

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.





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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

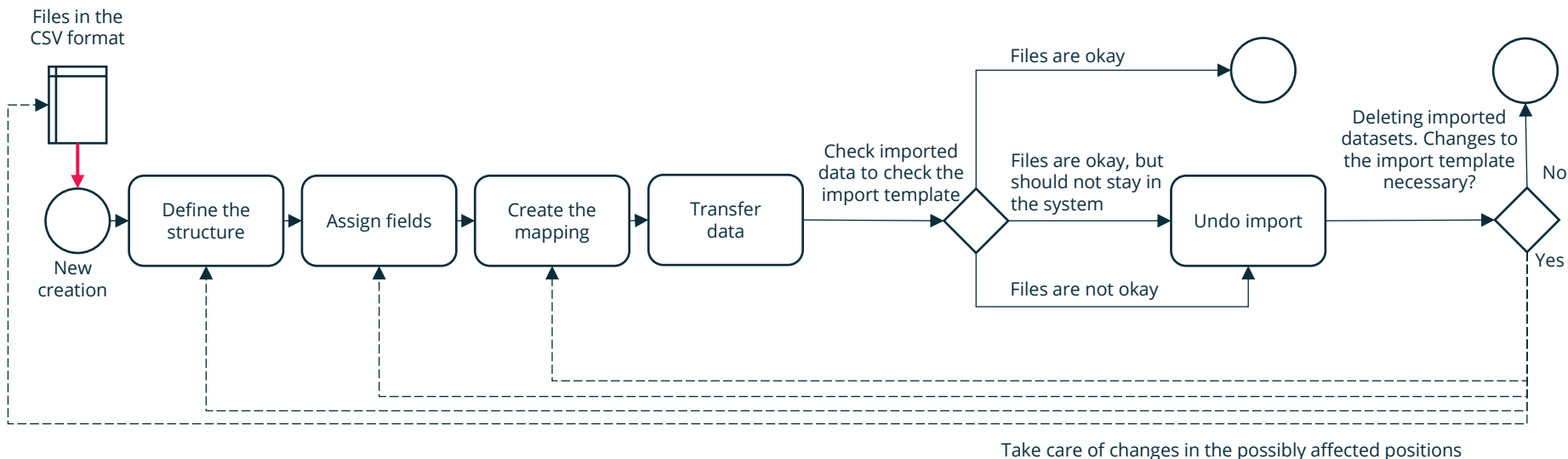
General procedure

- 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



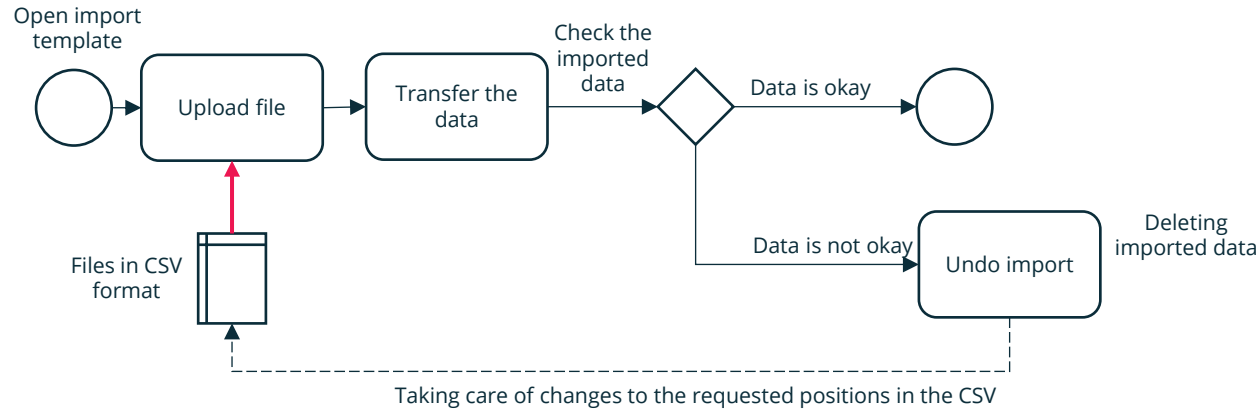
Requirement: The CSV file must be provided in the format in which it will be used in the future, including the names of the columns in the first line.



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.

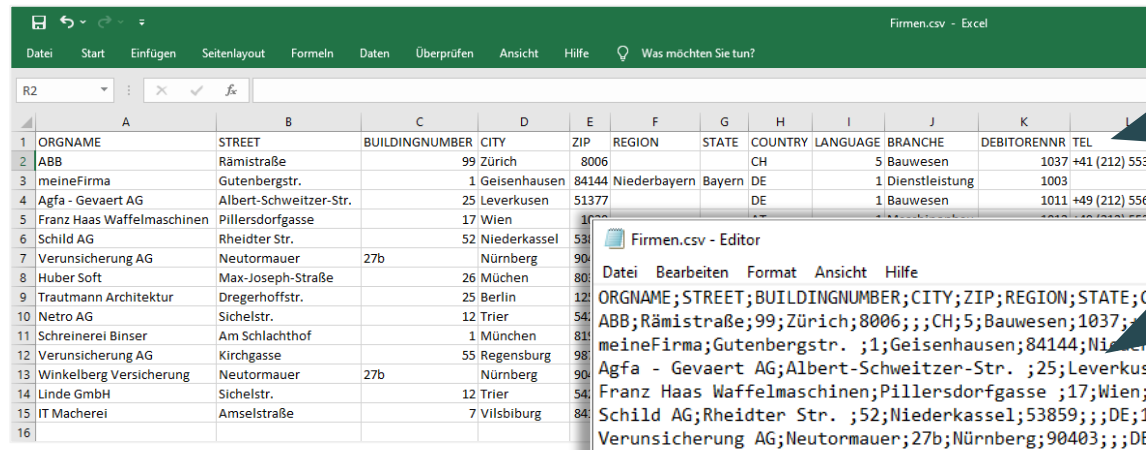


Data basis: CSV File

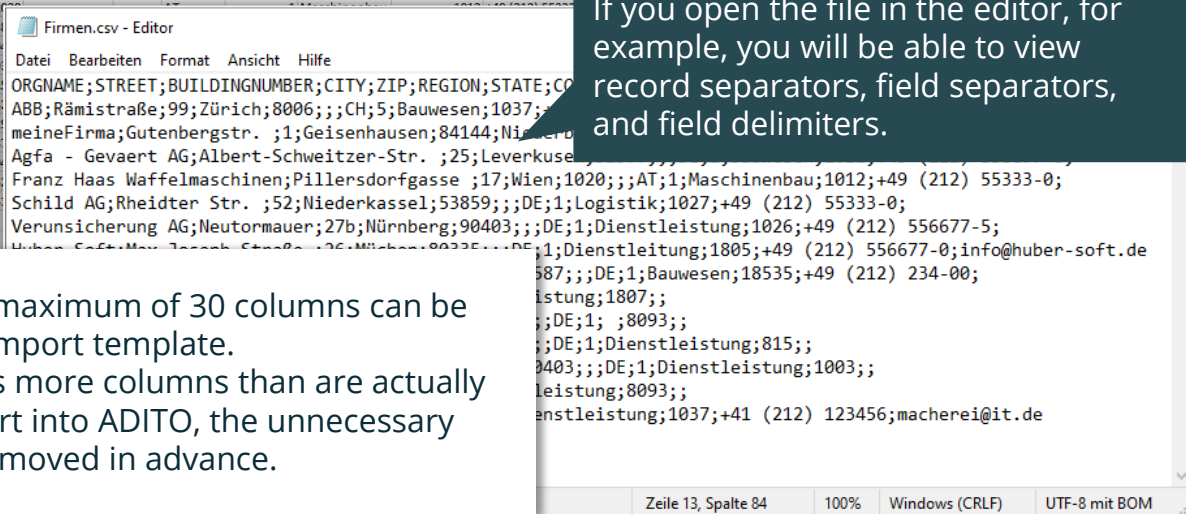


Data basis: CSV file

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.

Import of not formatted 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

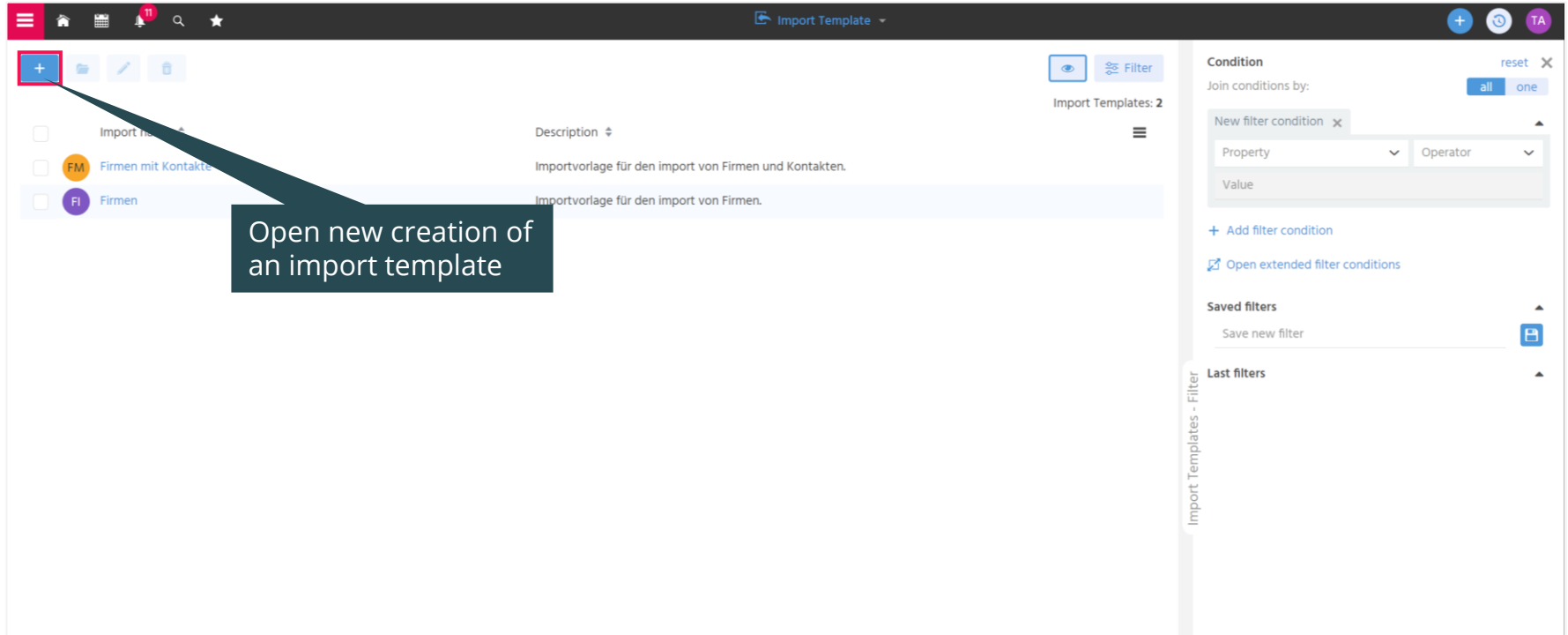
Import template



New creation with CSV file

Import template

FilterView



The screenshot displays the ADITO FilterView interface. On the left, a list of import templates is shown, including 'Importvorlage für den import von Firmen und Kontakten' and 'Importvorlage für den import von Firmen'. A red box highlights a '+' button in the top-left corner of the template list, with a callout box pointing to it that reads 'Open new creation of an import template'. The right side of the interface features a 'Filter' panel with a 'Condition' section for configuring filter rules, including options for 'Join conditions by' (all, one), 'New filter condition', 'Property', 'Operator', and 'Value'. Below this, there are sections for 'Add filter condition', 'Open extended filter conditions', 'Saved filters', and 'Last filters'.

Import template

Creating an import template

Use Case 1



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 - Companies

Stored file

Upload files

Companies.csv

Upload CSV file

Import name

Companies

Description

Import of trade fair leads

Record separator

carriage return and line feed

Field separator

semicolon

Field delimiter

quotation mark

Column Title

Column name indicator

Charset

Save Cancel

If necessary, you can adjust the default separators to those used in the CSV.

Provided that the CSV file contains the column names in the first line, activate the "Column name" indicator. This indicates that the first line will be read as the column names. If there are no column names or if you have deactivated the indicator, the columns will be created with names such as "Column 1," "Column 2," and so on.

Import template

Creating an import template

Use Case 1

UTF-8, ISO-8859-1, or ASCII can be used as the charset. This depends on whether the CSV file was created in Excel, for example.

The screenshot shows a web application interface for creating an import template. The top navigation bar includes a menu icon, home, calendar, notifications (20), search, and star icons. The page title is 'Import Template - Companies'. On the left, a sidebar lists fields: 'Stored file', 'Import name', 'Description', 'Record separator', 'Field separator', 'Field delimiter', 'Column Title', and 'Charset'. The 'Stored file' section shows a file named 'Companies.csv' with a checkmark and a close button. The 'Charset' dropdown is open, showing a search bar and three options: 'UTF-8', 'ISO-8859-1 (Excel)', and 'ASCII'. The 'UTF-8' option is highlighted. At the bottom, there are 'Save' and 'Cancel' buttons.

Field	Value
Stored file	Companies.csv
Import name	Companies
Description	Import of trade fair leads
Record separator	carriage return and line feed
Field separator	semicolon
Field delimiter	quotation mark
Column Title	☒
Charset	UTF-8

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.

The screenshot shows the ADITO 'Import Template - Firmen' interface. The 'Database' tab is active, displaying a table of imported data. The table has columns: ORGNAME, STREET, BUILDINGNUMBER, CITY, ZIP, REGION, STATE, COUNTRY, LANGUAGE, BRANCHE, DEBITORENNR, TEL, and EMAIL. The data includes companies like ABB, meineFirma, Agfa - Gevaert AG, Franz Haas Waffelmaschinen, Schild AG, Verunsicherung AG, Huber Soft, Trautmann Architektur, Netro AG, and Schreinerei Binsler.

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

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.

The screenshot displays the 'Import Template - Database' window. On the left, there's a sidebar with a 'Companies' section containing a logo and a 'Details' section listing various settings like 'Record separator', 'Field separator', etc., all set to default values. The main area shows a table of imported data with columns: ORGNAME, STREET, BUILDINGNUMBER, CITY, ZIP, REGION, STATE, COUNTRY, LANGUAGE, and A. The table lists several companies, with 'Netro AG' highlighted in blue. A red box highlights the edit icon in the top-left corner of the table header. A callout bubble points to this icon, stating: 'You can subsequently edit the uploaded data on a **case-by-case** basis.' Another callout bubble points to the 'Netro AG' row, stating: 'If the file is downloaded later from the import template, the changed value will be written to the CSV file.' On the right side, there's a form with fields corresponding to the table columns, showing the details for 'Netro AG'.

ORGNAME	STREET	BUILDINGNUMBER	CITY	ZIP	REGION	STATE	COUNTRY	LANGUAGE	A
ABB	Rämistraße	99	Zürich	8006		CH	5	Bau	
meineFirma	Gutenbergstr.	1	Geisenhausen	84144	Niederbayern	Bayern	DE	1	Dier
Agfa - Gevaert AG	Albert-Schweitzer-Str.	25	Leverkusen	51377		DE	1	Bau	
Franz Haas Waffelmaschinen	Pillersdorfgrasse	17	Wien	1020		AT	1	Mas	
Schild AG	Rheidter Str.								
Verunsicherung AG	Neutormauer								
Huber Soft	Max-Joseph-Straße								
Trautmann Architektur	Dregerhoffstr.								
Netro AG	Sichelstr.	12	Trier	54296		DE	1	Dier	
Schreinerei Binser	Am Schlachthof	1	München	81927		DE	1		
Verunsicherung AG	Kirchgasse	55	Regensd						
Winkelberg Versicherung	Neutormauer	27b	Nürnberg						
Linde GmbH	Sichelstr.	12	Trier						
IT Macherei	Amselstraße	7	Vilsbibu						

You can subsequently edit the uploaded data on a **case-by-case basis.**

If the file is downloaded later from the import template, the changed value will be written to the CSV file.

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

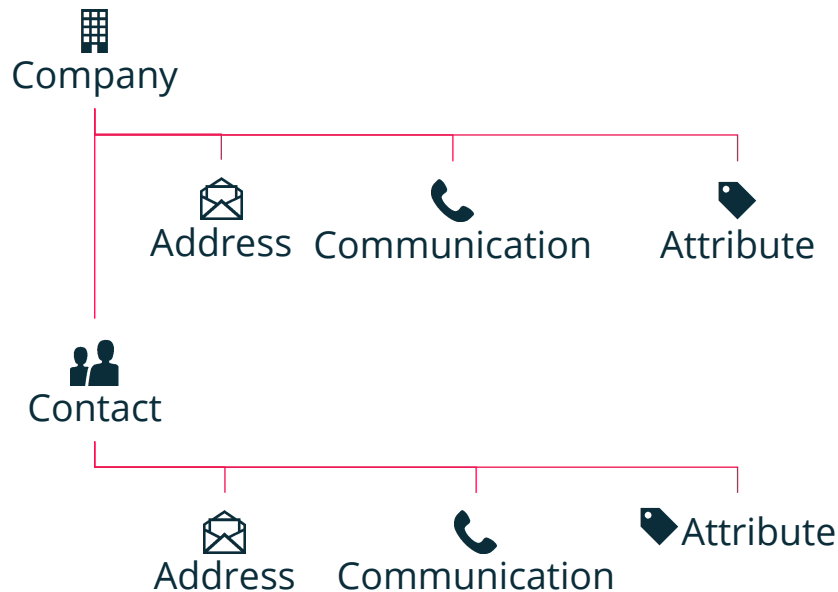
**Define data structure
for the import template**

Data structure in the import template

Why is a data structure required?

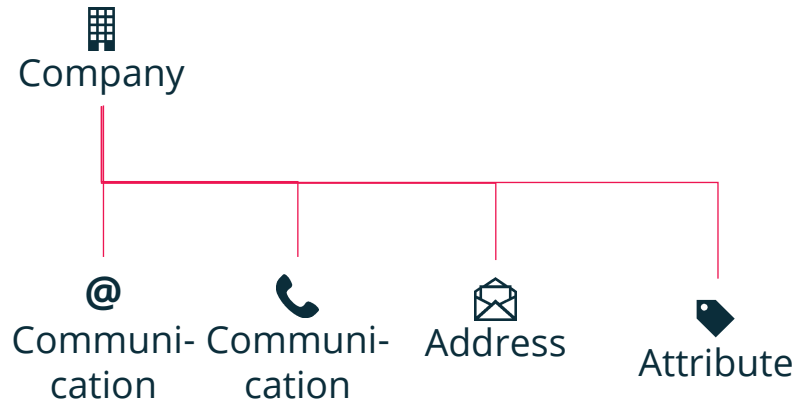
In the tab "Data structure", you define:

- 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

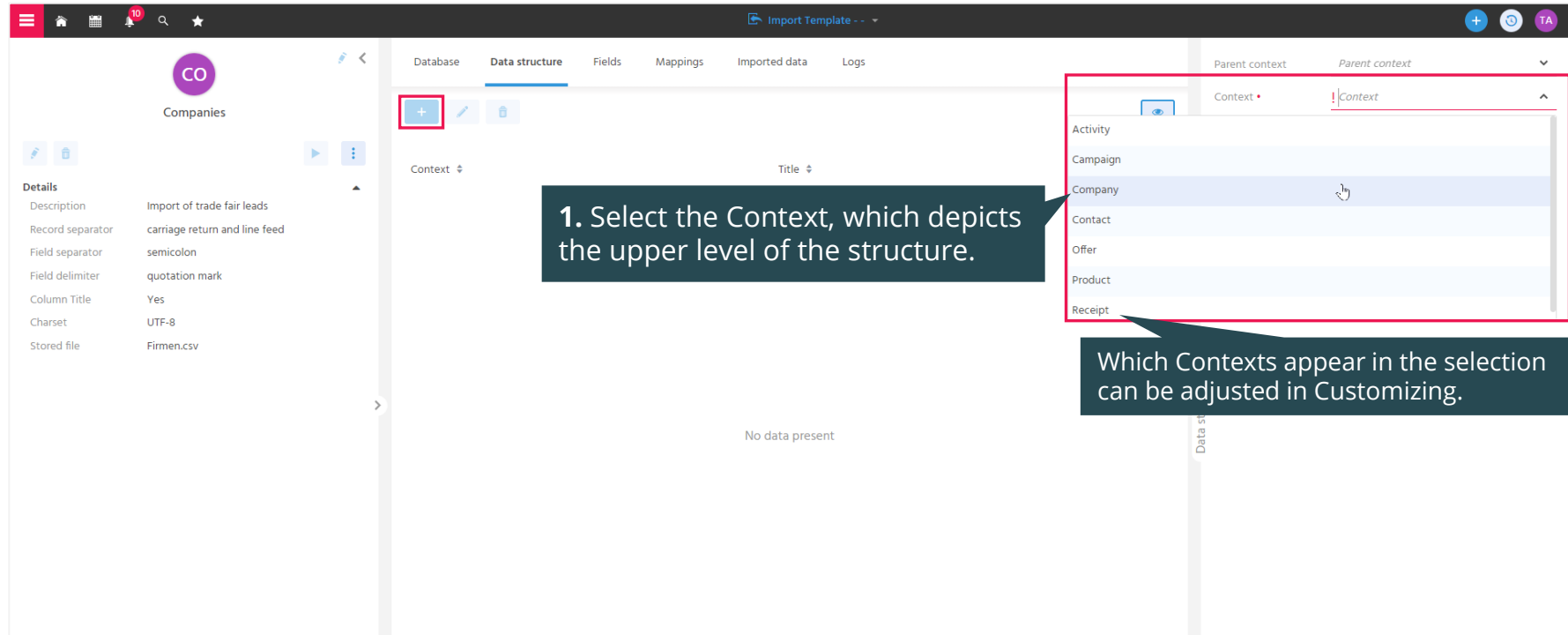


Use Case 2



Data structure in the import template

Create first-level Context

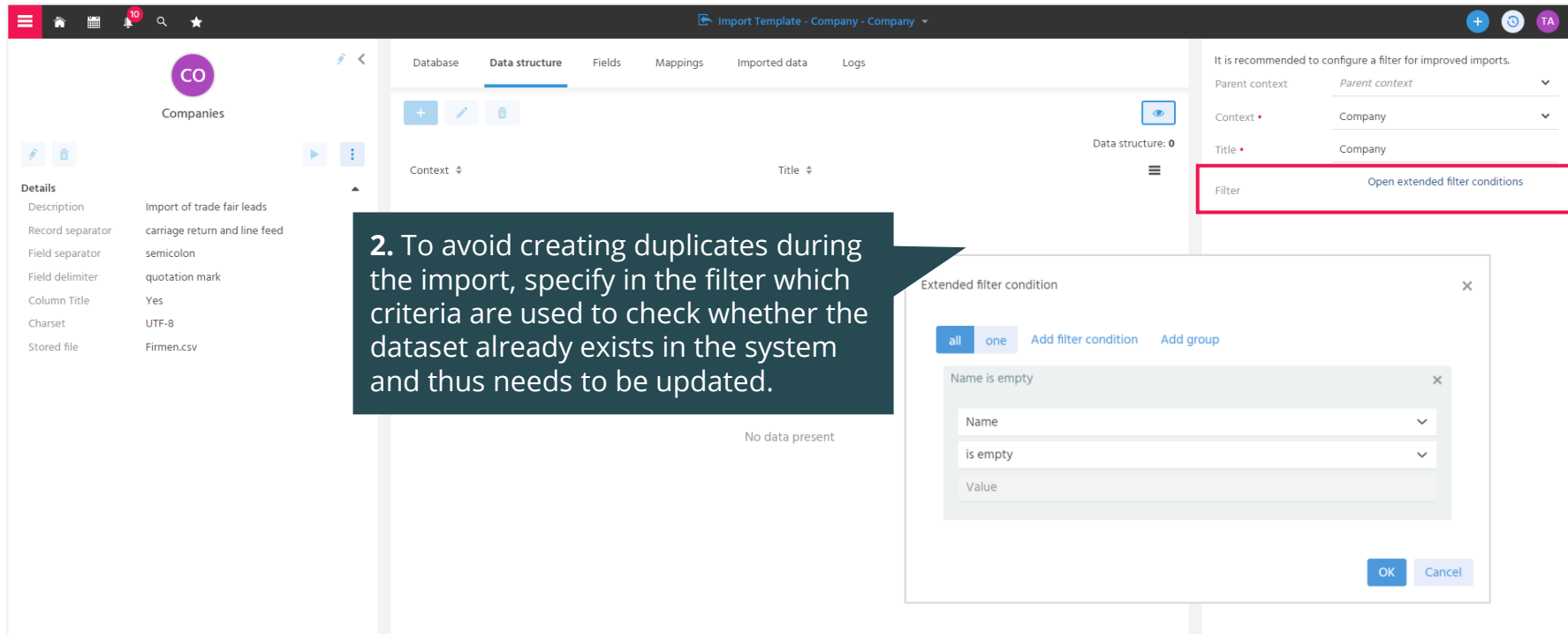


1. Select the Context, which depicts the upper level of the structure.

Which Contexts appear in the selection can be adjusted in Customizing.

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.

Extended filter condition

all one Add filter condition Add group

Name is empty

Name

is empty

Value

OK Cancel

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.

Database **Data structure** Fields

+ ✎ 🗑️

Context ▾
Company

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.

It is recommended to configure a filter for improved imports.

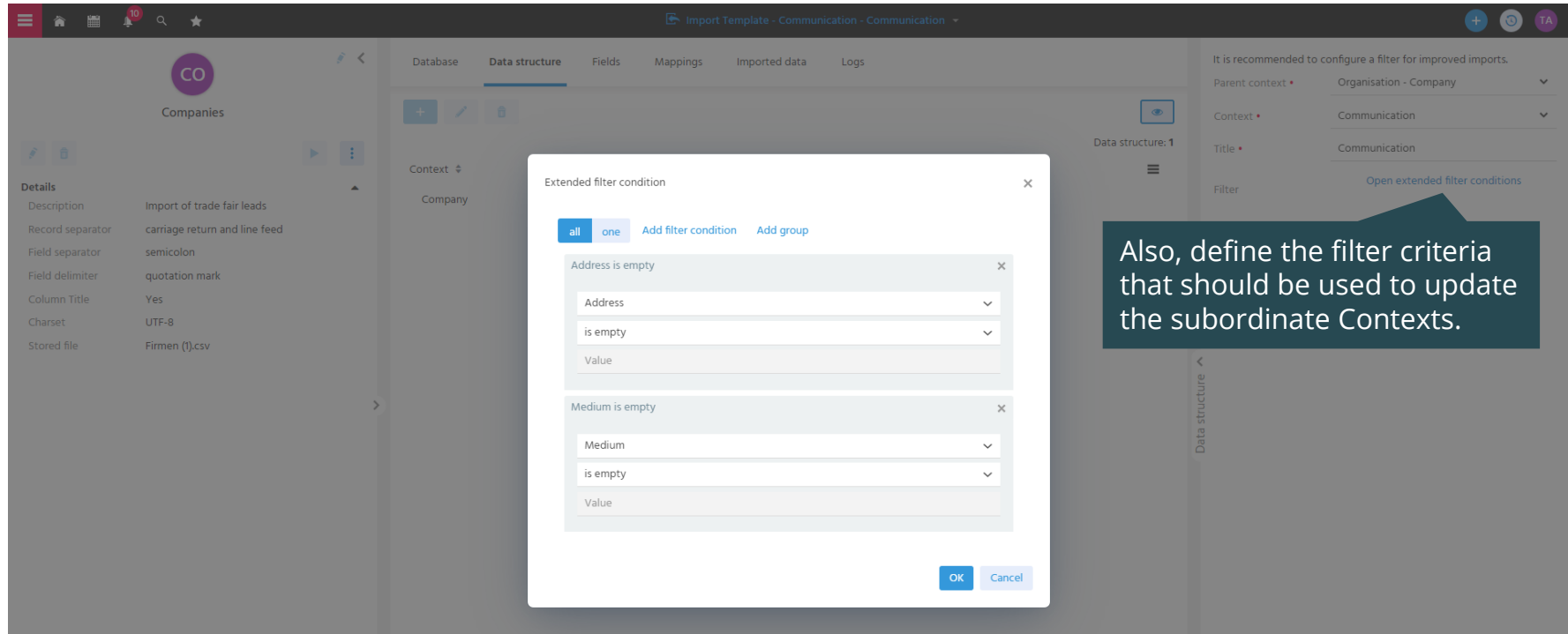
Parent context •	Organisation - Company ▾
Context •	Communication ▾
Title •	Communication
Filter	Open extended filter conditions

ata structure

* 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.

Data structure in the import template

Use Case 1

Create subordinate Contexts

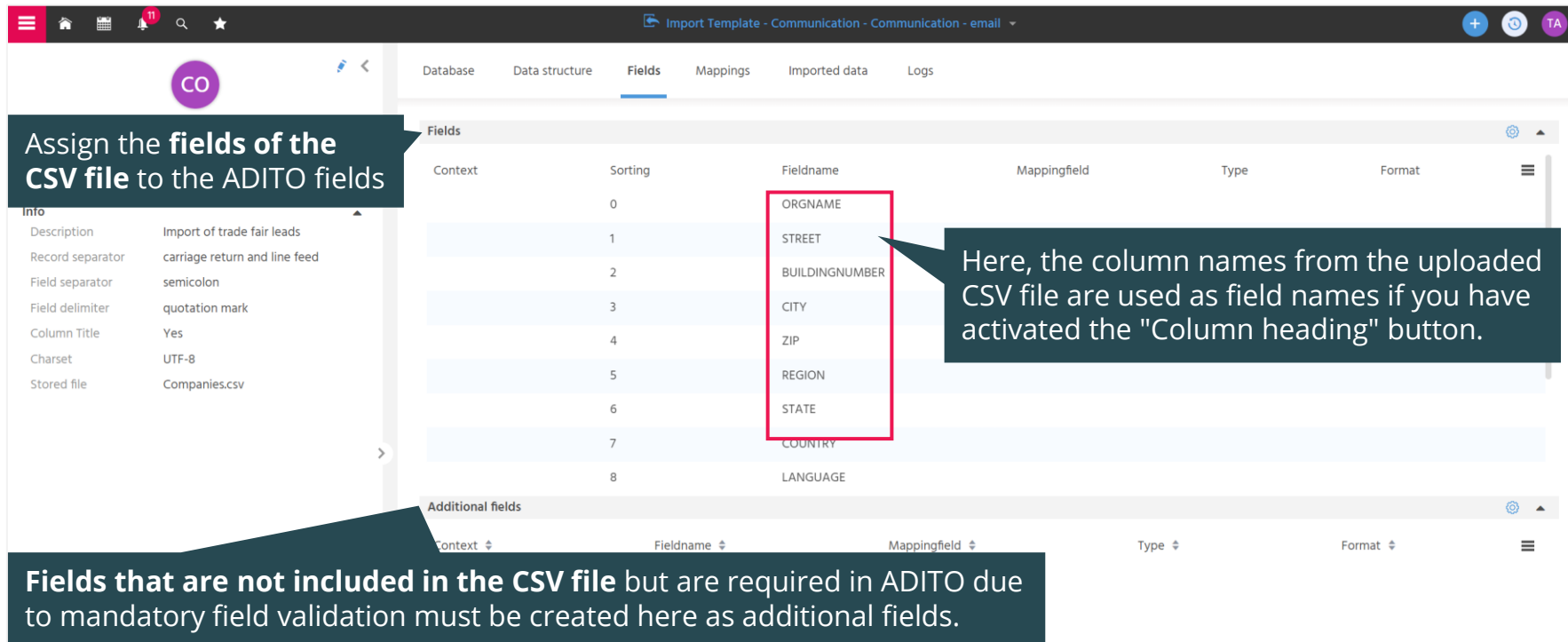
Use this procedure to define all subordinate Contexts and their update checks.

The screenshot displays the 'Import Template' application interface. The main window is titled 'Import Template - AttributeRelationWithoutTree - Attribute'. The 'Data structure' tab is active, showing a tree view of contexts. The 'Company (4)' context is expanded, revealing sub-contexts like 'Communication' and 'Address'. A dialog box titled 'Extended filter condition' is open in the foreground, allowing the user to define filter rules. The dialog has tabs for 'all' and 'one', and buttons for 'Add filter condition' and 'Add group'. Two filter conditions are listed: 'ID_VALUE is empty' and 'ATTRIBUTE_ID is empty', each with a close button (X). The background interface includes a sidebar with 'Companies' details, a top navigation bar with icons, and a right sidebar with configuration options like 'Parent context' and 'Context'.

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.

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

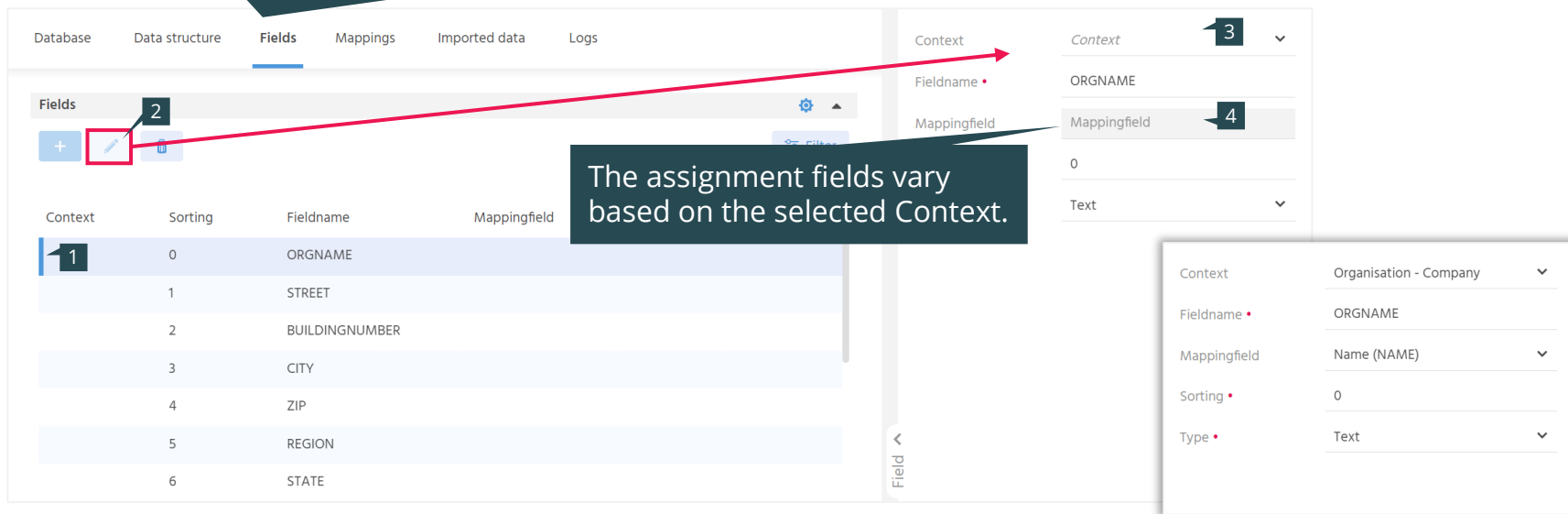
Additional fields

Context	Fieldname	Mappingfield	Type	Format
---------	-----------	--------------	------	--------

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.

Context	Sorting	Fieldname	Mappingfield
1	0	ORGNAME	
	1	STREET	
	2	BUILDINGNUMBER	
	3	CITY	
	4	ZIP	
	5	REGION	
	6	STATE	

Fields configuration details:

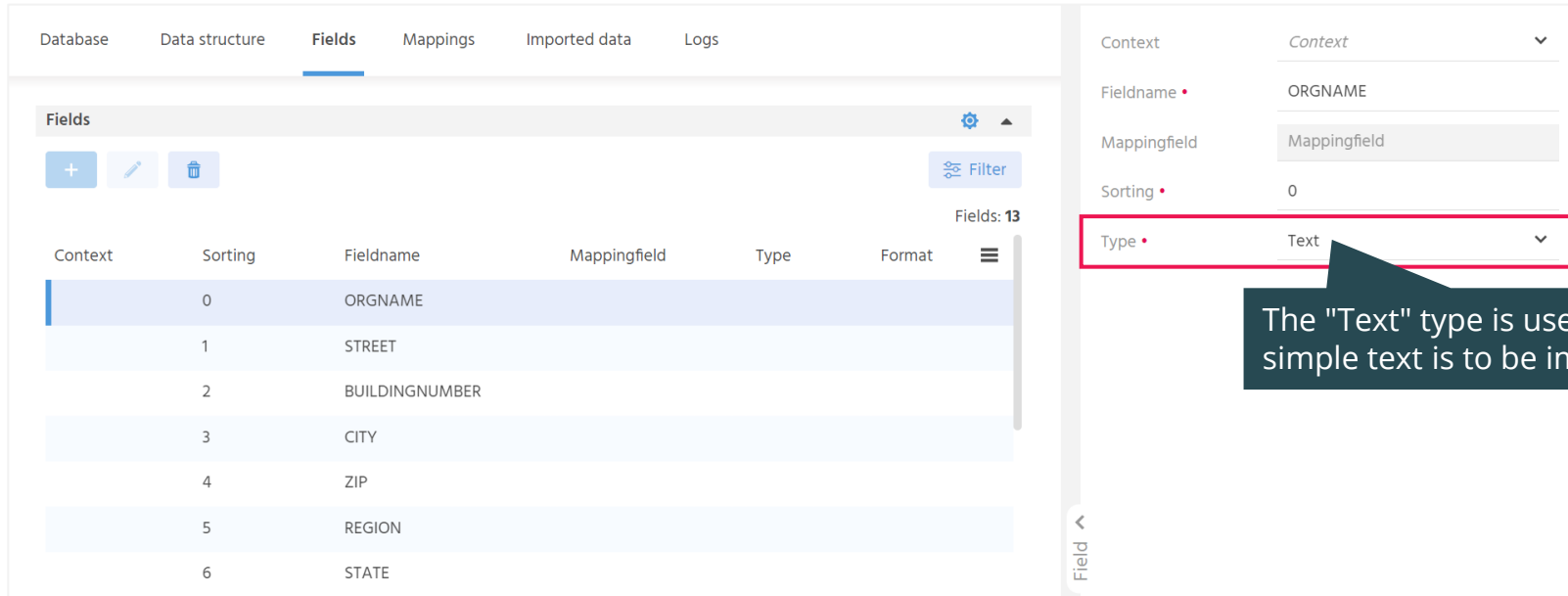
- Context: 3
- Fieldname: ORGNAME
- Mappingfield: 4
- 0
- Type: Text

Field selection dropdown:

- Context: Organisation - Company
- Fieldname: ORGNAME
- Mappingfield: Name (NAME)
- Sorting: 0
- Type: Text

Fields in the import template

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



The screenshot shows the ADITO Fields management interface. The 'Fields' tab is active, displaying a table with 13 fields. The first field, 'ORGNAME', is selected. A callout box points to the 'Type' dropdown menu, which is set to 'Text'.

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

Fields: 13

Field details for 'ORGNAME':

- Context: Context
- Fieldname: ORGNAME
- Mappingfield: Mappingfield
- Sorting: 0
- 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.

Context	Person - Contact	▼
Fieldname •	DOB	
Mappingfield	Mappingfield	
Sorting •	22	
Type •	Date	▼
Format	dd.mm.yyyy	

Fields in the import template

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

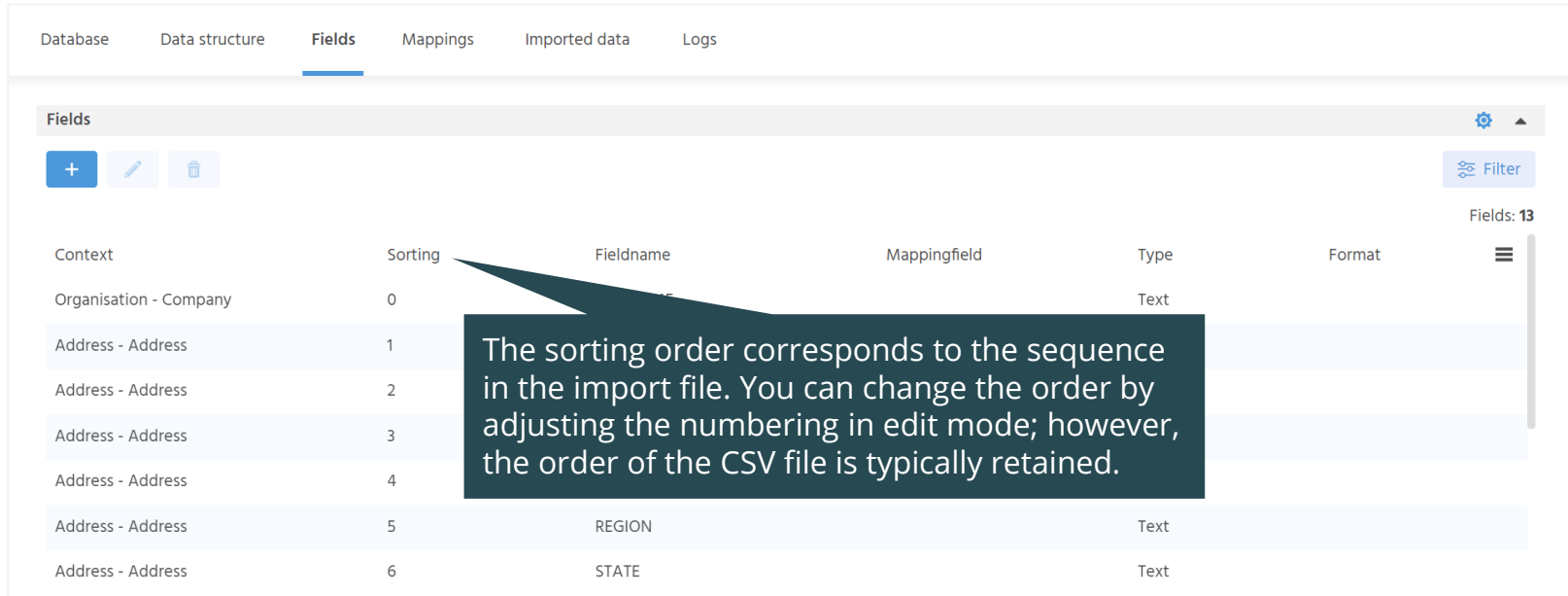
The "List" type is used when a link needs to be imported, such as a connection between activities and a contact or company, among others.

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.

Context	Context	▼
Fieldname •	! Fieldname	
Mappingfield	Mappingfield	
Sorting •	23	
Type •	List ▼	
Format		

Fields in the import template

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



The screenshot displays the 'Fields' management interface in ADITO. The interface includes a navigation bar with tabs: Database, Data structure, Fields (selected), Mappings, Imported data, and Logs. Below the navigation bar, there is a 'Fields' section with a header bar containing a settings icon and a 'Filter' button. The main area shows a table of fields with the following columns: Context, Sorting, Fieldname, Mappingfield, Type, and Format. The table lists several fields, including 'Organisation - Company' and multiple 'Address - Address' entries. A callout box points to the 'Sorting' column, stating: '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.'

Context	Sorting	Fieldname	Mappingfield	Type	Format
Organisation - Company	0			Text	
Address - Address	1				
Address - Address	2				
Address - Address	3				
Address - Address	4				
Address - Address	5	REGION		Text	
Address - Address	6	STATE		Text	

Fields in the import template

Use Case 1

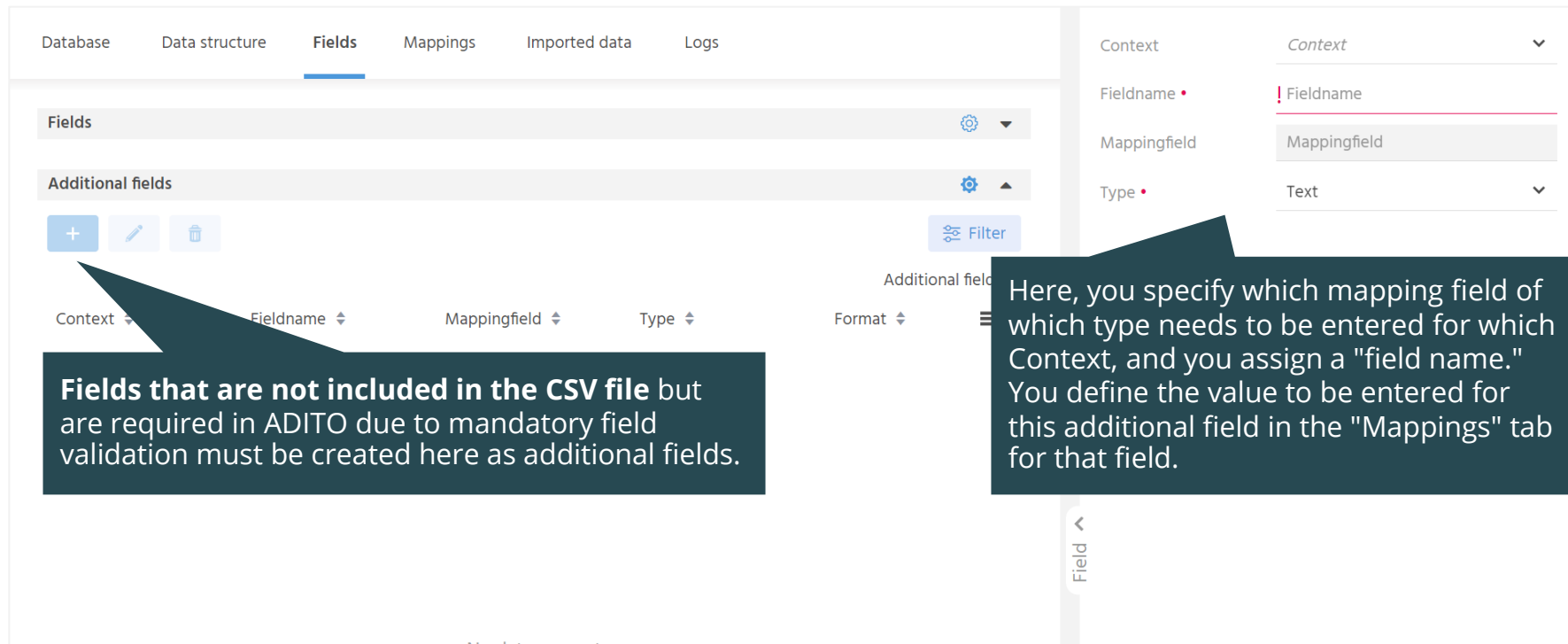
Assign the fields in the CSV file to the corresponding fields in the system

The screenshot displays the SAP Import Template - Companies interface. The left sidebar shows the 'Companies' entity with a 'Details' section containing import settings: 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), and Stored file (Firmen.csv). The main area shows the 'Fields' tab with a table of fields to be imported.

Context	Sorting	Fieldname	Mappingfield	Type	Format
Organisation - Firma	0	ORGNAME	Name (NAME)	Text	
Address - Adresse	1	STREET	Street (ADDRESS)	Text	
Address - Adresse	2	BUILDINGNUMBER	House number (BUILDINGNO)	Text	
Address - Adresse	3	CITY	City (CITY)	Text	
Address - Adresse	4	ZIP	Postcode (ZIP)	Text	
Address - Adresse	5	REGION	Region (REGION)	Text	
Address - Adresse	6	STATE	State (STATE)	Text	
Address - Adresse	7	COUNTRY	Country (COUNTRY)	Text	
Organisation - Firma	8	LANGUAGE	Language (LANGUAGE)	Text	
AttributeRelationWithoutTree - Eigenschaften	9	BRANCHE	ID_VALUE	Text	
Organisation - Firma	10	DEBITORENNR	Customercode (CUSTOMERCODE)	Text	
Communication - Kommunikation - Telefon	11	TEL	Address (ADDR)	Text	
Communication - Kommunikation - E-Mail	12	EMAIL	Address (ADDR)	Text	

Fields in the import template

Specify additional fields



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

Fields

Additional fields

+ ✎ 🗑

Filter

Additional field

Context Fieldname Mappingfield Type Format

Context Fieldname Mappingfield Type

Field

Context Context

Fieldname ! Fieldname

Mappingfield Mappingfield

Type Text

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

The screenshot shows the SAP Import Template - Companies interface. The left sidebar displays the 'Companies' entity with a 'Details' section listing various settings. The main area is titled 'Import Template - Companies' and features a tabbed interface with 'Fields' selected. Below the tabs, there is a 'Fields' section with a table of 'Additional fields'.

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

Fields

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 - Eigenschaft	ATTRIBUTE - BRANCHE	ATTRIBUTE_ID	Text	

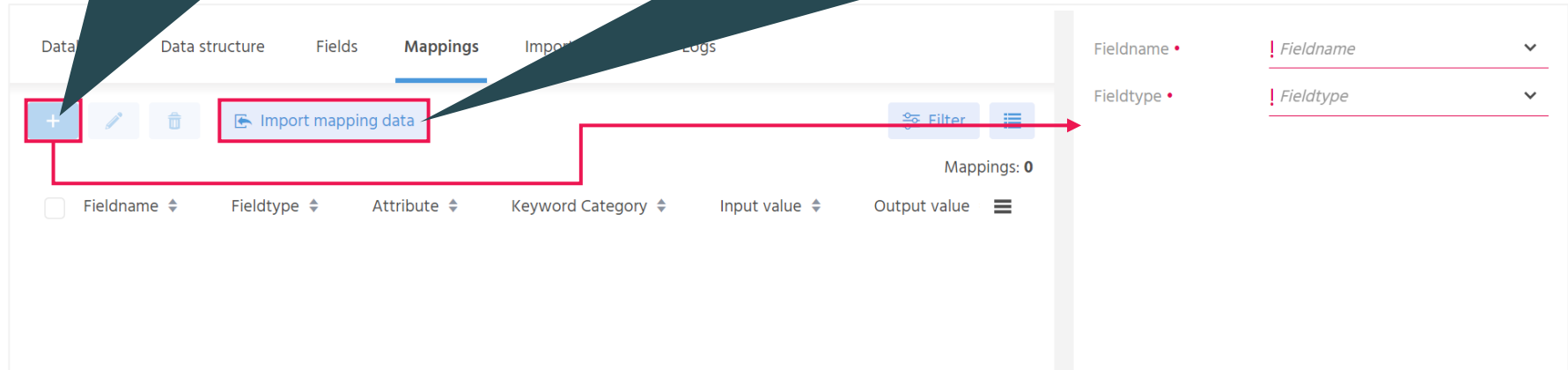
Mappings

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.



The screenshot shows the 'Mappings' tab in the ADITO interface. The top navigation bar includes 'Data', 'Data structure', 'Fields', 'Mappings' (selected), 'Import', and 'Logs'. Below the navigation bar, there are three icons: a plus sign (+), an edit icon (pencil), and a delete icon (trash). The 'Import mapping data' button, which includes a CSV icon, is highlighted with a red box. A red line connects this button to a callout box above it. Another red line connects the plus sign icon to a callout box above it. A red arrow points from the 'Filter' button to the right-hand side of the interface. The right-hand side shows two dropdown menus: 'Fieldname' and 'Fieldtype', both with red exclamation marks and the text 'Fieldname' and 'Fieldtype' respectively. Below these, it says 'Mappings: 0'. At the bottom, there is a table with columns: 'Fieldname', 'Fieldtype', 'Attribute', 'Keyword Category', 'Input value', and 'Output value'. The 'Fieldname' column has a checkbox next to it.

Mappings

Create "Mappings" individually

The screenshot shows the 'Mappings' tab in a software interface. At the top, there are tabs for 'Database', 'Data structure', 'Fields', 'Mappings' (selected), 'Imported data', and 'Logs'. Below the tabs, there is a toolbar with a plus button (+), an edit icon, a delete icon, and a button labeled 'Import mapping data'. A red box highlights the plus button, with a callout stating: 'To define mappings for **individual fields**, please use the plus button.' A red arrow points from the plus button to a 'Filter' button. On the right side, there are two dropdown menus: 'Fieldname' with a red exclamation mark and 'Fieldtype' with a red exclamation mark. A callout points to these dropdowns, stating: 'The fields you defined in the "Fields" tab are available here, including both the "Import fields" and the "Additional fields."' Below the dropdowns, there is a section titled 'Mappings' with a table header: 'Fieldtype', 'Attribute', 'Keyword Category', 'Input value', and 'Output value'. The table is currently empty, with the text 'No data present' at the bottom. A callout points to the table header, stating: 'The following terms are available here: "Free," "Keyword," and "Attribute." The possible subsequent steps are shown on the following slides.'

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

+ Import mapping data Filter

Fieldtype Attribute Keyword Category Input value Output value

No data present

Fieldname • ! Fieldname
Fieldtype • ! Fieldtype

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

Database

Data structure

+

☐ Fieldname ▾

Fieldtype

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.

Fieldname •

STREET

▼

Fieldtype •

Free

▼

Input value

Input value

Output value •

"Maintain street"

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.

Database	Fieldname	Fieldtype	Input value	Output value
☐	BRANCHE	Attribute	Contact_Industry	Logistik
☐	BRANCHE	Attribute	Contact_Industry	Maschinenbau
☐	BRANCHE	Attribute	Contact_Industry	Dienstleistung
☐	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

Database Data structure File

+ ✎ 🗄️ 📁 Import m...

Fieldname ▾	Fieldtype
☐ MEDIUM - TEL	Keyword
☒ MEDIUM - E-MAIL	Keyword
☐ LANGUAGE	Free
☐ LANGUAGE	Free
☐ BRANCHE	Attribute
☐ BRANCHE	Attribute

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.

Fieldname •	MEDIUM - E-MAIL ▾
Fieldtype •	Keyword ▾
Keyword Category •	CommunicationMedium ▾
Input value	Input value
Output value •	E-Mail ▾

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

DatabaseData structureFields**Mappings**Imported dataLogs

+

Import mapping data

Mappings: 10

Filter

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

DatabaseData structureFields**Mappings**Imported dataLogs

+

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.

FieldnameFieldtypeField delimiterField separatorRecord separator

! Fieldname! Fieldtypequotation marksemicoloncarriage 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



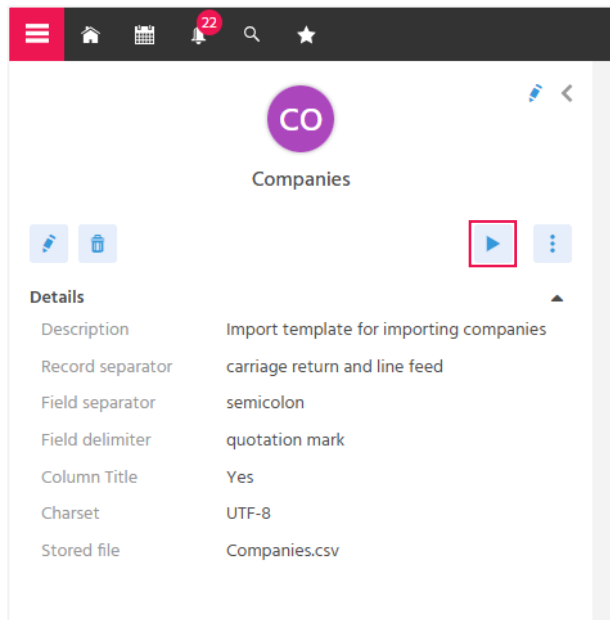
Initial import (as part of creating the import template)

- 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.

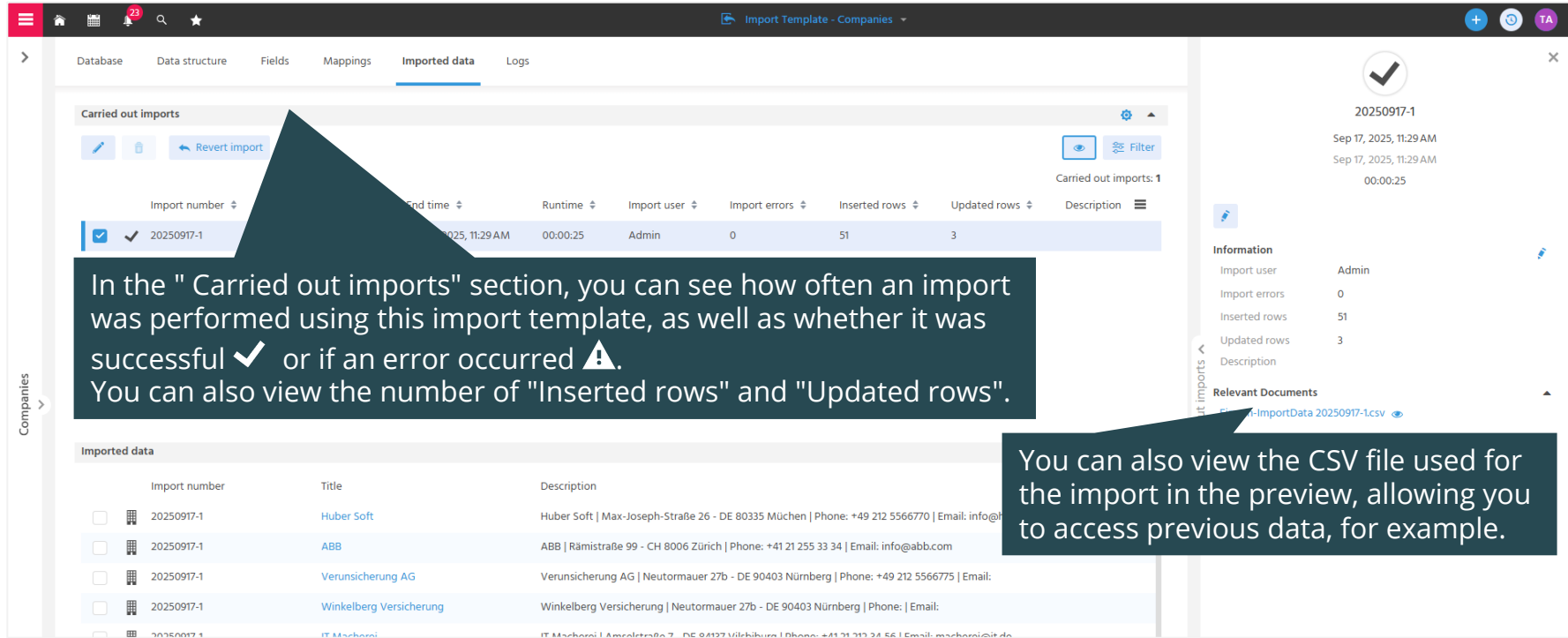
You will receive a notification as soon as the import is complete.



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 number	End time	Runtime	Import user	Import errors	Inserted rows	Updated rows	Description
20250917-1	2025, 11:29 AM	00:00:25	Admin	0	51	3	

Information

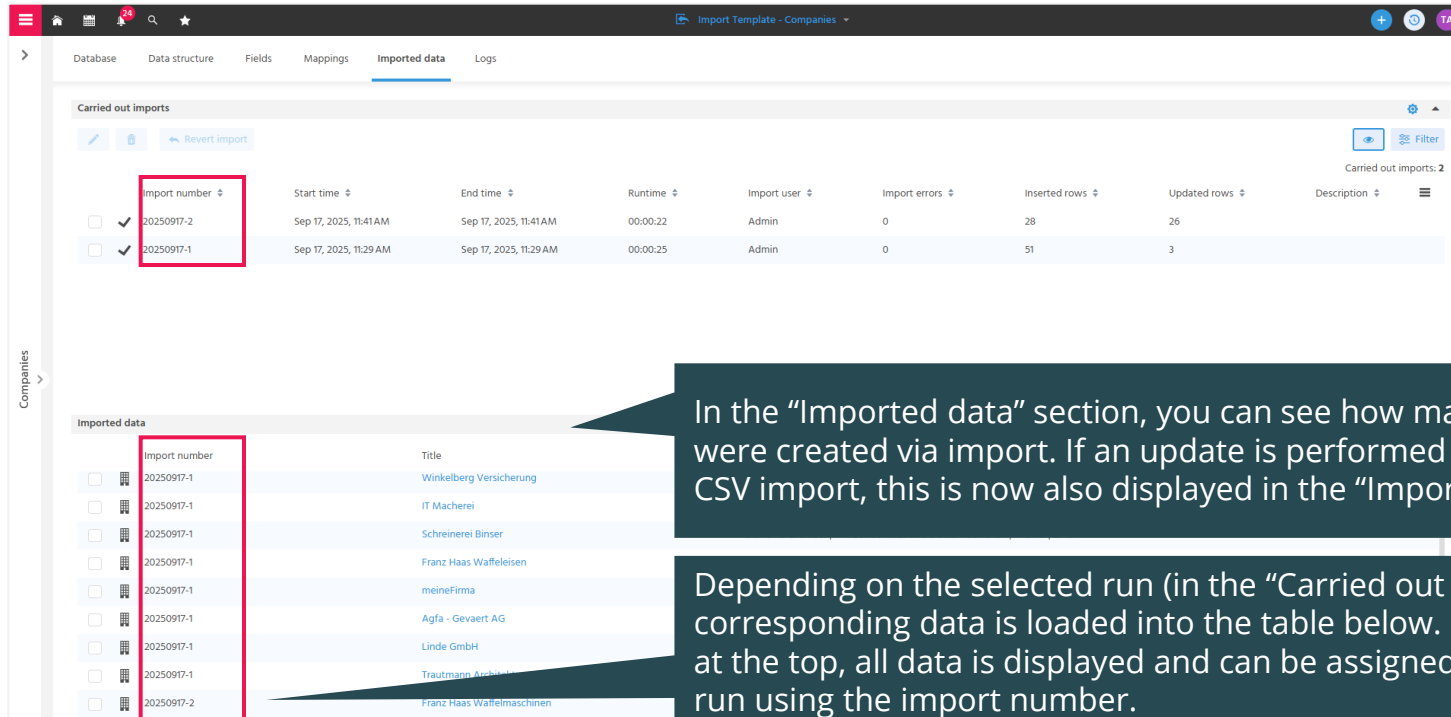
- Import user: Admin
- Import errors: 0
- Inserted rows: 51
- Updated rows: 3
- Description

Relevant Documents

- ImportData 20250917-1.csv

Import data

Analyse import – imported data



The screenshot displays the ADITO interface with the 'Imported data' section selected. The top part shows a table of 'Carried out imports' with columns for Import number, Start time, End time, Runtime, Import user, Import errors, Inserted rows, Updated rows, and Description. The bottom part shows a table of 'Imported data' with columns for Import number and Title. Red boxes highlight the 'Import number' column in both tables.

Import number	Start time	End time	Runtime	Import user	Import errors	Inserted rows	Updated rows	Description
20250917-2	Sep 17, 2025, 11:41 AM	Sep 17, 2025, 11:41 AM	00:00:22	Admin	0	28	26	
20250917-1	Sep 17, 2025, 11:29 AM	Sep 17, 2025, 11:29 AM	00:00:25	Admin	0	51	3	

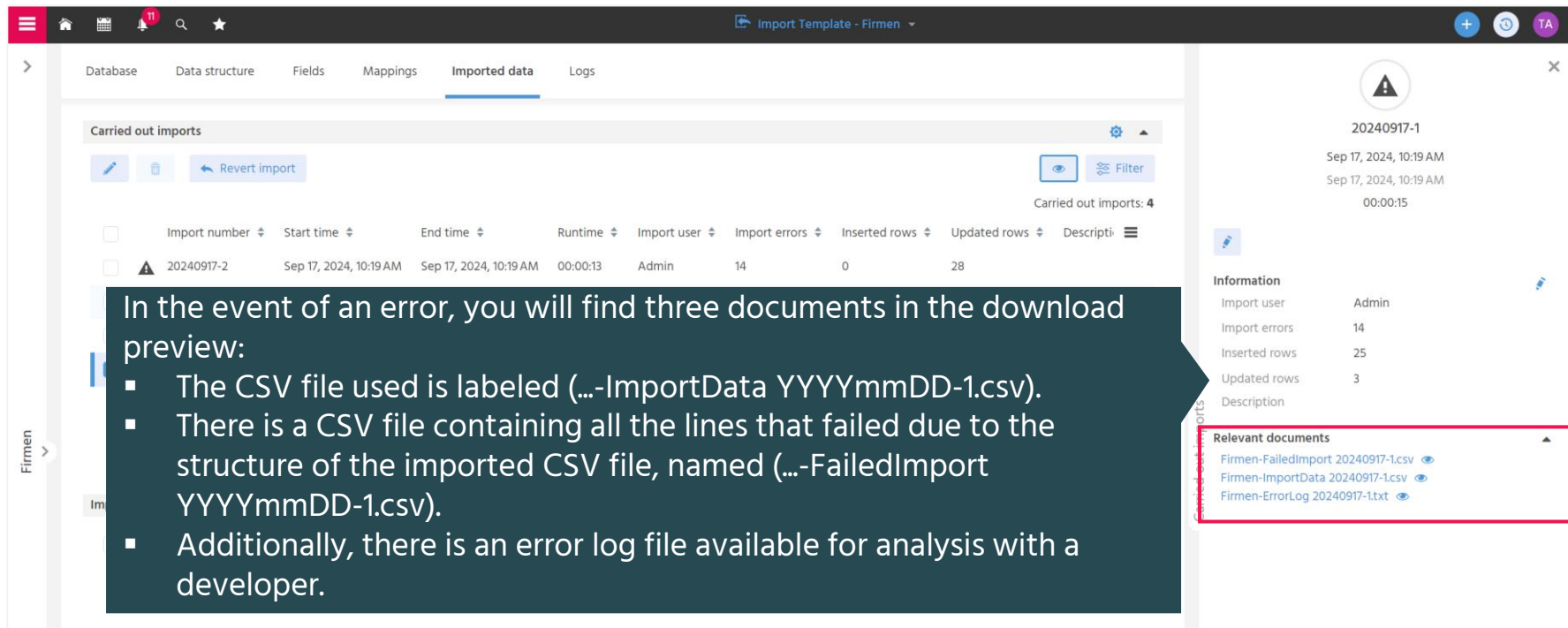
Import number	Title
20250917-1	Winkelberg Versicherung
20250917-1	IT Macherei
20250917-1	Schreinerei Binser
20250917-1	Franz Haas Waffeleisen
20250917-1	meineFirma
20250917-1	Agfa - Gevaert AG
20250917-1	Linde GmbH
20250917-1	Trautmann Antriebstechnik
20250917-2	Franz Haas Waffelmaschinen

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

Analyze import – Incorrect run



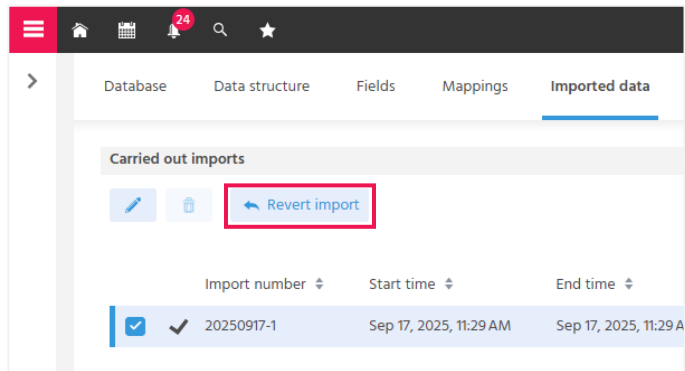
The screenshot displays the ADITO interface for analyzing an import run. The top navigation bar includes tabs for Database, Data structure, Fields, Mappings, Imported data (selected), and Logs. The main content area shows a table of import runs with columns: Import number, Start time, End time, Runtime, Import user, Import errors, Inserted rows, Updated rows, and Description. A table with one row is visible, showing an import run with 14 errors and 28 updated rows. A right sidebar provides detailed information for the selected run, including a warning icon, the run ID (20240917-1), the start time (Sep 17, 2024, 10:19 AM), and a summary of statistics. Below this, a section titled 'Relevant documents' lists three files: 'Firmen-FailedImport 20240917-1.csv', 'Firmen-ImportData 20240917-1.csv', and 'Firmen-ErrorLog 20240917-1.txt'. A dark blue callout box is overlaid on the table, providing instructions on how to find these documents in the download preview.

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.

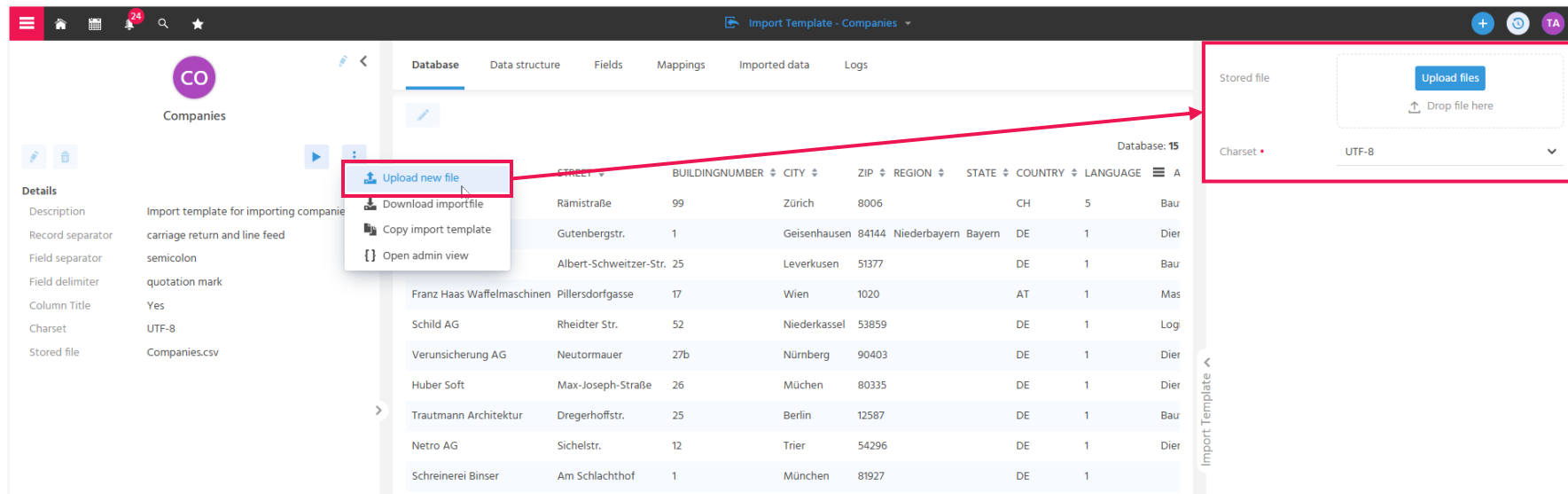
This action is primarily intended for creating the import template in a test or QA system, as this is where the [iterative process for developing an import template](#) usually occurs. This means that the data can be removed in the event of incorrect configurations or after the tests have been completed. 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.



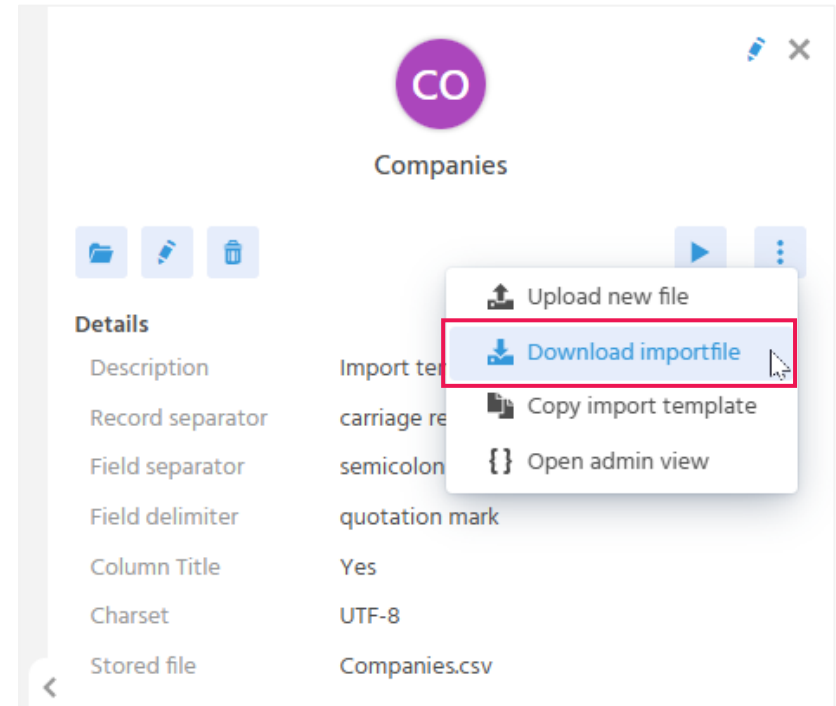
The screenshot shows the ADITO interface for the 'Companies' database. The 'Database' tab is active, displaying a table of imported data. A red box highlights the 'Upload new file' button in the left sidebar, and a red arrow points from it to the 'Upload files' button in the 'Stored file' section on the right.

STREET	BUILDINGNUMBER	CITY	ZIP	REGION	STATE	COUNTRY	LANGUAGE	A
Rämisträße	99	Zürich	8006			CH	5	Baur
Gutenbergstr.	1	Geisenhausen	84144	Niederbayern	Bayern	DE	1	Dier
Albert-Schweitzer-Str.	25	Leverkusen	51377			DE	1	Baur
Franz Haas Waffelmaschinen	Pillersdorfasse	17	Wien	1020		AT	1	Mas
Schild AG	Rheidter Str.	52	Niederkassel	53859		DE	1	Log
Verunsicherung AG	Neutormauer	27b	Nürnberg	90403		DE	1	Dier
Huber Soft	Max-Joseph-Straße	26	München	80335		DE	1	Dier
Trautmann Architektur	Dregerhoffstr.	25	Berlin	12587		DE	1	Baur
Netro AG	Sichelstr.	12	Trier	54296		DE	1	Dier
Schreinerei Binser	Am Schlachthof	1	München	81927		DE	1	

Data import

Download importfile

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

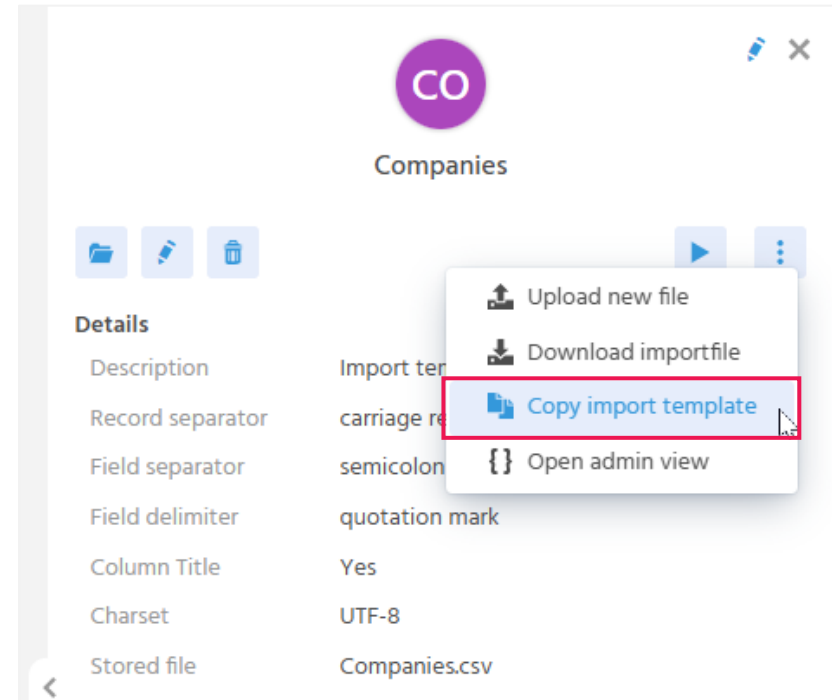


Import template

Copy import template

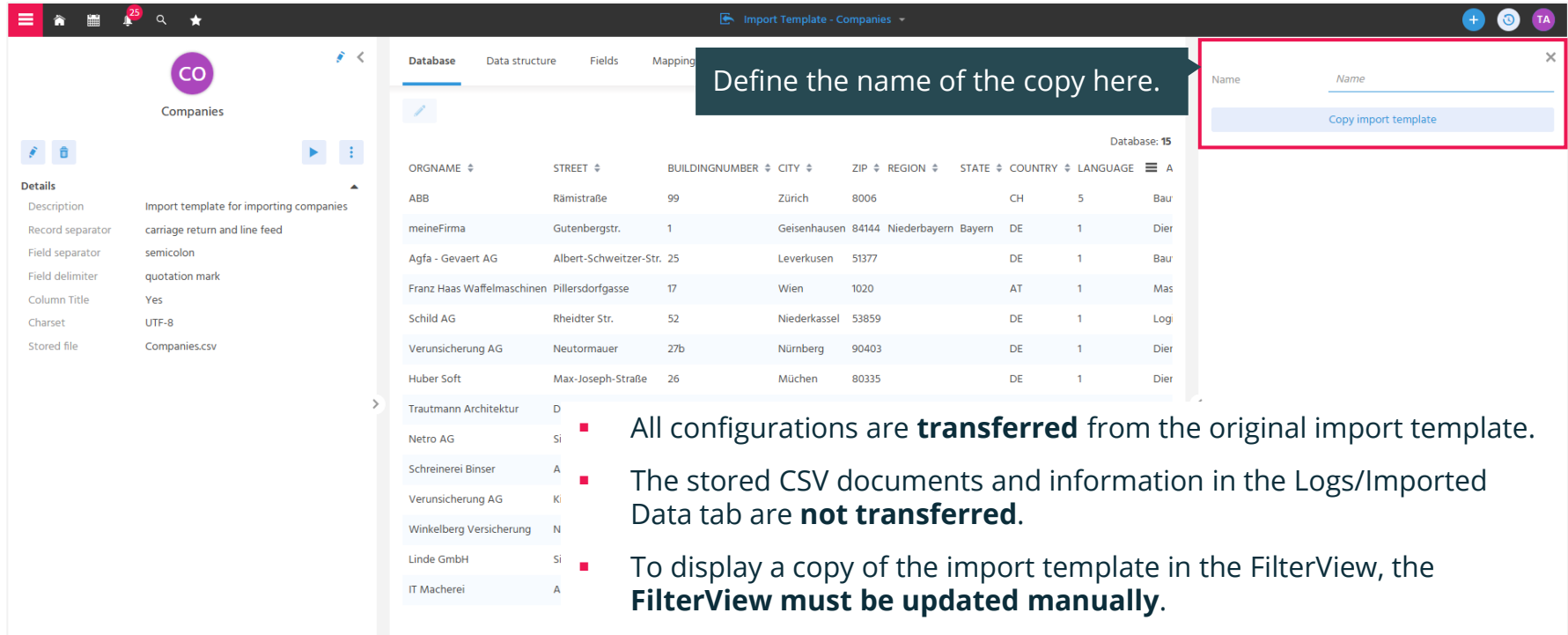
This action is used when similar CSV files are to be imported.

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



Define the name of the copy here.

Name

Copy import template

Database: 15

ORGNAME	STREET	BUILDINGNUMBER	CITY	ZIP	REGION	STATE	COUNTRY	LANGUAGE	A
ABB	Rämistraße	99	Zürich	8006		CH	5	Bau	
meineFirma	Gutenbergstr.	1	Geisenhausen	84144	Niederbayern	Bayern	DE	1	Dier
Agfa - Gevaert AG	Albert-Schweitzer-Str.	25	Leverkusen	51377		DE	1	Bau	
Franz Haas Waffelmaschinen	Pillersdorfasse	17	Wien	1020		AT	1	Mas	
Schild AG	Rheidter Str.	52	Niederkassel	53859		DE	1	Logi	
Verunsicherung AG	Neutormauer	27b	Nürnberg	90403		DE	1	Dier	
Huber Soft	Max-Joseph-Straße	26	München	80335		DE	1	Dier	
Trautmann Architektur	D								
Netro AG	Si								
Schreinerei Binser	A								
Verunsicherung AG	Ki								
Winkelberg Versicherung	N								
Linde GmbH	Si								
IT Macherei	A								

- 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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