGE	Free		1	deu
LANGUAGE	Free		5	eng
BRANCHE	Attribute	Contact_Industry	Bauwesen	Contact_Building industry
BRANCHE	Attribute	Contact_Industry	Logistik	Contact_Logistics
BRANCHE	Attribute	Contact_Industry	Maschinenbau	Contact_Mechanical engineering
BRANCHE	Attribute	Contact_Industry	Dienstleistung	Contact_Financial s
ATTRIBUTE - BRANCHE	Attribute	Contact_Assessment		Contact_Industry

Fieldname •	BRANCHE
Fieldtype •	Attribute
Attribute •	Industry
Input value	Dienstleistung
Output value •	Contact_Financial service

The output value for keywords and attributes is displayed in the table under "Title (original language)”.

Mappings

Create "Mappings" individually – "Attribute" field type

Database | Data structure | Fields | **Mappings** | Imported data | Logs

Import mapping data | Filter

Mappings: **10**

Fieldname	Fieldtype	Attribute	Keyword Category	Input value	Output value
Adressen Typ	Keyword				Office address
Medium Kommunikation Person	Keyword				Phone
Attribute	Attribute	Contact_Assessment			Contact_Industry
BRANCHE	Attribute	Contact_Industry		Maschinenbau	Contact_Mechanical engi
BRANCHE	Attribute	Contact_Industry		Dienstleistung	Contact_Service
BRANCHE	Attribute	Contact_Industry		Bauwesen	Contact_Building industry
BRANCHE	Attribute	Contact_Industry		Logistik	Contact_Logistics
LANGUAGE	Free			5	eng
LANGUAGE	Free			1	deu
Medium Kommunikation Firma	Keyword				Phone

Fieldname •	BRANCHE
Fieldtype •	Attribute
Attribute •	Industry
Input value	Dienstleistung
Output value •	Contact_Service

In order to map attributes such as "Industry" as a subordinate attribute of "Assessment," the "Assessment" attribute must be mapped to the newly created field “Attribute."

The individual selection values of the "Industry" attribute are then mapped to the “BRANCHE" import field.

Mappings

Import mapping

Database | Data structure | Fields | **Mappings** | Imported data | Logs

+ | Import mapping data | Filter

Mappings: **0**

Fieldname	Fieldtype	Attribute	Keyword Category	Input value	Output value

No data present

Extensive mappings can be uploaded as a separate CSV file.

Mapping import

Fieldname • ! *Fieldname*

Fieldtype • ! *Fieldtype*

Field delimiter • quotation mark

Field separator • semicolon

Record separator • carriage return and line feed

Required value is missing

Please provide the CSV in the following format without column headers.
Column1: Input value
Column2: Output value

File • Upload files

Drop file here

Required value is missing

Execute import

Mappings

Use Case 2

Mapping

Database | Data structure | Fields | **Mappings** | Imported data | Logs

+ | Import mapping data | Filter

Mappings: **10**

Fieldname	Fieldtype	Attribute	Keyword Category	Input value	Output value
Adressen Typ	Keyword		AddressType		Office address
Attribute	Attribute	Contact_Assessment			Contact_Industry
BRANCHE	Attribute	Contact_Industry		Maschinenbau	Contact_Mechanical engineering
BRANCHE	Attribute	Contact_Industry		Dienstleistung	Contact_Service
BRANCHE	Attribute	Contact_Industry		Bauwesen	Contact_Building industry
BRANCHE	Attribute	Contact_Industry		Logistik	Contact_Logistics
LANGUAGE	Free			5	eng
LANGUAGE	Free			1	deu
Medium Kommunikation Firma	Keyword		CommunicationMedium		Phone
Medium Kommunikation Person	Keyword		CommunicationMedium		Phone

Import data

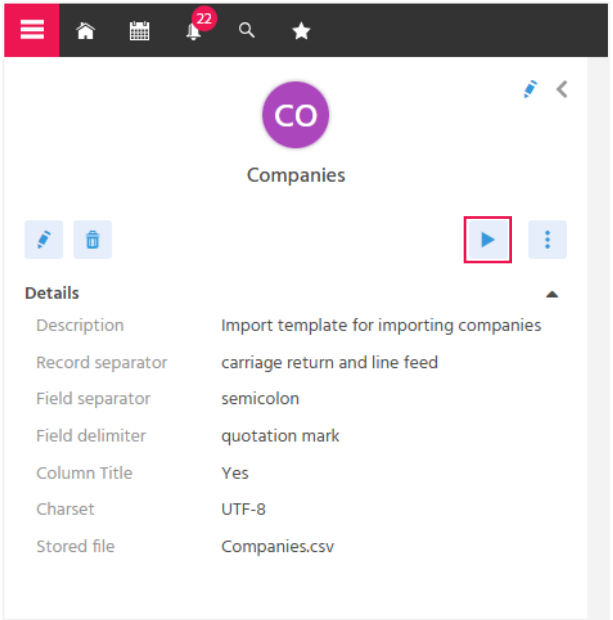
Import data

Initial import (as part of creating the import template)

- The CSV file was uploaded when the import template was created, and the import template has been configured.
  The data is now being imported using this import template.
- The import is being analyzed (including information and error messages in the "Imported Data" tab).

Import data

Execute data import



Use the “Import data" action to perform the import. A message confirms that the import has started.

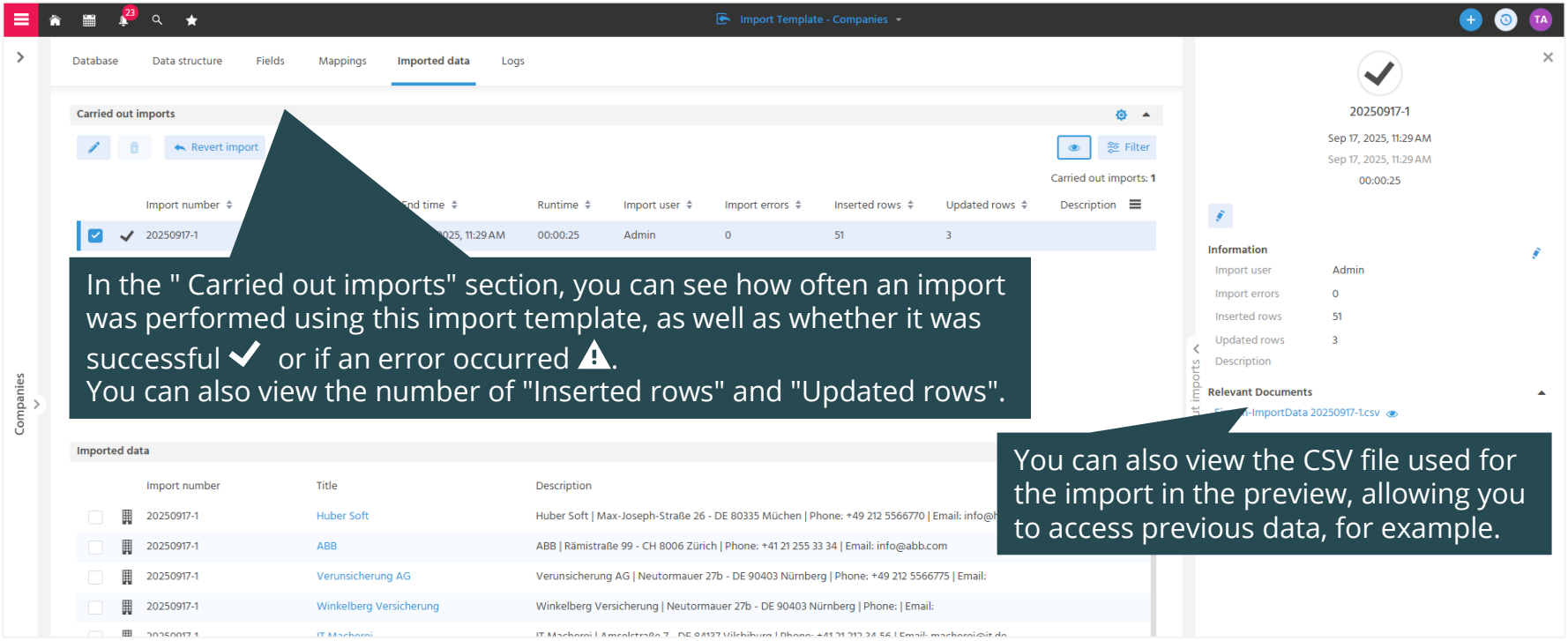
This will create the data that was previously displayed in the "Database" tab as records in the system.

You will receive a notification as soon as the import is complete.

It should be noted that, similar to manual creation by a user, mandatory field validation is also considered during the import process. This means that the required information must either be included directly in the CSV file or mapped through the additionally definable fields to prevent the import from encountering an error.

Import data

Analyse import

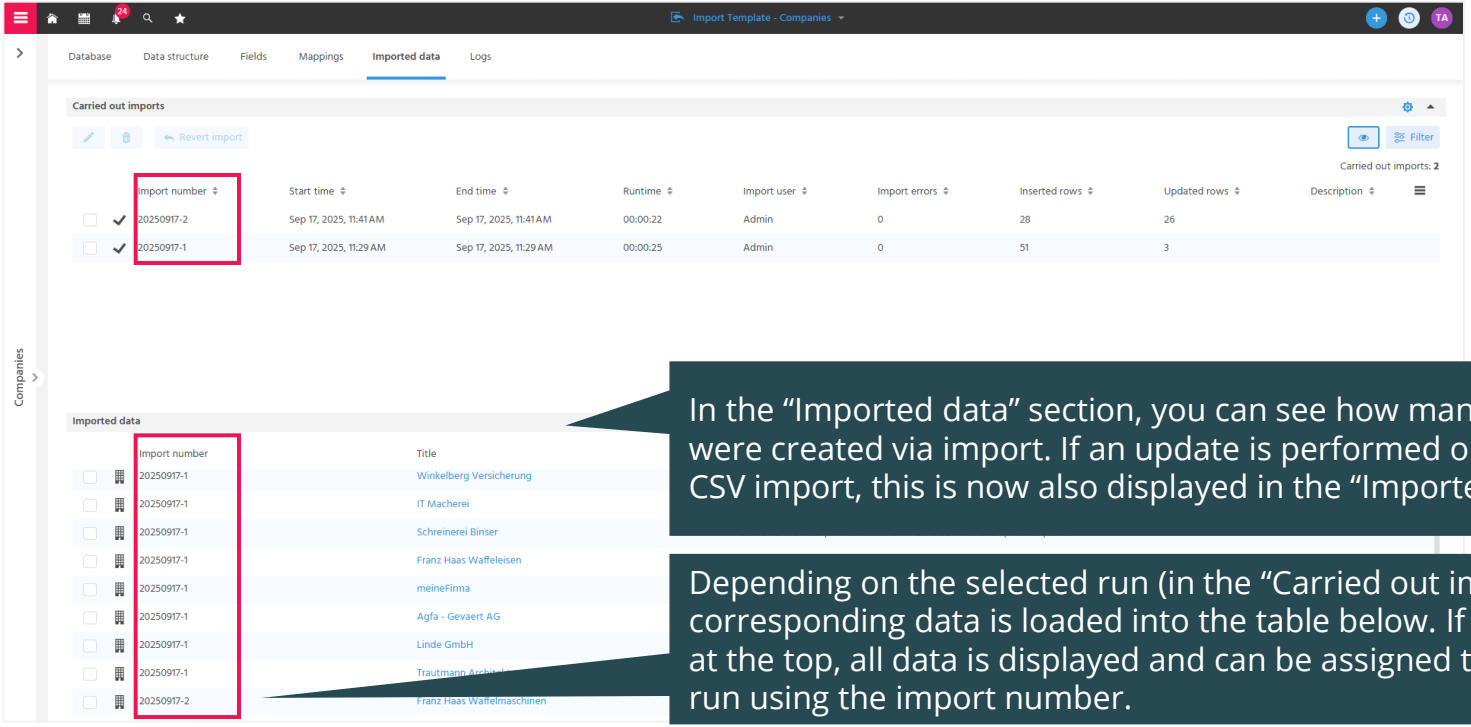


In the " Carried out imports" section, you can see how often an import was performed using this import template, as well as whether it was successful ✔ or if an error occurred ⚠.
You can also view the number of "Inserted rows" and "Updated rows".

You can also view the CSV file used for the import in the preview, allowing you to access previous data, for example.

Import data

Analyse import – imported data

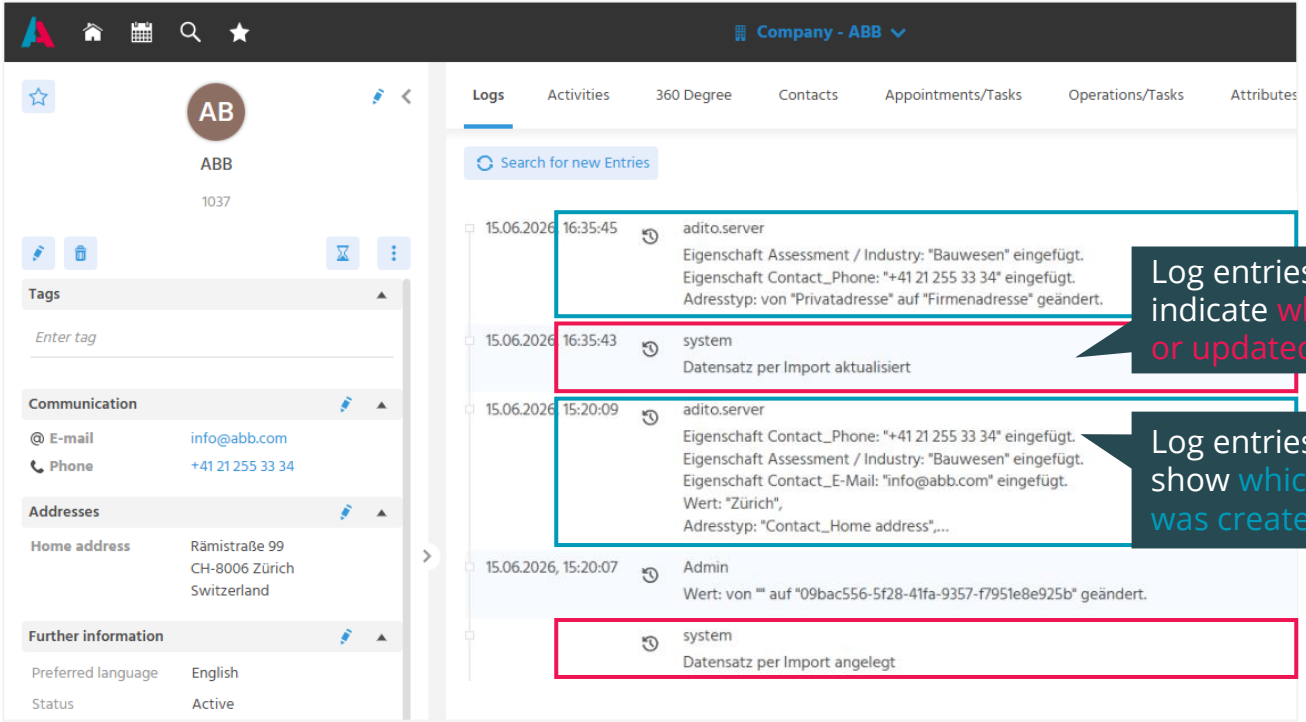


In the “Imported data” section, you can see how many data records were created via import. If an update is performed on a data record via CSV import, this is now also displayed in the “Imported data” section.

Depending on the selected run (in the “Carried out imports” area), the corresponding data is loaded into the table below. If no run is selected at the top, all data is displayed and can be assigned to the respective run using the import number.

Import data

Imported Data – Log entries



Log entries for a company or contact indicate whether the record was created or updated via an import.

Log entries for a company or contact show which information in the record was created or updated by an import.

Import data

Analyze import – Incorrect run

Import Template - Firmen

Database | Data structure | Fields | Mappings | **Imported data** | Logs

Carried out imports

Revert import | Filter

Carried out imports: **4**

Import number	Start time	End time	Runtime	Import user	Import errors	Inserted rows	Updated rows	Descripti
20240917-2	Sep 17, 2024, 10:19 AM	Sep 17, 2024, 10:19 AM	00:00:13	Admin	14	0	28	

20240917-1

Sep 17, 2024, 10:19 AM

Sep 17, 2024, 10:19 AM

00:00:15

Information

Import user	Admin
Import errors	14
Inserted rows	25
Updated rows	3
Description	

Relevant documents

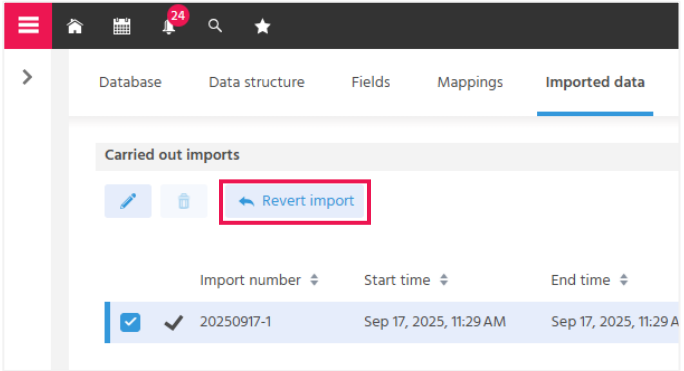
- Firmen-FailedImport 20240917-1.csv
- Firmen-ImportData 20240917-1.csv
- Firmen-ErrorLog 20240917-1.txt

In the event of an error, you will find three documents in the download preview:

- The CSV file used is labeled (...-ImportData YYYYmmDD-1.csv).
- There is a CSV file containing all the lines that failed due to the structure of the imported CSV file, named (...-FailedImport YYYYmmDD-1.csv).
- Additionally, there is an error log file available for analysis with a developer.

Data import

Undo import



The **"Revert import"** action can be used to completely reverse an import. This action deletes all data created during this lead import run from the system.

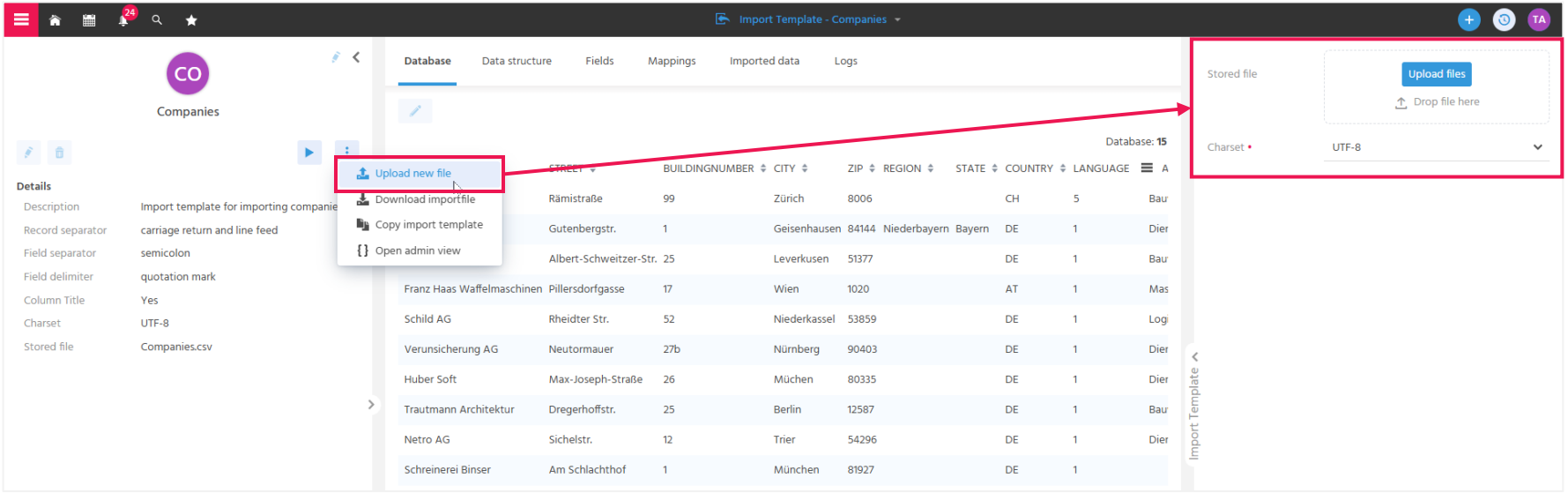
This action is primarily intended for creating the import template in a test or QA system, as this is where the iterative process for developing an import template usually occurs. This means that the data can be removed in the event of incorrect configurations or after the tests have been completed. Once the revert is complete, the user will receive a notification.

This function should only be used on production systems in exceptional cases, provided that it can be ensured that the import was not conducted too long ago and that the imported data has already been utilized.

Data import

Upload a new import file

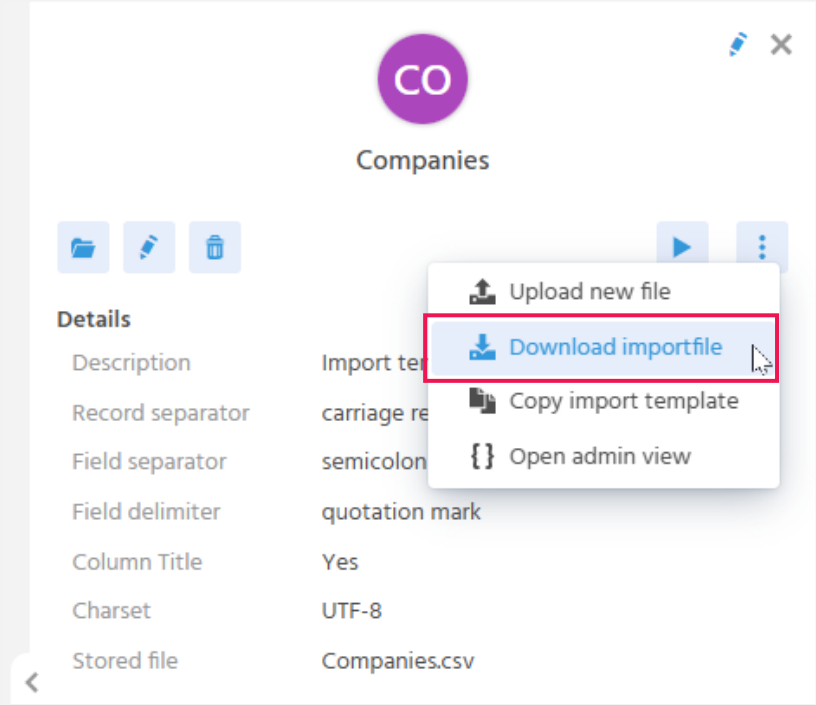
With the "Upload New File" action, you first transfer the content of the file to the "Database" tab. This action is used to upload an updated version of a CSV file, for example.



Data import

Download importfile

Use the "Download importfile" action to download the database that is currently in use.

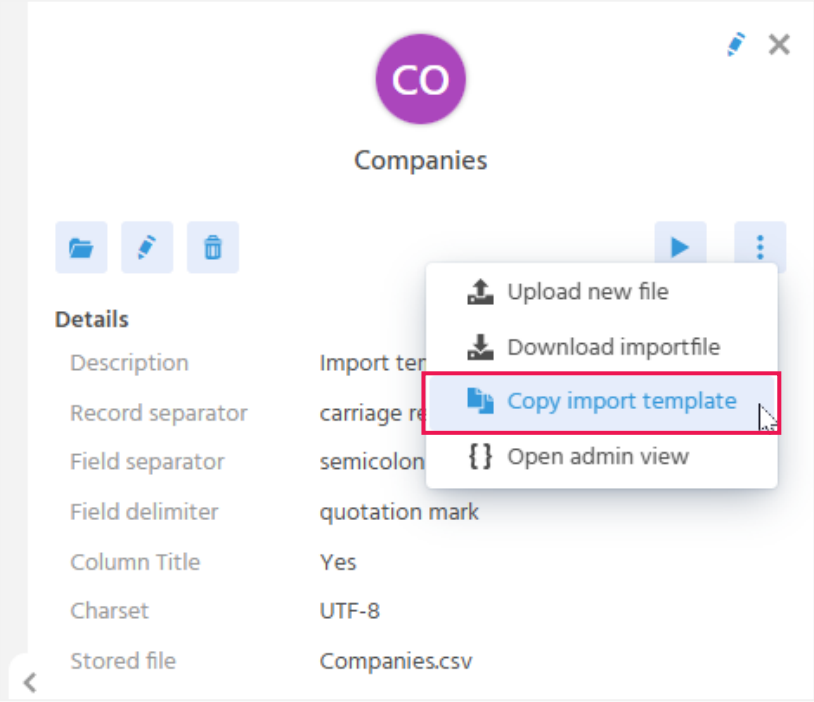


Import template

Copy import template

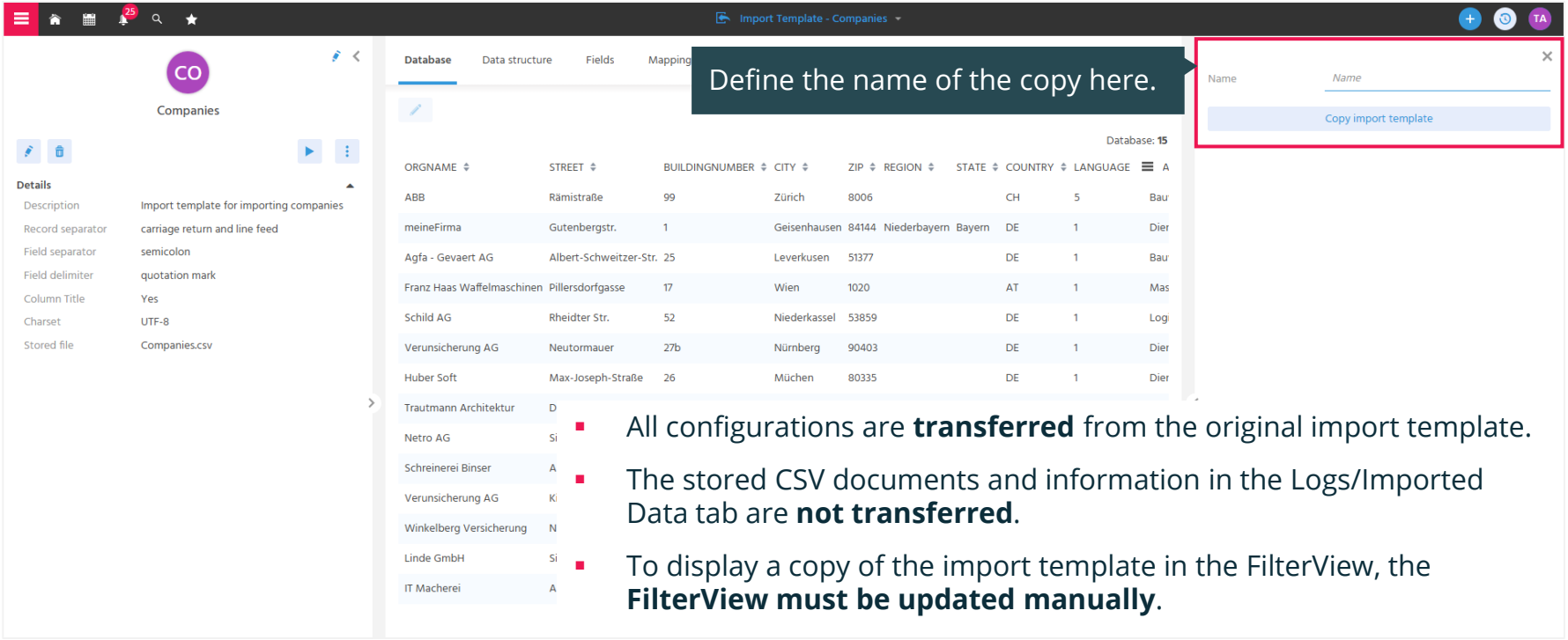
This action is used when similar CSV files are to be imported.

This means that the specialist administrator does not have to configure the import template (including field assignment and mapping, etc.) each time, but can utilize an existing one and make the necessary adjustments.



Import template

Copy import template kopieren



- All configurations are **transferred** from the original import template.
- The stored CSV documents and information in the Logs/Imported Data tab are **not transferred**.
- To display a copy of the import template in the FilterView, the **FilterView must be updated manually**.

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