

# Compano Online Software

## Manual Art-Connect [ Wholesaler ] COS Art-Connect

**Version 1.2**

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# 1 Introduction

This manual describes Art-Connect, Version 2. With Art-Connect, a wholesaler unlocks multiple suppliers for its customers with one link to *Artikelbeheer.nl*. Orders, order confirmations and invoices will be exchanged automatically between all parties.

## 1.1 Concepts

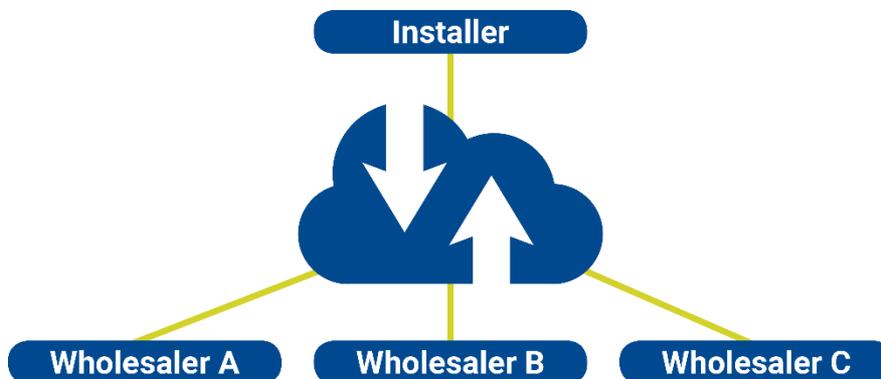
Artikelbeheer.nl	Data pool owned by Compano
Compano client	Client that uses Compano Art-Connect service for their ordering process, usually a wholesaler or sales organization.
Wholesaler	A person or company that sells goods in large quantities at low prices, typically to retailers.
Sales organization	A sales organisation is an organisation of individuals either working together for the marketing of products and services manufactured by an enterprise or for products that are procured by the firm for the purpose of reselling.
Customer	Customer of wholesaler, or Member of a sales organization, usually an installer, fitter or electrician.

## 1.2 Art-Connect for the customer

Using their own business software, customers—such as installers, fitters, or purchasing organization—can place orders by selecting suppliers that are connected with Art-Connect.

These orders are handled through the Art-Select server via a single connection. Art-Select then sorts the orders and delivers them to the (diverse) suppliers. Order confirmations and invoices are communicated to your business software in the same way. The entire process is automated and thus fast, error-free and cost-effective.

Basically, any business software package that can handle automatic ordering is suitable for Art-Connect. This applies, for example, to software from Acto. With our software partners BouwInfoSys, Compano business software, Gilde Software and Syntess, Art-Connect capability is built in as standard (depending on the version).

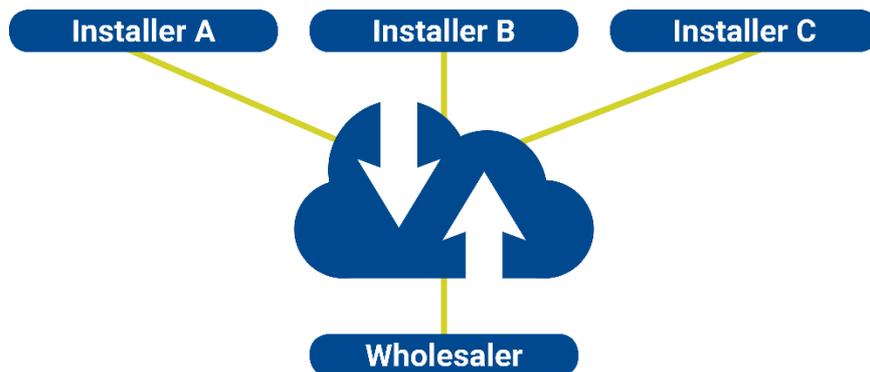




### 1.3 Art-Connect for the supplier

For suppliers a tailor-made connection between Art-Connect and their ERP software can be setup. In a central environment, customers (customers) who should have access to electronic ordering can be managed. Customers then place orders and are automatically picked-up by each supplier's ERP system.

The supplier can then confirm the orders via the reverse route. Of course it is possible to indicate that—perhaps a number of—order lines will be delivered later. Once the orders have been delivered, an invoice is sent in the same way.



### 1.4 Functionalities of Art-Connect

1. Distribute: Distribute messages from the sender to the correct recipient.
2. Interfaces: Art-Connect can support multiple transport protocols to the supplier such as FTP, e-mail (SMTP), HTTP(S) and web services (SOAP).
3. Feedback: Communication failures are reported directly to the sender.
4. Convert: Art-Connect converts files from the sender's format directly to the receiver format. A few well-known formats are *Message Service*, *IDOC*, *UBL*, *INSBOU003*, *INSBOU004*, and *SALES005*.

### 1.5 Implementation

Implementation of Art-Connect consists of:

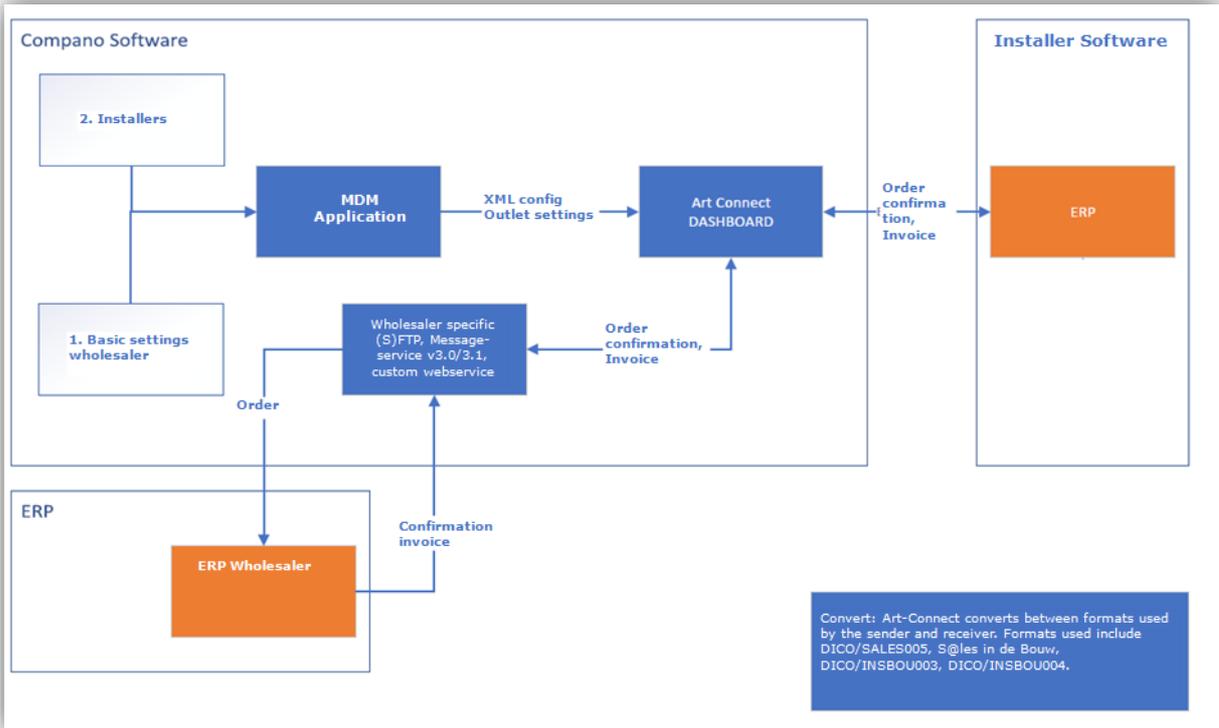
- Setup of COS application for wholesaler
- Adding accounts for wholesaler customers
- Setup of customer client software (Gilde, Syntess, Acto, other)

Two types of implementation are possible:

- Standard Art-Connect: Wholesaler application with multiple suppliers, for instance *Inka*, *Abel*, *Ticned*
- Private Art-Connect: Wholesaler with only *one* supplier.

Example: Private Art-Connect

Usually, the wholesaler is its own 'supplier' for multiple retail outlets or clients (installers). A setup for this kind of Private Art-Connect could look like this:



## 2 Setup server application [ COS ]

For any type of Art-Connect application the following setup applies:

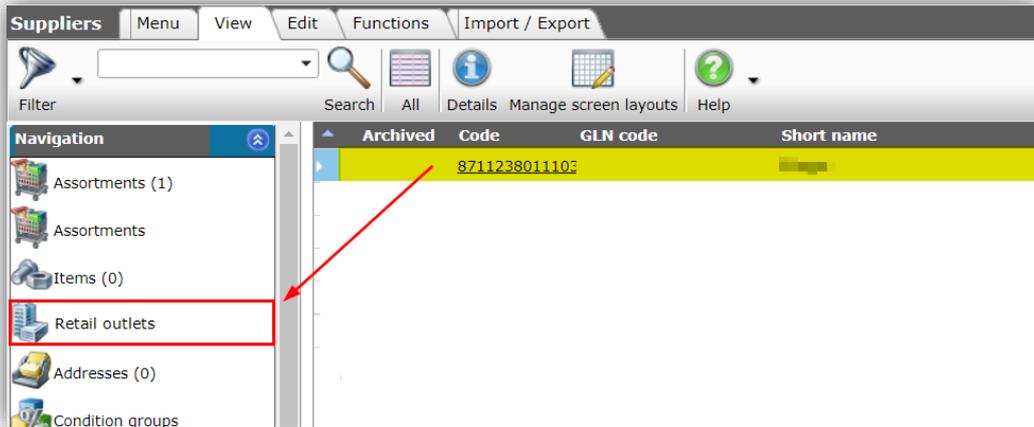
- Setup of COS application for the wholesaler
  - Add Retail outlet(s)
  - Add Members per retail outlet
- Setup of customer accounts

### 2.1 Setup COS application [ wholesaler ]

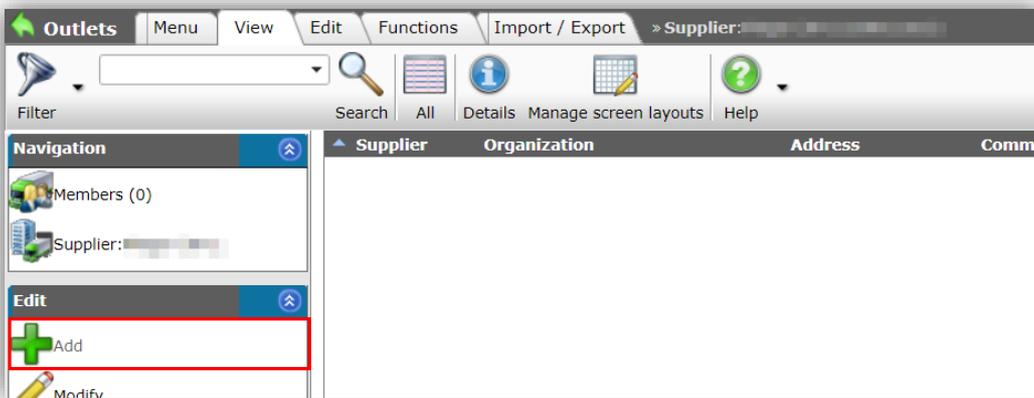
The basic setup of the COS application for a Compano client (wholesaler, sales organisation), consists of creating one or more retail outlet(s) for each supplier<sup>1</sup> in the customer application and setting the communication options:

1. Through the Menu, go to *Items > Suppliers*.
2. Select the supplier that needs to be connected to Art-Connect and, under Navigation, click on *Retail outlets*:

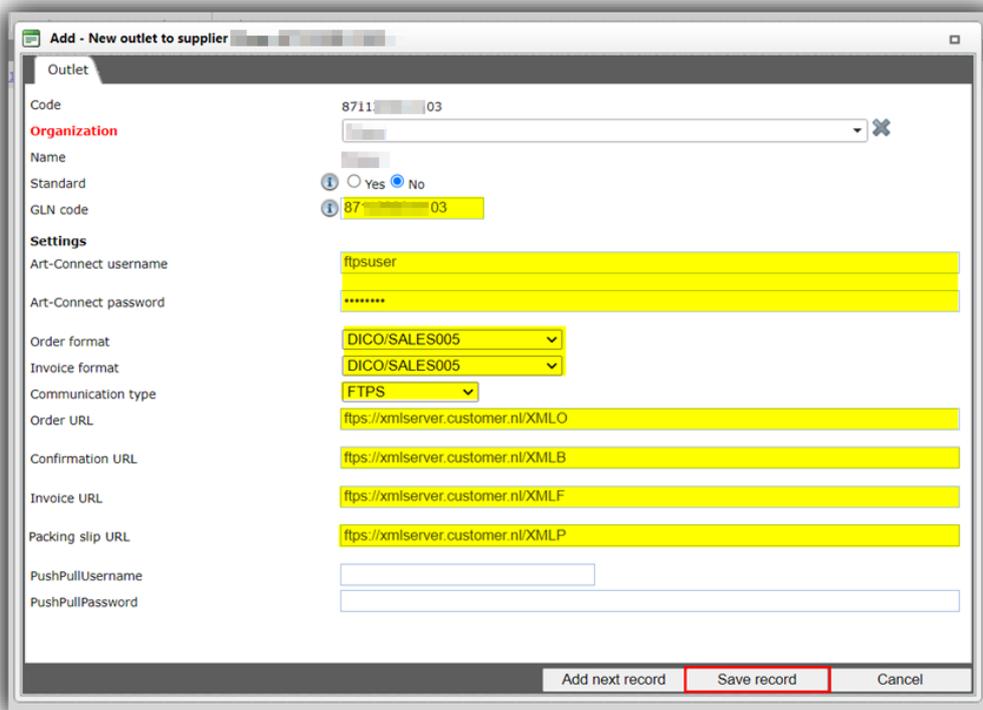
<sup>1</sup> In this example of a private Art-Connect, only retail outlets for one 'supplier' are setup as the wholesaler is its own 'supplier'.



3. On the next screen, under Edit, click on *+Add*.



4. In the pop-up window, enter the details of the new Retail Outlet:



- a. Code: Automatically adopted from selected supplier.
  - b. Organization: Select the Retail outlet. **Note:** For a *private Art-Connect* setup, select the (wholesaler) organization itself.
  - c. GLN code: Enter the GLN number of the supplier organization.
  - d. Art-Connect username: Enter the username for the communication type (Message Service or FTP(S)).
  - e. Art-Connect password: Enter the password for the communication type (Message Service or FTP(S)).
  - f. Order Message Format: Select the message format for the Order.
  - g. Invoice Message Format: Select the message format for the Invoice.
  - h. Communication type: Select the communication type for the messages:
    - i. E-mail: Exchange in e-mail format. **Note:** The e-mail exchange can *only* be used for sending invoices to [artconnect@compano.com](mailto:artconnect@compano.com)
    - ii. FTP: Exchange through FTP.
    - iii. FTPS: Exchange through FTPS.
    - iv. MSGSRVC30: Exchange through Message Service 3.0 format.
    - v. MSGSRVC31: Exchange through Message Service 3.1 format.
  - i. Order URL: Set the receiving URL for the Order message.
  - j. Invoice URL: Set the receiving URL for the Invoice message.
  - k. Packing slip URL: Set the receiving URL for the Packing Slip.
  - l. PushPullUsername: Not used.
  - m. PushPullPassword: Not used.
5. Save the record.

Als leverancier asynchroon wordt verwerkt dan kan met push methode zodra bij compano iets binnen is doorgespused dus niet elk half uur ophalen.

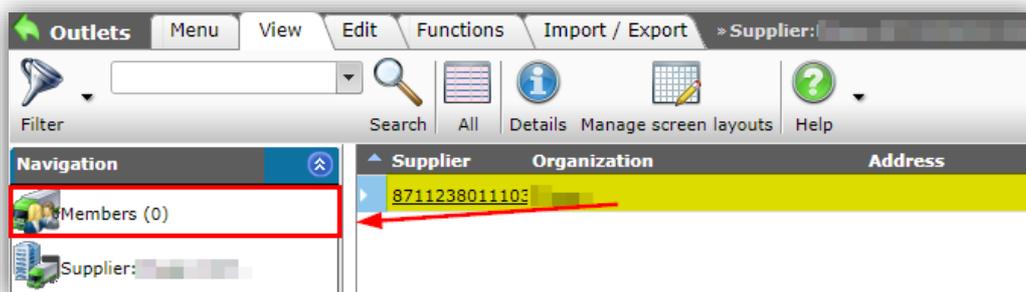
**Note:** Consultants need to check with the Compano customer for the correct message formats, communication type and URLs.

**Important:** When the supplier only uses *one account for all customers*, then the setup is complete. When each customer has *an individual account*, proceed to the next paragraph [2.1.1 ADD MEMBERS](#)

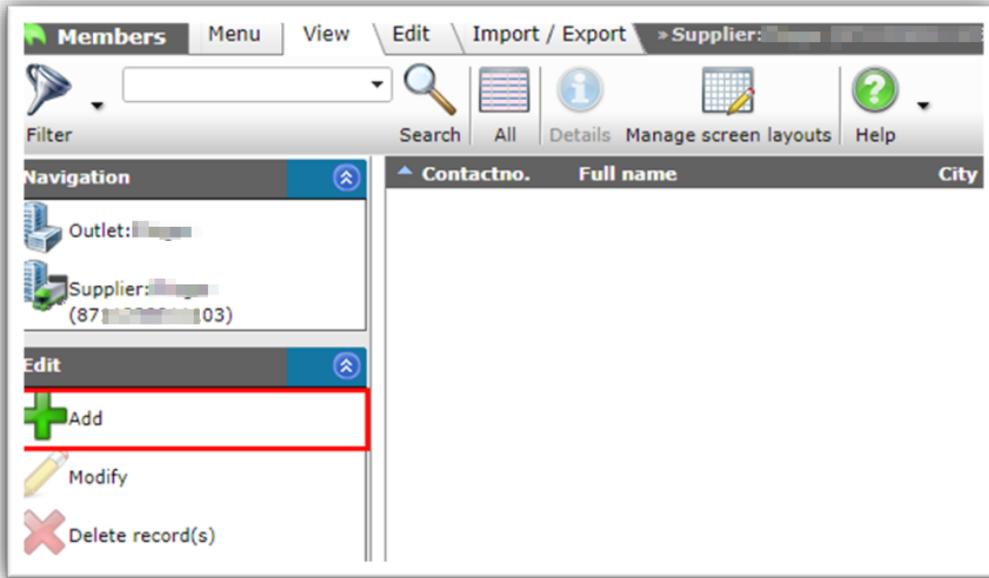
### 2.1.1 Add members

When the wholesaler (supplier) uses *individual customer accounts*, each customer needs to be added as a Member to the Retail Outlet:

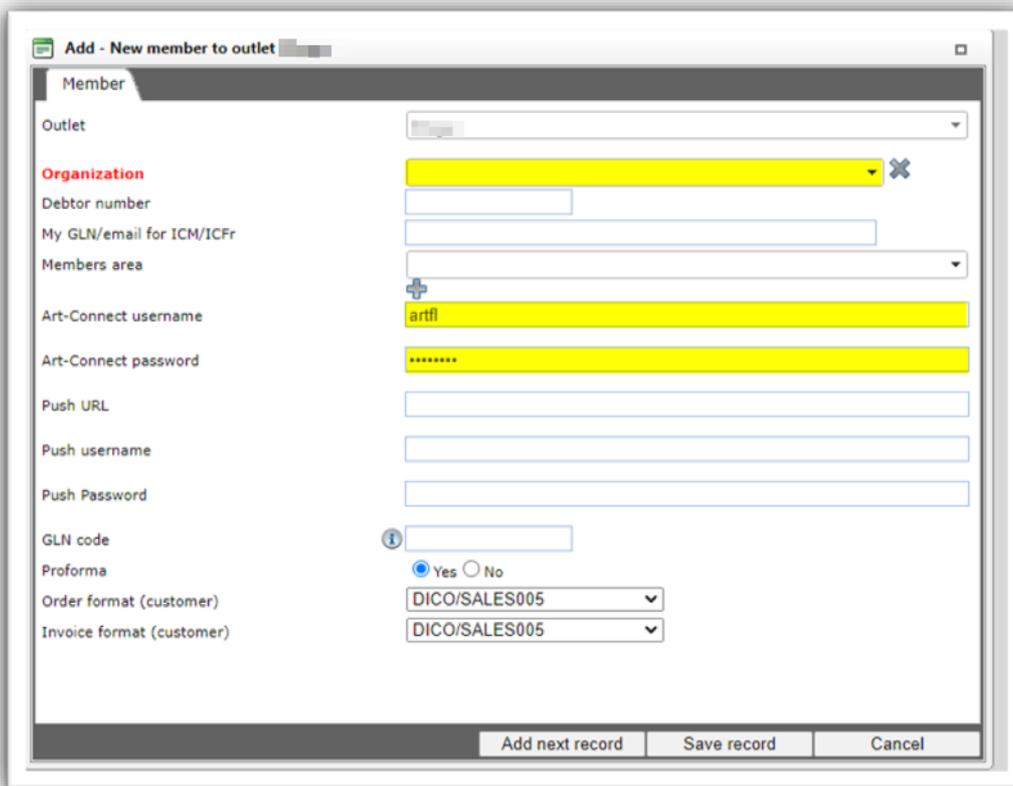
1. On the Retail outlets overview, select the Retail outlet to which you need to add members and, under Edit, click on *Members*.



2. On the next screen, click on *+Add* to add a new member:



3. In the pop-up window, enter the Member details:



- a. Organization: Select the customer organization (installer, fitter, electrician).
  - b. Art-Connect username: Enter the username of Message Service account<sup>2</sup> of the customer.
  - c. Art-Connect password: Enter the password of Message Service account of the customer.
6. Save the record.

<sup>2</sup> This is the Message Service account that has been setup by the Wholesaler for his customer(s).

NB: Repeat this process for all customer with an individual account that need to have access.

## 2.2 Setup customer account (server software)

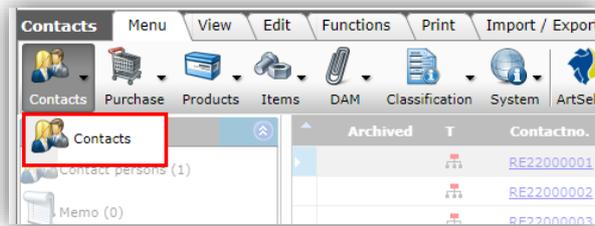
As a next step, for each customer an account needs to be setup:

- First, add the customer as a Member to the wholesaler COS application.
  - First, add the customer organization.
  - Then, add a customer contact person.
- Then, add a user account for the customer.

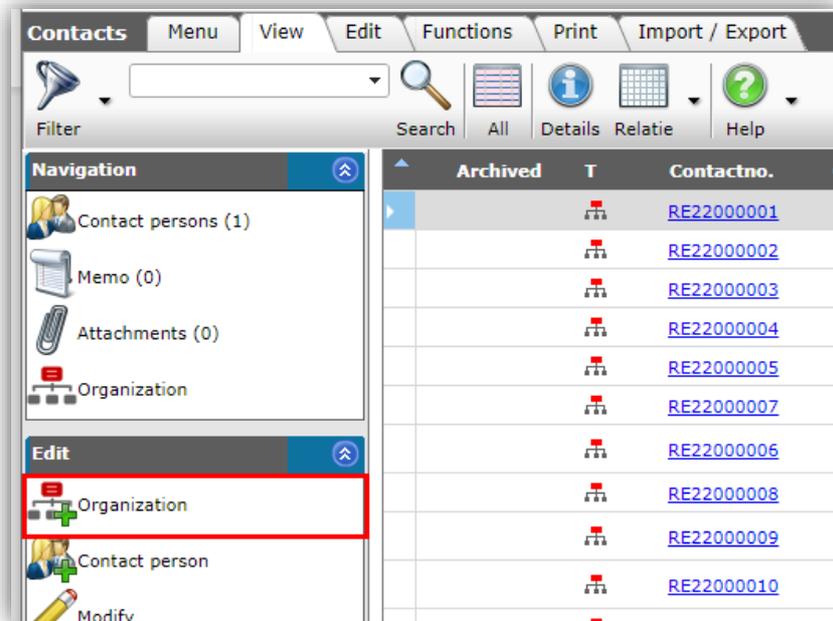
### 2.2.1 Add customer organization

To add a customer as a Member:

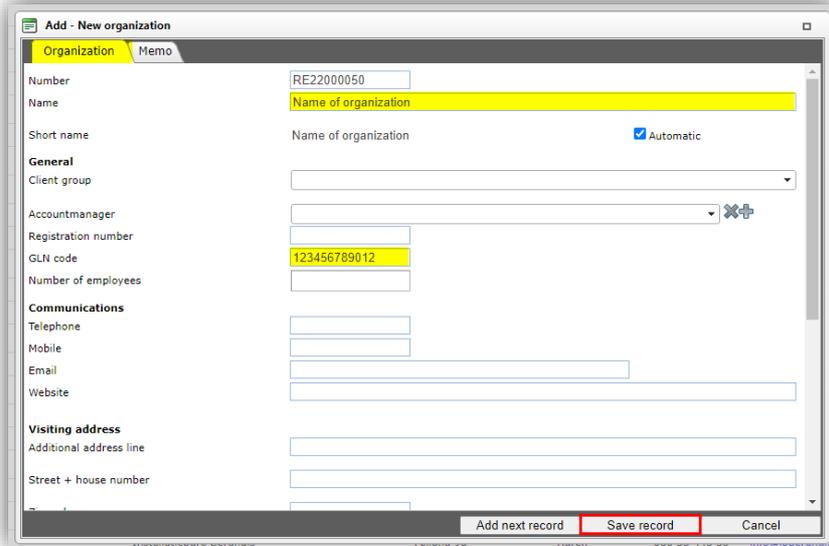
1. Through the Menu, go to *Contacts > Contacts*.



2. First, add the *Organization* of the customer with *+Organization*.



3. Enter the Organization details:

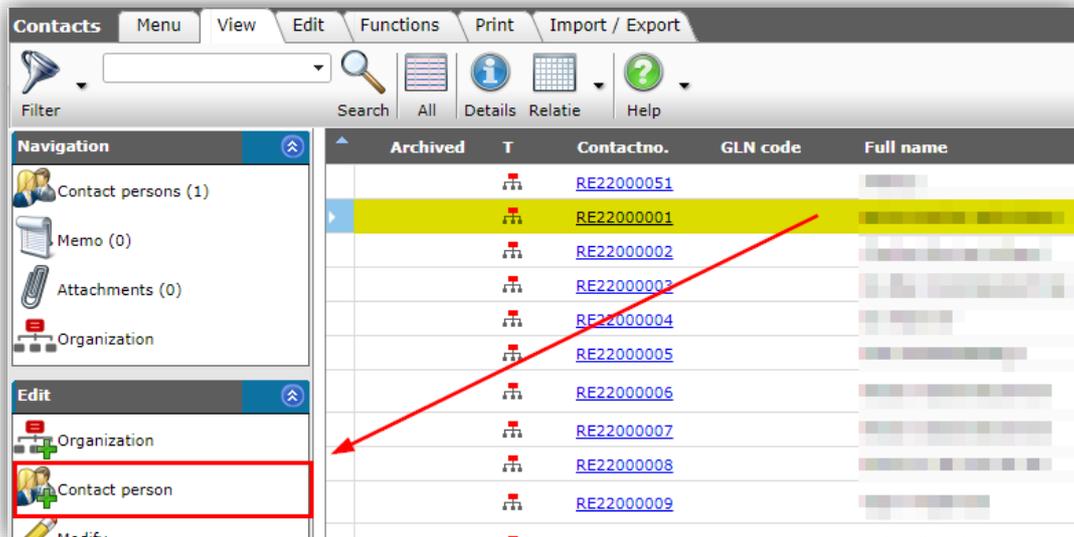


- a. Name (mandatory): Type a name for the Organization.
  - b. GLN (mandatory): Enter the *Global Location Number* of the organization.
  - c. Complete any other detail information of the Organization that you need.
4. Save the record.

## 2.2.2 Add contact person

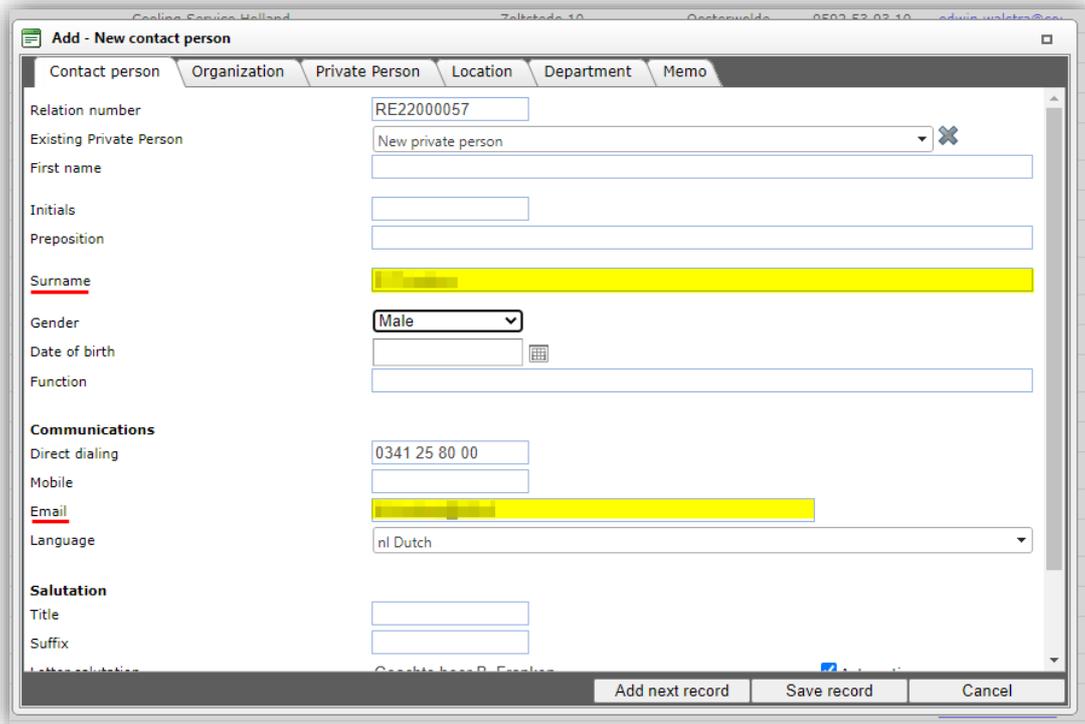
Next, add the customer as a *Contact Person* to the Organization:

1. On the Contacts overview, select the Organization you just added, and under Edit click on *+Contact Person*.



Archived	T	Contactno.	GLN code	Full name
		<a href="#">RE22000051</a>		
		<a href="#">RE22000001</a>		
		<a href="#">RE22000002</a>		
		<a href="#">RE22000003</a>		
		<a href="#">RE22000004</a>		
		<a href="#">RE22000005</a>		
		<a href="#">RE22000006</a>		
		<a href="#">RE22000007</a>		
		<a href="#">RE22000008</a>		
		<a href="#">RE22000009</a>		

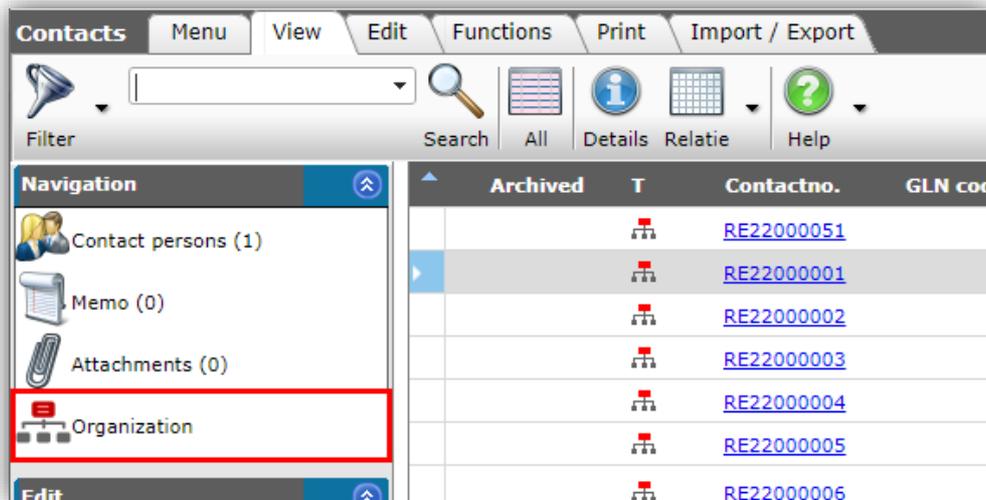
2. In the pop-up window, enter the Contact Person details:



- a. Surname (mandatory): Enter a surname for the Contact Person.
  - b. Email (mandatory): Enter an e-mail address for the Contact Person.
  - c. Optional: Enter any other detail information for the Contact Person.
3. Save the record.

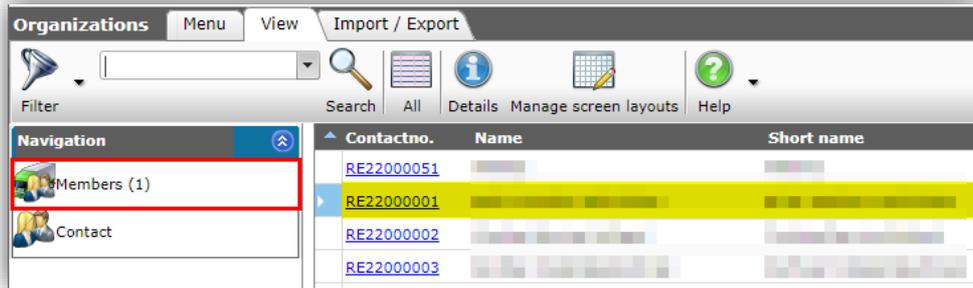
Now, add the customer as a Member of the Organization:

1. On the Contacts overview, select the Organization, and under Navigation click on *Organization*.

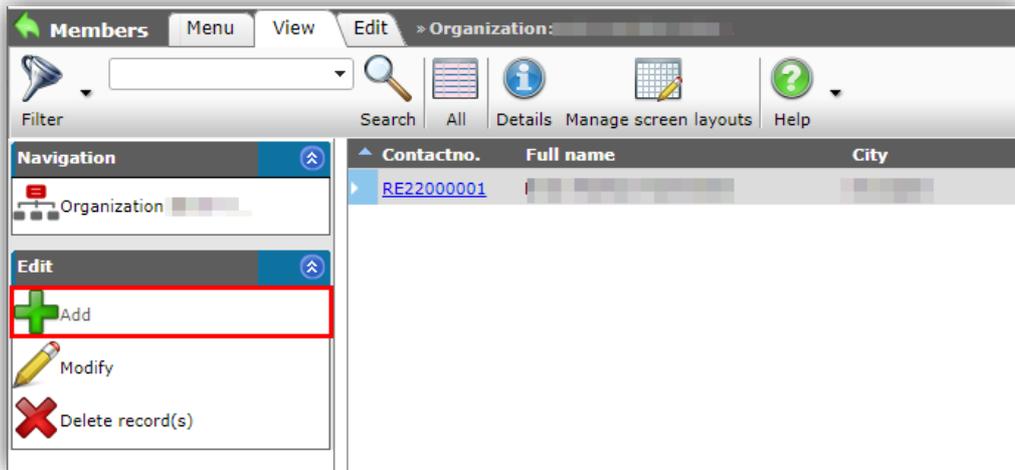


Archived	T	Contactno.	GLN cod
		<a href="#">RE22000051</a>	
		<a href="#">RE22000001</a>	
		<a href="#">RE22000002</a>	
		<a href="#">RE22000003</a>	
		<a href="#">RE22000004</a>	
		<a href="#">RE22000005</a>	
		<a href="#">RE22000006</a>	

2. On the next screen, select the Organization and under Navigation click on *Members*.



3. On the next screen, under Edit, click on *+Add*.



4. In the pop-up window, enter the Member details:

The screenshot shows a pop-up window titled 'Add - New member to organization'. It contains a form with the following fields:
 

- Outlet: dropdown menu
- Organization: dropdown menu with a close button (X)
- Debtor number: text input field
- My GLN/email for ICM/ICFr: text input field containing '8710002300234' (highlighted in yellow)
- Members area: dropdown menu
- Art-Connect username: text input field
- Art-Connect password: text input field
- Push URL: text input field
- Push username: text input field
- Push Password: text input field
- GLN code: text input field with an information icon (i)
- Proforma: radio buttons for 'Yes' (selected) and 'No'
- Order format (customer): dropdown menu with 'DICO/SALES005' (highlighted in yellow)
- Invoice format (customer): dropdown menu with 'DICO/SALES005' (highlighted in yellow)

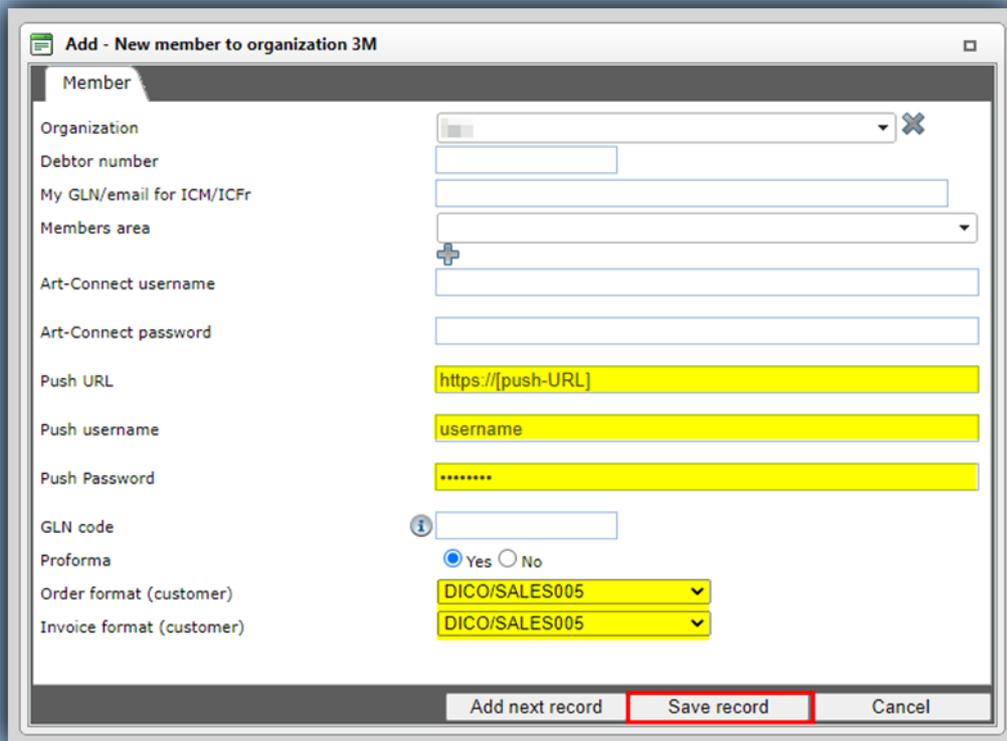
 At the bottom, there are three buttons: 'Add next record', 'Save record' (highlighted with a red box), and 'Cancel'.

- a. Organization: Select the customer organization.
- b. My GLN: Enter the GLN number of the customer.
- c. Order format (customer): Set the order format as the customer wants to receive it, for example DICO/SALES005.
- d. Invoice format (customer): Set the invoice format as the customer wants to receive it, for example DICO/SALES005.

### Push message service

By setting the Push Message Service details, messages from the supplier will be forwarded by the Compano server to the installer.

To setup the Push Message Service:



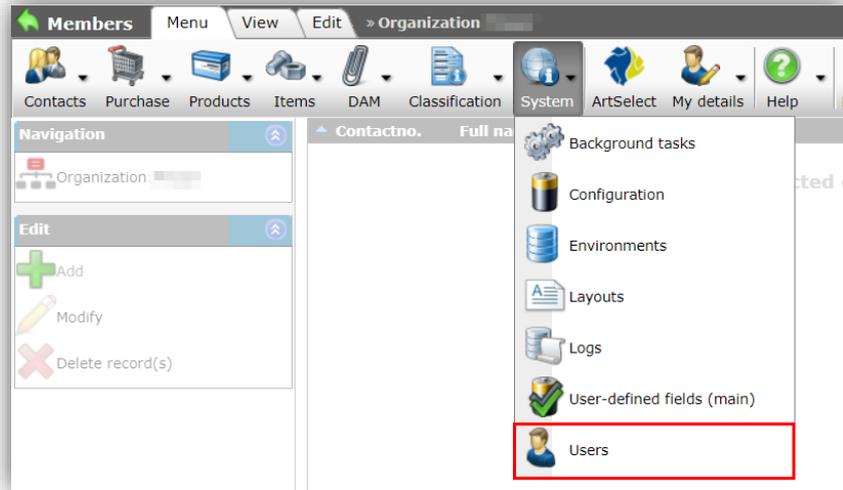
- a. Push URL: Enter the URL that is used by the Wholesaler for receiving push messages.
- b. Push username: Enter the username for the push message service.
- c. Push password: Enter the password for the push message service.
- d. Order format (customer):
- e. Invoice format (customer):

Note: The customer needs to specify the preferred Order and Invoice format.

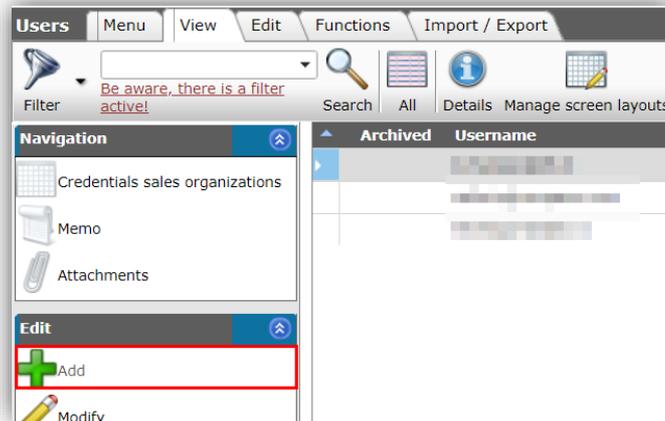
### 2.2.3 Add user account for customer

Now, add a user account for the customer in the (private) Art-Connect application of the wholesaler:

1. Through the Menu, go to *System > Users*.



2. Next, under Edit, click on *+Add* to add a new user account:



3. In the pop-up window, enter the user details:



- a. User-interface: Set to Art-Connect.
  - b. Contact: Select the correct contact person.
  - c. Username: By default, the user name is set to the contact persons e-mail address; optionally set a different user name.
  - d. Email: By default, the email address is set to the contact persons e-mail address; optionally set a different e-mail address.
  - e. Security: Optionally, set any additional security settings.
4. Save the record.

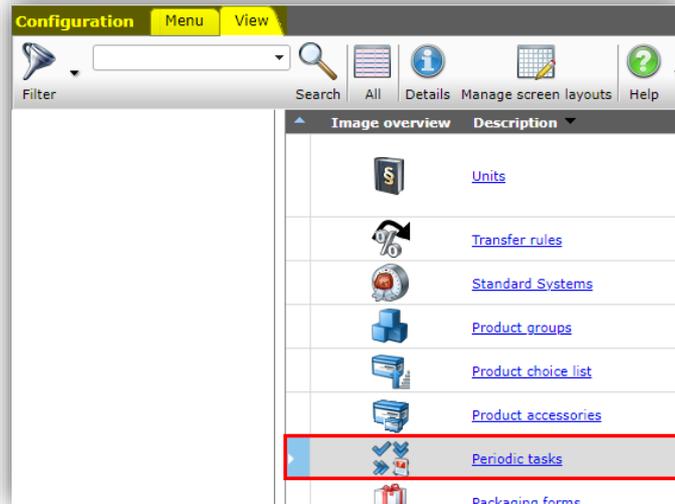
### 2.3 Setup periodic task

Apart from orders, invoices, etc., (new) user account details need to be sent to the Art-Connect server. For this a Periodic Task needs to be setup such that any user(s) will be validated by the server.

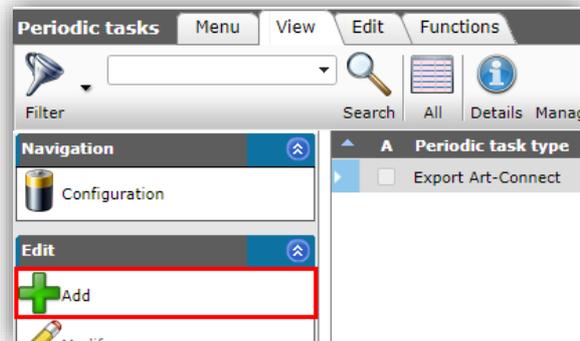
Note: Setting up the periodic task is a one-off action. The task will run periodically and thus sent **any new user account details to the server according to the task's frequency. Note however that user accounts are only active *after* the periodic task has run, which usually occurs at night.**

To setup a periodic task:

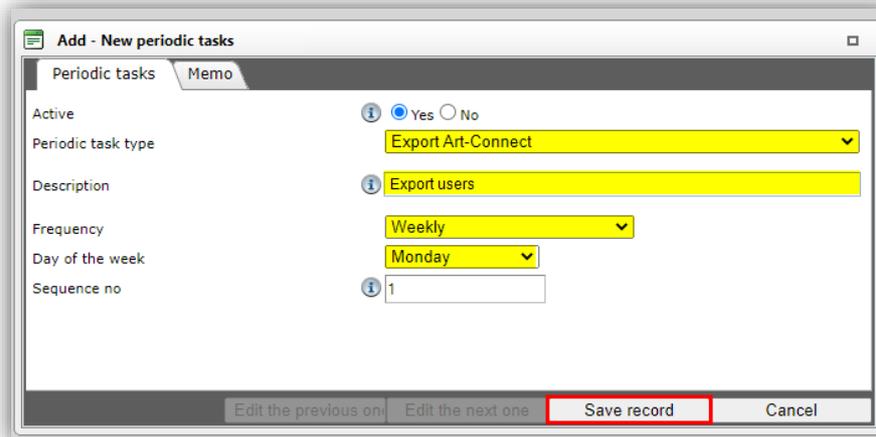
1. Through the Menu, go to *System > Configuration* and in the Overview, click on *Periodic Tasks*.



2. On the next screen, under Edit, click on *+Add*.



3. In the pop-up window:



- a. Active: Set to **Yes**.
  - b. Periodic task type: Select **Export Art-Connect**.
  - c. Description: Enter a description, for instance Export users.
  - d. Frequency: Select a frequency for the task depending upon how often you add new users.
  - e. Day of the week: Select a day of the week on which the task should run.
4. Save the record.