



CSV Export

ADITO Software GmbH

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Screenshots

The UX design of ADITO is continuously optimised for you. Therefore, there may be deviations in the screenshots.





AGENDA

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CSV Export



"Overview" (1/2)

Export templates are used to **export CSV files**.

Any Contexts¹ with **all²** their fields can be exported.

¹ In xRM, export templates can be created for the Contexts company, contact, activity, opportunity, offer, campaign, campaign step, eventdate, projectticket and bulkmail. In the ExportTemplate_Lib, the selection of Contexts can be extended by customising.

² In the ExportTemplate_Lib, individual entity fields (e.g. IDs) can be excluded.



CSV Export

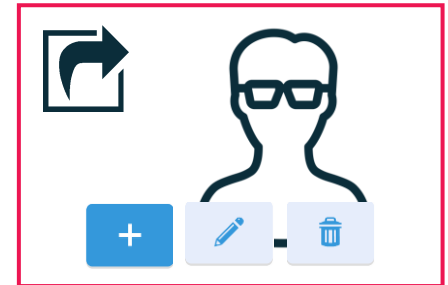
"Overview" (2/2)

The **user** performs the export in the FilterView of the respective Context and needs an export template for this.

The user can only export data to which he is authorized.

The **administrator** creates the export templates, thereby defining

- from which **Contexts** which **fields** are exported.
- via the **status** whether a template can be selected from a user.



Export Template

Structure of the presentation

The creation of export templates is explained using examples. On the right-hand side of the slide, you will find an indication of which [example](#) and which step of the [procedure](#) you are currently in.

Example x

x. Step

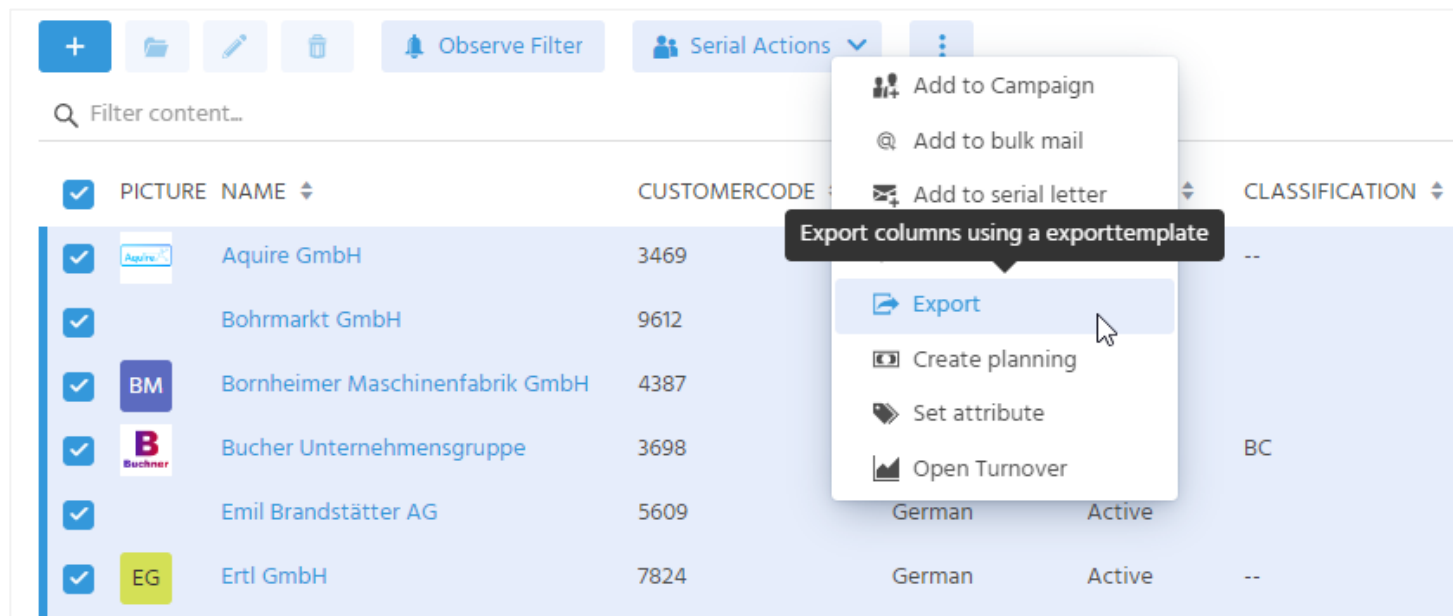
Perform CSV Export



CSV Export

Step 1

In the **Serial actions** of the FilterView, click on the action **"Export"**.



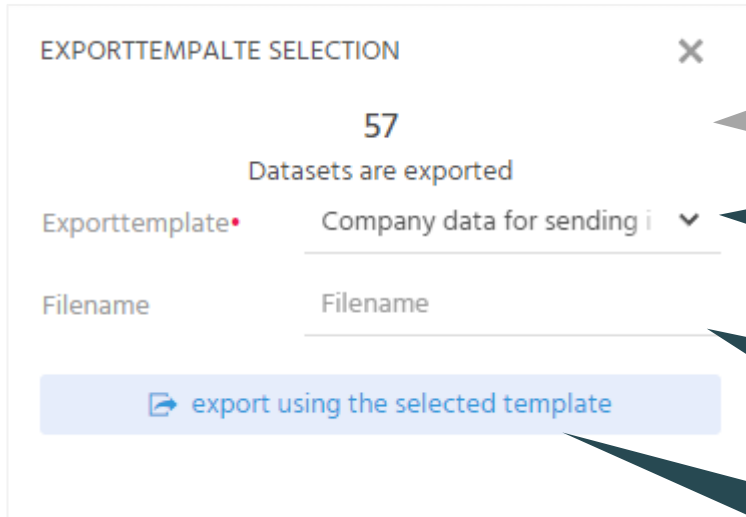
The screenshot shows the ADITO interface. At the top, there is a toolbar with icons for adding, filtering, editing, deleting, and observing filters. Below the toolbar is a search bar labeled 'Filter content...'. The main area displays a table with columns: PICTURE, NAME, CUSTOMERCODE, and CLASSIFICATION. A dropdown menu is open over the table, showing various actions: 'Add to Campaign', 'Add to bulk mail', 'Add to serial letter', 'Export columns using a exporttemplate', 'Export', 'Create planning', 'Set attribute', and 'Open Turnover'. The 'Export' option is highlighted by the mouse cursor.

✓	PICTURE	NAME	CUSTOMERCODE	CLASSIFICATION
✓		Aquire GmbH	3469	--
✓		Bohrmarkt GmbH	9612	
✓		Bornheimer Maschinenfabrik GmbH	4387	
✓		Bucher Unternehmensgruppe	3698	BC
✓		Emil Brandstätter AG	5609	German Active
✓		Ertl GmbH	7824	German Active --

CSV Export

Step 2

Select an export template and start the export process.



EXPORTTEMPALTE SELECTION

57
Datasets are exported

Exporttemplate • Company data for sending i ▼

Filename

Filename

export using the selected template

A **maximum of 5000 records** can be exported. If more records are selected, a note will be displayed.

Select the export template. If the selection is empty, no template is active for this Context.

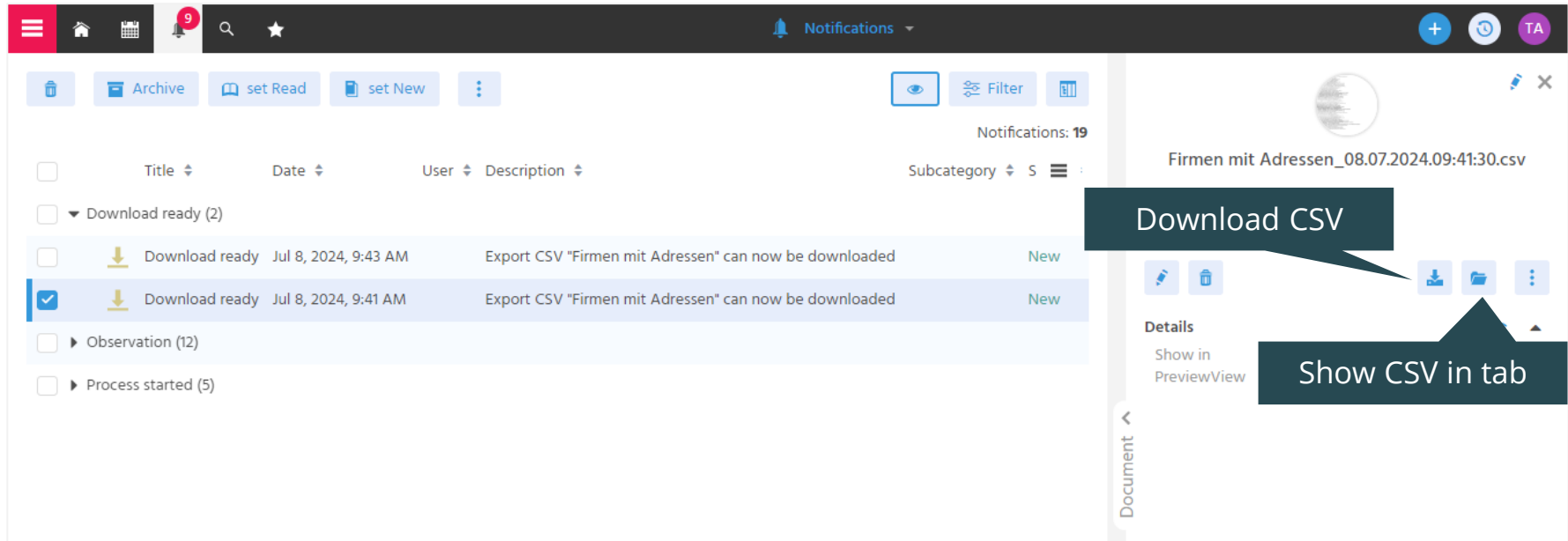
Optional: Enter a file name (default: template name + date + time).

With this action you start the export process which is executed in the background.

CSV Export

Step 3

Open the **Preview** of the selected CSV export.



The screenshot shows the ADITO interface. At the top, there's a dark navigation bar with a menu icon, home, calendar, and a notification bell with a red '9'. Below this is a toolbar with 'Archive', 'set Read', and 'set New' buttons. A table lists CSV exports with columns for checkboxes, Title, Date, User, and Description. Two rows are visible, both titled 'Download ready' with dates from July 8, 2024. The second row is selected. To the right, a 'Details' panel shows the filename 'Firmen mit Adressen_08.07.2024.09:41:30.csv' and a 'Show in PreviewView' button. Two callout boxes highlight the 'Download CSV' button and the 'Show CSV in tab' button in the details panel.

	Title	Date	User	Description	
☐	Download ready	Jul 8, 2024, 9:43 AM		Export CSV "Firmen mit Adressen" can now be downloaded	New
☒	Download ready	Jul 8, 2024, 9:41 AM		Export CSV "Firmen mit Adressen" can now be downloaded	New

Details
Show in PreviewView

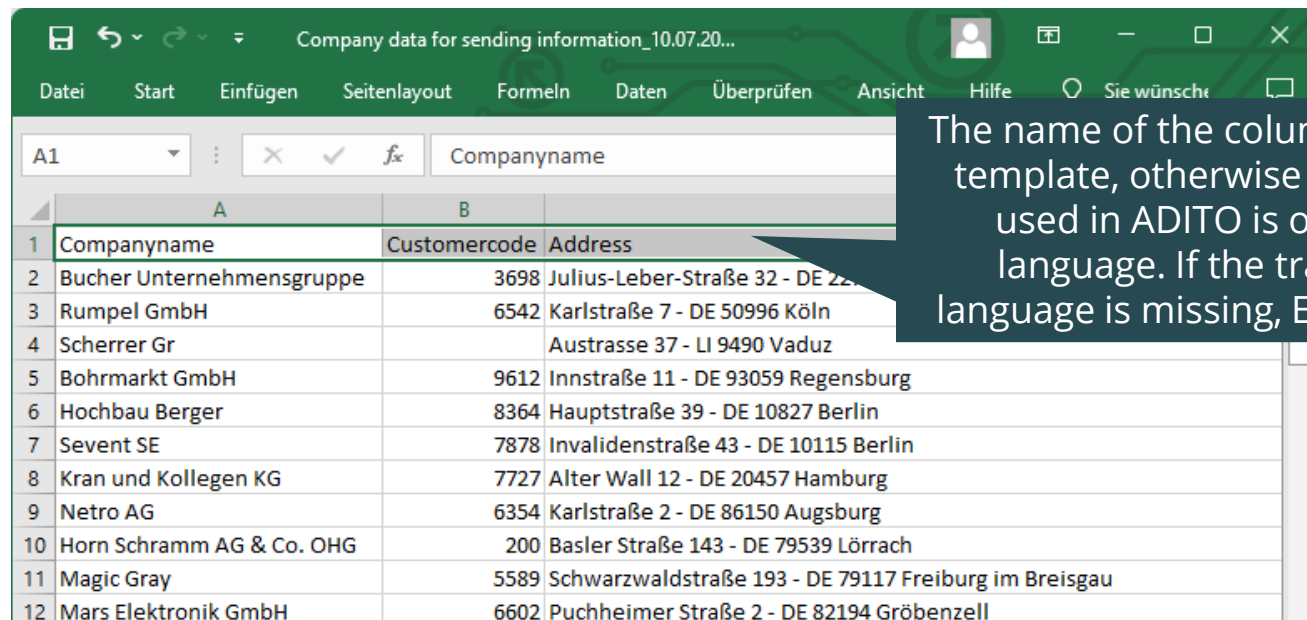
Download CSV

Show CSV in tab

CSV Export

Step 4 – Option 1: Open manually

Open the downloaded CSV file.

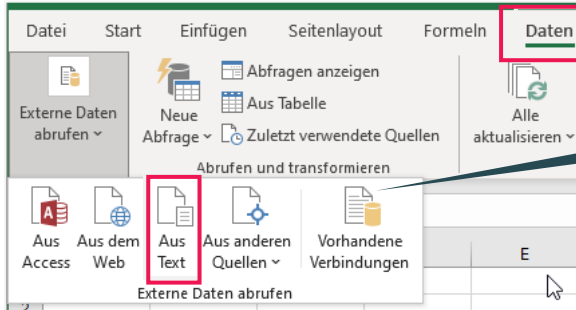


Company data for sending information_10.07.20...		
Datei Start Einfügen Seitenlayout Formeln Daten Überprüfen Ansicht Hilfe Sie wünschen		
A1 Companyname		
A	B	
1	Companyname	Customercode Address
2	Bucher Unternehmensgruppe	3698 Julius-Leber-Straße 32 - DE 22
3	Rumpel GmbH	6542 Karlstraße 7 - DE 50996 Köln
4	Scherrer Gr	Austrasse 37 - LI 9490 Vaduz
5	Bohrmarkt GmbH	9612 Innstraße 11 - DE 93059 Regensburg
6	Hochbau Berger	8364 Hauptstraße 39 - DE 10827 Berlin
7	Sevent SE	7878 Invalidenstraße 43 - DE 10115 Berlin
8	Kran und Kollegen KG	7727 Alter Wall 12 - DE 20457 Hamburg
9	Netro AG	6354 Karlstraße 2 - DE 86150 Augsburg
10	Horn Schramm AG & Co. OHG	200 Basler Straße 143 - DE 79539 Lörrach
11	Magic Gray	5589 Schwarzwaldstraße 193 - DE 79117 Freiburg im Breisgau
12	Mars Elektronik GmbH	6602 Puchheimer Straße 2 - DE 82194 Gröbenzell

The name of the columns can be defined in the template, otherwise the name of the field as used in ADITO is output in the set client language. If the translation of the client language is missing, English is used by default.

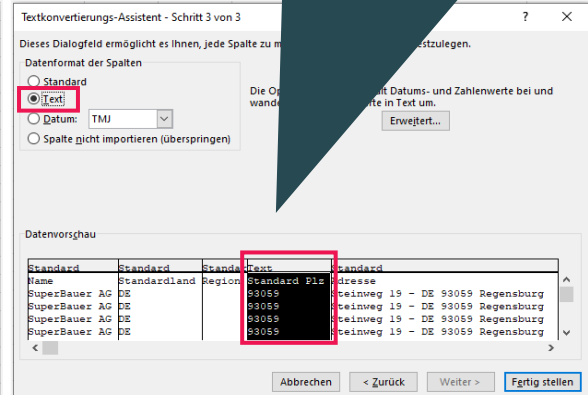
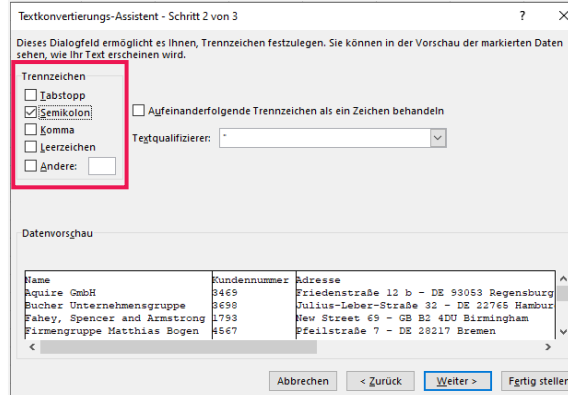
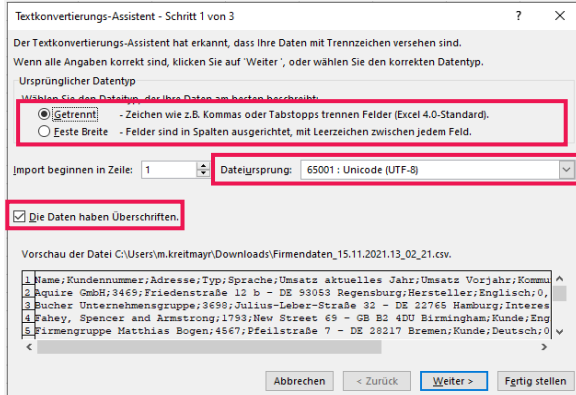
CSV Export

Step 4 – Option 2: Import to Excel (Text Conversion Wizard)



Open a new worksheet to import data **From Text**.

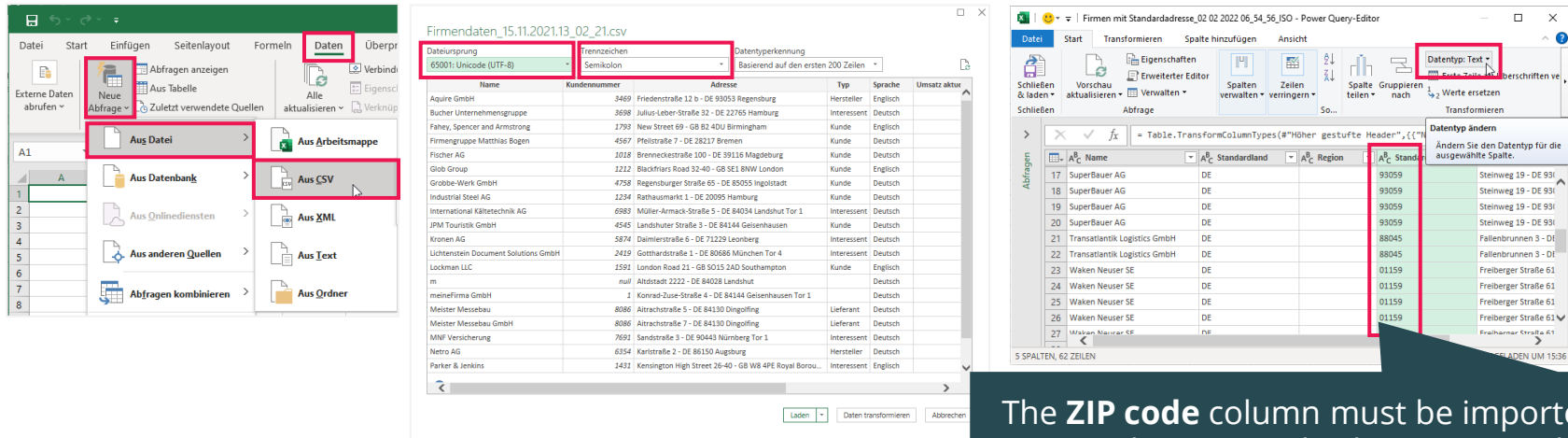
The **ZIP code** column must be imported as **Text** so that postcodes beginning with zero are correctly transferred from the CSV.



CSV Export

Step 4 – Option 3: Import to Excel from File

Open a new worksheet to import data **from file (CSV)**.



The first screenshot shows the Excel 'Daten' ribbon with the 'Aus Datei' button highlighted. The second screenshot shows the 'Importieren' dialog box with 'Dateisprung' set to '(5000): Unicode (UTF-8)' and 'Trennzeichen' set to 'Semikolon'. The third screenshot shows the 'Transformieren' ribbon with the 'Datentyp: Text' dropdown highlighted for the 'Standardland' column.

Name	Kundennummer	Adresse	Typ	Sprache	Umsatz aktuell
Aquire GmbH	3489	Friedenstraße 12 b - DE 93053 Regensburg	Hersteller	Englisch	
Bucher Unternehmensgruppe	3698	Julius-Leber-Straße 32 - DE 22765 Hamburg	Interessent	Deutsch	
Fahey, Spencer and Armstrong	1793	New Street 69 - GB B2 4DU Birmingham	Kunde	Englisch	
Firmengruppe Matthias Bogen	4567	Pfeilsstraße 7 - DE 28217 Bremen	Kunde	Deutsch	
Fischer AG	3038	Brenneckestraße 100 - DE 39116 Magdeburg	Kunde	Deutsch	
Glob Group	1222	Blackfriars Road 32-40 - GB SE1 8NW London	Kunde	Englisch	
Gröbke-Werk GmbH	4758	Regensburger Straße 65 - DE 85055 Regensburg	Kunde	Deutsch	
Industrial Steel AG	1234	Rathausmarkt 1 - DE 20095 Hamburg	Kunde	Deutsch	
International Kältetechnik AG	6985	Müller-Armack-Straße 5 - DE 84034 Landshut Tor 1	Interessent	Deutsch	
JPM Touristik GmbH	4545	Landshuter Straße 3 - DE 84144 Geisenhausen	Kunde	Deutsch	
Kronen AG	5874	Daimlerstraße 6 - DE 71229 Leonberg	Interessent	Deutsch	
Lichtenstein Document Solutions GmbH	2429	Gothardstraße 1 - DE 80686 München Tor 4	Interessent	Deutsch	
Lockman LLC	2592	London Road 21 - GB SO15 2AD Southampton	Kunde	Englisch	
im	null	Altstadt 2222 - DE 84028 Landshut	Deutsch		
meineFirma GmbH	1	Konrad-Zuse-Straße 4 - DE 84144 Geisenhausen Tor 1	Deutsch		
Meister Messebau	8086	Altrachstraße 5 - DE 84130 Dingolfing	Lieferant	Deutsch	
Meister Messebau GmbH	8086	Altrachstraße 7 - DE 84130 Dingolfing	Lieferant	Deutsch	
MNF Versicherung	7691	Sandstraße 3 - DE 90443 Nürnberg Tor 1	Interessent	Deutsch	
Netro AG	6354	Karlstraße 2 - DE 86150 Augsburg	Hersteller	Deutsch	
Parker & Jenkins	1431	Kensington High Street 26-40 - GB W8 4PE Royal Borough of Kensington and Chelsea	Interessent	Englisch	

The **ZIP code** column must be imported as **Text** so that postcodes beginning with zero are correctly transferred from the CSV.

Export Template



Provide Export Template

Procedure

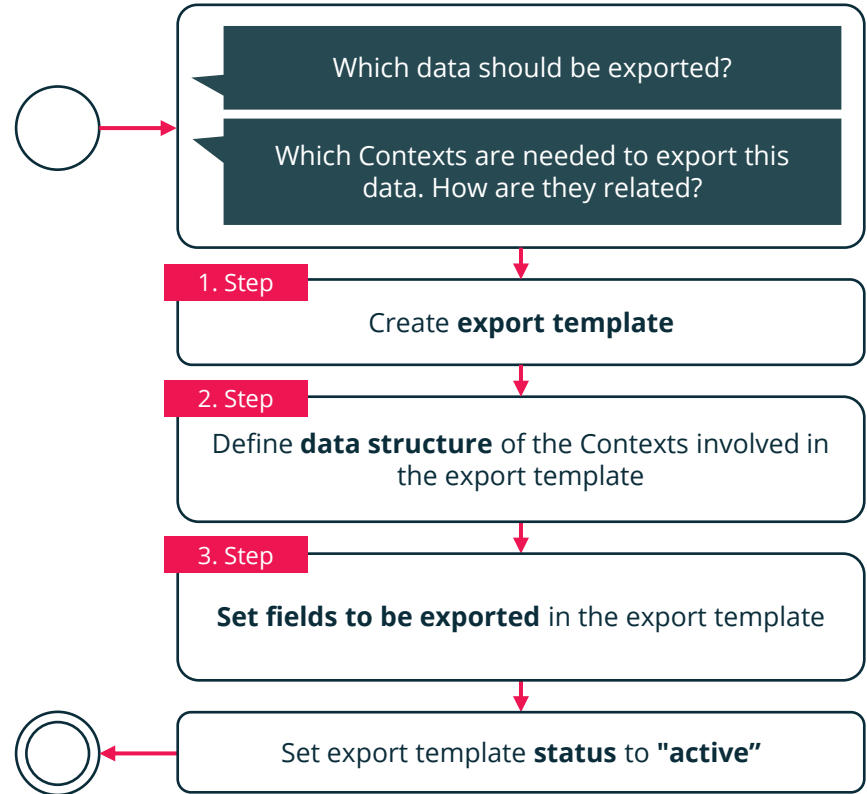


Employee

Requirement: "I need an export for..."

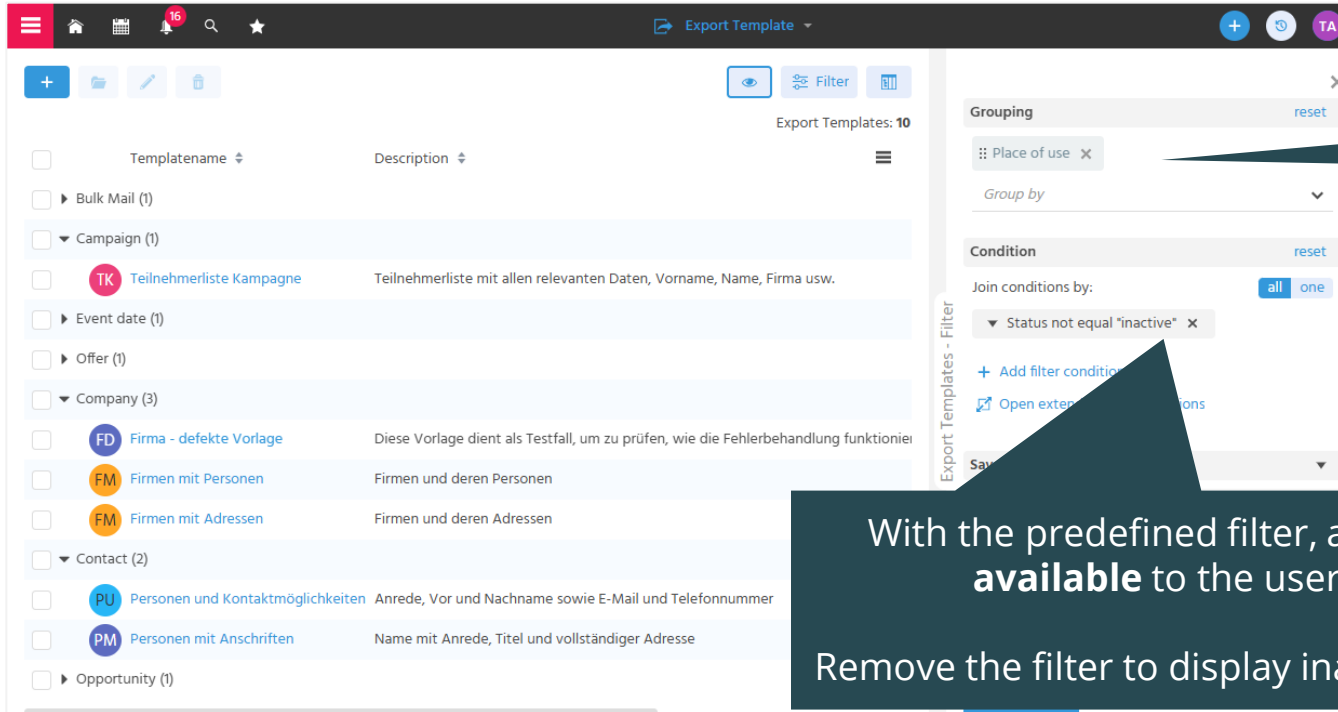


Tim Admin



Export Template

Administration



Export Templates: 10

☐	Templatename	Description
☐	Bulk Mail (1)	
☐	Campaign (1)	
☐	TK Teilnehmerliste Kampagne	Teilnehmerliste mit allen relevanten Daten, Vorname, Name, Firma usw.
☐	Event date (1)	
☐	Offer (1)	
☐	Company (3)	
☐	FD Firma - defekte Vorlage	Diese Vorlage dient als Testfall, um zu prüfen, wie die Fehlerbehandlung funktioniert
☐	FM Firmen mit Personen	Firmen und deren Personen
☐	FM Firmen mit Adressen	Firmen und deren Adressen
☐	Contact (2)	
☐	PU Personen und Kontaktmöglichkeiten	Anrede, Vor und Nachname sowie E-Mail und Telefonnummer
☐	PM Personen mit Anschriften	Name mit Anrede, Titel und vollständiger Adresse
☐	Opportunity (1)	

Export Templates - Filter

Grouping

Place of use

Group by

Condition

Join conditions by: all one

Status not equal "inactive"

Add filter condition

Open external conditions

Save

Grouping by place of use and status.

With the predefined filter, all **export templates available** to the user are displayed.

Remove the filter to display inactive export templates.

Export Template

Examples

- 1. Simple export template:**
Company data is to be exported.
- 2. Export template with data structure:**
Company data plus additional address data are to be exported (extension of example 1).
- 3. Export template with conditional data structure:**
Company data with company address and delivery address in separate columns are to be exported (extension of example 2).

Simple Export Template

Example 1

Procedure

1. When creating a new template, select "**Company**" as **place of use**.
2. In the main view, create the desired fields in the tab "**Fields**". The tab "**Data structure**" remains empty.
3. The **status** of the export template is set to **active**, i.e. it is now available for users.

Extract of the fields whose information can be exported directly for the company.



- ☐ Customercode,
- ☐ Information,
- ☐ Names,
- ☐ Language,
- ☐ Status,
- ☐ Type,
- ☐ Address,
- ☐ E-Mail,
- ☐ Phone,
- ☐ ...

Export Template

Example 1

Creating a new Export Template

1. Step

5

Export Template - Company data for sending information

+

TA

Templatenamename•	Company data for sending information
Description	For sending the print info materials, the contact details of the company of an agency are provided in the export
Status	active
Record separator•	CRLF
Field separator•	semicolon
Field delimiter•	quotation mark
Charset•	UTF-8
Place of use•	Company

Export Template

Example 1

Creating a new Export Template: Status and Separator

1. Step

Export Template - Company data for sending information

Templatenamename	Company data for sending information
Description	For sending the print info materials, the co
Status	active
Record separator	CRLF
Field separator	semicolon
Field delimiter	quotation mark
Charset	UTF-8
Place of use	Company

The status controls whether the template is available for users. As long as the template is not completely defined, you should use the status **"inactive"**.

In exceptional cases, any characters can be entered manually as separators.

Export Template

Example 1

Creating a new Export Template: Charset

1. Step

Export Template - Company data for sending information

Templatenamename	Company data for sending information
Description	For sending the print info materials, the contact details of the company of an agency are provided in the export
Status	active
Record separator	CRLF
Field separator	semicolon
Field delimiter	quotation mark
Charset	UTF-8
Place of use	Company

UTF-8 is preset

Export Template

Example 1

Creating a new Export Template: Place of Use

1. Step

The screenshot shows a web interface for creating an export template. The title bar reads 'Export Template - Company data for sending information'. The form contains the following fields:

Field	Value
Templatenamename*	Company data for sending information
Description	For sending the print info materials, the contact details of the company of an agency are provided in the export
Status	active
Record separator*	CRLF
Field separator*	semicolon
Field delimiter*	quotation mark
Charset*	UTF-8
Place of use*	Company

The "Place of use" field can only be edited when it is newly created. An export template can only have one Context as the place of use, as the other export columns are directly dependent on this Context.

The Context selection can be adjusted in customizing.

Export Template

Example 1

2. Step

Data Structure

Export Template - Company data for sending information

CD

Company data for sending information

Description	For sending the print info materials, the contact details of the company of an agency are provided in the export
Status	active
Record separator	CRLF
Field separator	semicolon
Field delimiter	quotation mark
Charset	UTF-8
Place of use	Company

Fields

Data structure Fields

+ ✎ 🗑️

subordinate context

Filter

Data structure: 0

For this "simple" case you do not need a data structure. Therefore, you do not enter any entries in the data structure here.

No data present

Export Template

Example 1

Define Export Template Fields

3. Step

Export Template - NAME

CD

Company data for sending information

Description For sending the print info materials, the contact details of the company of an agency

Data structure Fields

Sorting Field (Exportfile) Field (CRM) Place of Use Only Value

Fields: 0

Place of Use • Company (Company)

Field (Exportfile) Companyname

Field (CRM) • Name

Only Value ☐

Place of use – Context from which the field is exported

Field (Exportfile) – enter an **individual column name** here if necessary. If no individual entry is made here, the name of the field (CRM) is used as the column name.

Field (CRM) – Field whose value is to be exported. (Which fields can be selected can be defined in customising).

Define “Only Value”

- Inactive: Export value with formatting as it is displayed to the user in the client (Firmen Adresse: Julius-Leber-Straße 32 - DE 22765 Hamburg).
- Active: Export value without formatting, as it is entered in the database (Firmen Adresse: bspw.: e1aef1b7-569b-46be-bc50-f02332a42ef1).

Place of Use •

Company (Company)

Field (Exportfile)

Companyname

Field (CRM) •

Name

Only Value

☐

Export Template

Example 1

Define Export Template Fields

3. Step

Export Template - ADDRESS_ID

CD

Company data for sending information

Description: For sending the print info materials, the contact details of the company of an agency are provided in the export

Status: active

Record separator: CRLF

Field separator: semicolon

Field delimiter: quotation mark

Charset: UTF-8

Place of use: Company

Fields

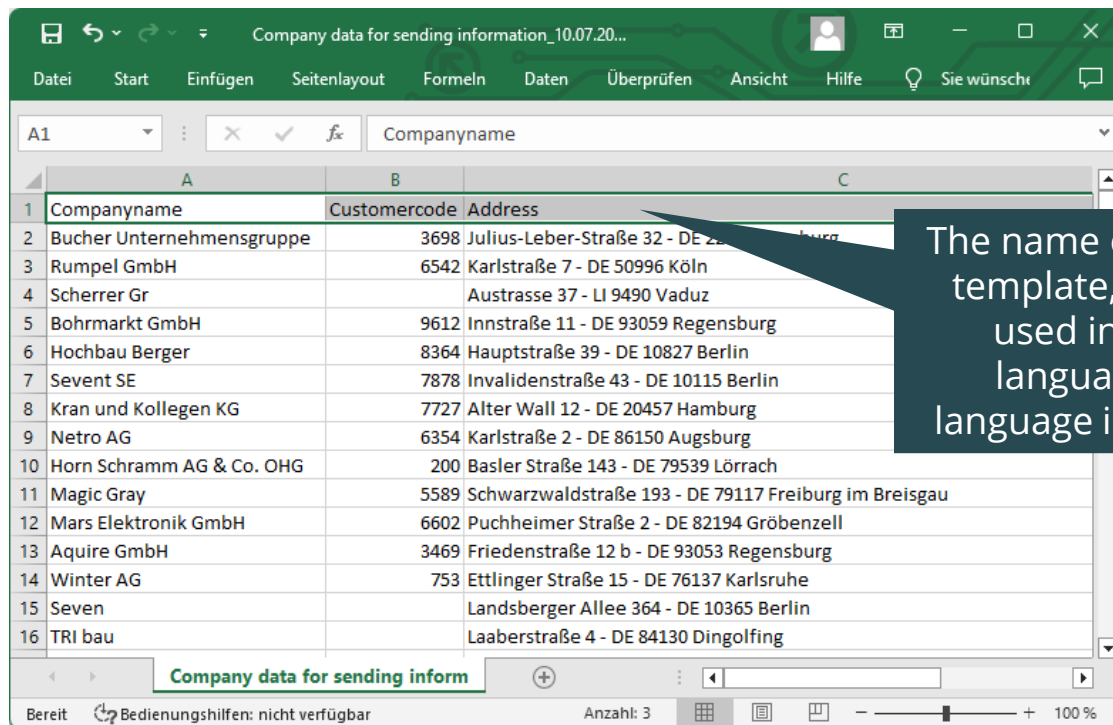
Sorting	Field (Exportfile)	Field (CRM)	Place of Use	Only Value
1	Companyname	Name	Company (Company)	No
2		Customercode	Company (Company)	No
3		Address	Company (Company)	No

Sort the **order** of the fields.

Export Template

Example 1

Result of the CSV Export



Company data for sending information_10.07.20...

	A	B	C
1	Companyname	Customercode	Address
2	Bucher Unternehmensgruppe	3698	Julius-Leber-Straße 32 - DE 20098 Hamburg
3	Rumpel GmbH	6542	Karlstraße 7 - DE 50996 Köln
4	Scherrer Gr		Austrasse 37 - LI 9490 Vaduz
5	Bohrmarkt GmbH	9612	Innstraße 11 - DE 93059 Regensburg
6	Hochbau Berger	8364	Hauptstraße 39 - DE 10827 Berlin
7	Sevent SE	7878	Invalidenstraße 43 - DE 10115 Berlin
8	Kran und Kollegen KG	7727	Alter Wall 12 - DE 20457 Hamburg
9	Netro AG	6354	Karlstraße 2 - DE 86150 Augsburg
10	Horn Schramm AG & Co. OHG	200	Basler Straße 143 - DE 79539 Lörrach
11	Magic Gray	5589	Schwarzwaldstraße 193 - DE 79117 Freiburg im Breisgau
12	Mars Elektronik GmbH	6602	Puchheimer Straße 2 - DE 82194 Gröbenzell
13	Aquire GmbH	3469	Friedenstraße 12 b - DE 93053 Regensburg
14	Winter AG	753	Ettlinger Straße 15 - DE 76137 Karlsruhe
15	Seven		Landsberger Allee 364 - DE 10365 Berlin
16	TRI bau		Laaberstraße 4 - DE 84130 Dingolfing

Company data for sending inform

Bereit Bedienungshilfen: nicht verfügbar Anzahl: 3 100 %

The name of the columns can be defined in the template, otherwise the name of the field as used in ADITO is output in the set client language. If the translation of the client language is missing, English is used by default.

Export Template with data structure

Example 2

Procedure

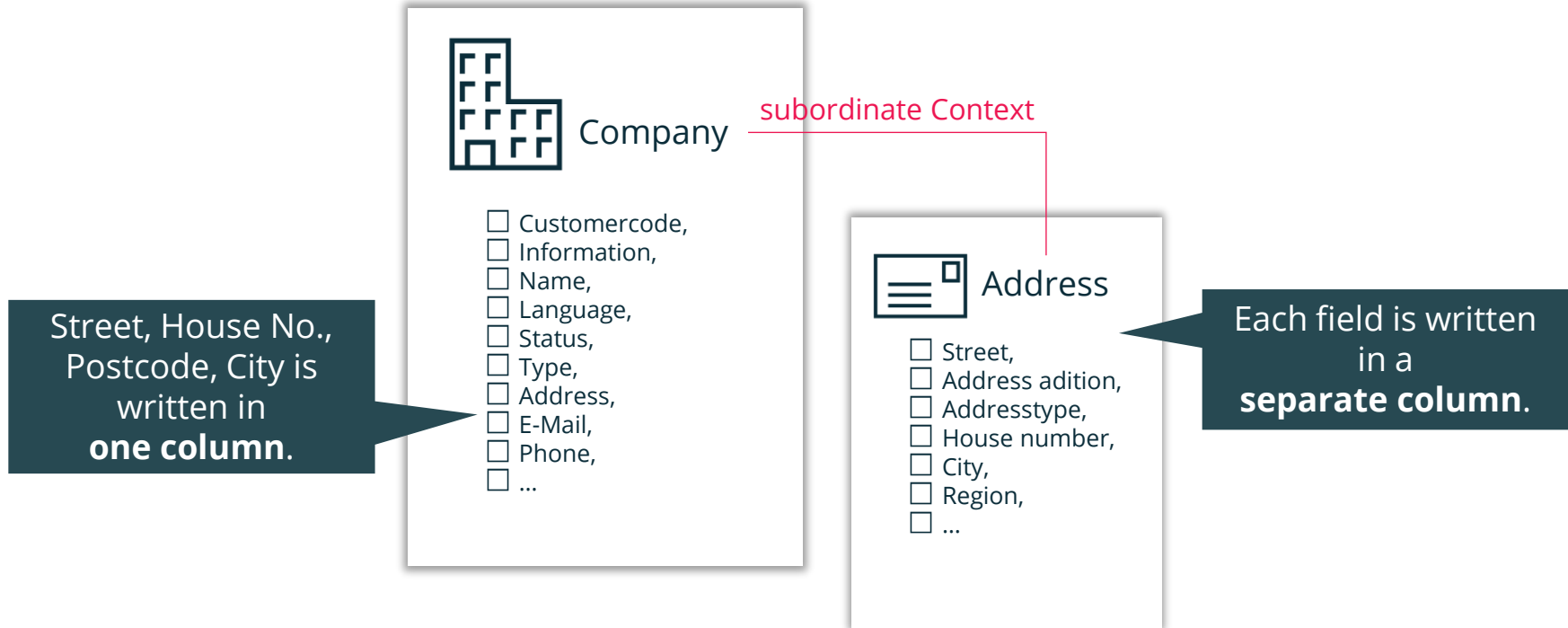
Create an export template that exports company data and **individual columns for address data**.

1. Open the export template you created in example 1.
2. In the "Data structure" tab, select the **subordinate Context** "Addresses".
3. In the "Fields" tab, define the fields that are required for the address **as individual columns**. If necessary, delete the "old" field "Address" with place of use "Company".

Export Template with data structure

Example 2

2. Step



Export Template with data structure

Example 2

Define data structure

2. Step

In the "Title" field, enter a title that reflects the technical background of the subordinate Context. [Further information on this can be found in the topic "Conditional data structure".](#)

For the extension of the example, the "Addresses" Context is now accessed in order to be able to access the address fields in detail. For this reason, create "Addresses" as a subordinate Context in the data structure.

Fields

1	Name
2	Customercode
3	Address

Context

Title	office address
subordinate context	! Context

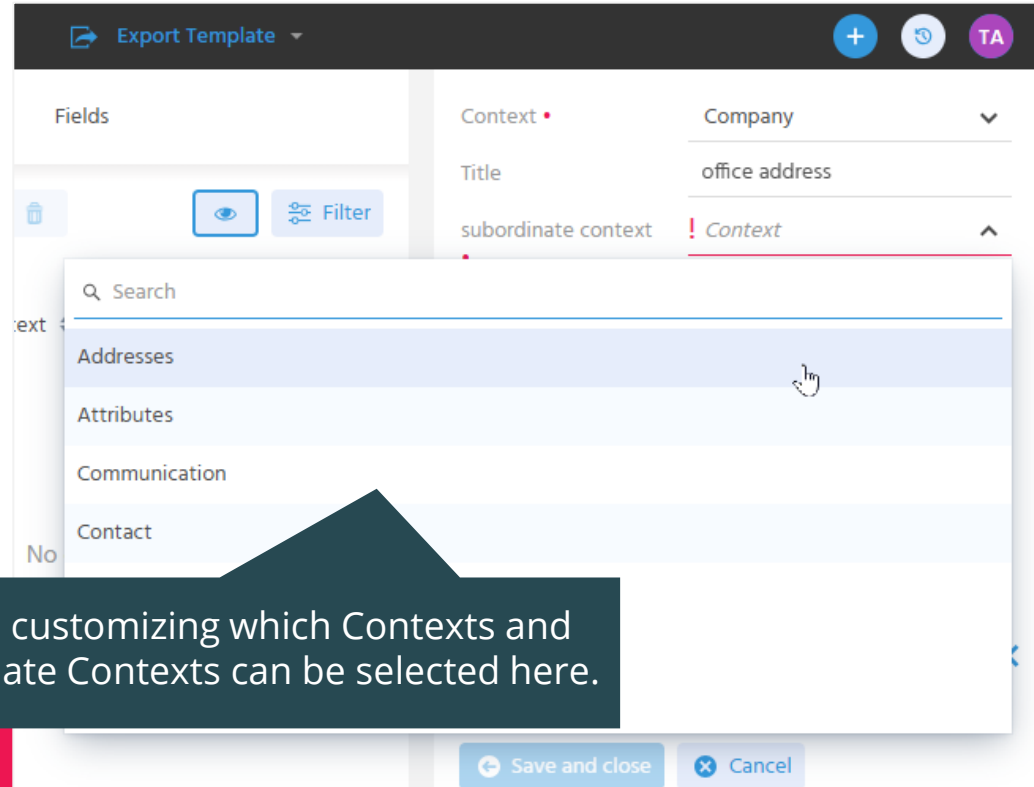
Addresses

Attributes
Communication

Export Template with data structure

Define data structure

In addition to the fields of a Context, information from subordinate Contexts can also be exported. To do this, the data structure must be created in the export template (e.g. to export companies and their offers).



Define in customizing which Contexts and subordinate Contexts can be selected here.

Export Template with data structure

Example 2

3. Step

Select Fields

The screenshot shows the 'Export Template' interface with the 'Fields' tab selected. The 'Place of Use' dropdown is highlighted with a red box, and its contents are visible. A dark blue callout box provides an explanation of the dropdown's function.

Company data for sending information

Description: For sending the print info materials, the contact details of the company of an agency are provided in the export

Status: active

Record separator: CRLF

Field separator: semicolon

Field delimiter: quotation mark

Charset: UTF-8

Place of use: Company

Fields

Sorting	Field (Exportfile)	Field (CRM)	Place of Use	Only Value
1	Companyname	Name	Company (Company)	No
2		Customercode	Company (Company)	

In the "Place of use" field, you can select the Contexts defined in the data structure from which the desired fields are exported.

Export Template with data structure

Example 2

Overview: Fields

3. Step

Company data for sending information

Description: For sending the print info materials, the contact details of the company of an agency are provided in the export

Status: active

Record separator: CRLF

Field separator: semicolon

Field delimiter: quotation mark

Charset: UTF-8

Place of use: Company

Fields

Sorting	Field (Exportfile)	Field (CRM)	Place of Use	Only Value
1	Companyname	Name	Company (Company)	No
2		Customercode	Company (Company)	No
3	Street House number	Street	Addresses (office address)	No
4	ZIP	Postcode	Addresses (office address)	No
5		City	Addresses (office address)	No

Fields of the Context

Fields of the subordinate Context

Export Template with data structure

Example 2

Result of the CSV Export

Company data for sending information_10.07.20...

	A	B	C	D	E
1	Companyname	Customercode	Street House number	ZIP	City
2	Bucher Unternehmensgruppe	3698	Julius-Leber-Straße 32	22765	Hamburg
3	Rumpel GmbH	6542	Karlstraße 7	50996	Köln
4	Scherrer Gr		Austrasse 37	9490	Vaduz
5	Bohrmarkt GmbH	9612	Innstraße 11	93059	Regensburg
6	Hochbau Berger	8364	Hauptstraße 39	10827	Berlin
7	Sevent SE	7878	Invalidenstraße 43	10115	Berlin
8	Kran und Kollegen KG	7727	Alter Wall 12	20457	Hamburg
9	Netro AG	6354	Karlstraße 2	86150	Augsburg
10	Horn Schramm AG & Co. OHG	200	Basler Straße 143	79539	Lörrach
11	Magic Gray	5589	Schwarzwaldstraße 193	79117	Freiburg im Bre
12	Mars Elektronik GmbH	6602	Promenadeplatz 2-6	80333	München
13	Mars Elektronik GmbH	6602	Puchheimer Straße 2	82194	Gröbenzell
14	Aquire GmbH	3469	Friedenstraße 12 b	93053	Regensburg
15	Winter AG	753	Ettlinger Straße 15	76137	Karlsruhe
16	Seven		Landsberger Allee 364	10365	Berlin

Company data for sending inform

Bereit Mittelwert: 43932,75 Anzahl: 10 Summe: 175731 100 %

If a company data record has several addresses, it is listed several times in the table.

Export Template with conditional data structure

Example 3

Procedure

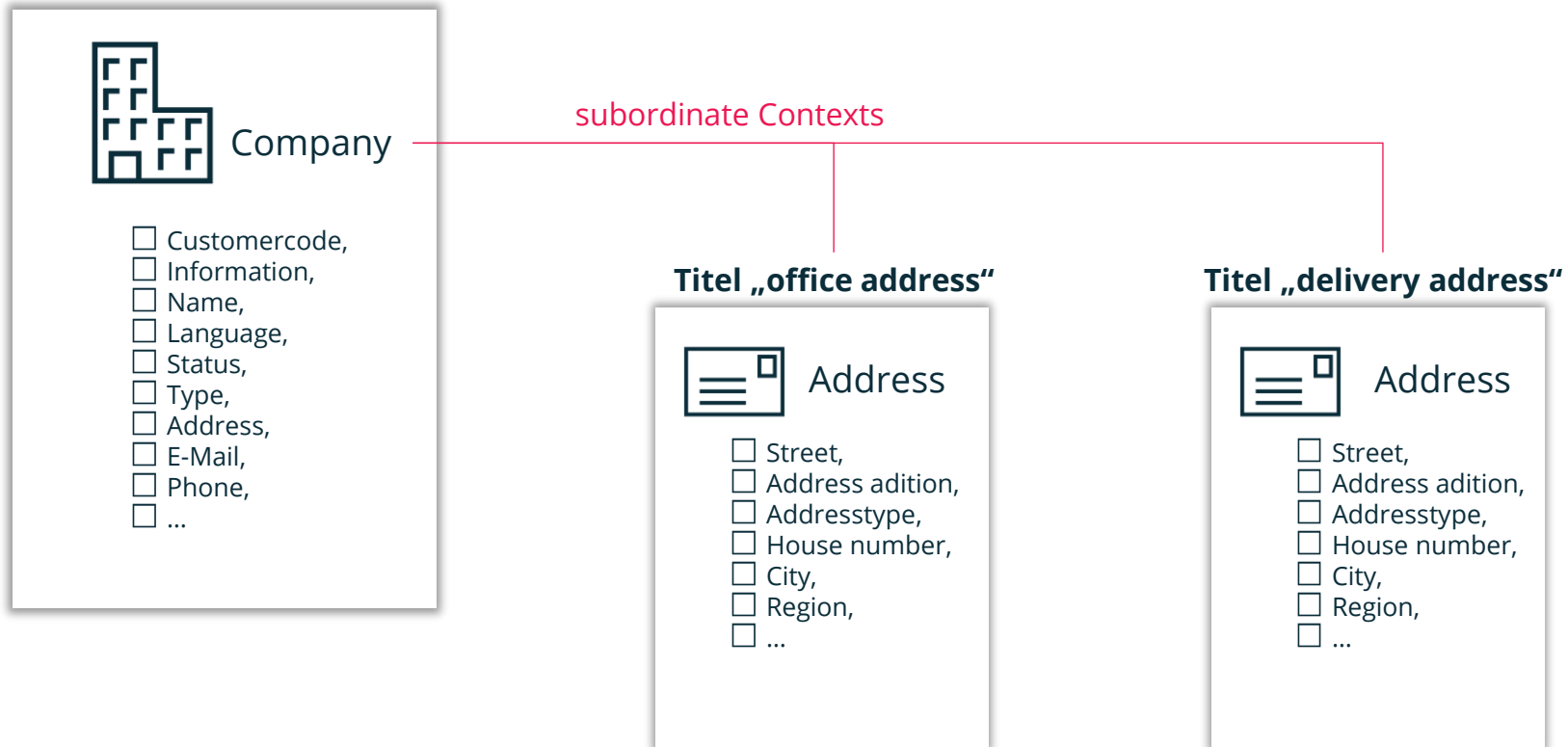
Create an export template that exports company data with company address and delivery address in separate columns.

1. Open the export template that you created in example 2.
2. In the "Data structure" tab, select the subordinate Context "Addresses" with the title "Office address" and enter the condition "Address type = Office address".
3. In the "Data structure" tab, add a second subordinate Context "Address" with the title "Delivery address" and the condition "Address type = Delivery address".
4. In the "Fields" tab, define the fields that are also required for the delivery address as individual columns. (The original fields of the office address can remain).

Export Template with conditional data structure

Example 3

2. Step



Export Template with conditional data structure

Example 3

2. Step

Enter condition

If the filter conditions of the subordinate Context are defined, only data that fulfils this condition is exported.

Example: Only addresses of the address type "Office address" should be exported.

The screenshot displays the 'Export Template - Address' interface. On the left, a sidebar shows 'Company data for sending information' with fields like Description, Status, Record separator, Field separator, Field delimiter, Charset, Place of use, and Fields. The main area is divided into 'Data structure' and 'Fields' tabs. Under 'Data structure', a table lists 'subordinate context' and 'Title'. The 'subordinate context' is set to 'Addresses', and the 'Title' is 'office address'. A 'Filter' button is visible, and a red box highlights the 'Filter' field with the text 'Open extended filter condi...'. A dark blue callout box explains: 'The filter criteria of the selected subordinate Context are available for entering the conditions.' Another dark blue callout box states: 'The filter condition can be adjusted subsequently.'

subordinate context	Title
Addresses	office address

Export Template with conditional data structure

Example 3

Define conditional data structure: Office address

2. Step

Company data for sending information

Description: For sending the print info materials, the contact details of the company of an agency are provided in the export

Status: active

Record separator: CRLF

Field separator: semicolon

Field delimiter: quotation mark

Charset: UTF-8

Place of use: Company

Fields

1	Name
2	Customercode
3	Street
4	Postcode
5	City

Extended filter condition

all one Add filter condition Add group

Addresstype equal "Office address"

Addresstype

equal

Office address

With the filter criteria of the dependent Context can be used to conditions can be mapped.

Open extended filter condi...

Export Template with conditional data structure

Example 3

Define conditional data structure: "Title" field

2. Step

Data structure Fields

subordinate context ▾ Title ▾

Addresses office address

Filter

Data structure: 1

Context • Company ▾

Title delivery address

subordinate context ▾

Addresses ▾

Filter [Open extended filter condition...](#)

If a subordinate Context is to be used several times in order to export different address types in a separate column, as in the example, a separate "Title" must be specified and a filter condition defined.

Export Template with conditional data structure

Example 3

Define conditional data structure: Delivery address

2. Step

The screenshot displays the 'Export Template - Address' application. The 'Data structure' tab is active, showing a list of fields on the left and a 'Filter' button on the right. A dialog box titled 'Extended filter condition' is open in the center, allowing the user to define a filter. The dialog has tabs for 'all' and 'one', with 'one' selected. It includes links for 'Add filter condition' and 'Add group'. The filter condition is set to 'Addresstype equal "Delivery address"'. The dialog also has 'OK' and 'Cancel' buttons. A red box highlights the 'Open extended filter condition...' button in the background, with a red arrow pointing to the dialog box.

Company data for sending information

Description: For sending the print info materials, the contact details of the company of an agency are provided in the export

Status: active

Record separator: CRLF

Field separator: semicolon

Field delimiter: quotation mark

Charset: UTF-8

Place of use: Company

Fields

1	Name
2	Customercode
3	Street
4	Postcode
5	City

Extended filter condition

all one Add filter condition Add group

Addresstype equal "Delivery address"

Addresstype

equal

Delivery address

OK Cancel

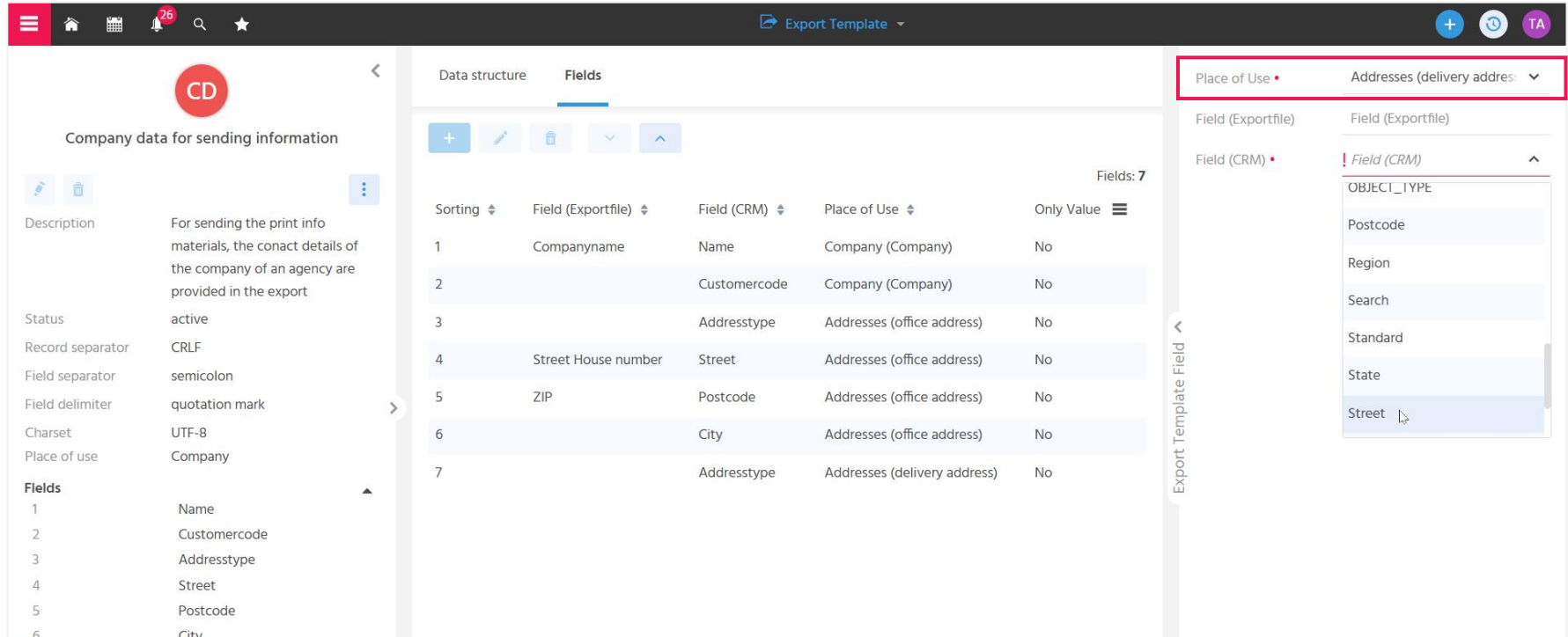
Open extended filter condition...

Export Template with conditional data structure

Example 3

3. Step

Define Fields



The screenshot displays the 'Define Fields' interface in a software application. The interface is divided into several sections:

- Header:** Includes a navigation bar with icons for home, calendar, notifications (26), search, and a star. The 'Export Template' button is visible.
- Left Panel:** Contains a 'CD' icon and the title 'Company data for sending information'. Below this, there are icons for edit and delete. A table lists various settings: Description, Status, Record separator, Field separator, Field delimiter, Charset, and Place of use.
- Main Table:** A table with 7 columns: Sorting, Field (Exportfile), Field (CRM), Place of Use, and Only Value. It lists 7 fields for export.
- Right Panel:** A dropdown menu for 'Place of Use' is open, showing a list of options including 'Addresses (delivery address)'.

Sorting	Field (Exportfile)	Field (CRM)	Place of Use	Only Value
1	Companyname	Name	Company (Company)	No
2		Customercode	Company (Company)	No
3		Addresstype	Addresses (office address)	No
4	Street House number	Street	Addresses (office address)	No
5	ZIP	Postcode	Addresses (office address)	No
6		City	Addresses (office address)	No
7		Addresstype	Addresses (delivery address)	No

Fields: 7

Place of Use • Addresses (delivery address) ▼

Field (Exportfile) Field (Exportfile)

Field (CRM) • ! Field (CRM) ^

OBJECT_TYPE

Postcode

Region

Search

Standard

State

Street

Export Template with conditional data structure

Example 3

3. Step

Define Fields

Company data for sending information

Description: For sending the print information materials, the contact details of the company of an agency are provided in the export.

Status:
Record separator:
Field separator:
Field delimiter:
Charset: UTF-8
Place of use: Company

Fields

Sorting	Field (Exportfile)	Field (CRM)	Place of Use	Only Value
1	Companyname	Name	Company (Company)	No
2		Customercode	Company (Company)	No
3		Addresstype	Addresses (office address)	No
4	Street House number	Street	Addresses (office address)	No
5	ZIP	Postcode	Addresses (office address)	No
6		City	Addresses (office address)	No
7		Addresstype	Addresses (delivery address)	No
8	Street House number	Street	Addresses (delivery address)	No
9	ZIP	Postcode	Addresses (delivery address)	No
10		City	Addresses (delivery address)	No

Fields for office address

Fields for delivery address

Export Template with conditional data structure

Example 3

Result of the CSV Export

Company data for sending information_10.07.2024.08_31_12.csv - Excel

Maria Kreitmayer

Was möchten Sie tun?

A57

Glob Group

	A	B	C	D	E	F	G	H	I	J
	Companyname	Customercode	Adresstype	Street House number	ZIP	City	Adresstype	Street House	Postcode	City
1	Companyname	Customercode	Adresstype	Street House number	ZIP	City	Adresstype	Street House	Postcode	City
47	Industrial Steel A	1234	Office address	Rathausmarkt 1	20095	Hamburg				
48	Grobbe-Werk Gm	4758	Office address	Regensburger Straße 6	85055	Ingolstadt				
49	MNF Versicherun	7691	Office address	Sandstraße 3	90443	Nürnberg				
50	Rixner und Rupp	4945	Office address	Schloßfreiheit 1A	19288	Ludwigslust				
51	Lichtenstein Doc	2419	Office address	Gotthardstraße 1	80686	München				
52	Scherrer Group	400	Office address	Stüdliackerstrasse 4	8207	Schaffhausen				
53	International Käl	6983	Office address	Müller-Armack-Straße	84034	Landshut				
54	Pluto GmbH	7110	Office address	Hauptstätterstr. 10	70190	Stuttgart				
55	Parker & Jenkins	1431	Office address	26-40 Kensington High	W8 4PE	Royal Borough of				
56	Bornheimer Mas	4387	Office address	Peter-Fryns-Platz	53332	Bornheim				
57	Glob Group	1212	Office address	32-40 Blackfriars Road	SE1 8NW	London	Delivery address	Gestütstraße	84028	Landshut
58	Skyscraper Bau G	1236	Office address	Rathausallee 50	22846	Norderstedt				
59	Pichelmaier Fina	3579	Office address	Oeder Weg 6	60318	Frankfurt am Main				
60										
61										

Company data for sending inform

Bereit

Bedienungshilfen: nicht verfügbar

Mittelwert: 42620

Anzahl: 10

Summe: 85240

Export Template: Companies with Contacts



In the export template that exports companies along with their contacts, the “Contact” context must be specified as a subcontext of the company.

Export Template - Firmen mit Personen

Firmen mit Personen

Data structure | Fields

subordinate context

Contact

subordinate Context

- ☐ Customercode,
- ☐ Information,
- ☐ Name,
- ☐ Language,
- ☐ Status,
- ☐ Type,
- ☐ Address,
- ☐ E-Mail,
- ☐ Phone,
- ☐ ...

Contact

- ☐ Address,
- ☐ Department,
- ☐ Salutation,
- ☐ Firstname
- ☐ Lastname,
- ☐ E-Mail,
- ☐ ...



Export Template: Companies with Contacts



This allows companies to be exported along with all their contacts.

The screenshot shows the ADITO interface with a list of companies and an export dialog. The company list includes columns for Picture, Name, Customercode, Preferred language, Status, and E-mail. The export dialog shows that 10 datasets are exported using the template 'Firmen mit Personen'.

Picture	Name	Customercode	Preferred language	Status	E-mail
	Aquire GmbH	3469	English	Active	info@aquire.de
	Bohrmarkt GmbH	9612	German	Active	info@bohrmarkt.de
	Bornheimer Maschinenfabrik GmbH	4387	German	Active	info@bornheimer.de
	Bucher Unternehmensgruppe	3698	German	Active	info@bucher.de
	Cuvox Consulting		German	Active	info@cuvox-consulting.de
	Emil Brandstätter AG	5609	German	Active	kontakt@brandstaetter.de
	Ertl GmbH	7824	German	Active	service@ertl.de
	Fahey, Spencer and Armstrong	1793	English	Active	greattohearfromyou@fahey.com
	Firmengruppe Matthias Bogen	4567	German	Active	info@matthiasbogen.de
	Fischer AG	1018	German	Active	info@fischer.tr

Export dialog details:

- 10 Datasets are exported
- Exporttemplate: Firmen mit Personen
- Filename: Filename
- export using the selected template

	A	B	C
1	Name	Firstname	Lastname
2	Bucher Unternehmensgruppe	Wilhelm	Kainz
3	Bohrmarkt GmbH	Harald Gunther	Meister
4	Bohrmarkt GmbH	Freddy	Braun
5	Bohrmarkt GmbH	Maria	Vogel
6	Aquire GmbH	Maximilian	Huber
7	Aquire GmbH	Lisa	Huber
8	Fahey, Spencer and Armstrong	Jennifer	Frost
9	Emil Brandstätter AG	Thomas	Huber
10	Firmengruppe Matthias Bogen	Markus	Altinger



Delete Export Templates

The following can be deleted

- single fields
- subordinate Contexts (and the associated fields)
- complete export templates

"Defective" export templates

Defect: field no longer exists

If a field is no longer available, the export is carried out anyway, with the result that the column of the field remains empty because no values can be determined.

If this behaviour is detected for an export template, this field (this column) can be removed from the overview of fields by the administrator.

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Einzigartige Beziehungen