

Maintenance of Contact Data

Description of how to update Contact Finder data.

At the moment the import process is a support request via SNOW to the GRM team. In 2024, we'll focus on an interface to the CRM system replacing the file-based import. Depending on the timeline we'll maybe also activate the file-based import for MBUs. We'll decide on that after all countries have been launched.

The Typo3-based revision of single entries is already available for editors.

- [Import Process \(bulk use cases\)](#)
- [Update Import Process \(bulk use cases\)](#)
- [Typo3 Backend \(single data changes\)](#)
- [Values & examples per data field](#)

Import Process (bulk use cases)

Important note:

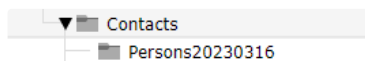
In the case of the initial first import of data, you have to create a new folder structure like described below. In case you want to update already existing data values and only add a few new entries, you can use the already existing folder. The import will automatically identify already existing items if naming of identifier fields is identical.

E.g.

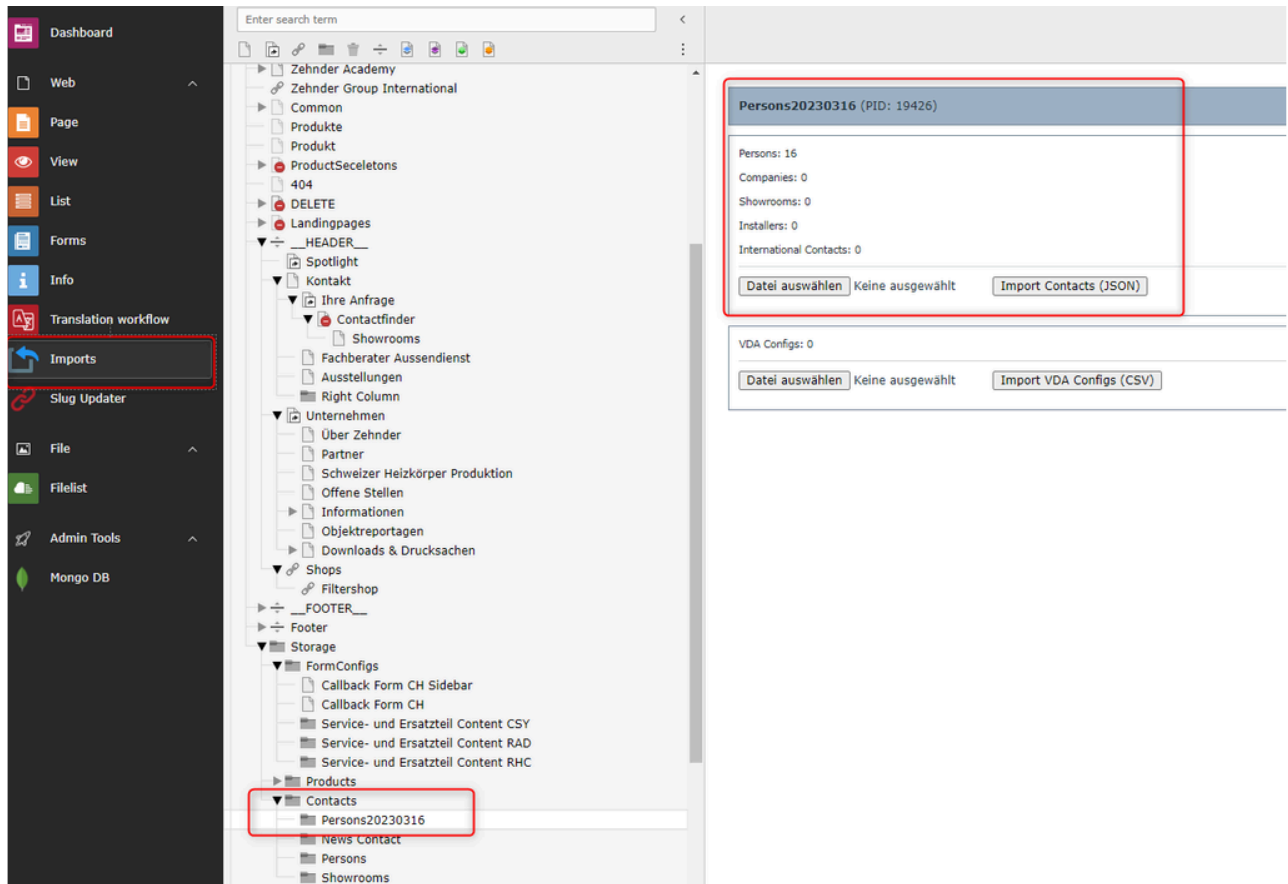
- a) Company name in combination with the address
- b) Person name in combination with address

Import process steps:

1. Create & fill the master file as XLSX (see file below)
 - a. File size has to be limited to max. 2000 rows otherwise the import process will run into a timeout.
2. Convert XLSX file to JSON File ( [Convert Excel to JSON Array Online](#) - [Table Convert Online](#))
3. Create a new storage folder with unique naming (e.g. typo of data + date)



4. Import JSON to the storage folder



5. If a salesperson is responsible for more than one country and related ZIP areas, the additional countries need to be maintained manually.
e.g. in Switzerland when a person is responsible for CH and LI



→ we'll add this functionality to the import file in a later phase after all country launches have been finished.

6. Connect Plugin on the page with the new storage folder

General
Plugin
Appearance
Language
Access

Selected Plugin

✖
Contact - Overview (Persons / Companies)
▼

Plugin Options

Filter:

Postal Code Search
▼

Record Storage Page

🔍
Find records

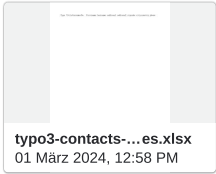
Persons20230316

▲
▼
🗑️
📄

📄
Page

📁
Persons20230316 [19426]

7. The index process is running to make data available in the Solr search
and on the related finder page (every 5 minutes 50 data items are updated)
8. If all new data is present on the website and quality check fine then delete old storage content and folder



Update Import Process (bulk use cases) [🔗](#)

Same steps as above but you can overwrite the already existing list of contact items with a new JSON Import file. In case of identical contacts, the importer will only update already existing data add only the delta of new items.

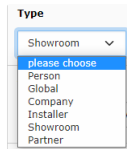
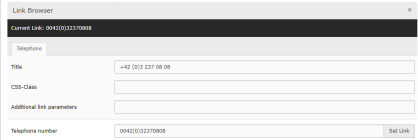
Deletions of contacts have to be done manually. The import process can't delete them automatically.

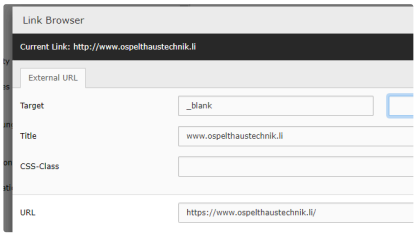
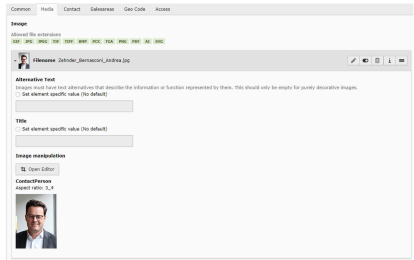
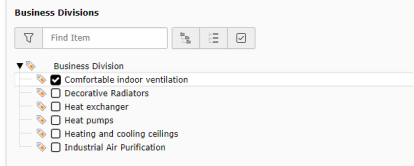
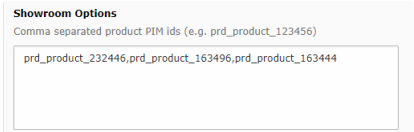
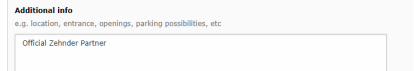
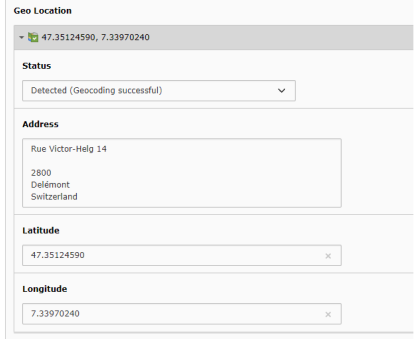
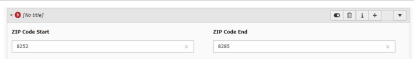
Typo3 Backend (single data changes) [🔗](#)

- 1. Go to the Typo3 Backend and related folder
- 2. Open List view
- 3. Look for the specific data set
- 4. Open and change the date within the shown edit view

Values & examples per data field [🔗](#)

Column field	data information	example
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Type	possible values are pre-defined and connected to different rule sets which master table columns are required or not. Possible types at the moment: - Person (for use case contact person search including different sales areas per person in DE, CH, UK, etc.) - Global (for use case sales international website and different country addresses) - Company (for use case "agenzia di vendita - Italy) or contacts per topcis in Germany - Installer (for use case installer search in BeNe) - Showroom (for showroom data including roduct detail page links) - Partner (for use case partner program includ. additional info field for partner status)	
Title	simple text	
Customer No	numeric	e.g. SAP number or partner number
firstname	simple text	
lastname	simple text, can also be used for additional contact information like job description	
address1	text & numeric	
address2	text & numeric	
zipcode	text & numeric	
city	text & numeric	
country	ISO2 code of the related country	List of country codes by alpha-2, alpha-3 code (ISO 3166)
phone	text & numeric, best practice would be 00country-numbers(0)contactnumber --> it is possible to add an additiona phone title for the front-end in the typo3 backend	0042(0)32370808 
fax	like phone	
mobile	like phone	
email	standard email address integration	

website	- link including https - additional title for front-end possible	
logo	image file for companies or persons, at the moment activated for type "person" - please ensure data privacy topics related to images and usage on our website	
partner status	not yet in use at the moment	
RAD	status "1" for activation for related filter, status "0" for deactivation	
CSY	status "1" for activation for related filter, status "0" for deactivation	
RHC	status "1" for activation for related filter, status "0" for deactivation	
CAS	status "1" for activation for related filter, status "0" for deactivation	
showroom options	used for links to product detail pages. PIM product IDs comma separated without spaces	
additional info	long simple text, in usage at the moment only for type "partner"	
Latitude	will be filled automatically by Google MAPs API and related to address data	
Longitude	will be filled automatically by Google MAPs API and related to address data	
ZIPCodeStart	beginning ZIP code of the sales area	
ZIPCodeEnd	ending ZIP code of the sales area	

Regions	Sales area config for UK	Regions CSV values for UK only SA,BA,BS,CF,DT,EX,HR,LD,NP,PL,TA,TQ,TR
Region	Sales are config for Italy	Region For IT only TRENTINO ALTO ADIGE Sub-Region For IT only BOLZANO
SubRegion	Sales are config for Italy	