



akuiteo
BUSINESS SOFTWARE

General Guide

ADDING COLUMNS TO IMPORTS

Version 4.3

Revision number: 3

Published in: October 2020

Written by: Documentation team

Copyright (c) 2006-2020 Akuiteo S.A.S. All Rights Reserved.

Any total or partial reproduction of this material, whether its form or content, without prior written permission from the author, is strictly prohibited. The French law only allows, on one hand, copies or reproductions strictly reserved for private usage of the copyist and not destined for collective usage and, on the other hand, analysis and short quotes for the purpose of illustration.

The Akuiteo designation and logos are registered trademarks of the Akuiteo S.A.S. company. Any use of the trademarks without the authorization of the Akuiteo S.A.S. company is prohibited.

Visit: <http://www.akuiteo.com> and <http://www.akuiteo.com/blog/>

Table of Contents

1 Preface	4
1.1 Revisions	4
1.2 Help Desk	4
2 Introduction	5
3 Adding new columns to import templates	6
4 Identifying syntax to use	7
4.1 Identifying field names	7
4.2 Identifying if columns can be added	8
4.2.1 Syntax with the [module."field_name"] type	8
4.2.2 Syntax with the [context.module."field_name"] type	9
4.2.3 Syntax with the ["field_name"] type	10
5 Syntax by import template	12
5.1 Purchasing	12
5.2 Project	12
5.3 Accounting	13
5.4 Resource	13
5.5 Help desk	14
5.6 People	14
5.7 Transversal	15
5.8 Cash	15
5.9 Sales	16

1 Preface

1.1 REVISIONS

Revision 3	Published in October 2020 <ul style="list-style-type: none">• Edited syntax for the sales invoice's header (see Sales (p. 16)).
Revision 2	Published in July 2020 <ul style="list-style-type: none">• Added syntax for the new Supplier contact import template (see People (p. 14)).• Added syntax for the new User import template (see Transversal (p. 15)).
Revision 1	Published in May 2020 First publication.

1.2 HELP DESK

Akuiteo S.A.S. highly values your satisfaction.

To share your feedback or contact the help desk, feel free to visit our website page:

<https://www.akuiteo.fr/akuiteo.clients/>

2 Introduction

The import templates available in Akuiteo each include a number of columns. It is possible to add columns in order to import additional data.

These columns can be added using a specific syntax. This syntax is different for each type of import and multiple different syntax can be used for the same type.

Example

For the sales order's import template, the syntax is different to add a field from the header (**[contexte.commandeCli."field_name"]**) and to add a field from the order lines (**[ligne."field_name"]**).

This document explains how to add columns for fields with alphanumeric characters or with functional help lists created using keywords. For fields with integrated help lists or in cases where the syntax cannot be applied, please contact your Akuiteo project manager.

3 Adding new columns to import templates

Tip

You will need to unprotect the sheet to be able to insert a new column in the import file.

- 1 In the Excel file of the desired import template, insert a new column.

Note

The location and the design of this new column does not matter. For example, if the new column has the same design as a required column, there will be no impact during the import.

- 2 In the column's header, enter the syntax corresponding to the type of template and the field to be added. For more information, refer to the [Identifying syntax to use \(p. 7\)](#) chapter and to the list of [Syntax by import template \(p. 12\)](#).

[facture.complement]			
B	C	D	E
FF_DATE	[facture.complement]	FF_FO_CODE_FOURNISSEUR	FF_FO_REFERENCE_FOURNISSEUR

- 3 Fill in the import file by adding the corresponding values in the new column, then import this file in Akuiteo from the Application Desktop.

↳ The values added in the new column are imported in Akuiteo.

4 Identifying syntax to use

DMF	09**** ADMINISTRATOR
-----	----------------------

4.1 IDENTIFYING FIELD NAMES

For each syntax, the "**field_name**" must be replaced by the name of the field you want to add as a column in the import file.

To find out the name of the desired field:

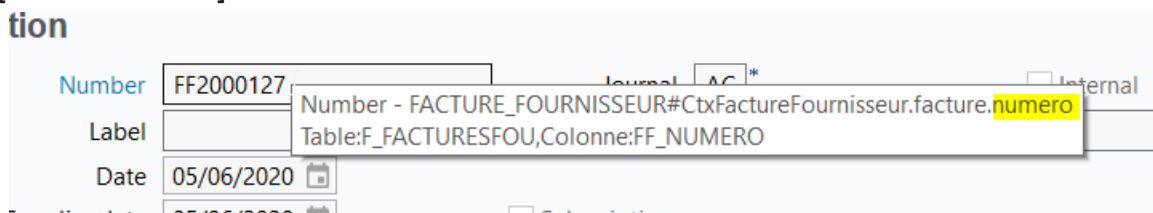
- 1 From the Application Desktop, switch to the setup mode using the following shortcuts:
 - CTRL + Alt + P on Windows
 - CTRL + options + P on Mac
- 2 Open a management object of the same type than the import file's.
- 3 Hover over the desired field to display its tooltip.
↳ The field name is the string of characters right after the last period in the tooltip's first line.

Tip

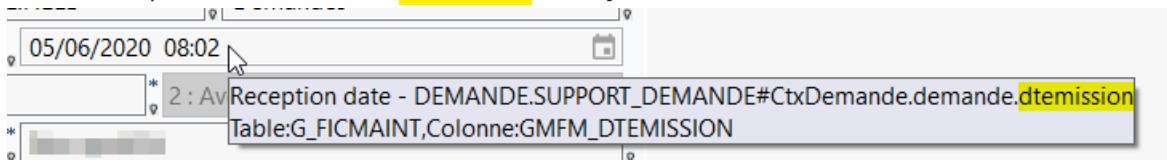
The field name matches the column name displayed in the tooltip's second line: **Colonne:PREFIX_FIELDNAME**.

Multiple examples to find out the field name:

1. In this example, the name of the **Number** field is **numero**. The syntax to use would be: **[facture.numero]**



2. In this example, the field name is **dtemission**. The syntax to use would be: **[dtemission]**



3. In this example, the name of the **Billed product** field is **codeProduitFini**:

Last name	Infos Facturation maintenance *	Service	
Prorata	Month started = due	Infos Facturation maintenanc	
Billed product	CC	Qty	UP
		1,00 *	1 000,00
1-HELP	Sold item code - CONTRAT_SIMPLIFIE#PrestationSimplifiee. codeProduitFini	rouping c	
<input checked="" type="checkbox"/> Multi-project	<input type="checkbox"/> Not seen in help desk		
Service: Review		Identification	

Note

If the table and column are not displayed in the field's tooltip (as for the **Billed product** field in the example), contact your Akuteo project manager to be able to add this column in an import file.

4.2 IDENTIFYING IF COLUMNS CAN BE ADDED

To identify whether a field can be added as a column or not in an import template, the syntax to use must be compared with the field's code.

Note

If the standard method to add a column cannot be applied, contact your Akuteo project manager.

4.2.1 Syntax with the [module."field_name"] type

For the **Projects** import template, the syntax to add a column is: **[affaire."field_name"]**

From the Application Desktop in setup mode, look at the codes of the first fields in a project record sheet's main tab:

us code	PRO	
Code	A_243EE358 *	
Il name	Affaire	Code - AFFAIRE#CtxAffaire. affaire.codeAffaire
t group	NFWRI77 *	
Budget	0,00	
nomme		Budget - AFFAIRE#CtxAffaire. affaire.montant Table:F_AFFAIRES,Colonne:AF_MONTANT
Status code	PRO	
Code	A_2	Production - AFFAIRE#CtxAffaire. affaire.codeEtat Table:F_AFFAIRES,Colonne:AF_CODE_ETAT
Call name	Affaire Util Test Auto 0608101208	

Therefore, the following connections can be made:

Import syntax	Field code
affaire	affaire
"field_name"	codeAffaire / montant / codeEtat

To add the fields shown in the screenshots, the following syntax should be used:

- **[affaire.codeAffaire]**
- **[affaire.montant]**
- **[affaire.codeEtat]**

Situations when a field cannot be added:

For the **Customer** field in a project record sheet, when comparing the syntax with the field code, we can see that this code contains an additional level:

	Level 1	Level 2	Level 3
Import syntax ([affaire."field_name"])	affaire	"field_name"	
Field code	affaire	clientByAfIdentClient	code

↳ The path used for the field code contains an additional level: the standard method to add a column cannot be applied.

4.2.2 Syntax with the [context.module."field_name"] type

For the **Sales order** import template, the syntax to add a column from the header is:
[contexte.commandeCli."field_name"]

From the Application Desktop in setup mode, look at the codes of the first fields in a sales order's **Header** tab:

Therefore, the following connections can be made:

Import syntax	Field name syntax
contexte	COMMANDE
commandeCli	FCommandecli
"field_name"	numero / refcli / date

To add the fields shown in the screenshots, the following syntax should be used:

- **[contexte.commandeCli.numero]**
- **[contexte.commandeCli.refcli]**
- **[contexte.commandeCli.date]**

Situations when a field cannot be added:

1. For the **Storage unit** field in a sales order, when comparing the syntax with the field code, we can see that this code contains an additional level:

	Level 1	Level 2	Level 3	Level 4
Import syntax ([contexte.commandeCli."field_name"])	contexte	commandeCli	"field_name"	
Field code	COMMANDE	FCommandecli	stDepot	codeDepot

↳ The path used for the field code contains an additional level: the standard method to add a column cannot be applied.

2. For the **Customer** field in a sales order, we can see that the field code does not match the other codes:

↳ The path refers to the **FPClient** client object, and not to **FCommandecli**: the standard method to add a column cannot be applied.

4.2.3 Syntax with the ["field_name"] type

For the **Issues** import template, the syntax to add a column is: **["field_name"]** (G_FICMAINT table)

When the syntax only contains the "field_name", the table is also specified to identify which columns can be added:

The first screenshot shows a dropdown menu for 'Customer references' with 'REF1' selected. The tooltip displays: 'Customer reference 1 - DEMANDE.SUPPORT_DEMANDE#CtxDemande.demande.refClient' and 'Table:G_FICMAINT, Colonne:GMFM_REF_CLIENT'.

The second screenshot shows a dropdown menu for 'Votes' with 'Votes - DEMANDE.SUPPORT_DEMANDE#CtxDemande.demande.nbVote' selected. The tooltip displays: 'Table:G_FICMAINT, Colonne:GMFM_NB_VOTE'.

To add the fields shown in the screenshots, the following syntax should be used:

- [refClient]
- [nbVote]

Situations when a field cannot be added:

For the **Corrective** field in an issue, the table specified is **G_PRD_VERSION** and not **G_FICMAINT**: the standard method to add a column cannot be applied.

The screenshot shows a dropdown menu for 'Corrective' with '4.1' selected. The tooltip displays: 'Corrective version - DEMANDE.SUPPORT_DEMANDE#CtxDemande.demande.prnVersionByGmfmGmpvReponse.code' and 'Table:G_PRD_VERSION, Colonne:GMPV_CODE'.

5 Syntax by import template

Important

The syntax to add columns is case-sensitive.

5.1 PURCHASING

Supplier quotes/orders	For the header: [commandefou."field_name"] For the lines: [ligneCommandePourLivraison.lignecomfou."field_name"]
Simplified purchase orders	[ligneCommandePourLivraison.lignecomfou."field_name"]
Supplier billing schedule	For the header: [tabFac."field_name"] For the lines: [ligneTabFac."field_name"]
Receptions	For the header: [approvisionnement."field_name"] For the lines: [ligneApprovisionnement."field_name"]
Purchase invoices	For the header: [facture."field_name"] For the lines: [ligneFac."field_name"]
Expense accounts	For the header: [ndf."field_name"] For the lines: [ligneNdf."field_name"]
Purchased items	For the header: [produitfini."field_name"] For the supplier references: [tarif."field_name"]
Supplier references	["field_name"] (F_TARIF table)

5.2 PROJECT

Projects	[affaire."field_name"]
Multi-customer projects	["field_name"] (F_AFF_CLIENT table)
History of allocation of income and expenses to the period	["field_name"] (F_HISTO_RAT_PERIODE table)
History of revenue recognition	["field_name"] (F_HISTO_CA table)
Phases - Sub-phases - Tasks	For the phases: [lot."field_name"] For the sub-phases: [ssLot."field_name"] For the tasks: [tache."field_name"]

Project groups	[marche."field_name"]
Schedule	["field_name"] (F_PLANNING table)
Leave schedules	["field_name"] (F_PLANNING table)
Sub-contracting	["field_name"] (F_AFF_SSTRAIT table)
Time	["field_name"] (F_FICHES table)

5.3 ACCOUNTING

Income statement	No addition possible
Accounts	["field_name"] (F_COMPTESCG table)
Entries	For the header: [ecriture."field_name"] For the lines: [ligne."field_name"]
Fixed assets	[immobilisation."field_name"]
Currency rates	["field_name"] (F_MONNAIES table)

5.4 RESOURCE

Leave	["field_name"] (F_COLL_CDEM table)
Resources (Employees and Subcontractors)	[ctxCollaborateur.collaborateur."field_name"]
Linked employees	["field_name"] (F_COLLAB_RELATION table)
Skill	["field_name"] (T_SAVOIR table)
Acquired entitlement for leave	["field_name"] (F_COLL_CBUD table)
User rights	["field_name"] (T_PROFIL_UTILISATEUR table)
Entities	For the header: [etablissement."field_name"] For the details: [adresse."field_name"]
Status history (recovery)	No addition possible
Employee status histories	["field_name"] (F_COLL_SITU table)
Employee skills links	["field_name"] (F_COMPETENCE table)
Profiles	[profilUtilisateur."field_name"]

5.5 HELP DESK

Checkbooks	For the header: [chequier."field_name"] For the billing: [jeton."field_name"] For the links: [lnk."field_name"]
Customer contracts / services / lines	[contrat."field_name"]
Issues	["field_name"] (G_FICMAINT table)
Tasks	["field_name"] (G_ORDWRK table)
Product task links	["field_name"] (F_LNK_PRD_INTER table)
Supplier service contract lines	[contrat."field_name"] [ligneContratEnCours.prdcat."field_name"] [ligneContratEnCours.prdcat.categorie."field_name"]
IT equipments	[produitMaint."field_name"]
Template products	[produitModele."field_name"]

5.6 PEOPLE

Other third party	[autreTiers."field_name"] [autreTiers.personne."field_name"] [adresse."field_name"]
Customers	[client."field_name"] [clientParam."field_name"] [client.personne."field_name"] [adresse."field_name"]
Customer contact	[contexte.contactSiteClient."field_name"]
Supplier contact	[contexte.contact."field_name"] [contexte.contactParam."field_name"] [contexte.adresse."field_name"] [contexte.contactFournisseur."field_name"] [contexte.contactSiteFournisseur."field_name"] [contexte.contact.personne."field_name"] [contexte.contactDestChaineConverter."field_name"]

Other third party contacts	[contexte.contact."field_name"] [contexte.contactParam."field_name"] [contexte.adresse."field_name"] [contexte.contactAutreTiers."field_name"] [contexte.contactSiteAutreTiers."field_name"] [contexte.contact.personne."field_name"] [contexte.contactDestChaineConverter."field_name"]
Suppliers	[fournisseur."field_name"] [personne."field_name"] [adresse."field_name"]
Customer - Prospects sites	[siteClient."field_name"] [siteClient.adresse."field_name"] [siteClient.client."field_name"]
Supplier sites	[siteFournisseur."field_name"] [siteFournisseur.adresse."field_name"] [siteFournisseur.client."field_name"]

5.7 TRANSVERSAL

CRM setup	No addition possible
Events	[evenement."field_name"]
BIS	["field_name"] (P_RIB table)
User	[utilisateur."field_name"]
Free areas	No addition possible

5.8 CASH

Customer-Supplier Receipt-Disbursement	For the header: [encaissement."field_name"] For the lines: [ligne."field_name"]
Direct debit mandates	["field_name"] (F_MANDAT table)
Forecasted cash flow	[mvtTresoPrev."field_name"]
Remaining for budget control	No addition possible

5.9 SALES

Quotations	For the header: [contexte.commandeCli."field_name"] For the lines: [ligne."field_name"]
Sales orders	For the header: [contexte.commandeCli."field_name"] For the lines: [ligne."field_name"]
Customer billing schedule	For the header: [tabFac."field_name"] For the lines: [ligneTabFac."field_name"]
Customer deliveries	For the header: [livraison."field_name"] For the details: [ligneLivraison."field_name"]
Customer invoices	For the header: [facture."field_name"] For the lines: [ligneFac."field_name"]
Standard rates	[venteBaseRef."field_name"]
Customer rates	[venteClientRef."field_name"]
Opportunities	[opportunité."field_name"]
Sold items	[produitfini."field_name"]
Sales journals	[journal."field_name"]