

# **COS Basics Manual** Compano Online Software

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# 1 Introduction

This document describes the layout and use of the Compano Online Software graphical user interface, as well as its basic functions.

## 1.1 Concepts

COS

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Compano Online Software application. Version of the COS-application are, for instance K05, L02, L03, etc.

PIM

Product Information Management system, used to manage product and item data. Data can be communicated to data pools, product websites, catalogues, web shops, etc.

#### Shared application

Your own COS-environment, which shares a database and application with other Compano customers.

#### Dedicated application

Your own COS-environment, database and COS-application; mandatory for additional licenses such user-defined fields.

#### Entity

Data object in COS, for instance Product, Item, Assortment, Attachment, Price, etc. For most entities in COS an overview has been created.

#### Record

One instance of a data object in COS, for instance one product or one item.

#### Overview

Overview of all records of a data object. A default screen layout has been defined for each overview.

#### Data field

One field containing data, such as a price in Euros, Diameter in millimetres, etc.

#### Import

Import of data into data fields in COS.

The data source is often an Excel or text-based data file, but could also be a data file which makes use of (international) *standard exchange standard*, such as DICO (INSBOU/SALES), BMEcat, FAB-DIS, etc.

#### Export

Export of data out of data fields in COS.

The export is often an Excel or text-based file. but could also be a data file which makes use of (international) *standard exchange standard*, such as DICO (INSBOU/SALES), BMEcat, FAB-DIS, etc.

#### Standard exchange format

Several standard formats have been defined to exchange data for the construction and engineering sector, for example: PAB, DICO/SALES, BMEcat, FAB-DIS. These Data Exchange Standards facilitate the sharing of structured data across different information systems.

#### Screen layout

Layout of data columns (fields) on an Overview in COS. Layouts can be customized by the user and often serve as a mapping for data exports as well.

#### Import layout

Layout for importing data into of COS. Import layouts can be customized by the user.

Export layout

Layout for exporting data out of COS. Export layouts can be customized by the user.

Delta import

A *Delta Import* compares data in the source file with data in COS. On import only new or changed data is imported.

Full import

A *Full Import* compares data in the source file with data in COS. All data in COS is overwritten with data from the import file.

#### 1.2 Product versus Item

Product

A product is a manufactured and often branded object which can be described in *technical terms*.

Item

An item is a (collection of) product(s) which are packaged and priced. An item can be described in *logistical terms*.

Product group

Product groups are used to group a set of products that share the same information, such as a photo, drawing, etc.

Item group

Item groups are used to group a set of items that share the same information, such as assembly manual, energy label, etc.

# 2 Login

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Compano offers its software as a service (SAAS). COS is in essence an online database which can be manipulated through a web browser.

A Compano consultant will have granted you access to your COS application. You should have received an e-mail containing a login link, user name and password.

Did you not receive an e-mail?

Please contact *Compano Support* at <a href="mailto:support@compano.com">support@compano.com</a>, or call +31 88 266 7 202.

# 2.1 Which browser to use?

Compano software is browser-independent, so you are free to use any of the commonly available web browsers. However, Compano recommends to either use the latest version of the Microsoft **Edge browser, or Google's Chrome browser.** 

# 2.2 Shared application

To log into a *shared* application, use the following URL:

#### https://pim.compano.com

Once you have entered your user name and password, you will be directed to your system environment:



# 2.3 Dedicated application

To log into a *dedicated* application, use this URL:

https://[your\_company\_name].compano.com

Should you need to practise or 'dry-run' an import or other task, you can do so in a prerelease environment:

For a shared environment: <u>https://pimprerelease.compano.com</u>

For a dedicated environment: <u>https://[compano\_name]test.compano.com</u>

<u>Note</u>: You will need a separate prerelease-account to login; please ask our Support department for your login credentials should you need them.

# 2.5 Login timeout

As a security measure, you will be automatically logged out after 60 minutes of inactivity.

# 3 Navigation

Once you are logged in, you will be presented with the *Compano graphical user interface* which consists of:

- Menu (main menu)
- Overview (overview of product, items or other data)
- Side panels (left and right)

🚨 🧐 🦓 🦓 .	Classification System My d	🖌 . 🙆 . 🖡 Ietails Help Logout	Menu						70,
vigation 🛛 🛞 🚔	X Manufacturer Descr	ription Code	GTIN		T Product description	Brand (product)	Type (product)	Quick Navigation	
Items (3/0)	Opple	<u>140043898</u>	06956712666215		LED E TS BATTEN 600 9W 800LM 3000K CT (langer)	LED	E_TS	Quick Filter	
Left side-	Opple	140043899	06956712666222		LED E TS BATTEN 600 9W 800LM 4000K CT	LED	E_TS	Manufacturer	
	Opple	140043900	06956712666239	4	LED E TS BATTEN 1200 18W 1600LM 3000K CT	Opple	E_75	Right sid	le-
panel	Opple	140043901	06956712666246	2	LED E TS BATTEN 1200 18W 1600LM 4000K CT	LED	E_TS	panel	
Is part of (0/0)	Opple	140043902	06956712666253		LED E TS BATTEN 900 11W S 3000K BL	LED	E_TS	Group (masterdata)	
Product certificates (1/0)	Opple	140043903	06956712666260		led e t5 batten 600 9w s 3000k bl	LED	E_TS		
Attachments (74/0)	Opple	140043904	06956712666277				E_TS	Suppliers	
Manufacturer:Opple (6	Opple	140043967	06956321843472		Overvie	w	E_85	Assortments	
	Opple	140043968	06956321843489		4000-wh-ct	Opple	Grille	Assigned classes	
Product group:E_T5 LE	Opple	140043969	06956321843410			Opple	Lekbak	Productmodels	
t 🛞	Opple	140043970	06956321843427		ledpaneirc-g sq298-11w- 4000-wh-ct	wisa	kraan	MC000010 Base conduit	
Add	Opple	140043971	06956321843458		LEDPanelRc-G Re298- 36W-3000-WH-CT	Opple	Grille	MC000176 Panel radiator	
Modify	Opple	140043972	06956321843465			Opple	Grille	Product	,
Delete record(s)	Opple	140043973	06956321843434			Opple	Grille	Deeplink	
Line edit on	Opple	140043974	06956321843441			Opple	Grille	Deeplink To website of Opple	
	Opple	140044049	06956321843731		LEDHIGHBAY-POLE-CT	LED	PERFORMER	Country of origin	
Сору	Opple	140044050	06956321843748		LEDHIGHBAY-BRACKET10- CT	LED	PERFORMER	General	
Paste	Opple	140044054	06956321843557		LEDPanelRc-G Sq598- Surface Module-CT	Opple	Surface Module	Status Succession	
actions (8)	Opple	140044055	06956321843564		LEDPanelRc-G Re298- Surface Module-CT	Opple	Surface Module	Classification	
Manipulate	Opple	140044056	06956321843496	1	LEDPanelRc-G Sq298- Surface Module-CT	Opple	Surface Module	Additional	

# 3.1 Main menu

The main menu contains the navigation buttons to the main components of the application:

- Contacts: Address and other data of users, manufacturers and suppliers.
- Products: Access to product overview, manufacturers, classification data and more.
- Items: Access to item overview, suppliers, assortments, price information and more.
- DAM: Digital Asset Management; management and overview of Attachments and Certificates.
- Publications (optional): Access to publication structures.

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- System: System configuration, logs and users.
- My Details: Change user details, company settings, screen settings.
- Help: Access to main Help website, support, release notes and system information.
- Logout: Log out option to terminate login session.

For more information on the main menu choice see chapter: <u>4. Main menu</u>.

#### 3.2 Submenu tabs

Once you make a choice in the main menu, you will be presented with several *tabs*, each with its own *submenu* with functions.

For example, if you choose *Products* from the main menu, the submenu functions on the tab *View*, such as *Filter, Search, Select, Details, Screen Layout* will perform their action on the product records which are visible in the overview:

		.0.						
	Search All Details Screen Layout	Help						
igation  🛞 📤	X Manufacturer Description	Code	GTIN		T Product description	Brand (product)	Type (produc	t)
Items (3/0)	Opple	<u>140043898</u>	06956712666215		LED E T5 BATTEN 600 9W 800LM 3000K CT (langer)	LED	E_TS	
Product parts (1/0)	Opple	140043899	06956712666222		LED E T5 BATTEN 600 9W 800LM 4000K CT	LED	E_T5	
	Opple	140043900	06956712666239	1	LED E T5 BATTEN 1200 18W 1600LM 3000K CT	Opple	E_75	
Accessory products (3)	Opple	140043901	06956712666246	2	LED E T5 BATTEN 1200 18W 1600LM 4000K CT	LED	E_T5	
Is part of (0/0)	Opple	140043902	06956712666253	4	LED E TS BATTEN 900 11W S 3000K BL	LED	E_T5	
Product certificates (1/0)	Opple	140043903	06956712666260	2	Ied e t5 batten 600 9w s 3000k bl	LED	E_TS	Overview of Product
Attachments (74/0)	Opple	140043904	06956712666277		Ied e t5 batten 300 4.5w s 3000k bl	LED	E_TS	records
Manufacturer:Opple (6	Opple	140043967	06956321843472	1	ledpaneirc-g sq598-36w- 3000-wh-ct	LED	E_85	records
Product group:E_T5 LE	Opple	140043968	06956321843489	2	ledpanelrc-g sq598-36w- 4000-wh-ct	Opple	Grille	
Product group:E_IS LE	Opple	140043969	06956321843410		ledpanelrc-g sq298-11w- 3000-wh-ct	Opple	Lekbak	
8	Opple	140043970	06956321843427		depanetrc-g sq298-11w- 4000-wh-ct	wisa	kraan	
Add _	Opple	140043971	06956321843458			Opple	Grille	
Modify	Opple	140043972	06956321843465	2		Opple	Grille	
Delete record(s)	Opple	140043973	06956321843434	1	LEDPanelRc-G Re166- 21W-3000-WH-CT	Opple	Grille	
Line edit on	Opple	140043974	06956321843441	1	LEDPanelRc-G Re166- 21W-4000-WH-CT	Opple	Grille	
Сору	Opple	140044049	06956321843731		LEDHIGHBAY-POLE-CT	LED	PERFORMER	

Once you switch to the *Edit* tab, different functions become available, such as *Search, Add, Modify, Delete record(s), Line edit on, Copy*), for changing or modifying data of product records:

roducts Menu View Ed	it Functions Print Import / Ex						
<b>/</b> -	▝▝▝▝▘⇙▕▓		. 0.				
Filter	Search Add Modify Delete record(s) X Manufacturer Description		Help	F T Product desc	ription Brand (product)	Type (product)	
Items (3/0)	Opple		6956712666215	LED E TS BATT		E_T5	
-	Opple	140043899 0t	6956712666222	LED E TS BATT		E_TS	
Product parts (1/0)	Opple	140043900 04	6956712666239	A LED E TS BATT 18W 1600LM 3	EN 1200 8000K CT Opple	E_75	
Accessory products (3)	Opple	140043901 0	6956712666246	A LED E TS BATT	EN 1200 4000K CT LED	E_T5	
Is part of (0/0)	Opple	140043902 0t	6956712666253	LED E TS BATT 11W S 3000K I		E_T5	Overview of Product
Product certificates (1/0)	Opple	<u>140043903</u> 0	6956712666260	Ied e t5 batten 3000k bl	1 600 9w s LED	E_T5	records
Attachments (74/0)	Opple	<u>140043904</u> 04	6956712666277	Id led e t5 batten 3000k bl		E_T5	
Manufacturer:Opple (6	Opple	<u>140043967</u> 06	6956321843472	a ledpaneirc-g so 3000-wh-ct		E_85	
Product group:E_TS LE	Opple	<u>140043968</u> 06	6956321843489	d ledpaneirc-g so 4000-wh-ct		Grille	
	Opple	<u>140043969</u> 06	6956321843410	a ledpaneirc-g so 3000-wh-ct		Lekbak	
dit 🛞	Opple	<u>140043970</u> 0	6956321843427	d ledpaneirc-g so 4000-wh-ct		kraan	
Add	Opple	<u>140043971</u> 0	6956321843458	A LEDPanelRc-G 36W-3000-WH	I-CT Opple	Grille	
Modify	Opple	<u>140043972</u> 0	6956321843465	LEDPanelRc-G 36W-4000-WH		Grille	
Delete record(s)	Opple	<u>140043973</u> 0	6956321843434	LEDPanelRc-G 21W-3000-WH		Grille	
T2)				Can LEDPanelRc-G	Re166-		

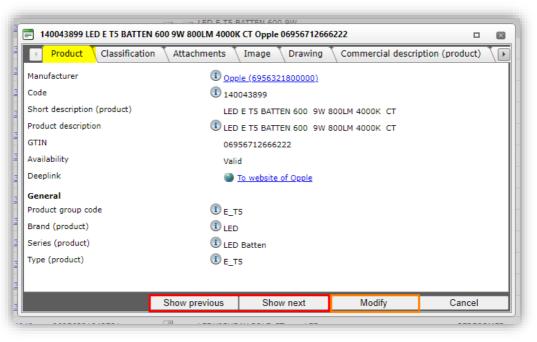
<u>Note</u>: The menu options from the Edit, Functions and Print tab are also available in the left side panel.

### 3.2.1 View

The View tab contains the options:

Products	Menu	View	Edit	Functio	ons	Print	Import /	Expo	rt	
٦.			•			1			?	
Filter				Search	All	Details	Screen Layo	ut	Help	

- Filter: Filter records in the overview, using one or a combinations of data fields.
- Search: Find all records containing a text string.
- All/Deselect Select all / deselect all active records in the current overview.
- Details: Show all data fields of the record *which contain data* in a pop-up window:



- Show previous and Show next: Use these buttons to leaf through the records in the Overview.
- o Modify: Use this button to directly change any data field.
- Screen Layout: Select a screen layout.

### 3.2.2 Edit

The *Edit* tab contains the options:

Products	Menu View	Edit	Functions	Print	Import / Exp	oort		
٦.		- (	< 🕂	P	×			?,
Filter		Se	arch Add	Modify	Delete record(s)	Line edit on	Сору	Help

- Filter: Filter records in the overview, using one or a combinations of data fields.
- Search: Find all records containing a text string.
- Add: Add a new record.
- Modify: Modify the selected record.
- Delete record(s): Delete the selected record(s).

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- Line edit on/off: Set *Line Edit* to *On*, you can now edit data of a record directly in the overview.
- Copy / Paste: First copy then paste the record.

## 3.2.3 Functions

The options under *Functions* differ according to the main menu selection.

For instance, the options for *Products* are *Manipulate*, and *(Add) Part*.

Products	Menu Vie	ew Ed	lit Functi	ions	Pri
	•		•		
		Search	Manipulate	Part	

The functions for Assortment are: Transfer (to) Artikelbeheer, Transfer 2BA, Transfer Fesah, Quality Control, Update and (Add) Purchasing contract.

Assortment	Menu	View	Edit	Functions I	mport / Expo	rt			
	•	. Q		1	2ba	Install Data	2	E	<b>%</b>
		Search	Transfe	er Artikelbeheer.nl	Transfer 2ba	Transfer Fesah	Quality Control	Update	Purchasing contract

# 3.2.4 Print

The *Print* tab contains several options for printing. Which options are available depends on the type of overview.

Options include:

- Search: find all records containing a text string.
- Product sheet: print a product sheet containing basic product information, product image and drawing, a barcode and the product class and corresponding features of a product
- Product class: print the product class and features of a record.
- Printing options: print either the product class or (overview) list of records, optional: select a printing layout.
- Managing Product class / List layouts: manage (add, edit, delete, copy) a print layout for printing of a product class of list of record(s).

# 3.2.5 Import / Export

The *Import / Export* tab contains several options for importing and exporting data. Which options are available depends on the type of overview:

Options include:

- Search: find all records containing a text string.
- Export [entity]: export (filtered/selected) records using either the screen layout or a predefined layout.
- Import: import data / records using a predefined layout and import file.
- Item exports: export (filtered/selected) records using an industry format, such as DICO/SALES, BMEcat, FAB-DIS, etc.

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- Export images: export images of (filtered/selected) records. Images will be sent to an FTPS-location on the Compano server where they can be downloaded<sup>1</sup>.
- Export classification: export all current classification data of products in COS.
- Report export attachments: generates a report listing all attachments for all products, product groups, items and item groups.

#### 3.3 Side panel navigation

Additional navigation and functional options are **available through the application's side panels**. By default the side panels are disabled to allow for maximum screen space for product or item data. To enable the side panels:

- Products Menu Import / Export View Edit Functions Print 国. ふ. y ? . Contacts Products Items Classification System DAM Help Logout My details hitems (3/0) Change password Product parts (1/0) npany settings ccessory products (3) My settings Is part of (0/0) ctivate screen settings roduct certificates (0/0) Create homepage Attachments (74/0)
- 1. Through to *Menu* go to *My details > My settings:*

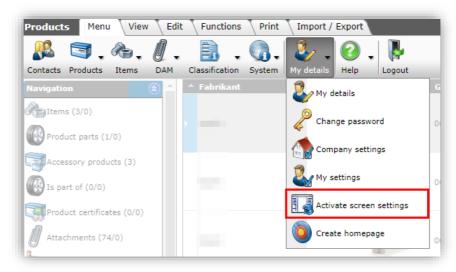
2. Under *Screen Settings* set the option for *Left panel display* and *Right panel display* to *Yes* and click on *Close*.

📄 User Settings			$\times$
System settings			
Email			
Mail relay password			
Send on behalf of (relay)			
Screen setting			
Left panel display	● Yes ○ No ● Yes ○ No		
Right panel display	● Yes ○ No		
		Close	

3. Next, through the main menu, go back to *My details* and click on *Activate Screen Settings*.

<sup>&</sup>lt;sup>1</sup> You should have received FTPS-account login details from your Compano consultant. For FTPS download, Compano recommends the freely available FTP-software <u>FileZilla</u>.

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The screen settings have now been activated, which means the side panels will show on every overview in COS

<u>Note</u>: COS remembers screen settings per user and per browser window resolution. Should you change the size of your browser window, you will have to re-activate them.

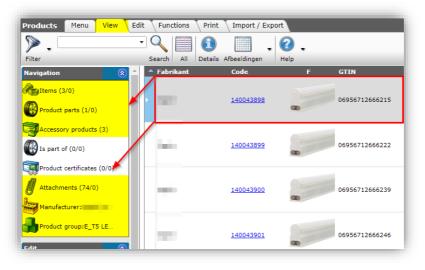
#### 3.3.1 Related navigation

Data of one record in COS can be related to other records. For instance, a product record is related to a corresponding item record and this item record is related to a gross price record, attachments records, surcharge records, etc.

Therefore, data in COS can be navigated by following these *relations* to other data. In practice this will allow you to select a product, item, price, or other data record and navigate to any related data record.

Relational navigation is available in the top left side panel. For instance:

- 1. Through the Menu, go to *Items*.
- 2. Select an item and in the left side panel, under *Navigation*, links to related data are shown:



In the example above, you can navigate to Product parts (1/0) of the selected item, Attachments (74/0), three Items (3/0) and the corresponding Product group: E\_TS LED.

<u>Note:</u> Numbers in parenthesis indicate how many related *active* records are available. Numbers after the forward-slash indicate the number of *archived* records:



#### 3.3.2 Submenu options

The menu options from the *Edit*, *Functions* and *Print* tabs are also available in the left side panel. For example:

	🕂 🧷 🕂					
Search	Add Modify pelete record (s)	Line edit on Copy	Help			
avigation 🛞 📤	Manufacturer Description	Code	GTIN	MC F	T Product description	Brand
Items (9/0)	> 1997	<u>140043898</u>	1000 C	2	LED E T5 batten 600 9W 800lm 3000K CT	
Product parts (0/0)	Part	<u>140043899</u>	Instruction and the	A	LED E T5 batten 600 9W 800lm 4000K CT	<b>Sec</b>
		<u>140043900</u>	Control of	2	LED E T5 batten 1200 18W 1600lm 3000K CT	-
Accessory products (0)	-	<u>140043901</u>	000723004	2	LED E T5 batten 1200 18W 1600lm 4000K CT	140
Is part of (0/0)	(and	140043902	010/0100	2	LED E T5 batten 900 11W S 3000K BL	100
Attachment (33/0)		<u>140043903</u>	100 C	Â	LED E T5 batten 600 9W S 3000K BL	-
Manufacturer:Opple (O	(inter-	140043904	and the state of	2	LED E T5 batten 300 4.5W S 3000K BL	<b>North</b>
Productgroup:E_T5 LED	light-	140043967	1000 C	2	LEDPanelRc-G Sq598- 36W-3000-WH-CT	ingen i
	reader -	140043968	000003-000	A	LEDPanelRc-G Sq598- 36W-4000-WH-CT	int.
lit 🛞	1874	140043969	00000-000	2	LEDPanelRc-G Sq298- 11W-3000-WH-CT	100
Add	1994	140043970	and the second	2	LEDPanelRc-G Sq298- 11W-4000-WH-CT	-
Modify	Sec.	140043971	and the second	2	LEDPanelRc-G Re298- 36W-3000-WH-CT	<b>Testa</b>
Delete record (s)	ing to	140043972	Contraction of the local	2	LEDPanelRc-G Re298- 36W-4000-WH-CT	-
Line edit on	and the second se	140043973	00003-000	2	LEDPanelRc-G Re166- 21W-3000-WH-CT	int.
	1874	140043974	00003-040	Â	LEDPanelRc-G Re166- 21W-4000-WH-CT	1.0
Copy			Contract of the local diversion of the local	2	LEDHighbay-POLE-CT	in the second

### 3.4 Back button

<u>Note</u>: As the navigational history of the application can differ from browser history always use the *green arrow back button* to return to the previous screen:

Products	Menu	View	Edit	Functio	ns P	rint Import	/ Export	»Productgroup:01.7 Gas standard » Productgroup:COIL GAS
			- 🤍		1		. 📀	•
filter E	lack bu	utton	Search	All	Details	Screen Layout	Help	

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The main menu contains the main navigation for the application:



# 4.1 Contacts

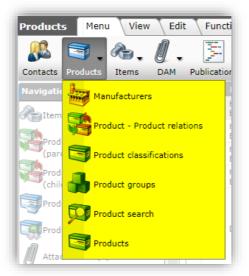
In *Contacts* you will find the name, address and other data of organisations or persons which are used in the application. For instance, your company, users of the PIM software, et. Cetera.

Contacts Menu View	Edit	Fu	nctions	Import / Export				
filter		Search	h All	Details Screen Layout	,			
	: -		T	Full name	Street and housenumber	Place	Telephone	E-mail
			Æ	Compano BV				
Contact persons (1/0)				1993 (March 1997)		The second se		
Attachment (0/0)			. <del></del>	and the second sec	The second second	Set .	IN PARTICI	an and parts and
Organization			. <del></del>	525555				
				term they prove spray	Television (C	No.	In Provide	DOLDON MARKED
Edit 🤅	$\odot$		<u>8</u>	Selection (Second Sec				
Organization				Actual consequence spinster	Television (1	No.	and provide a	DOLDON MARKED

<u>Note</u>: For a PIM implementation, you will often only find your own **company's details and those of** the application users.

# 4.2 Products

Under *Products* you can View/Edit:



Manufacturers: One or more manufacturers of your products. Often also doubling as the 'brand name'.

Product – Product relations: Set relations between products, such as product parts, accessories, optional products, or set the predecessor and successor relations.

Product classifications: An overview of all your products, including all product classification data.

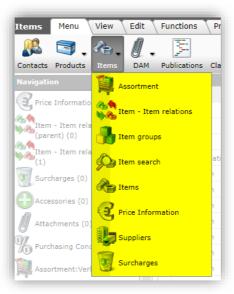
Product groups: An overview of all product groups which are in use.

Product Search: A quick, searchable overview of all your products. <u>Note</u>: This menu option is for Compano Artikelbeheer.nl customers only. Compano PIM customers can use the search box on the Product overview instead.

Products: An overview of all products, including extended edit functions.

## 4.3 Items

Under Items you can View/Edit:



Assortment: One or more collections of your items. For instance, all item for the Belgian market and all items for the UK market.

Item – Item relations: Set relations between items, such as item accessories, alternatives and optional items, or set the predecessor and successor relations.

Incidental export: Pre-defined exports of item data.

Item groups: An overview of all item groups which are in use.

Items: An overview of all items, including extended edit functions

Price Information: An overview of the price history of all items

Item Search: A quick, searchable overview of all your items. Note: This menu option is for

Compano Artikelbeheer.nl customers only. Compano PIM customers can use the search box on the Item overview instead.

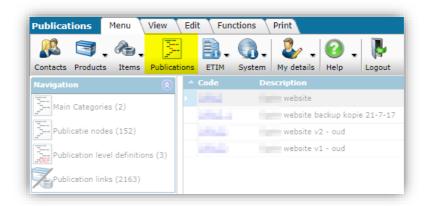
Suppliers: An overview of all suppliers.

Surcharges: An overview of all surcharges which are applicable to you items.

### 4.4 Publications

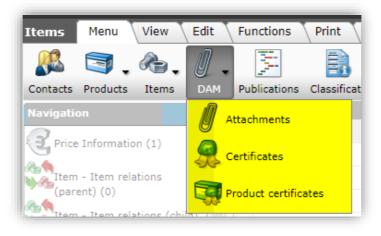
*Publications* determine the way information is structured for exchange with (external) application using the XML feed format.

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### 4.5 DAM

DAM stands for Digital Asset Management. This is a placeholder for the planned Compano DAM system, to better manage your attachments.



### 4.5.1 Attachments

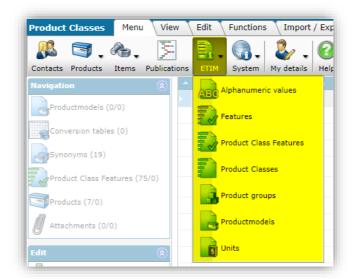
Currently, only an overview of all your attachments is available.

#### 4.5.2 Certificates

This option allows for the addition of certificates and linking them to multiple products. Certificate information is shared using the DICO/SALES, BMEcat 5.0 and DQR industry formats.

### 4.6 ETIM

The *ETIM* menu option, provides an overview of the latest ETIM classification:



Note: ETIM is a *dynamic* classification system, which means it is updated each Sunday.

# 4.7 System

Under *System* you will find:

Items Menu View Edit	Functions	Print Imp	ort / Export		
Contacts Products Items DA	• Dublication	Classification	🚮 - 🧞 -		
	<ul> <li>Supplie</li> </ul>		System My details		Logout
Price Information (1)			Configuration		2
Item - Item relations (parent) (0)			A Layouts		e e
Item - Item relations (child)		andra bilani)	Logs		ε -> ε
Surcharges (0)	1 Aurilla	dan -	User-defined	fields (main)	ε -: ε
Attachments (0)			lusers		⇒ € ⇒
	inter the	ter (	2	8210460	m
Purchasing Conditions	Later St.	den la constante de	2	8366540	m

Background tasks: Larger imports and exports take time; in Background tasks the overview will show how many tasks are still running, including an indication by which time they will be finished. The interface also allows for stopping background tasks which are in progress.

Configuration: Configuration holds all the configurable options of COS, such as which languages to use, periodic tasks, conversion tables and much more. Configuration is usually the domain of your application manager or the Compano consultant.

Environments (*optional*): If your application controls several, different (sub)environments, access to these is through this menu option.

Layouts: Overview of all layouts, including feed, import, export and screen layouts. Layouts can be prepared through this menu option.

Logs: Logs will show an overview of all changes to the data made by system users. <u>Note</u>: you can also find and download system reports under *Logs*.

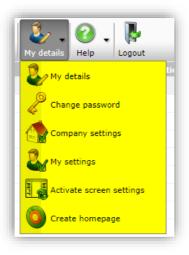
User-defined fields (main) (*optional*): If you need extra data fields beyond the standard fields, you can manage them here. Only available if you have a dedicated application.

User groups (*optional*): With the option user groups you can set access levels per group (f.i. view only, data manager, etc.) and assign users to them.

Users: System users have access to the data and, depending on user rights, can view, edit and/or delete information.

# 4.8 My details

My details can be used to change user details and settings:



My details: Change contact information, user interface language, e-mail address, and more. Change password: Reset your password.

My AB subscription (optional): Manage your subscription to Artikelbeheer.nl.

Company settings: Configurable PIM options for your company, such as classification system, price system, default import/export settings, default language, default country, number formats and more.

My settings: Screen settings (left and/or right sidepanel).

Activate screen: Activate screen settings.

Homepage: Set your homepage within Compano PIM.

### 4.9 Help

Under Help you will find:



Help: Access to Compano's webpage for downloading manuals, Excel templates and the Microsoft Office Add-in.

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Support: Access your support tickets to view their status.

Release Notes: Read the latest release notes which include changes to application functionality. Ticket: Add a support ticket concerning a wish, error or question.

Info: Find information on your software version and how to contact Compano Support.

# 4.10 Logout

Use this menu option to log out. Alternatively, you can close the browser or browser tab in which the application is shown.



<u>Note</u>: if multiple people make use of the same Compano login account, please always use the Logout button, as otherwise the next user cannot login for 30 minutes as the browser session needs to time out.

# 5 View

Once you make a choice in the main menu, the application will switch to the *View* tab, which will give you the option to search for, view and select one or more data records:



# 5.1 Filter

The preferred way to find one or more records is to use the comprehensive Filter:



#### 5.1.1 Apply a filter

To apply a filter:

- 1. Click on the *Filter* button (1)
- 2. In the pop-up window use any number of data fields (2) to set filter parameters.

Note: You can combine any number of data fields on any of the tabs:

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1 er	<b>•</b>	Sear	ch All D	etails	Screen Layout Price Reference date Help		
	📄 Filter						×
Pric	Item Product Clas	sifica	ation 🔨 Stat	us 🔪	Logistics Other User def fields Translations		
Sur	Supplier	ī	equal	•	<b></b>	2	
Ow	Item Number	٤	between	۲	140044000 [140044050]		I
	GTIN	i	start	۲			I
Acc	Own item number	ī	start	•			I
Atta	CBS Code	ī	start	۲			I
Iter	Country of origin	ī	equal	۲	Belgium 🗸		I
Pro	Item description	ī	start	۲			I
FIG	Commercial description		contains	۲			I
t	Technical description		contains	۲			I
Ado	Description 1		start	۲			
Acc	Description 2		start	۲			
Pur	Division						
Pur	Assortment	(i)	equal	۲	entra (mark (m. m)		
=+ F	Condition group code		start	۲			
Iter	Group Code	i	start	۲			
Мог	Group (masterdata)		equal	•	STR_L LED Streetlight 🔹		

3. Click on *Apply* (3) to activate the filter.

#### 5.1.2 Filter options

#### 5.1.2.1 Text filter options

For data fields which contain an alpha-numeric text value, these options are available:

Description (product)	start 🗸
Commercial description (product)	contains word
connercial acscription (product)	start
Technical description (product)	filled
	empty automatic
Country of origin	automatic

- Contains word: Filters records with text containing filled out word, or words. Also filters on part of a single word.
- Start: Filters records with text starting with filled out word, or words. Also filters on part of a single word.
- Filled: Filters records where this text field contains a value
- Empty: Filters records where this text field contains *no* value
- Automatic: Filters records where the text field is set to be filled automatically; i.e. inheriting data from another data field.

#### 5.1.2.2 Number filter options

For data fields which contain a number value, these options are available:

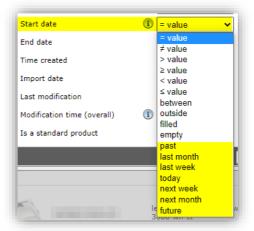
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Number of items	= value	~
Attachments	= value ≠ value	
Amount of attachments	> value	
AddOnProductCount	≥ value < value	
IsAddOnProduct	<mark>≤ value</mark>	
Sub product count	between outside	

- = value: Filters records where the data field value is *equal* to the filled out value.
- ≠ value: Filters records where the data field value is *not equal* to the filled out value.
- > value: Filters records where the data field value is *greater than* to the filled out value.
- < value: Filters records where the data field value is *smaller than* to the filled out value.
- ≥ value: Filters records where the data field value is *greater than or equal* to the filled out value.
- < value: Filters records where the data field value is *smaller than or equal* to the filled out value.
- Between: Filters records where the data field value is *between* the filled out values.
- Outside: Filters records where the data field value is *outside* the filled out values.

#### 5.1.2.3 Date field options

For data fields containing a date, the following extra options are available:



- Past: Filters records where the date lies in the past (counting as of today).
- Last month: Filters records where the date is within the last 30 days (counting as of today).
- Last week: Filters records where the date is within the last 7 days (counting as of today).
- Today: Filters records where the date is today's date.
- Next week: Filters records where the date is within the next 7 days (counting as of today).
- Next month: Filters records where the date is withing the next 30 days (counting as of today).
- Future: Filters records where the date lies in the future (counting as of today).

#### 5.1.2.4 Other options

For other types of data fields a number of other option might be available, including:

- Contains: Filters records where the data field value contains the filled out value.
- Contains not: Filters records where the data field value does *not* contain the filled out value.
- Ends with: Filters records where the data field value ends with the filled out value.

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- Has [entity]: Filters records that are linked to records of the specified entity. For instance: The product has linked items.
- Has not [entity]: Filters records that are not linked to records of the specified entity. For instance: The product has *no* linked items.
- Has archived [entity]: Filters records that are linked to archived records of the specified entity.
- Has unarchived [entity]: Filters records that are linked to unarchived records of the specified entity.
- Has no unarchived [entity]: Filters records that has no linked unarchived records of the specified entity.

#### 5.1.3 Save a filter

If you need to save a filter for future use:

1. Click on the *Save as* button in the pop-up window:

🚍 Filter					×
Product Classification	Мо	del Additional	User-defined fields Translations		
Manufacturer	i	= value 🗸 🗸		•	
Code	i	start 🗸			
GTIN		start 🗸	87		
Company-specific product code	i	start 🗸			
ERP code	i	start 🗸			
Short description (product)		start 🗸			
Description (product)	i	start 🗸			
Commercial description (product)	)	contains word 🗸 🗸			
Technical description (product)		contains word 🗸 🗸			
Country of origin	i	= value 🗸 🗸	Nederland	•	
ProductPublish		= value 🗸	On internet     In catalog       On webshop     ERP       Datapool     Calculation		
General					
UNSPS code		contains 🗸 🗸	23423		
Product group code	i	start 🗸			
Brand (product)	i	start 🗸			
Series (product)	i	start 🗸			-
			Apply Empty Empty and close Save as	s	

2. In the new pop-up window set a name for your filter and choose whether it will be available only to you, or to all Compano users within your company:

📄 Add - New layout			
Layout Product Class	ification 🔪 Model 🔪 Additional 🔪 Use	r-defined fields 🔪 Me	emo
Туре	Filter setting	~	
Name	My filter		
Application	◯ 🖼 Within the company	🖲 🗳 For me	]
	Add next record	Save record	Cancel

3. Click on the *Save* button.

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<u>Note</u>: The filter will be available in the *Filter* menu once you have refreshed your browser with CTRL-F5.

#### 5.1.4 Use a saved filter

To access the savedfilter menu, use the down-arrow next to the filter button. This will display a list of saved filters, including your own filter:

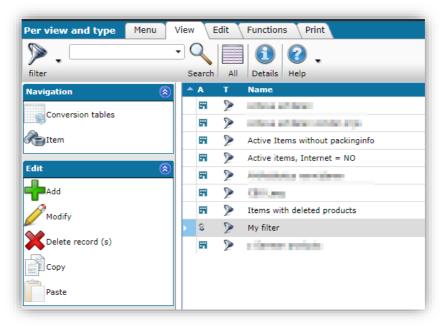
Products Menu View Edit
Filter S
Filter
Including archive
My filter
Manage filters

#### 5.1.5 Edit a filter

To manage saved filters, use the *Manage filter* option in the filter menu:

Assortment Menu	View	Edit F
filter		Search
filter	۲	<u>^</u>
Including archive		
Manage Filters		

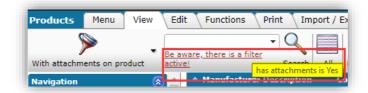
This option will show a list of saved filters which you can edit, copy/paste or delete, using the buttons in the *Edit* menu:



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#### 5.1.6 Clear a filter

Once you have applied a filter, a warning message will alert you that a filter is active:



Hovering over this message will show a tooltip listing all filter parameters that were set.

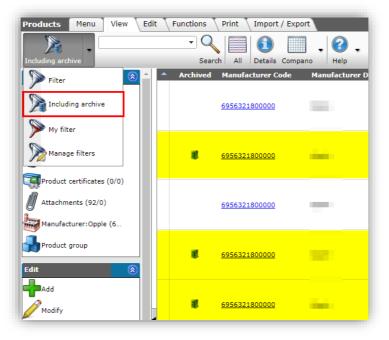
To clear a filter:

- 1. Click on the filter button
- 2. In the pop-window, click on either:
  - a. *Empty*. This will reset all filter parameters so you start the filter process anew
  - b. or *Empty and close*. This will reset all filter parameter and close the filter window

UNSPS code	contains	✓ 23423			
Product group code	(1) start	▼			
Brand (product)	<li>start</li>	~			
Series (product)	<li>start</li>	~			
		Apply	Empty	Empty and close	Save as

#### 5.1.7 Archived records

Archived records will not show in the Overview as this will only display active records. To display archived records, select the filter option *Including archive*.



If you screen layout contains the data column *Archived*, this **column will show a 'file cabinet' icon** next to any archived records.

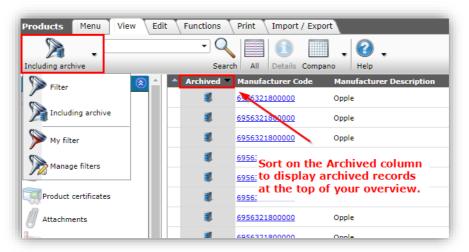
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<u>Important</u>: As of software version L03 the data field Mutation Code, which was also used to indicate archived records, has been deprecated. On your layouts this field should be replaced with the Archived field.

#### 5.1.7.1 Additional filter options on archived records

Should you need to filter on archived records with additional filter options, follow the steps below:

1. First, filter your products/items using the *Include archive* filter option:



- 2. <u>Tip</u>: Sort on the 'Archived' column to display all archived records at the top
- 3. Next, click on the *Include archive* button again to set any additional filter options. For instance, with product code equal to **500012000300**:

e	Filter	
e	Product Classification	Model Additional User-defined fields Translations
e	Manufacturer	I = value ▼
e	Code	Is equal to ▼ 500012000300
е	GTIN	start 🗸
P	Company-specific product code	🚯 etart 🗸

4. This will display the archived record with the product code 500012000300:

Products Menu	View Edit	t Functions	Print Import / E>	port
Filter	<mark>s a filter</mark>	Search All	Details Compano	- Help
Navigation	^ (ی	Archived	Manufacturer Code	Manufacture
Items		1	<u>6956321800000</u>	Opple
Product parts				
<b>S</b>				

<u>Note</u>: While the overview *will* show records, including archived ones, the *Filter* button will reset to *'Filter'*.

The right side panel contains a *Quick Filter*. With this filter you can make quick selections of records, based on information available in your application.

The quick filter is updated each night, so any information that you add today will be available for filtering the next day.

The quick filter is a *cascading filter*, which means that you will be presented with further choices once you make a selection. For example, selecting **Valves** will give you a new choice to select the **Type** of valve:

Quick Filter 🚷
Brand
✓
Product group
✓ Valves
Product line
Vot applicable
▼
Ball valves - Accessories - Gear (19)
Ball valves - Accessories – Gear (11)
Ball valves - Accessories - Handles (9)
Ball valves - Accessories - Hexagon (6)
Ball valves - Accessories - ISO flange (4)
Ball valves - Accessories - Spindle extension (4)
Ball valves - Accessories - T- handles (4)
Ball valves - Full bore (127)
Ball valves - Reduced bore (122)
Ball valves underground – Full bore (13)

To reset the quick filter, use the *Clear Selection* button:

Quick Filter	۲
Brand	
✓ Ballomax®	
Product group	
Valves	
Product line	
Not applicable	
Туре	
	-
Clear Selection	

### 5.3 Search

Optionally, filter results can be refined by using the *Search box*. Type any number of search terms to narrow down the number of results of a filter. As of the first three characters typed, the search box will suggest available search term options:

Products	Menu View Edit	Functions Print Import / Export
Filter	bsh ~	Search All Details Datapool
Navigatio		Manufacturer Code Manufacturer Description
Items	bsh0401p07a2a	8712423008878
Tems	bsh0401p07f2a	8712423008878
Produ	bsh0401p16a2a bsh0401p16f2a	
<b>.</b>	hch0401p17p3p	8712423008878
Acces:	bsh0401p17f2a	8712423008878
Is par		8712423008878
	bsh0401p26f2a	
Produ	bsh0401p27a2a bsh0401p27f2a	8712423008878
Attach		8712423008878
	bsh0401p36f2a	8712423008878
Manuf	bsh-bmh	0/12423000070
Rendu	There are 873 products found	8712423008878

<u>Note</u>: *Search* will search through *all* data fields for a match. This way, you will often get unexpected search results or find several matching records which are not the same thing, for instance a **sealing wax** and a **valve sealing ring**.

# 5.4 Select

To select a record, click on the line in the overview. The selected record will display as a grey line. Use SHIFT- and CTRL-click to select multiple records. Use the arrow-keys to extend your selection:

Supplier	Α	Item no.	Abbreviation	Item description	Gross / CU	Disc%	Purchase / CU
1000		<u>140043898</u>	pce	LED E T5 batten 600 9W 800lm 3000K CT	€ 22.00	0.00%	€ 22.00
1000		<u>140043899</u>	pce	LED E T5 batten 600 9W 800lm 4000K CT	€ 22.00	0.00%	€ 22.00
100.00		<u>140043900</u>	pce	LED E T5 batten 1200 18W 1600lm 3000K CT	€ 29.00	0.00%	€ 29.0
0000000		<u>140043901</u>	pce	LED E T5 batten 1200 18W 1600lm 4000K CT	€ 29.00	0.00%	€ 29.0
1004		<u>140043902</u>	pce	LED E T5 batten 900 11W S 3000K BL	€ 29.00	0.00%	€ 29.0
1000		<u>140043903</u>	pce	LED E T5 batten 600 9W S 3000K BL	€ 22.00	0.00%	€ 22.0
1000		<u>140043904</u>	pce	LED E T5 batten 300 4.5W S 3000K BL	€ 17.50	0.00%	€ 17.5

Note: To select records, do *not* click on any links in the Overview as this will open an information window instead.

# 5.5 Details

To view the details of a record, either click on the *Detail* button or on the *link* displayed on the overview:

Items Menu View	Edit	Functions P	rint	Import / Exp	ort		
▶.	•		•			•	2.
Filter		Search All	Details	Screen Layou	it P	rice Reference dat	e Help
Navigation		Supplier			A	Item no.	Abbreviation
Price Information (2/0)						<u>140043898</u>	pce
						140043899	pce
Surcharges						140043904	pce
Own alternatives			1.1			140043967	pce

Detailed information on the selected record will show in a pop-up window with several tabs. To view tabs that are out of view, use the scroll button:

Item Gross price Addit	ional 🔪 Image 👘 Drawing 认 Alternatives 认 Synonyms 🛝 Accessories 🐧 Order information	on 🔪 Price history 🔪 Surci
Supplier		
tem Number	140043898	
roduct	140043898 LED E T5 BATTEN 600 9W 800LM 3000K CT (langer)	
riginal item number	140043898 <b>S</b> O	croll button
Short description	LED E T5 batten 600 9W 800lm 3000K CT	
tem description	IED E T5 batten 600 9W 800lm 3000K CT	
TIN	1 06956712666215	
General		
ssortment		
Condition group code	PLU	
inks		
Deeplink		
	Show previous Show next Mod	ify Cancel

#### 5.6 Screen layout

The Screen Layout determines which data fields are visible on the Overview. As not all available information of a record fits into one window, the application allows for several, different layouts, which can be tailored to your needs.

#### 5.6.1 Default layout

For each data overview in COS a default layout is available. This default layout will show the most common data fields for that screen.

Once you have added other screen layouts of your own design, the default layout will be available as selection option in the *Screen Layout* menu:

Items Menu Vie	w Edit Functions Print	Import / Export		
filter	Search All Details	Screen Layout	Price Reference date	🕜 🗸
Navigation	Supplier	Screen Lay	out defaul	t

#### 5.6.2 Datapool layouts (PIM-customers only)

In addition to the default layout, Compano offers screen layouts tailored to the specific needs of PIM-customers. These layouts offer an overview the most relevant data fields for data pools such as 2BA, InstallData and others. *Datapool*-branded<sup>2</sup> layouts are available for the following overviews:

- Products
- Items

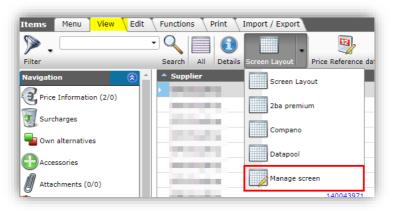
<sup>&</sup>lt;sup>2</sup> Depending your application version, these layouts are called either *Datapool* or *Compano. Datapool* layouts include the *Short description* field for both Products and Items and are thus SALES005-ready.

Producten Menu Bekijken	Bewerken Functies	s Afdrukken Import/Ex	port								
Filteren	Zoeken Alles Detai	Is Datapool									
	Fabrikantscode	Fabrikant omschrijving	GLN code	мс	s	GTIN	Code	F	Product omschrijving Omschrij	vina kort	Me
Artikelen (1/0)	-	Service .			Geen		100		Wandcontactdoos GT 16A 5p 400V 6h IP44 beh. 90x87 beh. 90x87	actdoos GT OV 6h IP44 7	
Product onderdelen (0/0)			_		Geen		101		Wandcontactdoos GT 32A 5p Wandconta 32A 5p 40	actdoos GT OV 6h IP44	

#### 5.6.3 Custom layout

To add a custom layout or your own design:

- 1. Navigate to the Overview where you need to add a screen layout.
- 2. On the View tab, go to Screen Layout > Manage Screen.



3. On the next screen, +Add new layout:

Per view and type Menu	View I	Edit	Function	s Print	
▶.	- 🔍		1		?
Filter	Search	All	Details	Go to report layouts	Help
Navigation 😵	A 🕈	т	Name		
	<b>•</b>	9	2ba pren	nium	
Edit 🛞	EN I	9	Company	, ,	
Add	m	0	Datapool		
Modify					

4. In the pop-up screen:

📕 Add - New la	yout					
Layout Fi	elds Sorting	Quick Filter	Memo			
Туре			Screen		~	
Name						
Application		(	🗆 🖬 Within the d	company	🖲 🖁 For m	ie -
		A	d next record	Save	record	Cancel

#### Layout tab

- a. Type: Type of layout (automatic).
- b. Name: Type a name for your layout. This name will show in the drop-down selection menu.

c. Application: Choose whether the layout will be available only for you, or for anyone within your company.

#### Fields tab

On the *Fields* tab you will find two field lists next to each other:

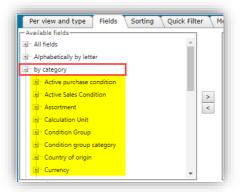
- a. Available fields: Lists data fields that can be added to your layout, organised in four different ways (*All fields, Alphabetically, By category, Standard fields*).
- b. Selected fields: Lists the data fields that are currently in your screen layout. <u>Note</u>: by default, a new layout will contain the *standard fields* for the overview. These standard fields can be removed/reordered as fits your needs:

Per view and type Fields Sorting Quic	k Filter 🔪 Me	mo		
· Available fields-	- 1	-Selected fields -		
II fields		Field	Header	
Alphabetically by letter		Supplier brief description	Supplier	
by category		Availability	А	
± Standard fields		Item Number	Item no.	
	>	Calculation Unit abbreviation	Abbreviation	4
	<	Description	Item description	
		Gross price per calculation unit	Gross / CU	
		Purchase Discount	Disc%	
		Purchase price per calculation unit	Purchase / CU	

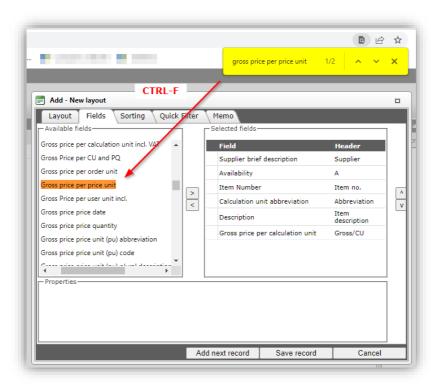
#### 5.6.3.1 Adding/removing data fields

To add or remove data fields to/from the screen layout:

- 1. Either *double-click* the field, or use the left/right arrow buttons, to add/remove fields from one list to the other. <u>Note</u>: you *cannot* add/remove multiple fields at the same time.
- 2. When *adding* a field, first find the field in the *Available fields* window. To find the right field, searching *by category* is recommended:



<u>Note</u>: By extending *All fields,* the CTRL-F search option of the browser can be used to quickly find a data field:

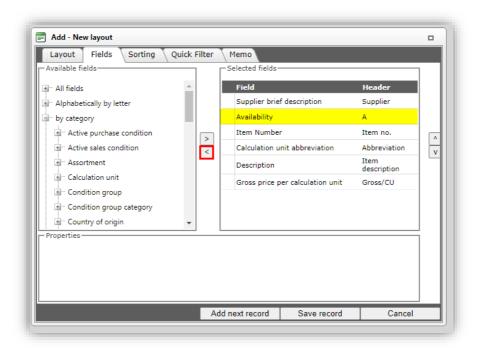


3. By default, fields will be added at the *bottom* of the Selected fields list. To add a field at a specific position in your layout, select a line in the Selected fields list, then add the new field. The field will be added *above* the line you selected:

Add - New layout					
Per view and type Fields Sorting	g Quick Filter N	4emo			
Available fields		_	elected fields		
Active purchase condition	<b>^</b>		Field	Header	
Active Sales Condition			Supplier brief description	Supplier	
Active sales condition			Availability	A	
Calculation Unit			Item Number Added field	Item no.	
Condition Group	>		Condition Group code	Condition Group	
Code	<	►	Calculation Unit abbreviation	Abbreviation	
Code and description			Description Selected posit	Item description	
Description			Gross price per calculation unit	Gross / CU	
Condition group category			Purchase Discount	Disc%	
Country of origin			Purchase price per calculation unit	Purchase / CU	

4. To *remove* data fields, simply double-click any unwanted fields in the *Selected Fields* list or move them to the left with the arrow button:

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#### 5.6.3.2 Reorder fields

To reorder a field in the Selected fields window, select a line and use the up/down arrows :

Add - New layout					
Layout Fields Sorting Quick F - Available fields - Available fields - All fields - All fields - All fields - by category - by category - Active sules condition - Active sales condition - Active sales condition - Condition group - Condition group - Condition group category - Properties	ilter	Description		Header Supplier A Item no. Abbreviation Item description Gross/CU	Ň
	Add	next record	Save record	Cancel	]

#### 5.6.3.3 Customize layout properties

You can customize each data field in your layout in the *Properties* window:

- 1. Select the field which properties you need to customize
- 2. In the *Properties* window change one or more data field properties<sup>3</sup>, such as:
  - a. Header: To change the header text of the data column, first uncheck Automatic tick box, then type a new header text.
  - b. Column width: Select a column width option:

<sup>&</sup>lt;sup>3</sup> Which properties are available will depend on the type of data field.

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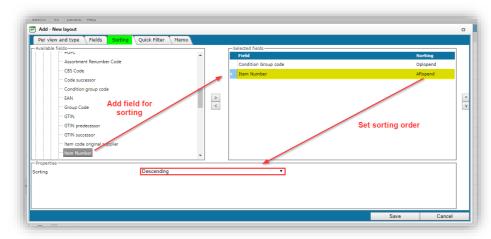
- i. *Standard*: This is the default setting.
- ii. *Automatic*: The column width will be matched to the data entry with the most characters.
- iii. *Fill out*: All data fields marked with the Fill out option, will be divided over the available screen space.
- iv. *<enter a value, eg50>*: Enter a number of pixels to be used for the data field. Use this option if you need to fine-tune your screen layout.
- c. Other properties...

wailable fields					
Active purchase condition		1	-Selected fields		
	<b>^</b>		Field	Header	
Active Sales Condition			Supplier brief description	Supplier	
			Availability	A	
			Item Number	Item no.	
Condition Group			Condition Group code	Condition Group	
Code			Calculation Unit abbreviation	Abbreviation	
Code and description			Description	Item description	
Description			Gross price per calculation unit	Gross / CU	
' ∃ <sup></sup> Condition group category		> <	Purchase Discount	Disc%	
Country of origin		<	Purchase price per calculation unit	Purchase / CU	
∃ Deliverytime unit					
Future price info					
Gross price					
ister ltem					
Treen Unit					
Original Supplier					
	•		<b>*</b>		
Properties					 
ader	Gross / CU		Automatic		<u> </u>
lumn Width	Standard 🝷				
imber format	2 decimals (#0,00)		¥		
ro show	Yes No				
ow Euro symbol	Yes No				
oltip	Gross Price per unit of & nbsp	; without VA	π		
					 *

#### 5.6.3.4 Sorting

The sorting of records in your layout can be set on the *Sorting* tab:

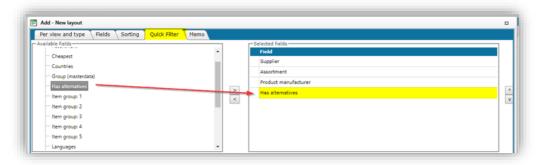
- 1. Switch to the Sorting tab
- 2. Add fields from the *Available fields* window to the *Selected fields* window. Note: in this example records will first be ordered on **Condition Group Code**, and within each code on **Item number**:



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#### 5.6.3.5 Quick filter

The Quick Filter tab will always show the default quick filter options. If you need to filter on other fields, add them from the Available fields window:



#### 5.6.3.6 Save a layout

Once you are satisfied with your layout, click on the *Save* button:

Per view and type Fields Sorting Quick Filter Men	no				
Available fields		-Selected fields			
··· All fields		Field	Header		<u>^</u>
··· Alphabetically by letter		Supplier brief description	Supplier		
··· by category		Availability	A		
··· Standard fields	>	Item Number	Item no.		
	<	Condition Group code	Condition Group		
		Calculation Unit abbreviation	Abbreviation		
		Description	Item description		
		Gross price per calculation unit	Gross / CU		-
Properties					
				Save	Cancel

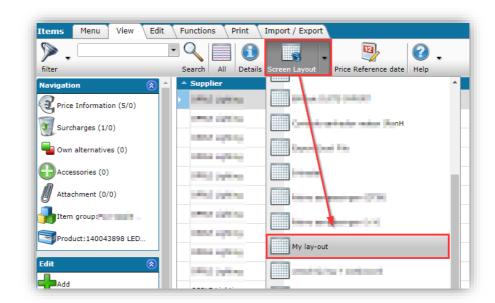
#### Activate a layout 5.6.4

Once you have saved the layout, you will return to the overview of layouts. To activate your new layout, click on Apply under Functions.

Functions	$\widehat{\}$	m	Q	Main any series (2700)
		8	0	bisis as pasign is to
Apply		-	<b>O</b>	My lay-out
Print (	$\overline{\otimes}$ ,	m	0	production in and particular
<u></u>		m	0	producting particle product states
Print		EM .	0	production and of product the rest

Alternatively, you can select your layout on the View tab of your screen, using the Screen Layout button:

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#### 5.6.5 Edit / Copy / Delete layout

To edit or delete a custom layout, click on the *Screen Layout* button and select *Manage Screen layouts*. Under *Edit* you can either *Modify, Copy* or *Delete* a layout.

When you need a slightly different variant of a layout, use the Copy and Paste buttons to quickly copy an existing layout. Then use the Modify button to change the copied layout to your needs.

# 6 Edit

To add, modify, delete, or copy/paste a record, on any screen go to the *Edit* tab:



Or, in the left side panel, select an option under Edit:



# 6.1 Add

To add a record, for example a *product*:

- 1. Click on +Add
- 2. Enter the required information. For a product this would be:
  - a. Manufacturer: Choose a manufacturer from the drop-down menu
  - b. Code: Enter a product code
  - c. Product description: Enter a description
  - d. Etc.
- 3. Check if any fields on any of the other tabs needs to filled in.

Product Classification	Model Commercial description Technical description Status User de	f fields Translations
General		
Manufacturer		- **
Code	1-23498024-w	
Product description	1 LED T8 Batten	
		1
	Automatic	
GTIN	16956712666045	
#CompanyCode		
Country of origin	(1) China	- 🗙
Division		
Group Code	BAT_T8 LED T8 Batten	
Group (masterdata)	BAT_T8 LED T8 Batten	- 🗙
Brand		
Series	<b>1</b> T8	
Туре	<li>Batten</li>	
	Save	Cancel

4. Save the new record.

<u>Note</u>: Adding multiple records manually is a time-consuming task. Multiple records are usually added by importing data from an Excel file.

# 6.2 Modify

To modify any data field of a record:

- 1. On any overview, select a record and click on *Modify*
- 2. In the pop-up window, change any of the data fields on any of the data tabs
- 3. Click on *Save*, to save your changes.

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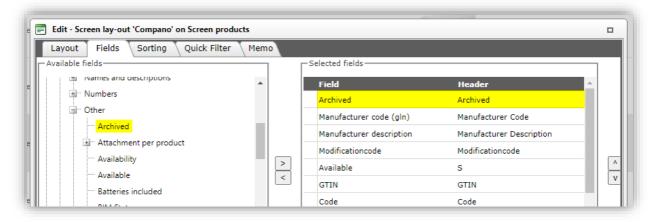
Products Menu View Ed	lit Functions Print Import / Expo	ort		
Search	Add Modify Delete record (s) Line edit o	Copy Help		
Navigation 🛞 📤	Edit - 140043898 LED E T5 batten 600 9	W 800Im 3000K CT		
(9/0)	Product Classification Model	Commercial description 👗 Technical description 👗 Sta	tus 🔷 User def fields 🔪	Translations
Product parts (0/0)	General Manufacturer	1		• X+/
Accessory products (0)	Code	140043898		• •• • •
Is part of (0/0)	Product description	LED E T5 batten 600 9W 800lm 3000K CT		
Attachment (33/0)	GTIN	Automatic		
Manufacturer:	#CompanyCode	1		
Productgroup:E_T5 LED	Country of origin	China		- *
Edit	Division Group Code	E_T5 LED T5 Batten EcoMax		
Add	Group (masterdata)	E_T5 LED T5 Batten EcoMax		- *
Modify	Brand	3		
Delete record (s)	Series	LED Batten     T5 EcoMax		
Line edit on	Type			
Сору			Save	Cancel
Paste		an - EDDr	ownlightRc-HZ R120	

# 6.3 Archive / Delete

Deleting an active record within COS is a two-step process:

- First, a record is *archived*;
- Next, the archived record can be *deleted*<sup>4</sup> (permanently).

The Archive Status of a record is handled by the data field Archived<sup>5</sup>:



On screen layouts, an *archived record* is indicated by a *file cabinet icon* in the *Archived* column. Archived records are not shown on regular overviews, but can be made 'visible' by selecting the filter option *Including archive*.

 <sup>&</sup>lt;sup>4</sup> <u>Important</u>: Deleting an archived record is an irreversible action. Should you need to retrieve accidentally deleted records, you will have to contact Compano Support and have them restore a backup of your data.
 <sup>5</sup> In previous versions of COS, the field Mutation Code (MC) was used to indicate the Archived status. <u>Note</u>: This field has been deprecated.

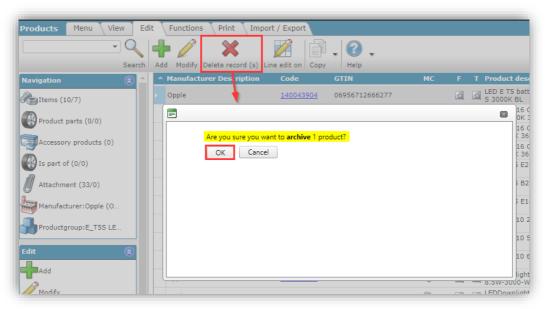
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Products Menu View Ed	dit \	Functions	Print Import / Expo h All Details Compa				_
Navigation 🛞 🛆		Archived	Manufacturer Code	Manufacturer Description	S None	GTIN 06956712666215	Code 120028393
Product parts (0/0)		at		-	None	06956712666222	<u>140043899</u>
Is part of (0/0)					None	06956712666239	<u>14004390</u>

### 6.3.1 Archive a record

To archive any record:

- 1. On any overview, select a record(s) and click on *Delete record(s)*
- 2. A pop-up window will display the following message:



3. Click on OK to archive the record.

<u>Note</u>: For PIM applications archived records are kept for 2 years. After 2 years, the archived data will no longer be loaded into your application, which means it is no longer visible in your PIM application. However, the data is still available in your database and can be loaded on request. Should you wish so, please contact Compano support.

#### 6.3.2 Modify archived records

Archived records *cannot* be modified, unless they are first unarchived. Thus, if you need to modify an archived record, you first can do so by unarchiving the record, modify it and then again archived it.

To unarchive a record, see 7.1.2 From archive.

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#### 6.3.3 Unarchive a record

To unarchive a record, see <u>7.1.2 From archive</u>.

#### 6.3.4 Delete a record

To *permanently* delete a record(s):

- 1. On any overview, first check if the record you want to delete has been archived.
  - a. Either check for a *recycle icon* in the MC column
  - b. Or, check if the MC in the record details is set to Delete:

140043909 LED E MR16 GU5.3           Product         Classification	12V 2.5W 2700K 36D BL Opple 06956712666048 Attachments Inage Commercial description Status Items User def f	ields Translations
Classification		
General		
Manufacturer	1	
Code	140043909	
Product description	IED E MR16 GU5. 12V 2.5W 2700K 36D BL	
GTIN	departmenter et al a service de la service d	
Country of origin	(1) China	
Availability	Deleted	
Division	Mutation Code	
Group Code	1 E MR16	
Brand	0	
Series	LED Reflector	
Туре	() E MR16	
Other sites		
Deeplink		
Status and data		
MC	E Delete	
Time Created	19-04-2017 10:49	

- 2. <u>Optional</u>: If the MC has not been set to *Delete*, first *Archive* the record
- 3. Select the archive record(s) and click on *Delete record(s)*
- 4. A pop-up window will display the following message:

NI NI		орре	E_140
<b>E</b>			
	Are you sure you want to o	lelete 1 product?	
	OK Cancel		

5. Only click *OK* if you are really sure you want to *permanently* delete the record.

#### 6.3.5 Using import to archive / restore records

The *Archive Status* of a record can also be changed using an import file. The import file should contain a data column labelled *Archived*, where the archive status can either be set to **Yes** (record is archived) or **No** (record is not archived):

Compano Online Software

	Α		F		
3	Archi	ived 🔤	ltem no. 📘	·	
4	No		140043898	https://	.compano.com/Data/Environ
5	No		140043899	https://	.compano.com/Data/Environ
6	Yes		140043900	https://	.compano.com/Data/Environ
7	Yes		140043901	https://	.compano.com/Data/Environ
8	Yes		140043902	https://	.compano.com/Data/Environ
9	Yes		140043903	https://	.compano.com/Data/Environ
10	No		140043904	https://	.compano.com/Data/Environ
11	No		140043967	https://	.compano.com/Data/Environ
40					

#### 6.3.5.1 Archive products/items on import

For the import of Products and Items only, an alternative archiving option is available:

In the Import dialog the option Archive not imported records can be set to Yes. Any Products (or Items) which are present in the COS database, but are *no longer offered* as a record in the Import file (Excel or text-based), will be archived.

<u>Important</u>: The Archive not imported records will only be available when an Import layout is selected that contains the key data fields for the entity Product or Item.

Summary					
Test Importof file Template_New_Pr with impactreport: All except the pr		c_r2-3_L03.xlsx			
Import van Products met layout Pro Product code Manufacturer code (GLN) Brand (product)/Nederlands (Ne Series (product)/Nederlands (Ned Type (product)/Nederlands (Ned Long description (product)/Nede Short description (product)/Nede	derland) erland) rlands (Nederland)	en:			
Layout1 Title	Products	and Items (v2.3)			
Import entity	Product			-	\$
Import layout	Excel im	oort lay-out 'Product	import L04' on Screen pr	roducts 🔻 🕷	\$ \$⊕∕
Archive not imported records	• Yes	<u>)</u>			

<u>Note</u>: Archiving of products/items using the Archive not imported records will also function when the layout is used for a Periodic Import Task.

### 6.4 Line edit

Using the *Line edit* function, data fields can be edited *directly* in the Overview. This method is particularly useful to make quick correction to your data:

1. Under *Edit*, click on *Line edit on* to active line editing:

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2. In the Overview, click on any of the data fields to edit it:

2.	- Q	V 🕂 🦉 🔰	🖌 📝 📄 .	0.						
ncluding archive	Sear	ch Add Modify Delete	record(s) Line edit off Copy	Help						
avigation 🛛 🛞 📤 💆	<ul> <li>Archived</li> </ul>	Manufacturer Code	Manufacturer Description	S	GTIN	Code	F	Product description	Brand (product)	Series (product
Product parts (1/0)		<u>6956321800000</u>	Opple	None 🗸	06956712666215	<u>140043898</u>	800	LED E TS BATTEN 600 9W 800LM 3000K CT (langer)	Opple	LED Batten
Accessory products (3)	ŧ	<u>6956321800000</u>	Opple	None	06956712666222	<u>140043899</u>	30	LED E TS BATTEN 600 9W 800LM 4000K CT	LED	LED Batten

Note: User-defined fields *cannot* be edited using line edit.

Important: Set Line Edit to Off, once you have finished editing.

# 6.5 Copy / Paste

To copy a record:

1. On any overview, select the record you want to copy and, under Edit, click on *Copy:* 

Products Menu View	Edit Functions Print Import / Export	
⋟		
Filter	Search Add Modify Delete record(s) Line edit on Copy Help           A         Annufacturer Code         Manufacturer Description         S	GTIN
Ttems (1/1)	6956321800000 None	06956712666215
Product parts (0/0)	> <u>6956321800000</u> None	06956712666239
	6956321800000 None	06956712666260

2. Next, under Edit, select *Paste* from the *Copy* menu

Products Menu View	Edit Functions Print Import / Export	
▶.	- 🤍 🕂 🧪 💥 📝 🛐 😧 🗸	
Filter	Search Add Modify Delete record(s) Line edit on Copy Help	
Navigation (	🔊 📤 🔺 Manufacturer Code 🛛 Manufacturer Descript	GTIN
Items (1/1)	6956321800000	06956712666215
	6956321800000 Paste	06956712666239
Product parts (0/0)	6956321800000 None	06956712666260

<u>Note</u>: The copy/paste function is well-suited for copying products, layouts or filters, but will return an error message when you try to copy an item, product group or item group. The reason being that item-, and group codes cannot be copied as they need to be unique.

# 6.5.1 Copying products

Products can be copied while retaining all product data, including classification, provided a *product number template* has been defined.

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A product number for the new product will be generated, based on the *Product number template*. The *Product number template* can be set at the *Manufacturer* settings:

Manufacturer Organization	Item manager Translations	
Code (GLN)		
1anufacturer		
.ogo	<b>()</b>	
1anufacturer type	(1) Manufacturer	
Data manager	×	
Product number template	00000000	

<u>Note</u>: The **#**-character can be used as a wildcard in the template. For instance, if you have two product number variants, **NA-0000** and **RX-0000**, then the product number template should be **##-0000**; thus products with both number variants can be copied.

# 6.6 Edit multiple records

To edit multiple records, see the function 7.1.1 Manipulate

# 7 Functions

Functions are specific to the Entity on which they have an effect. Thus, for instance, functions for Products differ from those for Items. Please see the next paragraphs for functions related to each entity.

Note: Depending on your software license, some functions might not be available.

# 7.1 Common functions

Two functions are common to *all entities* within the application:

- Manipulate: Change data of one or more data fields for multiple records;
- From archive: Change the status of a record from *Archived* to *Unarchived*.

### 7.1.1 Manipulate

Change the data of *multiple records* at the same time, using the function *Manipulate*.

For example, should you want to change the value of *Type* for multiple products:

1. Select the products you wish to change and, under *Functions*, click on *Manipulate*.

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Filter	Search Ma	anipulate Part of	Generate product	sheet From an	chive Help				
Navigation  🛞	🔺 🔺 Archi	ved Manuacturer	Description	Code	GTIN	F	T Product description	Brand (product)	Type (product)
Items		Opple		<u>140043898</u>	06956712666215	2	LED E TS BATTEN 600 9W 800LM 3000K CT (langer)	LED	E_T5
Product parts		Opple	$\overline{}$	<u>140043900</u>	06956712666239	2	LED E T5 BATTEN 1200 18W 1600LM 3000K CT	Opple	E_75
	•	Opple	$\sim$	140043903	06956712666260		led e t5 batten 600 9w s 3000k bl	LED	E_T5
Accessory products		Opple		140043904	06956712666277		led e t5 batten 300 4.5w s 3000k bl	LED	E_TS
Is part of		Opple		140042057	05055221842472		Jedpanelrc-g sq598-36w-	150	E 05

2. For any data field where you want to make a change, set the action to *Grant* and change the value of the data field:

Intervention   Description (product)   No action   Short description (product)   No action   (product)   No action   Technical description (product)   No action   STIN   Company-specific product   No action   Company-specific product   No action   Company-specific product   No action   Country of origin   No action   Seneral   JNSPS code   No action   Product group code   No action   Stroup (masterdata)   No action   Series (product)	
Code       No action         Description (product)       No action         Short description (product)       No action         Commercial description (product)       No action         Technical description (product)       No action         Company-specific product       No action         Company-specific product       No action         Country of origin       No action         Country of origin       No action         On Internet       No action         UNSPS code       No action         Product group code       No action         Group (masterdata)       No action         Brand (product)       No action         Series (product)       No action	
Description (product) No action (product) Commercial description (product) Technical description (product) No action Technical description (product) No action Company-specific product No action Company-specific product No action Country of origin No action Series (product) No action No ac	
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(product) No action ✓ (product) No action ✓ (product) No action ✓ (product) No action ✓ Company-specific product No action ✓ Company-specific product No action ✓ Company-specific product No action ✓ Country of origin No action ✓ Country of origin No action ✓ On Internet No action ✓ General UNSPS code No action ✓ Product group code No action ✓ Group (masterdata) No action ✓ Brand (product) No action ✓ Series (product) No action ✓	
(product)     No action       Technical description     No action       (product)     No action       GTIN     No action       Company-specific product     No action       Company-specific product     No action       ERP code     No action       Country of origin     No action       On Internet     No action       General     UNSPS code       UNSPS code     No action       Group (masterdata)     No action       Brand (product)     No action       Series (product)     No action	
(product)       No action         GTIN       No action         Company-specific product       No action         ERP code       No action         Country of origin       No action         On Internet       No action         UNSPS code       No action         Product group code       No action         Group (masterdata)       No action         Brand (product)       No action         Series (product)       No action	
Company-specific product       No action         Code       No action         ERP code       No action         Country of origin       No action         On Internet       No action         UNSPS code       No action         Product group code       No action         Group (masterdata)       No action         Brand (product)       No action         Series (product)       No action	
code No action ERP code No action Country of origin No action On Internet No action General UNSPS code No action Product group code No action Group (masterdata) No action Brand (product) No action Series (product) No action	
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On Internet No action  General UNSPS code No action Froduct group code No action Group (masterdata) No action Brand (product) No action Series (product) No action	
General       UNSPS code       No action       Product group code       No action       Group (masterdata)       No action       Brand (product)       Series (product)	
UNSPS code No action   Product group code No action  Group (masterdata) No action  Brand (product) No action  Series (product) No action	
Product group code No action V Group (masterdata) No action V Brand (product) No action V Series (product) No action V	
Group (masterdata) No action   Brand (product) No action   Series (product) No action	
Brand (product) No action  Series (product) No action	
Series (product) No action	
Type (product)	
Standard product No action	
Classifier New York	 1

3. Click on *Apply* to save the changes.

# 7.1.2 From archive

To unarchive a record:

1. On any overview, on the View tab, first select the *Including archive* filter option:

Products	Menu	View 🛛	Edit Functi	ons \ Print	Import	: / Export	
			•		$\mathbf{\Theta}$	-	2.
Including arc	hive			Search All	Details	Products with ETIM class	Help

2. Alternatively, click on Filter and, on the Additional tab, set *Archive moment* to **filled**, or choose an appropriate archive date:

Compano Online Software	
pan	Filter
E	Product Classific
<u> </u>	Assortments
*	
	Status
	Available
	BIM Status
	Predecessor code
	Code automatica

Status Available 👔	del Additional = value  v	User-defined fields	Translations	- Run in		
Assortments Status Available	= value V	None		ORun in		
Status Available				ORun in		
Available (1)	= value		-	ORun in		
Available (1)	= value			□Run in		1
Available (1)	= value 🗸			□ Run in		
Available (1)	= value 🗸			Run in		
BIM Status		Running out				
BIM Status						
	= value 🗸	None		Under construction		
Predecessor code	start 🗸	🗌 🗮 Ready		🗌 🗖 Test		
	start 🗸					
	start 🗸		1			
	start 🗸		]			
	start					
Data Archive moment	filled 🗸					
	= value V					
Ŭ	= value V					
						-
		Apply	Empty	Empty and close	Save as	

3. Next, select any archived record(s) and, under Functions, click on *From archive:* 

Products Menu View	Edit	Functions	Print Import /	Export		_
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Filter	Sea	arch Manipul	ate Part of Ger	erate product sheet	From archive	Help
Navigation 🤇		Archived	Manufacturer De	scription d	e GT	IN
Items			100	1400	<u>)43899</u> 069	956712666222
Product parts		81		<u>1400</u>	0 <u>43901</u> 069	56712666246
		81.	ini i	<u>1400</u>	043902 069	56712666253
Accessory products		a	100 C	1400	062610 060	45720452051

4. The Archive Status of the record(s) will now be set to No.

# 7.2 **Products**

Products	Menu View Edit	Functions	Print	Import / Export		
٦.	• (	२   🕺			J	0.
Filter	S	earch Manipula	ite Gener	rate product sheet	From archive	Help

#### 7.2.1 Generate product sheet

The Generate product sheet function generates product sheets for all selected products. More information can be found in paragraph 8.2 GENERATE PRODUCT SHEETS.

# 7.3 Product classifications

Product classifications	Menu View	Edit	Functions Print	Import / Export			
⋟.	- 🤍	•		<b>&gt;</b>	MG	J	0
Filter	Search	Manipulate	Generate product sheet	Copy classification	MC Viewer	From archive	Help

#### 7.3.1 Copy classification

With the *Copy classification* function, classification data can be copied from one classification system to another, for example: from ETIM Dynamic to ETIM 9.

More information is available in the *Manual Multi-Model Classification*, which is available from the <u>Compano Help-website</u>.

### 7.3.2 MC Viewer

With the MC Viewer function ETIM Model data can be viewed and/or modified.

More information is available in the Manual ETIM MC Viewer, which is available from the <u>Compano</u> <u>Help-website</u>.

# 7.4 Assortment



### 7.4.1 Transfer with scheme

For some set-ups, Assortments can be transferred using an Extract, Transfer, Load scheme. This option is usually available for MDM-configurations of the Compano software.

More information is available in the *Handleiding overzetregels*, which is available from the <u>Compano Help-website</u>.

### 7.4.2 Transfer AB

Transfer data to the Artikelbeheer.nl data pool.

More information is available in the *Manual Publishing on Data Pools*, which is available from the <u>Compano Help-website</u>.

### 7.4.3 Transfer 2BA

Transfer data to the Dutch 2BA data pool.

More information is available in the *Manual Publishing on Data Pools*, which is available from the <u>Compano Help-website</u>.

### 7.4.4 Transfer InstallData

Transfer data to the Belgian InstallData data pool.

More information is available in the *Manual Publishing on Data Pools*, which is available from the <u>Compano Help-website</u>.

#### 7.4.5 Quality Control

Use the Quality Control function to check the quality of your Item data.

Transfer data to the 2BA data pool.

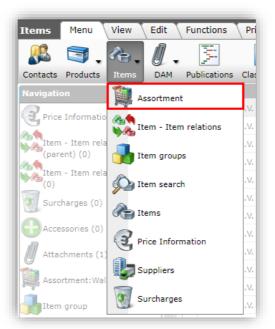
More information is available in the *Manual Classification*, which is available from the <u>Compano</u><u>Help-website</u>.

#### 7.4.6 Update

Use the Update function to update your Item data, for instance when data in the Purchase assortment has been changed.

To update a sales assortment:

1. Through the Menu, go to *Items > Assortment*.



2. Select the sales assortment that is to be updated and, under Functions, click on *Update*.

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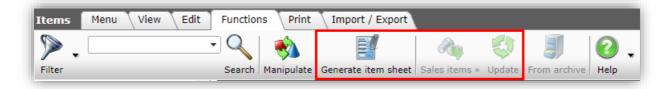
Assortment Menu Vie	Edit Functions Import / Export	
⋟.	🖵 🔍 📩 Install 🗼 🔇 🧊 🕜	
Filter	Search Transfer 2BA Transfer InstallData Quality Control Update From archive Help	
Navigation	Logo Code Description	
ltems (3153)		
Logs (39)		
Item groups (0)	(Purchase assortment)	
Transfer rules	B.A. (BE)	
Memo (0)	and sale and the fight many same Furl (FR)	

3. In the pop-up window:

🗐 Update			×
Update			
Sales assortment	(1) The second secon		•
Purchase assortment	(Purchase assortment)	×	
Price reference date	23/01/2024		
Only check run	● Yes ○ No		
	Execute Clo	se	

- a. Sales assortment: The selected sales assortment.
- b. Purchase assortment: The selected sales assortment will be updated with data from this purchase assortment.
- c. Price reference date: Select a price reference date; a (future) price date can be set to update prices in the sales assortment with the price valid at that date.
- d. Only check run: Set this option to **Yes** to only generate an update report indicating changes that will be made to the sales assortment. To actually execute the changes, set this option to **No**.
- 4. Click on Execute.

### 7.5 Items



#### 7.5.1 Generate item sheet

The *Generate product sheet* function generates product sheets for all selected products. More information can be found in paragraph <u>8.3 GENERATE ITEM SHEETS</u>.

### 7.5.2 Generate sales items

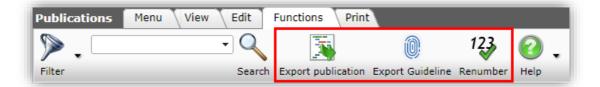
Use this function on Purchase Items to generate corresponding Sales Items. The dialog allows the selection of the Sales Assortment where the Sales Items need to be generated.

## 7.5.3 Update

The Update function will update the following information of the selected items:

	Climate for tire	
Edit	NITS NL	_
	Updating selected items. This concerns:	
Add	Prices,	
	Packing code,	
/ Modify	Calculation unit,	
	Delivery unit,	
Delete assortment	Status,	
<u></u>	VAT code,	
Сору	Order unit,	
Сору	Number of CU per OU	
	Number of PU per OU,	
Paste	GTIN Successor,	-
	GTIN Predecessor,	
Functions	Gross weight,	Ide
	Weight unit,	L.
Transfer with scheme	Packing height,	
	Packing length,	
Transfer AB	Packing width,	
	Packing size unit,	
1	Stock,	
2ba Transfer 2BA	Processable,	
Install	The following fields are set only if they are empty in the sales assortment	
Data Transfer InstallData	Delivery time,	
<u></u>	Minimum order quantity,	
Wuality Control	Increment,	
	Start date	
Update		
<b>S</b>		
From archive		
From archive		_

# 7.6 Publications



### 7.6.1 Export Guideline

Guideline is a database publisher based in Belgium. Using the *Export Guideline function*, an XML export including special formatting tags can be exported.

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More information is available in the *Manual Publications*, which is available from the <u>Compano</u><u>Help-website</u>.

#### 7.6.2 Renumber

When manually creating or editing a publication the sequence numbering of publication links can easily become corrupted, for instance when removing publication links. Use the *Renumber function* to correct the numbering of a publication.

More information is available in the *Manual Publications*, which is available from the <u>Compano</u><u>Help-website</u>.

# 7.7 Product classes

Product Classes	Menu View Fun	ctions Import / Export	
	-	ICS	0.
Filter	Search	ICS Email impact analysis	Help

### 7.7.1 ICS Email impact analysis

The function *ICS Email impact analysis* will generate a report of all changes in the ETIM Dynamic classification system since [date]. This information can be used to check the whether any changes need to be made to your classification.

More information is available in the *Manual Classification*, which is available from the <u>Compano</u><u>Help-website</u>.

# 7.8 Background tasks

Background tasks	Menu View	Functions			
▶.	- Q	< 🕺		STOP	. ⊙
Filter	Sea	rch Manipulate	Refresh	Stop	Help

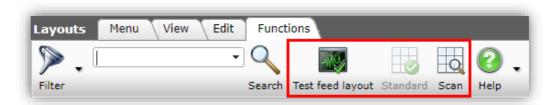
### 7.8.1 Refresh

Use the function *Refresh* to update the status of running processes, for example a large import of new product and/or items.

#### 7.8.2 Stop

Use the function *Stop* to cancel a running processes, for example a large import of new product and/or items.

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#### 7.9.1 Test feed layout

Use the *Test feed layout* function to generate an XML-file of the selected feed.

Note: XML- and JSON-feed can also be tested using third-party software such as Postman.

#### 7.9.2 Standard

Use the *Standard* function to set the selected layout as the standard report template layout for chosen entity.

Note: Only relevant for report layouts.

#### 7.9.3 Scan

Use the *Scan* function to scan for corrupt and invalid layouts A scan report will be generated, listing all layouts with invalid fields or any corrupt ayouts (InvalidLayouts.csv). The scan report is available via System > Logs and will also be sent to the user performing the scan.

Note: Compano consultants will still have access to layouts that have been removed.

# 7.10 Users



#### 7.10.1 Login as

Use the Login as function to log in as the selected user.

#### 7.10.2 Change Password

Use the *Change Password* function to change the password for the selected user.

#### 7.10.3 Send Password

Use the *Send Password* function to send the password to the selected user.

#### 7.10.4 Create Administrator

Use the *Create Administrator* function to grant Administrator rights to the selected user.

# 8 Print

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A record or list of records can be printed to PDF, using the following print options:

- Print product sheet, or generate product sheets for all products
- Print individual record
- Print a list of records

# 8.1 Print product sheet

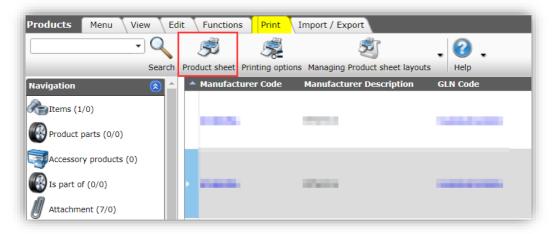
For each product a product sheet can be printed as a PDF, according to a product sheet *print layout*.

A default product sheet print layout is provided with your application, which will print the following information:

- Basic product information (brand, series, type, product number, description)
- Product image and drawing
- Barcode (EAN or GTIN)
- Commercial description
- Product class and product class features information

To print a product sheet:

- 1. On Product overview, select one or more products
- 2. On the *Print* tab, click on the *Product class* print button:



3. A printable PDF will open in a new browser tab:

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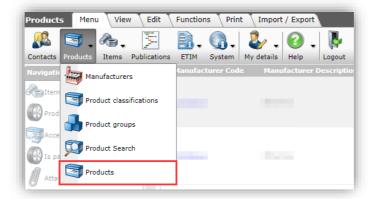
# 8.2 Generate product sheets

Product sheets can also be generated for multiple products in one go. The function *Generate product sheet* has several options, such as:

- Select different print layouts, optionally in different translations;
- Automatically add product datasheets as an attachment to your products;
- Generate product datasheets for all products or a selection of products;
- Download the product datasheets from an FTPS-location.

To generate product sheets:

1. Through the Menu go to *Products > Products*.



2. Filter and/or Search and then select the products for which you need to generate product sheets:

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Products Menu	View 🔪 Edi	t <mark>Fun</mark>	ctions 🐧	Print Im	oort / Export			
⋟.	•	- 🤍	1	0.			3	₴.
Filter		Search	Manipul	ate Part of	Generate product	: sheet	From archive	Help
Navigation	^ (	<u>^</u> A	rchived	Manufacture	er Description	Code	GTI	N
Items						<u>1400</u>	<u>43898</u> 069	56712666215
Product parts		•				<u>1400</u>	<u>43900</u> 069	56712666239
		•		-		1400	<u>43903</u> 069	56712666260
Accessory products		•				1400	<u>43904</u> 069	56712666277
Is part of						1400-	43967 069	56321843472

3. On the *Function* tab click on *Generate Product Sheet*. In the resulting pop-up window, you can choose your options:



- a. Layout: Select the print layout for the product sheet. <u>NB</u>: You will be provided with a default print layout. For custom layouts, including **your company's logo or** stationary, contact <u>sales@compano.com</u>.
- b. Language: Select the language for the product data<sup>6</sup>.
- c. Overwrite existing product sheet: Set this option to *Yes*, if you need to generate a new version of the product sheet. This will overwrite the existing version of the product sheet which is attached to your product.
- d. Filename product sheet: Type a filename for the product sheet; this will be the filename of the downloadable attachment. Certain system variables can be used in the filename:
  - i. %ProductCode%: Add Product code to filename (mandatory)
  - ii. %ItemCode%: Add Item code to filename
  - iii. **%Language\_Code%**: Add Langue code to filename, for instance **n1** or **de**
  - iv. **%Language%**: Add Language description to filename, for instance **Nederlands** or **German**
  - v. %GTIN%: Add Product GTIN to filename
  - vi. %Manufacturer%: Add Manufacturer to filename
  - vii. %Fabrikant%: Add Manufacturer to filename
- e. Description product sheet: Type a description for the product sheet; this will be the Description of the attachment.
- f. Title product sheet: Type a title for the product sheet; this will be the Title of the attachment.

<sup>&</sup>lt;sup>6</sup> This option is only available if you have acquired the multi-language module. Contact <u>sales@compano.com</u> for more information and pricing.

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4. Click on *Create* and the product sheet will be generated and added as an attachment to your product with Attachment Type *Link to Sheet (CHR)*.



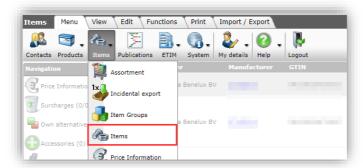
5. Click on the link to view the Product Sheet:

	ASHEE TOUCH-wifi		ET	HERMAN
Article number	44722			
Brand				
Type	eTOUCH-wifi			
	Control systems			
	mart thermostate -T	OIICH wife it is even more and	might to heat and raws money. In addition to the	a inhuitive operation of the
With the new, s controller, the E control via app, Amazon Alexa o ECO + control in switched as pow temperature rar	asy Start-Up progra the temperature of r the Google Assista ntelligence is convir ver control, floor, ro	Im for easy initial installation an a room is easily controlled - no ant. The large display is easy to icing for a uniform and fully aut om or combination thermostat :	mient to heat and save money. In addition to the d the new app make controlling the heating even matter where in the work. It can also be oper- read and easy to control thanks to the touchpa- matic optimization of the heating system in or or adjusted of the heating system in or switching current: 16A, mounting: on flush-mo	n easier. With the remote ted by voice control with d at the touch of a finger. The ler to save energy. It can be : high-gloss white,
controller, the E control via app, Amazon Alexa o ECO + control in switched as pow	asy Start-Up progra the temperature of r the Google Assista ntelligence is convir ver control, floor, ro	Im for easy initial installation an a room is easy controlled - no and. The large display is easy to cing for a uniform and fully aud om or combination thermostat cable length: 3 m (max. 50 m)	d the new app make controlling the heating eve matter where in the world. It can also be operar matter optimization of the heating system in ior and complex with the ecodesign directive. Color switching current: 16A, mounting: on flush-mo	n easier. With the remote ted by voice control with 1 at the touch of a finger. The er to save energy. It can be : high-gloss white, united switch box, protection
With the new, s controller, the E control via app, Amazon Alexa o ECO + control in switched as pow temperature rar rating: IP21, Model	asy Start-Up progra the temperature of r the Google Assist ttelligence is convir er control, floor, ro tige: 5-40°C, sensor	Im for easy initial installation an a room is easily controlled - no ant. The large display is easy to icing for a uniform and fully aut om or combination thermostat :	d the new app make controlling the heating eve matter where in the world. It can also be oper- read and easy to control thanks to the touches and complex with the exodesign directive. Color and complex with the ecodesign directive. Color avticching current: 16A, mounting: on flush-mo Measuring range minimum value	n easier. With the remote ted by voice control with at the touch of a finger. The touch of a finger. The touch of the second of the united switch box, protection
With the new, s controller, the E control via app, Amazon Alexa o ECO + control in switched as pov temperature rar rating: IP21,	asy Start-Up progra the temperature of r the Google Assist ttelligence is convir er control, floor, ro tige: 5-40°C, sensor	m for easy initial installation an a room is easy controlled - no nant. The large display is easy to cring for a unform and fully aut om or combination thermostat. cable length: 3 m (max. 50 m). On/Off	d the new app make controlling the heating eve matter where in the world. It can also be operar matter optimization of the heating system in tor and complex with the ecodesign directive. Color switching current: 16A, mounting: on flush-mo	n easier. With the remote ted by voice control with 1 at the touch of a finger. The er to save energy. It can be : high-gloss white, united switch box, protection
With the new, s controller, the g Amazon Alexa o ECO + control in switched as poo temperature rar rating: IP21, Model Type of power s Connection	asy Start-Up progra the temperature of r the Google Assist ttelligence is convir er control, floor, ro tige: 5-40°C, sensor	m for easy initial installation an a room is easy controlled - no nart. The large display is easy to cing for a uniform and fully auto om or combination thermostat. cable length: 3 m (max. 50 m) On/Off 230 V AC	d the new app make controlling the heating eve matter where in the world. It can also be opera- mater optimization of the heating system in tor and complex with the ecodesjon directive. Color switching current: 16A, mounting: on flush-mo Measuring range minimum value Measuring range	n easier. With the remote ted by voice control with 1 at the touch of a finger. The er to save energy. It can be high-gloss white, unted switch box, protection 5 Degrees celsius 5/40 Degrees celsius
With the new, s controller, the E control via app, Amazon Alexa o ECO + control li switched as poor temperature rar rating: IP21, Model Type of power s Connection With receiver	asy Start-Up progra the temperature of r the Google Assist ttelligence is convir er control, floor, ro tige: 5-40°C, sensor	m for easy initial installation an a room is easy controlled - no nat. The large display is easy to cing for a uniform and fully auto om or combination thermostat. cable length: 3 m (max. 50 m) On/Off 230 V AC Two-wire (running out)	d the new app make controlling the heating eve matter where in the world. It can also be open- read and easy to control thanks to the touches and complex with the exodelsion directive. Colo switching current: 16A, mounting: on flush-mo Measuring range minimum value Measuring range minimum value	n easier. With the remote ted by voice control with 1 at the touch of a finger. The 1 sign-glass while, can be united switch box, protection 5 Degrees celsius 3 40 Degrees celsius 4 0 Degrees celsius
With the new, s controller, the E CO + control in switched as pow temperature rar rating: IP21, Model Type of power s Connection With receiver External sensor	asy Start-Up progra the temperature of r the Google Assist telligence is convir er control, floor, ro ge: 5-40°C, sensor	m for easy initial installation and a nomis easily controlled - no nt. The large display is easy to om or combination thermostat, cable length: 3 m (max. 50 m) On(Off 230 V AC Two-wire (running out) yes	d the new app make controlling the heating eve matter where in the world. It can also be opera- mater optimization of the heating system in or analic optimization of the heating system in or and complex with the ecodesign directive. Color switching current: 16A, mounting: on flush-mo Measuring range minimum value Measuring range maximum value Number of heater outputs	n easier. With the remote ted by voice control with the day voice control with the base control with the et to save energy. It can be the save energy, It can be the switch box, protection 5 Degrees celsius 5/40 Degrees celsius 4 Degrees celsius 1
With the new, s controller, he control wa app, Amazon Alexa o CCO + control wa switched as por temperature arr rating: IP21, Model Type of power s Connection Thermal feedba Control charact	asy Start-Up progra the temperature of the Google Assist telligence is convir er control, floor, ro ge: 5-40°C, sensor	m for easy initial installation and a comis easily controlled - no nt. The large display is easy to not or combination thermostat. cable length: 3 m (max. 50 m) On/Off 230 V AC Two-wire (running out) yes	d the new app make controlling the heating eve matter where in the world. It can also be open read and easy to control thanks to the touches and complex with the ecodesign directive. Colo switching current: 16A, mounting: on flush-mo Measuring range Measuring range Measuring range Measuring range Measuring range Measuring range Measuring range Measuring vange Measuring vange Meas	n easier. With the remote ted by voice control with 1 at the touch of a finger. The 1 sight globs with a control of the united switch box, protection 5 for Degrees celsius 40 Degrees celsius 1 5 fS Kelvin 230 Voit 16 Ampere
With the new, s controller, the controller with es- control via app, Amazon Alexo a ECO + control in ECO + control in ECO + control in exercises witched a govern temperature rar rating: IP21, Model Type of power s Connection With receiver External sensor Thermal feedba Control charact	asy Start-Up progra the temperature of the Google Assist telligence is convir er control, floor, ro ge: 5-40°C, sensor	m for easy initial installation and a room is easily controlled - no controlled - no controlled - no controlled - no controlled - no controlled in themsolatic cable length: 3 m (max. 50 m) On(Off 230 V AC Two-wire (running out) yes yes Parallel	d the new app make controlling the heating eve matter where in the world. It can also be opera- round copression of the heating system in or and complex with the exodesjon directive. Color and complex with the ecodesjon directive. Color switching current: 16A, mounting: on flush-mo Measuring range minimum value Measuring range maximum value Number of heater outputs Differential value Max. contact value Max. contact value	n easier. With the remote ted by voice control with the test by control with the test by control with the test by control with the test by the test by the test test by the test by the united switch box, protection 5 Job Degrees celsius 6 Degrees celsius 1 5 Kevin 230 Voit 1 6 Ampere 75 Millimetre
With the new, s controller, the E control via app, Amazon Alexa o ECO + control in Switched as power temperature rar rating: IPZ1, Model Type of power s Connection With receiver External sensor Thermal feedba Control characte Heating Cooling	asy Start-Up program the temperature of the Google Assist er control, floor, ro ge: 5-40°C, sensor upply	m for easy initial installation and an comis easily controlled – no nt. The large display is easy to merce on the easy of the easy of the cable length: 3 m (max. 50 m) On/Off 2 30 V AC Two-wire (running out) yes yes Parallel Other yes no	d the new app make controlling the heating eve matter where in the world. It can also be open read and easy to control thanks to the touches and complex with the ecodesjon directive. Color and complex with the ecodesjon directive. Color switching current: 16A, mounting: on flush-mo Measuring range maximum value Measuring range maximum value Number of heater outputs Differential value Max. contact voltage Max. contact load Height Width	n easier. With the remote ted by voice control with at the touch of a finger. The status of the second of the united switch box, protection 5 [40 Degrees celsius 40 Degrees celsius 1 [5] Kelvin 230 Voit 16 Ampere 75 Millimetre 75 Millimetre
With the new, s controller, the E control via app, Amazon Alexa o ECO + control ii switched as pov temperature rar rating: IP21, Model Type of power s	asy Start-Up program the temperature of the Google Assist telligence is convir er control, floor, ro ge: 5-40°C, sensor upply ck eristic rential	m for easy initial installation and a room is easily controlled - no os ciend for a uniform and hilly aud control for a uniform and hilly aud control for a uniform and hill y aud on c combination thermostat. cable length: 3 m (max. 50 m) On/Off 230 V AC Two-wire (running out) yes yes Parallel Other yes	d the new app make controlling the heating eve matter where in the world. It can also be opera- round copression of the heating system in or and complex with the exodesjon directive. Color and complex with the ecodesjon directive. Color switching current: 16A, mounting: on flush-mo Measuring range minimum value Measuring range maximum value Number of heater outputs Differential value Max. contact value Max. contact value	n easier. With the remote ted by voice control with the test by control with the test by control with the test by control with the test by the test by the test test by the test by the united switch box, protection 5 Job Degrees celsius 6 Degrees celsius 1 5 Kevin 230 Voit 1 6 Ampere 75 Millimetre

# 8.3 Generate item sheets

Data sheets with Item information are generated in a similar fashion as generating Product sheets:

1. Through the Menu go to *Items > Items*.



2. Select the Item for which you need to generate Item sheets and, under Functions, click on *Generate Item Sheet*:

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Items Menu View Ed	dit Functions Print	Import / Export				
Filter	Search Manipulate	Generate item sheet	Gales Items » Update	From archive	🕜 🗸	
Navigation 🔗	🔺 🔺 Supplier	GTIN	Product	Item no.	Item description	CU
Price Information		06956712666215	<u>140043898</u>	<u>140043898</u>	LED E T5 batten 600 9W 800lm 3000K CT	PCE
Surcharges		06956712666222	<u>140043899</u>	<u>140043899</u>	LEDPanelRc-G Sq598- 36W-3000-WH-CT	<u>PCE</u>
		06956712666277	<u>140043904</u>	<u>140043904</u>	LED E T5 batten 300 4.5W S 3000K BL	<u>PCE</u>
With alternatives		06956321843472	<u>140043967</u>	<u>140043967</u>	LEDPanelRc-G Sq598- 36W-3000-WH-CT	<u>PCE</u>
Accessories		06956321843489	<u>140043968</u>	<u>140043968</u>	LEDPanelRc-G Sq598- 36W-4000-WH-CT	<u>PCE</u>
Attachments		06956321843410	140043969	140043969	LEDPanelRc-G Sq298-	PCE

- 3. Follow the instructions as per <u>8.2 Generate product sheets</u>, except for Product substitute Item. The following system variables can be used in the filename for the Item sheet:
  - i. %ArtikelCode% (mandatory)
  - ii. %Leverancier%
  - iii. %Supplier%
  - iv. %Language\_Code%
  - v. %Language%
  - vi. %Productcode%
  - vii. **%Itemcode%**
  - viii. %GTIN%
  - ix. %Fabrikant%
  - x. %Manufacturer%
- 4. A default print layout will be provided. For custom layouts, **including your company's logo** or stationary, contact <u>sales@compano.com</u>.

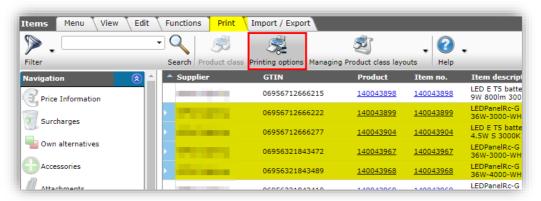
# 8.4 Printing options

To print information of *one record* or to print a *list of records*, use the *Printing options* print button.

#### 8.4.1 Print list

To print a list of records:

1. Select the records which you want to print and, under Print, click on Printing options.



2. In the pop-up window, select the *List* option and, optionally, select a printing layout:

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Printing options		$\mathbf{X}$
Print		
Print		
O Product class		
● List		
Options-		
OUsing the layout which per Item has been set.		
• For all selected Items using the following layout.		
		<u> </u>
	_	
Print	Close	

3. Click on the *Print* button. A printable PDF will open in a new browser tab:

Filter: Selectie:				Geen filter 4 van 944 Items	
Supplier	A	Item no.	Abbreviation	Item description	Gross/CU
OPPLE Lighting		140043899	рсе	LEDPanelRc-G Sq598-36W-3000-WH-CT	€ 22.00
OPPLE Lighting		140043904	pce	LED E T5 batten 300 4.5W S 3000K BL	€ 17.50
OPPLE Lighting		140043967	pce	LEDPanelRc-G Sq598-36W-3000-WH-CT	€ 199.00
OPPLE Lighting		140043968	pce	LEDPanelRc-G Sq598-36W-4000-WH-CT	€ 199.00
				OFIN	

### 8.4.2 Print record

To print product data of one record:

- 1. Select the record which you wish to print and, under *Print*, click on *Printing options*.
- 2. In the pop-up window, select the *Product class* option and, optionally, select a printing layout:

un estel u		×
hich per Item has been	set.	
ms using the following	layout.	
		<u>~</u>
		_
Print	Close	
	hich per Item has been ms using the following	hich per Item has been set. ms using the following layout.

3. Next, click on the *Print* button. A printable PDF will open in a new browser tab:

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Item		
Item Number	140043899	
Item description	LEDPanelRc-G Sq598-36	W-3000-WH-CT
Classification system	n ETIM Dynamic	
ProductClass		
Material heat excha	nger	Aluminium
Material quality		Other
Closed version		Yes
Operation as open r	nodel (air supply) possible	No
Condensing		Yes
Nominal power, 80-	60 °C	234 Kilowatt
Nominal power, 50-	30 °C	234 Kilowatt
Nominal load upper	value	23 Kilowatt
Nominal load lower	value	3 Kilowatt
Heating capacity ad	justable	Yes
Suitable for natural	gas	No
Control signal 0-10	v	Yes
Burner controller hig	gh/low	Yes
Max. supply temper	ature (operating temperature)	) 23 Degrees celsius
Min. return tempera	ture	23 Degrees celsius
Max. allowable oper	ating pressure	4 Bar
Height		34 Millimetre
Width		21.8 Millimetre
Depth		455 Millimetre

# 8.5 Translations

Product and Item sheets can be printed in different languages, provided that:

- Multi-language license is active
- Product and/or Item sheet lay-outs for different languages have been prepared
- User language is set to language in which the sheet is to be printed

Thus, for example, to print a product sheet in the Swedish language:

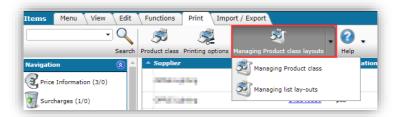
- A Swedish product sheet template needs to be prepared
- The language of the logged-in user needs to be set to Swedish (SE)

Note: This includes the translations of UDFs on product group and item group.

#### 8.6 Manage print layouts

To change the data fields and layout that will be printed, you can add or manage print layouts:

- 1. On any overview, go to the *Print* tab and click on Manage *[Product class/list layouts]*
- 2. Choose which kind of layout you want to manage:



- 3. In the pop-up window:
  - a. Name: Type a name for this layout
  - c. Application: Choose whether the layout will be available only to you, or to anyone within your company

Per view and type	Properties Elemente	n Vroductoverzicht	Memo		
Туре	F	Report	Ŧ		
Name	M	y print lay-out			
Application	0	Within the company		🖲 🕯 For me	

- 4. On the *Properties, Elements* and *Productoverzicht* tab, format the layout.
- 5. Save your layout.

<u>Note</u>: Managing a print layout can be quite complicated. Contact Compano Support if you need any assistance. Alternatively, Compano can design the layout for you; contact <u>sales@compano.com</u> should you wish to make use of this service.

# 8.6.1 Show/Hide (ETIM) features

On the print layout you can now specify which (ETIM) features should be printed on the Product Sheet:

Add - New layout Layout Properties	Elementen	Productdata Artikelen Artikel details Memo
	Elementen	
Visible		● Yes ○ No
Text		#IO.ReportDetailProductClass
New page		None
<b>Productklasse</b>		
Visible		● Yes ○ No
number of columns		1 column
Show required features		● Yes ○ No
Show optional features		● Yes ○ No
Show unimportant features		● Yes ○ No
Show undefined features		● Yes ○ No
Show 'No' values		● Yes ○ No
Classification system		ETIM Dynamic

When creating a product sheet layout, on the *Elements* tab, you can set the following features to be shown (yes) or hidden (no):

- Required features
- Optional features
- Unimportant features
- Undefined features

#### 8.6.2 Show product number in header/footer

The product number can be shown in either the *header* or *footer* of a product sheet.



This option can be set at the Properties tab of the product sheet layout:

Lay-out Eigenschappen	Elementen Productgegeve	ns Toebehoren Memo	
Mana have	Automatisch	Automatisch	
Marge boven	5,00		
Marge onder	2,00	Automatisch	
Marge links	1,50	<ul> <li>Automatisch</li> </ul>	
Marge rechts	1,50	Automatisch	
Watermerk			<ul> <li>Automatisch</li> </ul>
Koptekst	Automatisch		
🛃 🐡 Ω -   🐰 🗈 🖺 י	🔊 • (* • Wer • B I U	E Z Z E Z Z 4 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
📓 😁 🔝 🛂 Voeg codefrage	ment in 🔻 💌 Veld toevoegen 📃	- 🗄 🚚 🍋 💷 🗈 👔 💷 💷 🛱	< 🗹 🗹
			<b>^</b>
[ProductRecord.Co	de/]: [ProductRecord.S	hortDescriptionen-GB/I	

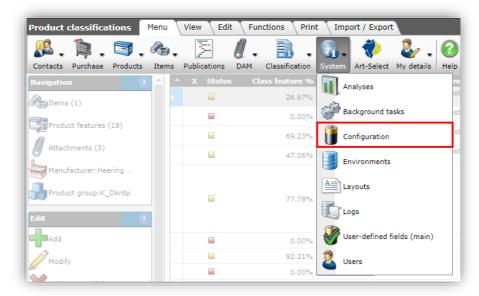
### 8.6.3 Show item data fields on product sheets

Item fields can be included on printed product sheets; specific item fields can be added on the tabs *Item* and *Item details* in the Product sheet layout editor:

Layout Properties Elementer	n Productdata	Item Ite	em details Memo		
Available fields	s	Selected fields			
≝ <sup>…</sup> All fields		Field		Header	
≝ <sup>…</sup> Alphabetically by letter		Item number		Item no.	
<ul> <li>by category</li> <li>Standard fields</li> </ul>		Description		Item description	_
	>	Commercial descri	ption	Commercial description	v
		Product product cl	ass classification system	Classification system	
Properties —					
		Add next record	Save record	Cancel	

# 9 Configuration

The *System > Configuration* menu can be used to add master data such as conversion tables and attachment types, or manage countries and languages, among other things.



<u>Warning</u>: Care must be taken when changing or adding configuration as this can severely disrupt your application. If unsure how to proceed, please contact <u>support@compano.com</u> and have things explained to you.

▶.	• 🔍 🔲	<ol> <li>2</li> <li>2</li> <li>3</li> <li>4</li> <li>4</li></ol>		
ilter		Details Manage screen layouts Help		_
		view Description		Is ready
	2 3	Accessories selections	Accessories product, Product	
	B	Attachment type	Attachment	
		Certificate types	Certificate	
		Choice items	Choice items selection list	
	<b>%</b>	Condition classifications	Division, Paired condition group	
	278	Condition_groups		
		Conversion tables	Conversion Value, ETIM Product class feature	
		Countries	Address, Item, Assortment land, Product	
		Credentials sales organizations		
	0	Currencies	Supplier	
	2	Customer groups	Purchasing contract, Contact, Item surveillance, Salescontract	
	. 🥥	Delivery addresses	Contact	
		Email template		
		Field chapters	User-defined field	
		Fields fallback		
		Item groups	Attachment, Item, Item group, Publication	
		Languages	Attachment, Contact, Country, Environment, Field translation, Layout language, Periodic tasks, ETIM Synonym, Visitor	

Below follows an overview of the most commonly used configuration settings:

# 9.1 Attachment types

Add all DICO/SALES attachment types (*Autofill*) and/or create (*Add*) your own attachment types; also see *the Manual Attachments and Certificates* on the Compano Help-website.

Attachment type Me	View Edit Functions Import / Export	
≫.		
Filter	Search All Details Manage screen layouts Help	
Navigation	Code Description	
Configuration	CAD CAD	
	CHR Link to Sheet	
Edit	EEP Energy Label	
Autofill	LDT Photometric Data	
Autoini	LNK Deeplink	
Add	LOG Logo	
Modify	MAN Instructions	
	MTE Installation- & maintenance documen	ıt
Delete record(s)	OTA Other Attachments	
Functions	OTD Other document	
Mariaulata	OTV Other visual element	
Manipulate	PHI Image for printing	
	PPI Image for internet	

# 9.2 Certificate types

Add all DICO/SALES, BMEcat, DQR and FAB-DIS certificate types (*Autofill*) and/or create (*Add*) your own certificate type; also see *the Manual Attachments and Certificates* on the Compano Help-website.

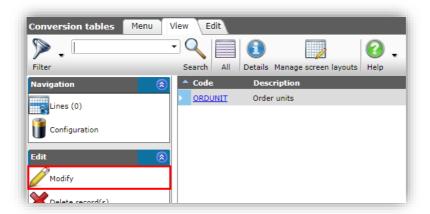
Certificate types 🏾 M	lenu View	Edit	unctions / Import / Export
⋟.⊑	- (	2	<ol> <li>Image: A state of the state of</li></ol>
Filter	S	earch All	Details Manage screen layouts Help
Navigation	⊗ _	Code	Description
Configuration		<u>ACS</u>	Sanitary Conformity Certificate
		ADR	European Agreement concerning the International Carriage of Dangerous Goods by Road
Edit	$\otimes$	ART	mark (motor-)cycle locks
Autofill		AVCP	Assessment and Verification of Constancy of Performance Certificate
Adtoini		BATTERY	Air freight inspection of batteries and accumulators
Add		BOIS	EU Timber Regulation
Modify		BREEAM	Declaration BREEAM (Building Research Establishment Environmental Assess-ment Method)
/ Houry		CAL	Calibration certificate

# 9.3 Conversion tables

Manage Conversion tables, which will allow you to converted values on import or export; also see the *Manual Universal Import/Export* on the Compano Help-website.

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## 9.4 Countries

Per Country, the following settings can be made:

Code	DE		
Description	German	у	
	Automati	c	
SO Code	DEU		
Currency code	EUR		
anguage	de-DE		- 💥
/AT Rate high	19.00	%	
/AT Rate low	7.00	%	
Country number	49		
Jse country-specific fields	• Yes	No	

- VAT percentage (hight and low)
- Currency code
- Preferred default language
- Use country-specific fields, for export formats such as DQR, BMEcat or Imperial system fields (USA).

### 9.5 Custom menu

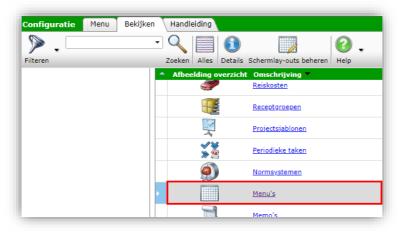
In the application, you can create your own (custom) menu, for example to add self-written manuals. It is possible to create a menu with multiple *sub-levels*.

<u>Note</u>: The Custom menu option is only available with a paid license. Please contact <u>sales@compano.com</u> should you need this option.

To create your own menu:

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1. From the Menu, go to *System > Configuration* and click on the Menus option:



2. To add a menu, under Edit, click + Add.

Menu's Menu Bekijken	Bewerken Functies Import/Expo	rt Handleiding		
Filteren	Zoeken Alles Details CWD	<b>О</b> -		
Navigatie	🛞 🔺 Icoon Hoofdmenu iten	n Volgorde Omschrijving	Locatie	Level
Menu's (5)	for construction	1 Handleidingen		1
Configuratie	G Handleidingen	2 Google	www.google.nl	2
Bewerken	Aandleidingen	2 Afhandeling tarieven	Afhandeling tarieven met prio versie 1	2
Toevoegen	Handleidingen	4 nos.nl	https://www.nos.nl	2
Nijzigen 🖉	Handleidingen	6 NU	https://www.nu.nl	2
Verwijderen record(s)	Handleidingen	7 Tabel kabels 10kV	Tabel kabels 10kV	2
Kopiëren				

3. In the pop-up window:

Wijzigen - 1 Handleidingen		erente al		
Menu				
Hoofdmenu item				- 💥 🔒
Icoon	for construc		ent/Bijlage/Logo%20C	CWD.png
Volgorde	1			
Omschrijving	Handleidingen			
Locatie	X			
	Vorige bewerken	Volgende bewerken	Bewaar record	Annuleer

- a. Main menu item (optional): Choose a main menu item here if you are creating a menu with multiple sub-levels. Leave this option blank for the top level in the menu.
- b. Icon (optional): Upload an icon (image) for the menu.
- c. Order: Type a number for the order in which this menu item is displayed in relation to other items.
- d. Description: Type a description for the menu item; this is also the text shown on the menu button.
- e. Location: Upload and link a document (e.g. a manual), or type in the URL of a web page you want to link to.

Compano Online Software

4. Save the record.

The custom menu is visible on a separate tab on each of the overviews:

3000-1					
Handleidingen					
<u>^</u>	1	-		Hoofdmenu item	
E Afhandeling tarieven			ersonwolterfedros (m.		
G Google			for construction		
			G	Handleidingen	
nos.nl					
			£	Handleidingen	
NU			U	renerengen	
4				Handleidingen	
Tabel kabels 10kV				Handleidingen	

# 9.6 Languages

Manage languages available for translations in your application:

	Edit Functions	Details Manage screen layouts He	<b>)</b> .	_	_	
Navigation  🛞	▲ ISO Code	Description	Language environment	Use multilingual fields	Hide in user interface	Memo
Field translations (27129)	> de	German		<ul> <li>✓</li> </ul>		3
	de-DE					1
Configuration	en	English		✓		1
	en-GB					
Edit 🛞	fr	French		✓		
Autofill	nl	Dutch	<b>V</b>	✓		
Add	<u>nl-NL</u>					1
Modify						

Note: Language can be added as a main language or dialect language.

Settings per language are:

- Use multilingual fields
- Hide in user-interface

For more information, see the Manual Multilingual Data on the Compano Help-website.

# 9.7 Fields Fallback

A Fields Fallback System has been added to the application, as a manual alternative for the default Automatic Fallback System. This new system is available for text fields of the entities Product, Product group, Item and Item group and allows for manually setting the **'fall back'** to the value of *any another* text data field of the entities Product, Product group, Item and Item group. This way, whenever a data field is not filled out, its value will be read from the field it falls back to. **When required, an entire 'fallback chain' can be set, where a data field can be set to fallback upon** several consecutive text fields (max. 4).

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ields fallback Menu	View	Edit Functions Im	port / Export	
⋟.∟	•			<ol> <li>.</li> </ol>
Filter		Search All Details Man	age screen layouts	Help
Navigation	$\odot$	<ul> <li>X Entity</li> </ul>	Language	Description
Configuration		Product	<u>da-DK</u>	Brand (product)/da-DK (product)
		Product	<u>de-DE</u>	Brand (product)/de-DE (product)
Edit	۲	Product	<u>en-GB</u>	Brand (product)/en-GB/Default (product)
Item		Product	en-US	Brand (product)/en-US (product)
		Product	<u>fi-FI</u>	Brand (product)/fi-FI (product)
Item group		Product	fr-FR	Brand (product)/fr-FR (product)
Product		Product	<u>it-IT</u>	Brand (product)/it-IT (product)
		Product	<u>nl-NL</u>	Brand (product)/nl-NL (product)
Product group		Product	sv-SE	Brand (product)/sv-SE (product)
Modify		Item group	da-DK	Commercial description (item group)/da-DK (item group)
Delete record(s)		Item group	de-DE	Commercial description (item group)/de-DE (item group)
Delete record(s)		Item group	en-GB	Commercial description (item group)/en-GB/Default (item group)
Functions	۲	<u>Item group</u>	<u>en-US</u>	Commercial description (item group)/en-US (item group)
		Item group	<u>fi-FI</u>	Commercial description (item group)/fi-FI (item group)
From archive	•	Item group	fr-FR	Commercial description (item group)/fr-FR (item group)

# 9.8 Packing forms

Add all DICO/SALES packing forms (Autofill) and/or create (Add) your own packaging forms.

Packing forms Men	View Edit Functions Import / Export	
⋟.∟		
Filter	Search All Details Manage screen layouts Help	
Navigation	🛞 🔺 Code Description	
Items (60)	08 Oneway pallet	
	09 Returnable pallet	
Configuration	200 Pallet ISO 0 - 1/2 EURO Pallet	
	201 Pallet ISO 1 - 1/1 EURO Pallet	
Edit	202 Pallet ISO 2	
Autofill	203 1/4 EURO Pallet	
Add	204 1/8 EURO Pallet	
	210 Wholesaler pallet	
Modify	211 Pallet 80 X 100 cm	
	212 Pallet 60 X 100 cm	

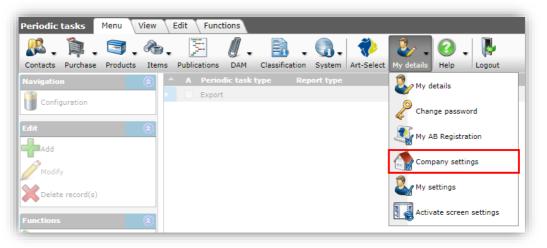
# 9.9 Periodic tasks

Add or manage Periodic Tasks to automate certain COS-processes, such as Import, Export 2BA, Export, Feed export, etc. Also see the *Manual Periodic Tasks* on the Compano Helpwebsite. 🍠 🌮 💭

Periodic tasks Menu	View Edit Functions	
Filter	Search All Details Manage screen layouts	Help
Navigation Configuration	A Periodic task type Report typ     Export	pe Description Weekly price list export
Edit		
Modify		
Functions Start task		

# 9.10 Company settings

Company settings have their own configuration menu, which is available via *Menu > My details > Compano settings*.



<u>Warning</u>: Care must be taken when changing or adding Compano settings as this can severely disrupt your application. If unsure how to proceed, please contact <u>support@compano.com</u> and have things explained to you.

Company settings allow for various system-wide settings in your application. Which settings can be made, depends on your type of application and may include:

- Project administration settings
- Calculation/Offer settings
- Purchase settings
- Financial administration settings
- Etc.

#### 9.10.1 Purchasing

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My Company settings			×
Purchasing Item manager	System settings Number pattern Intern	ational	
Purchasing			
Update when number is adjusted	● Yes ○ No		
		lose	

• Update when number is adjusted: Set to **Yes** to ensure that when the number(s) of Purchase items is changed, the system will check if a different graduated rate needs to be applied.

### 9.10.2 System settings

My Company settings			
Purchasing Item manager	System settings	Number pattern 🔪 Inte	ernational
<b>System</b> Login from the central area Phone number template	• Yes	O No	
			Close

- Login from the central area: When set to **No**, logins initiated in the main environment are blocked. <u>Note</u>: Setting this to **No** will prevent any support by Compano or other Administrators.
- Phone number template: Set a phone number template, such as 06 46 11 6993 or (31)
   (0) 646116993.

#### 9.10.3 Number pattern

Set the default number patterns for several automatically numbered entities:

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My Company settings			
Purchasing Item manager System	settings	Number pattern	International
Number pattern			
Number pattern for contacts	REYY0	00001	
Number pattern for support contract	ADYY0	00001	
Number pattern for templates	SJ0001		
			Close

Depending upon your application, the number patterns for the following entities can be set:

- Contacts
- Support contracts
- Templates
- Offers
- Invoices
- Recipes
- Projects
- Etc.

### 9.10.4 International

My Company settings			×
Purchasing Item manager	System settings Number pattern	International	
International			
Country	<li>Netherlands</li>	•	•
Language code	1 nl Dutch	•	•
Fallback translations	● Yes ○ No		
Encoding fallback for import	IBMPC-DOS-437	~	
		Close	

- Country: Default country. The country selected will be used as the default country when adding a new relation.
- Language: Default language. The language selected will be used as the default userinterface language when adding a new relation and/or user account.
- Fallback translations: Default at **Yes**. Set this option to **No** if you want to make use of the Fields Fallback system instead of the default Translation fallback. Also see *Manual Multilingual Data*.
- Encoding fallback for import: If the correct character set cannot be determined from an import file, fallback to the character set which is specified here:



# 10 Import data

Import of data can be handled on the *Import / Export* tab of an Entity Overview:

Items	Menu	View	Edit	Functior	ns Print	Impor	t / Export		
۶.				- 🔍	4	4		2	•
Filter				Search	Export items	Import	Item exports	Help	

Depending to the Entity, several options for importing and exporting of data are available.

<u>Note</u>: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

# 10.1 Import scenario's

The Universal Import/Export method will handle the following import scenario's:

- Industry standard imports: Used for importing data by means of an industry standard, such as *DICO (INSBOU/SALES), BMEcat, FAB-DIS*, or custom standards, such as *Pricat, Galvano*, etc.
- Custom imports: Used for importing data from an Excel file or character-separated and fixed-width data files, such as **CSV** or **TXT** (Unicode) formats.
- Update imports: Used for updating data.

# 10.2 Industry standard import formats

For easy data exchange a few standard industry formats are available. These data formats can be used for importing data into COS:

- PAB (automatic version detection)
- INSBOU (automatic version detection)
- SALESBOUWV3
- DICO/INSBOU (automatic version detection)
- DICO/SALES (automatic version detection)
- BMEcat (automatic version detection)
- OpenData (DQR 6/7); also useful for modern ARGE (DQR 6) import
- DataNorm; also useful for older ARGE import.

<u>Note</u>: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

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## **10.2.1** Alternative item import formats

A number of alternative, non-standard item import formats are available, these are:

- Pricat
- Galvano
- Sales Construction
- Plieger
- VGH
- eZbase

<u>Note</u>: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

## 10.3 Standard import formats (COS PIM-only)

For PIM-customers several *premade standard import formats* (Excel) have been added to assist with data imports. These formats can be used in combination with accompanying Import layouts to import data. These Excel templates are available from the <u>Compano Help website</u>.

Excel template	Import layout	Used for
Template New Products and Items	Standaard product import in Excel –	Importing product data
(DICO/SALES005)7	L03	
Template New Products and Items	Standaard artikel import in Excel –	Importing item data
(DICO/SALES005)	L03	
Template Price Updates	Standaard prijsupdates in Excel – L03	Importing (new) price information
Template Import Accessories	Standaard import toebehoren	Importing accessories or parts
	product – LO3	information
Template Import Accessories	Standaard import toebehoren	Importing accessories or parts
	product met GTIN – L03	information, using product GTINs
Template Import Attachments	-	Importing attachment information

## **10.4 Custom import formats**

Data can also be imported from any type of *data file* in combination with a proper *import layout*:

- Excel: The data file is an Excel spreadsheet;
- Text: The data file is a character-separated text file (*CSV* or *Unicode*).

<u>Note</u>: Compressed versions (*ZIP*, *BZIP2* and *7Z*) of Excel-, CSV- or Unicode-files can also be imported. Compano recommends using the free, open source software *7zip* (<u>https://www.7-zip.org</u>) to create these files.

#### Example

As an example of this kind of import, this paragraph will describe the import of item data. However, the import process applies to *all* types of imports, whether these are on product, item, attachments, discount groups, or any other entity.

<sup>&</sup>lt;sup>7</sup> <u>Note</u>: The template for importing new products and items is tailored to the needs of the Dutch datapool 2BA.

#### 10.4.1 Unicode and UTF-8 encoding

To import or update data using character-separated text file, your data file needs to be a *CSV or Unicode* file. Both file types use a delimiting character to separate values; *CSV* uses a *semicolon*, *Unicode* uses a *TAB*-character.

For example, opening a CSV file in a text editor will look something like this:

```
$LN;GTIN;ARTKORT;ARTNUMMER;ARTFAK_OM;ART_PRI_V;PRODCODFAB;KORTGROEP ;;
5907791600004;5907791600011;"01-0012-1/4""";011001040000;"EE bocht bi/bu zwart 01-001Z-1/4""";2,25;5907791600011 ;'01;;
5907791600004;5907791600042;"01-001Z-3/8""";011001060000;"EE bocht bi/bu zwart 01-001Z-3/8""";2,70;5907791600042 ;'01;;
5907791600004;5907791600073;"01-001Z-1/2""";011001080000;"EE bocht bi/bu zwart 01-001Z-1/2""";2,40;5907791600073 ;'01;;
5907791600004;5907791600103;"01-001Z-3/4""";011001120000;"EE bocht bi/bu zwart 01-001Z-3/4""";4,20;5907791600103 ;'01;;
```

However, beware of saving and/or re-opening in CSV format (!). CSV is notoriously tricky when it comes to **encoding 'special' ch**aracters such as é, a,  $\hat{e}$ ,  $\in$ ,  $\Box$ ,  $\mu$ ,  $\beta$  c, et cetera; basically anything that is not part of the basic <u>ASCII-127</u> set. The biggest problem is not CSV itself, but that many spreadsheet, ERP- and database programs, including *Microsoft Excel*, handle CSV-encoding unpredictably.

Some common CSV pitfalls are:

- Microsoft Excel (Windows): When using Excel to save as CSV, always use the safe CSV UTF-8 (Comma delimited) format. However, older versions of Excel only offer to save as CSV (Comma Separated Values) (.csv)". This format uses your locale's Windows or Mac codepage which will silently replace any unsupported character in your document with an underscore \_ character.
- Microsoft Excel (MacIntosh): This version of Excel *cannot* save extended characters at all and will scramble them into something which is unreadable.
- Numbers: Apple's spreadsheet program exports a *faulty UTF-8 format* which cannot be read correctly.

Thus, whenever you need to save your data into a text format for import or export, *the best, safe option is the Unicode format*. This format uses the correct UTF-8 encoding by default. If you cannot save your data in the Unicode format, the next best option is to save in the CSV UTF-8 format. If UTF-8 is not specified, be aware of the pitfalls mentioned above, when saving in a 'plain' CSV format. It is recommended to check your file by opening it in a text editor (Notepad, Notepad++, or other).

<u>Warning</u>: Should you need to alter any data in your spreadsheet, please do so in your *original* Excel-file. Try and avoid editing a CSV-file using MS Excel as this will change large numbers (GLN, GTIN) to exponential values 8.713218237987E12 and other problems which makes your data unfit for import.

#### **10.4.2 Custom import layout**

To be able to import a spreadsheet format (either Excel, CSV or TXT), COS needs to know the structure of the import file. To identify this structure, an import layout needs to be created that will identify how and where data from the import file will be imported into COS data fields.

Example

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	A	В	С	D	E	F	G	н
1	GLN 💌	GTIN 💌	ARTKORT	ARTNUMMER -	ARTFAK_OM	ART_PRI_V 💌	PRODCODFAB	KORTGROEP 💌
2	5907791600004	5907791600011	01-001Z-1/4"	011001040000	EE bocht bi/bu zwart 01-001Z-1/4"	2,25	5907791600011	'01
3	5907791600004	5907791600042	01-001Z-3/8"	011001060000	EE bocht bi/bu zwart 01-001Z-3/8"	2,70	5907791600042	'01
4	5907791600004	5907791600073	01-001Z-1/2"	011001080000	EE bocht bi/bu zwart 01-001Z-1/2"	2,40	5907791600073	'01
5	5907791600004	5907791600103	01-001Z-3/4"	011001120000	EE bocht bi/bu zwart 01-001Z-3/4"	4,20	5907791600103	'01
6	5907791600004	5907791600134	01-001Z-1"	011001160000	EE bocht bi/bu zwart 01-001Z-1"	5,65	5907791600134	'01
7	5907791600004	5907791600165	01-001Z-1.1/4"	011001200000	EE bocht bi/bu zwart 01-001Z-1.1/4"	10,05	5907791600165	'01
8	5907791600004	5907791600196	01-001Z-1.1/2"	011001240000	EE bocht bi/bu zwart 01-001Z-1.1/2"	12,95	5907791600196	'01
9	5907791600004	5907791600226	01-001Z-2"	011001320000	EE bocht bi/bu zwart 01-001Z-2"	21,45	5907791600226	'01
10	5907791600004	5907791600257	01-0017-2 1/2"	011001/00000	FE booht bi/bu zwart 01-0017-2 1/2"	46 75	5907791600257	'01

In this Excel file each data line represents one Item. The item data is stored in the following columns:

Excel column header	Description
GLN	Global Location Number; unique international code for manufacturer
GTIN	Global Trade Item Number; unique international code for an item
ARTKORT	Short description of an item
ARTNUMMER	Item number
ARTFAK_OM	Long description of an item
ART_PRI_V	Gross price of an item
PRODCODFAB	Product code of a manufacturer
KORTGROEP	Discount group

Custom import layouts can be created:

On-the-fly: In the Import dialog, using the +-button:

Importof file Excel-import-surcharge	s.xlsx	
with impactreport: Full		
Import van Surcharges met layout I	mport surcharges en velden:	
Item item number Item supplier code		
• Туре		
Start date Amount per PU+PQ		
Sequence		
Lower limit		
<ul> <li>Lower limit unit</li> </ul>		
Layout1		
Title	Blad1	
		- 💥
Import entity	Surcharge	
Import entity	Surcharge	n surcharge 🕶 🎇 🚼

Or at System > Layouts:

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

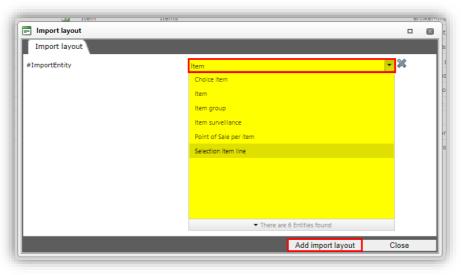
🌱 狑 💭



2. Next, under Edit, select *Add Import* layout:

Layouts Menu View Edi	Functions	
▶.		
Filter	Search All Details Manage screen layouts Help	
Navigation 😵	<ul> <li>Standard A Name</li> </ul>	
Edit		
Edit 🛞	<b>m</b>	
Feed layout	<b>•</b>	
Add OData layout	<b>•</b>	
	E E E E E E E E E E E E E E E E E E E	
Free form	- <b>m</b>	
Add export layout	<b>1</b>	
	Image:	
Add import layout	<b>I</b>	
Add conact tomplate		

3. In the pop-up window, select the *Entity*<sup>8</sup> for which you want to define the layout, in this example *Item*.



<sup>&</sup>lt;sup>8</sup> An Entity is a data object in COS, for instance Product, Item, Assortment, Attachment, Price, etc.

- 4. Click on Add import layout.
- 5. In the next pop-up window, fill out the options for the layout on the different tabs:

#### Layout tab:

🔽 Item Items					a
🚍 Add - New layout					c
Layout Properties Fields Memo					E
Туре	Excel import	~			E
Name	Item import from Exc	el		⊐∣	
Application	◯ III Within the comp ◎ <sup>©</sup> For me	any 🔿 🖧 For al	l members		
	Add next record	Save record	Cancel		
	Add next record	Save lecold	Cancer		

- a. Type: Choose the Import type:
  - i. Excel import: Imports data from Microsoft **XSLX**-format.
  - ii. Text import: Imports data from a Text format, such as CSV or Unicode.
- b. Name: Type a name for the Import layout
- c. Application: Choose whether the layout should be visible for only yourself (*For me*), for all users of this environment (*Within the company*), or for all members/users of all (layered) environments (*For all members*)

Properties tab:

🔀 Item Items			
Add - New layout			
Layout Properties Fields Memo			
Number of headers	1		
Continue with errors	O Yes 🖲 No	-	
	Add next record	Save record	Cancel

- a. Number of header rows: Set the number header rows contained in your import file. <u>Note</u>: These rows will be skipped on import.
- b. Continue on errors: Set to *Yes* if the import should continue on errors in your data file<sup>9</sup>. Erroneous data will *not* be imported.

Fields tab:

<sup>&</sup>lt;sup>9</sup> Usually, Continue on errors is set to *No*, however if you need a report on *all* the errors in your data file, you can set this option to *Yes* and perform a testrun of your data.

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Layout Properties Fields	Memo			
Available fields		Selected fields		
		Field	Header Pos	
Alphabetically by letter		Item Number	Item 1	
		Supplier code	Supplier 2	
Standard fields		Supplier gln code	GLN 3 Code	
Add data fields	~	Remove unwant	ed fields	[
- Properties				
Header		ıpplier	<u></u>	
		Automatic		
Field position	2	🗹 Automati	-	
Fixed value	_	ompano (2220000074100)	- ×	
Maintain		Yes 🖲 No		
Continue on error	C	Yes 🖲 No	-	

- a. Available fields: Add data fields to be imported from the list of available fields
- b. Selected fields: Remove unwanted fields from the list of available fields. <u>Note</u>: The position number (**Pos**) indicates from which position (Excel data column) the value of the field will be exported.
- c. Properties: Optionally, set options for selected data fields.
- 5. Click on *Save record* to save the layout.

#### Memo tab

You can use the memo tab to make a note for which purpose this layout was made and how it may be used.

<u>Note</u>: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

#### **10.4.3** Properties for Text import layouts

<u>Important</u>: Inspect your Unicode/CSV file before you enter the layout features below. You can do this by opening the Unicode/CSV file in *Notepad* or another text editor. A good and free editor is *Notepad++* <u>https://notepad-plus-plus.org</u>.

On the tab *Properties* enter the following values where needed:

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	reade ocaren	
🗐 Wijzigen		•
Layout Properties Fields M	lemo	
Number of header rows	0	A
Format	Character separated	~
Separation character	TAB	
Decimal separator character		
Decimal group character	2	
Date separator character	/	
Time separator character	:	
Text enclosure character	**	
Continue import on errors	🔾 Yes 🖲 No	
		•
	Add next record S	Save record Cancel
TTING TTING and doubt address of	TTAA J	01

- a. Number of headers: This is the number of rows above the first row with data in your data file. Often, there is only one header row which shows the labels of the columns, but there may be more header rows.
- b. Format: Choose whether your text file is *Character-separated* (either semicolon or TAB), or if it is a file with a fixed number of characters per line (fixed width).
- c. Separation sign: The default separator sign for a CSV file is a semicolon. Check which separator sign is used in your CSV file. <u>Note</u>: If you are using a *Unicode* file, enter the value TAB for the separation character.
- d. Decimal separator sign: Specify the format of the decimal separator sign
- e. Decimal group sign: Specify the format of the decimal group sign
- f. Date separator sign: Specify the format of the date separator sign
- g. Time separator sign: Specify the format of the time separator sign
- h. Text enclosure sign: Sometimes lines of text are enclosed by a text enclosure sign, often a quote or double quote. Specify which format your text file uses.
- i. Continue on errors: If set to Yes, the import will continue whenever an error is encountered; item with errors will NOT be imported.

# 10.5 Optional layout features

When designing your import layout, you can make use of a couple of optional layout features which can facilitate the import process.

<u>Note</u>: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

#### 10.5.1 Conversion table

Whenever data in your text file is not in the correct format, you can correct this by making use of a conversion table.

In the example above, position 8 (KORTGROEP) contains values such as '01, '02, etc. As the quote in front of the numbers is not correct, you can create a conversion table where the values are replaced:

Value IN	Value OUT
'01	01
'02	02
Etc.	

## 10.5.2 Fixed values

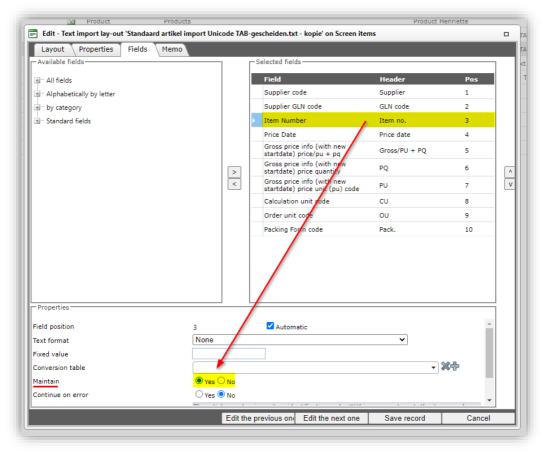
For some fields in your layout, *fixed values* can be used. Two scenarios with fixed values are:

- For all data records, the value is the same, fixed value. For instance, *Price Unit*
- Wherever the value for the data field is *empty* in the import file, a fixed value should be written into COS. For instance, price data:

<u>Note</u>: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

#### 10.5.3 Maintain data (no overwrite)

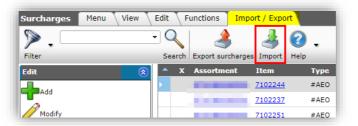
To prevent overwriting of data in COS on import, set the *Maintain* option of a data field to *Yes*.



# 10.6 Importing data files

To import any type of data file:

1. Go to the *Import/Export* tab of any Entity and click on *Import*.



2. In the pop-up window, select your data file<sup>10</sup>, and click on *Next*.

🗐 Import		LED E TEL U. A	200		1 🛛
Import					
Import File		ĺ	Template_Nieuwe_Producter	Select	
		Previous	Next	Close	
140043972	140043972	LEDI UNCIKE O KE	PCF	1.00	1 00 PC

3. In the next dialog window, you will be presented with one or more data Layouts<sup>11</sup>. If your import file contains multiple data files or Excel worksheets, these are automatically detected and named Layout1, Layout2, etc.:

🗐 Import					×
Import					
Summary					
Nothing selected to import!					
Layout1					
Title	Excel-Ite	ms.csv			
Import entity	Item			- 💥	
Import layout				- × - ×	
Layout2					
Title	Excel-Pro	oducts.csv			
Import entity	Product			- × - ×+	
Import layout				- X-	
			Next	Close	_

For each Layout:

- a. Import entity: Select an Import entity.
- b. Import layout: Select an Import layout, or—alternatively—, add a create an import

layout using the **+**-buttons. <u>Note</u>: Optionally *skip importing* of a data Layout by *not selecting* an Import entity and/or Import lay-out.

4. Click on Next for the Import settings.

 <sup>&</sup>lt;sup>10</sup> Note: Excel files with multiple worksheets or compressed files (ZIP, BZIP) containing multiple data files can also be imported. For importing multiple data sources, multiple import layouts need to be selected.
 <sup>11</sup> Note: Industry standard files will be auto-detected; no Import layout is necessary.

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= Import				
Import				
Summary				
Importof file Multiple-data-set.zip with impactreport: Full				<b>^</b>
Import van Products met layout Standaar Country of origin code GTIN Manufacturer code Brand Series Type Code Short description Description Product Gravp code Product Class code (ETIM Dynamic)	rd product import Unicode TAB-gescheiden.txt en velden:			
Country of origin code     GTIN     Manufacturer code     Brand	rd product import Unicode TAB-gescheiden.txt en velden:			Ţ
Country of origin code     GTIN     Manufacturer code     Brand     Series				Ţ
Country of origin code     GTIN     Manufacturer code     Brand     Series Settings	rd product import Unicode TAB-gescheiden.txt en velden: Full	<u> </u>		Ţ
<ul> <li>Country of origin code</li> <li>GTIN</li> <li>Manufacturer code</li> </ul>		<u> </u>		Ţ
Country of origin code GTIN Manufacturer code Brand Series Settings Reporting level Is testrun	Full	<b>~</b>		
Country of origin code     GTIN     Manufacturer code     Brand     Series Settings Reporting level	Full O Yes ® No		s.csv (Standaard produ	v

- c. Reporting level: Select the reporting level for the import report:
  - i. None: Do <u>not</u> generate an import report. This will result in the fastest import.
  - ii. Full: Generate a full import report, including all changes in all fields. This will result in the slowest import as all fields will be checked.
  - iii. Only warnings: Generate an import report only listing warnings. This import is generally faster than with a Full report.
- d. Is testrun: Set to *Yes* to simulate an import; this will only generate an import report listing any potential error and/or warnings. No data is actually imported!
- e. Selected files: (De-)select the files from your multiple data set which you need to import.
- 5. Click on *Next* to start the import. You will receive an e-mail with an Import report.

#### **10.6.1** Multiple data sources

The Universal import method also provides for importing multiple data source at once. The following data files can contain multiple data sources:

- Multiple worksheets (Excel): An Excel file with multiple data worksheets
- Compressed data file (ZIP, BZIP): Compressed format containing multiple data files

<u>Important</u>: Each data source needs to be linked to an *Entity* and imported with a *separate import layout*.

On import, an *Entity* and *Layout* need to be assigned to each data source, as demonstrated below:

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	Import done		b	0
= Import				
Import				
Summary				
Importof file Multiple-unicode-data with impactreport: Full	iset.zip			<b>^</b>
Import van Items met layout Stan Supplier GDR Supplier GLN code Assortment code Item Number GTIN Short description Gross price info (with new start Gross price info (with new start Gross price info (with new start Number CU per OU Calculation unit code Number of PU per OU Order unit code Minimum purchase in OU Increment decrease Packing Form code Condition group code	date) price quantity	scheiden.txt en veld	len:	
Layout1 Title	Unicode-items.txt			
Import entity	Item			- ×
Import layout	Text import lay-out	'Standaard artikel imp	oort Unicode TAB-gesche	ide 🕶 🗱 🗭 🖊
Layout2 Title	unicode-product.txt			
Import entity	Product			- 💥
Import layout	Text import lay-out	Standaard product in	nport Unicode TAB-gesch	neix 🕶 🗱 🗭 🦯
		-		
		Previous	Next	Close

For more information on Importing multiple data source, see the *Manual Universal Import/Export* available from the <u>Compano Help website</u>.

## 10.7 Import 2BA

Depending upon the setup of your version of the Compano software, a direct import of assortments from data pool 2BA is an option:

To import an assortment directly from the 2BA data pool:

1. Through the Menu, go to *Items> Assortment*.

Assortment	Menu View Edit F	Functions Import	: / Export				
<b>&gt;</b> _		A	4			2ba	?.
Filter	Search	Export assortments	Import I	Item exports	Export images	Import 2BA	Help

2. On the Import/Export tab, click on Import 2BA:

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Import 2BA				E
Import 2BA				
Supplier	(8715847000008)			)
Item format	DICO/SALES005		~	] [
Products (product data + class)	● Yes ○ No			
Add new manufacturers	● Yes ○ No			
Changes since	E			
Testrun only	● Yes ○ No			
Authorize URL	https://authorize.2ba.nl	l		
API URL	https://api.2ba.nl			
UserName				] [
Password				] [
ClientId				
Secret				
Enrich profile	● Yes ○ No			
		Import	Close	

- a. Supplier: Automatically selected.
- b. Item format: Select to file format for import
- c. Products (product data + class): Set to Yes to import product (classification) data
- d. Add new manufacturer: Add a new manufacturer if not already present in COS
- e. Changes since: Only import changes in the data since [selected date]
- f. Testrun only: Set to *Yes* to simulate a 2BA import; an import analysis will be made available
- g. Authorize URL: Set automatically.
- h. API URL: Set automatically
- i. UserName: Enter your 2BA account username
- j. Password: Enter your 2BA account password
- k. ClientID: Enter your 2BA account client ID
- I. Secret: Enter your 2BA account secret code
- m. Enrich profile: Set to *Yes* to enrich product information based on product GTIN. <u>Note</u>: When set to *No*, incomplete products from 2BA will not be downloaded.

## **10.8 Automated imports**

Imports of (industry standard) data can be automated using either Periodic Tasks, FTPS or a combination of both.

#### 10.8.1 Industry standard data

For automated imports of Industry Standard data (PAB, DICO/INSBOU, DICO/SALES and BMEcat) please see *Appendix A: FTPS access*. paragraph <u>13.8 INDUSTRY STANDARD DATA</u> (AUTOIMPORT/AUTOCHECK).

#### 10.8.2 Periodic import task

Any other type of data can be imported using Periodic Tasks. More information can be found in the *Manual Periodic Tasks*, which is available from the <u>Compano Help website</u>.

Item and product data in COS can be exported, using:

- Industry exchange standard
- COS screen layout
- COS export layout

<u>Note</u>: The example in this chapter concerns export of item data. However, the export process applies to *all* kinds of exports, whether these are on product, item, attachments, discount groups, or any other entity.

<u>Note</u>: Detailed information on exporting data is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

# **11.1 Standard export formats**

Should you choose to export data using one of the industry exchange formats, you have the option to either export all items of an assortment, or export (a selection of) items directly.

<u>Warning</u>: Please pay close attention to your settings when switching between export formats! Settings in the export dialog below are *stored per user*, however common settings are *retained* when selecting a different export format. Thus, for instance, when exporting in the FAB-DIS format with the ETIM 8 setting, this setting is retained when switching back to the DQR export format.

## **11.1.1 Export Assortment**

To export all items of an assortment:

- 1. Through the main menu go to *Items > Assortment*.
- 2. Go to Import / Export tab, select an assortment and click on Item exports.

Assortment Menu View	Edit Functions	Import / Expo	rt		
⋟		الله ال			₴.
Filter	Search Export ass	ortments Import	Item exports	Export images	Help
Navigation 🛞	🔺 Logo	Code	Description		
Ttems (890/151)					
		COMPANO	Compano BV		
Logs (0/0)		100 C			
Item groups (0/0)			in the	1000	
Transfer rules					
Memo (0/0)	× .	OPP NL	OPPLE Lightin	Ig	
				100 B (10	
Edit 🛞					

3. In the pop-up window:

💕 🌮 💭

I EDPanelDr	NG 56598.		
Item exports			
Send export to			
Software package	Other		~
Free text export	O Yes 🔍 No		
Item Format	#Sales005		~
Prices	Gross prices		~
Products (product data + class)	🔿 Yes 🔍 No		
Features (technical product specifications)	🔿 Yes 🔍 No		
To classification system	EDynamic		~
Changes since:			
Price Reference date:	30/05/2022		
Start Date	06/05/2022		
End Date			
Country	België		- 🗙
#ItemsLanguages	☐ de German ✔ en English ☐ fr French		
Catalog version	✓ nl Dutch		
Add images + attachments	🔿 Yes 🖲 No		
		Export	Close

- a. Send export to: Enter an email address; the export will be sent to this address
- b. Software package: Should wish to export in a specific software format, select a package. If not, select *Other*.

Software package	Other
Free text export	Compano: GA-Software Compano: InstallCalc
Item Format	Building Infosys: Install Office (t / m K40.14.008)
Country	Building Infosys: Install Office (from K40.14.009) Acto: Easy Project / MyProject
Language	InstalLogic: Soft Hand
Prices	Syntess: Atrium / Prism ENK Software
Future Prices	Other

- c. Free text export: Set to *Yes*, to select a Text export format. Set to *No*, to export in an industry standard format.
- d. Item Format: Select an industry standard format for the export:

Item Format	PAB 2.0
Country	PAB 2.0
Country	PAB 2.03
Language	DICO/INSBOU003
Prices	DICO/INSBOU004
FILLES	#Sales005
Including canceled items	BMEcat 3.1
Products (product data + class)	BMEcat 4.2
	#Bmecat50
features (technical product specifications)	Datanorm 4.0
Attachment (attachmentindex2.txt)	IGH
	ARGE11
Classification system	ARGE12
Itemrelations (koppelingen.txt /	Open Datacheck
ItemRelations.xml)	Fab-Dis

💕 🌮 💭

<u>Note</u>: Depending on the industry format which was selected, the following export options differ. For unique options the corresponding standard is shown in parenthesis.

- i. Country: Choose to only export items with this [country] of origin
- ii. Language: Select in which language data should be exported
- iii. Guideline: (BMEcat / ARGE12) Select the BMEcat or ARGE12 Guideline version
- iv. LUCID number (OpenDataCheck): Enter the LUCID number (optional)
- v. Disposal service provider (OpenDataCheck): Enter the name of the disposal service provider
- vi. WEEE items (OpenDataCheck): *Yes/No*, select whether assortment contains WEEE items
- vii. Modelnumber (OpenDataCheck): Select which entity functions as the model number
- viii. Item group (OpenDataCheck): ): Select which entity functions as the item group
- ix. Product group (OpenDataCheck): ): Select which entity functions as the product group
- x. HTML text: (BMEcat)
- xi. Catalog version: (BMEcat)
- xii. Add images + attachments: (ARGE11/12), export a zip-file including images and other attachments
- xiii. Price Book No.: (IGH)
- xiv. Release no. (IGH)
- xv. Version year: (IGH)
- xvi. Customer organization: (BMEcat / IGH)
- xvii. Organization ID: (IGH)
- xviii. Prices: Select which prices should be exported
- xix. Future prices: Yes/No, choose whether to export prices with a future price date
- xx. Including archived items: Yes/No; choose whether to include cancelled items
- xxi. Products: *Yes/No*, choose whether to export Product class
- xxii. Features: Yes/No, choose whether to export Product class features
- xxiii. AttachmentIndex: *Yes/No*; exports fixed length text file containing product/item number and corresponding attachment(s); automatically included for INSBOU004 and SALES005.
- xxiv. Classification system: Choose which classification should be used when exporting the classification data
- xxv. Item relations (koppelingen.txt / ItemRelations.xml): Yes/No, choose whether to export all item relations (parts, accessories, alternatives) to internal/external URLs
- xxvi. Changes since: Only export items which have been changed since [date]
- xxvii. Price Reference date: Only export prices from this [date]
- xxviii. Start Date: (ARGE 11/12, BMECat)
- xxix. End Date: (ARGE 11/12, BMECat)
- xxx. Add Bonus Group based on discountgroup: (ARGE 11/12) *Yes/No*, choose whether to export the bonus group

<u>Note BMECat export</u>: When exporting item data of an assortment in *BMECat* format, any attachments are exported to your FTPS-folder, provided the option *Add images + attachments* has

**been set to 'Yes'**. You will be notified via e-mail of the FTPS-location, where you can download the attachments as a ZIP-file. As this option differs from the usual download protocol, *no* log entry will be made.

<u>Note</u>: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

#### 11.1.2 Export Items

Alternatively, you can first select a subset of items, using the Filter and Search options:

- 1. Through the main menu, either go to *Items > Items*, or *Items > Assortment > Items*
- 2. Using the *Quickfilter*, the *Filter* and/or *Search*, make a selection of items
- 3. On the View tab, click on the *All/Deselect* toggle button, to select all items in your selection (or, CTRL-A):

🔦 Items 🛛 Menu 🔍 Vie	Edit Functions	Print Import / Export	» Assortment:Op	ple (Belgie) (OPI	Р_В
🎾 🗸 🛛 batten				2.	
filter	Search deselect	Details Screen Layout	Price Reference date	Help	
Navigation	🔊 🔺 🔺 Supplier	A	Item no. Al	breviation	Item description
Price Information	OPPLE BE		<u>140043898</u> pc	e	LED E T5 batten 600 9W 800lm 3000K CT
Surcharges	OPPLE BE		<u>140043899</u> pc	e	LED E T5 batten 600 9W 800lm 4000K CT
	OPPLE BE		<u>140043900</u> pc	e	LED E T5 batten 1200 18W 1600lm 3000K CT
Own alternatives	OPPLE BE		<u>140043901</u> pc	e	LED E T5 batten 1200 18W 1600lm 4000K C1
Accessories	OPPLE BE		<u>140043902</u> pc	e	LED E T5 batten 900 11W S 3000K BL
Attachment	OPPLE BE		140043903 pc	e	LED E T5 batten 600

4. Go to the *Import/Export* tab and click on the *Item exports* button:

🔦 Items	Menu	View	Edit	Functions	Print	Import / Export	<b>*Assortment:</b> Opple (Belgie) (OPP_B		PP_B
batten		- Q	. 🔺	4		32	. 📉 .		2.
_		Sear	ch Expor	t Import	Manage layout	s Excel Import	Excel Update	Item exports	Help

5. In the pop-up window:

Item exports				1	- (
Item exports					
Send export to	Yorick.Elling@op	ople.com			
Software package	Other		¥		
Free text export	🔍 Yes 🖲 No				
tem Format	PAB 2.03		T		
Prices	Gross Prices		•		
Products (product.txt / ProductData.xml)	🔘 Yes 🖲 No				
eatures (PAB prodspec.txt / ProductData.xml)	🔍 Yes 🖲 No				
.ttachmentIndex2.txt	🔍 Yes 🖲 No				
o classification system	EDynamic		Ŧ		
inks (links.txt)	🔍 Yes 🖲 No				
1anufacturersinfo in export	🔍 Yes 🖲 No				
Changes since:					
rice Reference date:	24/06/2019				
Start Date	19/02/2018				
and Date					
Country	Netherlands		 	- 💥	
anguage	nl-NL Dutch (NL)			- *	
Catalog version	04 2018				
add images + attachments	Yes  No				
-					
			Export	Close	

- a. Send export to: enter an email address; the export will be sent to this address
- b. Software package: should wish to export in a software-specific format, select a package. If not, select *Other*:

Free text export     Compano: GA-Software       Item Format     Compano: InstallCalc       Item Format     Building Infosys: Install Office (t / m K40.14.008)       Country     Building Infosys: Install Office (from K40.14.009)       Language     InstalLogic: Soft Hand       Prices     Syntess: Atrium / Prism	Software package	Other	•
Compano: InstallCalc Item Format Building Infosys: Install Office (t / m K40.14.008) Country Acto: Easy Project / MyProject Language InstallLogic: Soft Hand Prices Syntess: Atrium / Prism	Free text export		
Country Building Infosys: Install Office (From K40.14.009) Acto: Easy Project / MyProject Language InstalLogic: Soft Hand Prices Syntess: Atrium / Prism		Compano: InstallCalc	
Country     Acto: Easy Project / MyProject       Language     InstalLogic: Soft Hand       Prices     Syntess: Atrium / Prism	Item Format	Building Infosys: Install Office (t / m K40.14.008)	
Acto: Easy Project / MyProject       Language     InstalLogic: Soft Hand       Prices     Syntess: Atrium / Prism	Country	Building Infosys: Install Office (from K40.14.009)	
Language InstalLogic: Soft Hand Prices Syntess: Atrium / Prism	Country	Acto: Easy Project / MyProject	
Prices Syntess: Atrium / Prism	Language	InstalLogic: Soft Hand	
	Prices		
	Frices		

- c. Free text export: No
- d. Item Format: Choose according to which format the data should be exported:

Send export to	An and a second s
Software package	Other 🗸 🗸
Free text export	🔾 Yes 🔍 No
Item Format	Sales005
Prices	PAB 2.0 PAB 2.03
Products (product.txt / ProductData.xml)	INSBOU 003
features (PAB prodspec.txt / ProductData.xml)	INSBOU 004 Sales005
Classification system	Salestos Bmecat31
Changes since:	Bmecat42
Price Reference date:	Datanorm 4.0 IGH
Einddatum	ARGE11
Country	ARGE12 #OpenDataCheck
Language	nl-NL Dutch (Netherlands)

<u>Note</u>: The following export options differ depending on the standard format which was chosen. For unique options the corresponding standard is shown in parenthesis.

- a. Prices: select which prices should be exported
- b. Including cancelled features: (BMECat)
- c. Products: Yes/No; choose whether to export Product class
- d. Features: Yes/No; choose whether to export Product class features
- e. AttachmentIndex: Yes/No; export fixed length text file containing product/item number and corresponding attachment(s); automatically included for INSBOU004 and SALES005 export formats.
- f. To classification system: choose which classification should be used when exporting the classification data
- g. Changes since: Only export data for items that have been changed since this [date]
- h. Links: Yes/No; export all links to internal/external URLs
- i. Manufacturersinfo in export: Yes/No; choose whether to export manufacturer info
- j. Price Reference date: Only export prices (price records) up until and including this [date]
- k. Start Date: (ARGE 11/12, BMECat)
- I. End Date: (ARGE 11/12, BMECat)
- m. Country: Country of origin
- n. Language: select in which language data should be exported
- o. Guideline: (BMEcat)
- p. HTML text: (BMEcat)
- q. Catalog version: (BMEcat)
- r. Customer organization: (BMEcat)
- s. Add images + attachments: (ARGE11/12), export a zip-file including images and other attachments

<u>Note</u>: Detailed information on exporting data is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

#### 11.1.3 Country-specific fields

On products and items, country-specific fields for exports and certain *industry formats* (for example, for *BMEcat 2005*) can be enabled, such as *UBA Positiv Liste* (Germany) or *LIV-number* (Finland).

Country-specific fields can be enabled or disabled per country via the Country table in the Configuration overview. This applies to country-specific ETIM attributes as well as other country-specific fields, such as LVI number, SEG number, UBA positive liste etc.

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germany	Search All	Details Screen Layout	🕜 🗸				
Navigation	^ (۱	Code Description		ISO Code	Currency code	Country number	Use c
Configuration		DE Germany		DEU	EUR	49	
		📄 Erit - Germany					
Edit		Country Translatio	ns				
Autofill		Code		DE			
Add		Description		Germany			
Modify		ISO Code		DEU			
	<u> </u>	Currency code		EUR			
Delete record(s)		Language		de-DE German (	Germany)	- 💥	
Functions		VAT Rate high		19.00	%		
Manipulate		VAT Rate low		7.00	%		
<b>Aa</b>		Country number		49			
		Use country-specific fields		● Yes ○ No			
			Edit previous	Edit next	Save record	Cancel	_

<u>Note</u>: Detailed information on country-specific fields is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

#### 11.1.4 Metric/imperial system fields

The conversion of Imperiale to Metric measures and vice versa is done via user-defined fields and their *mapping* to ETIM attributes. See also the <u>Manual Metric/Imperial</u>.

However, the **Height**, **Length**, **Width**, **Weight**, **Volume** system fields and their units, such as **Meter**, **Kilo** and **Cubic Meter**, are listed as USA country-specific fields *and* are available when enabled at the USA country. When a system field is filled in, its Metric or Imperial counterpart is calculated and filled in.

<u>Note</u>: Calculation of Metric or Imperial values is automatic as soon as one of the two fields is filled in. By removing the checkmark next to 'automatic', the automatic value can be overwritten with a self-filled value. This can be useful, for example, for nominal values, where a calculated value of **50.8** is equal to the nominal connection size **50**.

<u>Note</u>: The metric value is leading in the conversion. However, the Imperial value for each product/item can be manually 'overruled' by removing the checkmark from 'Automatic'.

💕 🌮 🛄

	cription (product) 🔪 Techr	ical description (product) 🔨 Additiona	al 🔨 User-defined field	s Translations	Country-specific fie
Denmark					
EL number					
/VS number					
Finland					
#FI_LVINumber					
Sweden					
SEG number					
RSK number					
Jnited States					
	0.59	Inch 🗹 Automatic			
Height (imperial)	0.59 0.47	Inch 🗹 Automatic Inch 🗹 Automatic			
Height (imperial) Length (imperial)					
Jnited States Height (imperial) .ength (imperial) Width (imperial) Size unit (imperial)	0.47	Inch 🗹 Automatic		,	
teight (imperial) .ength (imperial) Width (imperial) Size unit (imperial)	0.47	Inch 🗹 Automatic			
Height (imperial) Length (imperial) Width (imperial)	0.47 0.59 INH Inch	Inch 🗹 Automatic Inch 🗹 Automatic			• *
łeight (imperial) Length (imperial) Vidth (imperial) Size unit (imperial) /olume	0.47 0.59 INH Inch 0.00	Inch 🗹 Automatic Inch 🗹 Automatic		,	

#### 11.1.5 Imperial conversion for UDF type Table value

For user-defined fields of type *Table* value, a Imperial value can now also be filled in (extra field). This value is converted from the Metric value and cannot be adjusted. Associated ETIM attributes are provided with an additional field for an Imperial value; This too cannot be changed.

#### 11.2 Custom export format

Should you wish to export data from COS using your own custom data layout, you have two options:

- Export with screen layout
- Export with custom layout

#### 11.2.1 Export with screen layout

Any records in COS can be exported using the Overview of an entity:

- 1. Navigate to the Entity where you want to export data records.
- 2. On the *View* tab, select one of the existing screen layouts (or make a new one):

			Import / Export	Print	dit Functions	View Ed	Menu	Items
. (2)								۶.
	Price Reference da	•	Article description	Details	Search All			filter

3. Go to the *Import/Export* tab and click on the *Export* button:

4. In the pop-up window, set the option *Use screen layout* to **Yes**. <u>Note</u>: Leave the Prepare for Import option set to **No**:



5. Next, click on the *Export* button. This will generate an Excel file containing your data.

<u>Note</u>: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

#### 11.2.2 Export with custom layout

Alternatively, you can design your own export layout.

To export with your own screen layout:

- 1. Navigate to the overview of data you want to export
- 2. Go to the *Import/Export* tab and click on the *Export* button:

Products	Menu View Edi	it 🔪 Fund	ctions Print	Impor	rt / Export
ا . 🔇		- 🤇	٨		<li>? .</li>
Filter		Search	Export products	Import	Help

3. In the pop-up window:

🤗 🌮 🛄

Export products				
Export products				
Jse screen layout	🔾 Yes 🖲 No		_	
Export layout			▼ × +	
Prepare for import	O Yes 💿 No			
Summary				
Export view: Products Filter: Selection: product: '140043898 LED	E T5 BATTEN 600 9W 800LM 3000K CT (lan	ger) Opple 069567126662	15'	
	Conversions	Export	Close	

- a. Use screen layout: Set to No.
- Export layout: Either select a premade Export layout, or create a new one using the +-button; The process for designing the layout is similar to <u>10.4.2</u> <u>Custom import layout</u>.
- c. Prepare for import: Set the option *Use screen layout* to **No**.
- 4. Next, click on the *Export* button to start the export. This will generate an Excel file containing your data.

<u>Note</u>: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

#### 11.2.3 Export for updating data

Data in COS can be updated using a combination of Export and Import. The data is exported as a special ExcelForImport file. Data in this file can be edited and then imported back into COS.

Any Excel export layout can be used to create an *ExcelForImport-file*, by setting the *Prepare for import option* to *Yes:* 

HU122201BE60	DP drukverh 10mn v/tanw RVS z/toerreg.nom 2m3/h-118kPa G1 1x230V P		
Export products			$\times$
Export products			
Use screen layout	○ Yes		
Export layout	Excel export lay-out 'test' on Screen products	- <b>*+</b> /	
Prepare for import	● Yes ○ No		
Summary			
Export overzicht: Products Filter: Selectie: de 21 geselecteerde products			

The resulting Excel file will be named COS-ExcelForImport-[ENTITY]-[DATE]-[TIME].xlsx

<u>Important</u>: When renaming an ExcelForImport file, always make sure the filename starts with COS-ExcelForImport, otherwise the update import will not work properly.

To update data, edit this ExcelForImport-file with Microsoft Excel. Subsequently, use the *Import function* in COS to import the updated data.

<u>Important</u>: Worksheets in an ExcelForImport file are *protected*; should you remove this protection, then Compano cannot guarantee that any changes in the file will be imported correctly.

<u>Note</u>: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the <u>Compano Help website</u>.

# 11.3 HTML-formatted data

Certain data fields in COS can contain HTML formatting code, for instance the *Commercial Description* field. When exporting these data fields, please note:

- Custom export: The HTML-code is stripped on export; the export file will contain *no* HTML-codes.
- Export for import: The HTML-code is exported; the ExportForImport-file will contain HTML-codes, which can be updated and imported back into COS.

# **11.4 Automated exports**

Data can be automatically exported using Periodic Tasks. More information can be found in the *Manual Periodic Tasks*, which is available from the <u>Compano Help website</u>.

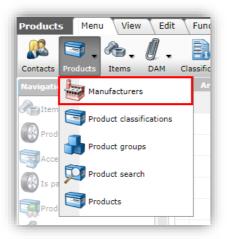
# 12 Manually entering data

Importing data is usually the preferred method for data entry, however manually adding data is also an option. This chapter describes how to add product data, generate an item based on a product and complement the item data. Adding product and item data is also discussed.

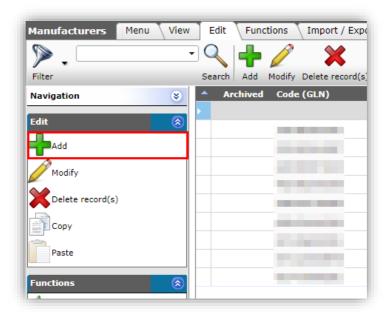
# 12.1 Add manufacturer

To add a (new) manufacturer:

1. Through the Menu, go to *Products > Manufacturers*.



2. Under Edit, click on +Add to add a new manufacturer:



3. In the pop-up window:

Add - New manufacturer		
Manufacturer Organization	Item manager Translations	
Code (GLN)	(1) 4013341000000	
1anufacturer		
.ogo	()	
1anufacturer type	(1) Manufacturer	
ata manager	· · · · · · · · · · · · · · · · · · ·	
roduct number template		
	Add next record Save record Ca	ncel

Manufacturer tab

- a. Code (GLN): Enter the Global Location Number of the manufacturer
- b. Manufacturer: Enter a name/description of the manufacturer
- c. Logo (optional): Upload a logo of the manufacturer
- d. Manufacturer type: Select the manufacturer type:
  - i. Manufacturer: Default option.
  - ii. *Standard manufacturer*: Used with standardised products (standardisation system).
  - iii. Unknown: No longer used (Artikelbeheer.nl)
- e. Data manager (optional): Select a relation who is responsible for data management of product data.
- f. Product number template (optional): Products can now be copied while retaining all product data, including classification. A product number for the new product will be generated, based on the product number template. For instance, 00000-00 denotes a number template of 5 digits, a dash and 2 more digits.

<u>Note</u>: The #-character can be used as a wildcard in the template. For instance, if you have two product number variants, NA-0000 and RX-0000, then the product number template should be ##-0000; thus products with both number variants can be copied.

Manufacturer	Organization	Item manager	Translations		
Organization		()			<b>-</b> X
Number		RE1900	04		
Name					
Short name					
Communications					
Telephone					
Visiting address					
Street + house nun	nber				
Zip code					
City					
Mailing address					
Different postal add	lress	⊖ Yes	🖲 No		
Street + house nun	nber				
Zip code					
City					

a. Organization: Optionally, select an Organization from the available relations.

#### Item manager

Manufacturer Organization	n Item manager Translations	
Central manufacturer	- × ×	₽
inks		
Deeplink template		
Product image URL	http://catalogus.manufacturer.nl/f.asp?f=photo.jpg&art=%prdcode%	
Product drawing URL	(1) http://catalogus.manufacturer.nl/f.asp?f=drawing.jpg&art=%prdcode%	
Settings		
DataOwner	() <b>The state of the state of t</b>	₽
	Add next record Save record Can	cel

- a. Central manufacturer (optional): Select a central manufacturer.
- b. Deeplink template: Refer to a template for the deeplink to products, for instance: https://products.my-compano.com/f.asp?f=foto-%code%.jpg
- c. Product image URL: Set a template for the product image
- d. Product drawing URL: Set a template for the product drawing
- e. DataOwner: Select the data owner for data pool Artikelbeheer.nl; the product data of this manufacturer can only be edited and transferred to Artikelbeheer.nl by this data owner.
- 4. Save by clicking on *Save record*.

#### URL wildcards

The following 'wildcards' can be used to generate the correct URL for deeplinks, images or drawings:

- %code%: the product code
- %prdGTIN%: GTIN of the product

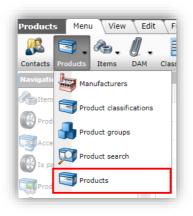
🍠 🌮 💭

- % prdgroup%: product group code
- %erpcode%: ERP code
- 5. Save by clicking on *Save record*.

## 12.2 Add individual product

To add a product:

1. Through the main menu, go to *Products > Products* 



2. Under *Edit* click on *+Add:* 

Products	Menu	View	Edi	t Fund	tions	Print	Import / E>
_ 🔇			•		♣		×
Filter				Search	Add	Modify	Delete record(s
Navigation			*	Ar	chived	Man	ufacturer Descr
Edit			۲	•		1 and	
Add						-	
Modify							

3. In the pop-up window:

Product tab

General       UNSPS code       Organy code       Group (masterdata)       Brand (product)       Image: Ima	Code     112 Second       Short description (product)     LED E T5 BATTEN 600 9W 800LM 3000K CT       Description (product)     1 LED E T5 BATTEN 600 9W 800LM 3000K CT longer       GTIN     06956712666215       Company-specific product code     1       EXP code     1       Country of origin     10 Duitsland       ProductPublish     0 n internet       UNSPS code     1       Group (masterdata)     Image: Construction of the construction of	Product	Classification Model Commercial description (product) (en)	Technical de
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Company-specific product code  ERP code  ERP code  Country of origin  ProductPublish  On internet On internet On webshop ERP Datapool  Calculation  General  UNSPS code  Froduct group code  Group (masterdata)  Erand (product)  Erand (product)  Erand Era	Company-specific product code  ERP code  ERP code  Country of origin  ProductPublish  On internet On internet On webshop ERP Datapool  Calculation  General  UNSPS code  Froduct group code  Group (masterdata)  France  Froduct)  Erro Erro Erro Erro Erro Erro Erro Er	Description (product)	LED E T5 BATTEN 600 9W 800LM 3000K CT longer	
ERP code	ERP code	GTIN	06956712666215	
Country of origin  ProductPublish  On internet  On internet  On internet  In catalog  Conwebshop  ERP  Datapool  Calculation  General  UNSPS code  Product group code  Group (masterdata)  Brand (product)  ET5	Country of origin  ProductPublish  On internet On internet On internet On webshop ERP Datapool  Calculation  General UNSPS code  Product group code G Group (masterdata) Brand (product) G ET5	Company-specific product code	1	
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Group (masterdata)	Group (masterdata)   Group (masterdata)  Brand (product)  Series (product)	UNSPS code		
Brand (product)   Series (product)	Brand (product)   Series (product)	Product group code	1	
Series (product)	Series (product)	Group (masterdata)		- *
		Brand (product)		
Type (product)	Type (product) (1) Batten	Series (product)	[] E T5     []	
		Type (product)	Batten	

- a. Manufacturer: Select a manufacturer
- b. Code: Enter the product code
- c. Short description: Enter a short description for the product (max. 70 characters)
- d. Product description: A longer description for the product (max. 256 characters). <u>Note</u>: Short and long description need to be different to be accepted by 2BA and InstallData data pools.
- e. GTIN: Enter the unique international product identifier.
- f. Company-specific product code (optional): Enter a code for internal product reference which is different from the Product code.
- g. ERP code (optional): Enter a code by which the product is identified in the manufacturers ERP system.
- h. Country of origin: Select the country where the product was produced.
- i. Publication: Select the publications in which the product should appear, for instance, your webshop.
- j. UNSPS: Enter the *United Nations Standard Products and Services Code*. The UNSPS code is a hierarchical coding system to classify both products and services for use in eCommerce. It is a hierarchy with four levels that is coded as an eight-digit number.
- k. Group Code: Enter the product *Group* code.
- I. Brand: Enter the Brand name.
- m. Series: Enter the product Series.
- n. Type: Enter the product Type.

Other tab

Other			
Standard Product	1		- X+
Status			
Available	Running out	<b>~</b>	
BIM status	None	🔿 📟 Ready	
	🔿 🖴 Under construction	🔿 🖬 Test	
Predecessor code	1		
Code successor	®		
GTIN predecessor	(1)		
GTIN successor	()		
ADR			
Hazardous Material	🔿 Yes 🖲 No		
Batteries included	🔿 Yes 🔿 No 🖲 Unknown		
RoHS Indication	Unknown		
Has CE marking	🔿 Yes 🔿 No 🖲 Unknown		
Has Safety Data Sheet (SDS)	🔾 Yes 🔿 No 🖲 Unknown		
Size Units			
Height			
Length			
Width			
Size Unit			- 🗙
Volume			
Volume Unit			- ×
Net Weight	195.0000 kilograr	n	
Weight Unit	Kilogram		<b>-</b> ×
data			
Start date			
End Date	· · · · · · · · · · · · · · · · · · ·		
Import Time	06-11-2020 14:00 🔟 🙆		

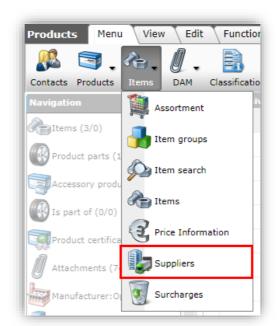
Additional product information can be filled out on the *Other* tab, including:

- a. Available: Set the *Availability status* of the product.
- b. Predecessor / Successor: Enter the *product/GTIN codes* for the predecessor and/or successor products.
- c. ADR: Enter product safety information.
- d. Size: Enter product size and weight information.
- e. Data: Set dates for introduction and/or end-of-life of the product.
- 4. Optionally add additional product information on the other tabs, such *as Commercial description, Technical description, User defined fields, Translations.*
- 5. Save the product.

## 12.3 Add supplier

To enter a (new) supplier:

1. Through the Menu, go to *Items > Suppliers*.



- 2. Under Edit, click on +Add.
- 3. In the pop-up window:

Supplier tab

	Hisense Climate Solutions by	_
Add - New supplier		
Supplier Organization	Item manager Links Memo Translations	
Organization	1	•
Code	and the second second second	
Description		🗹 Automatic
Supplier		
Logo		
Condition assessment	1 Exact	
GLN code		
Manufacturer		- **
Barcode prefix		
	Add next record Save record	Cancel

- a. Organization (optional): Optionally select an Organization. Note: Organization information can be entered through the *Menu > Contacts > Organizations*.
- b. Code: Enter a letter code for the supplier. <u>Note</u>: The letter code must consist of at least 4 letters, for instance VHMIJ.
- c. Description (optional): Enter a description for the supplier.
- d. Supplier: Enter a short description for the supplier. Recommended is to use the full supplier name. If this is a long name, it is advisable to enter a shortened version.
- e. Logo (optional): Upload a logo for of the supplier.
- f. GLN code (optional): Enter the Global Location Number of the supplier.
- g. Manufacturer: Select the manufacturer to which items of this supplier are to linked.

#### Links tab

۷	Hisense Clima	te Solutions B	SV.	
5 📄 Add - New supplier				
Supplier Organization	Item manager Links	Memo	Translations	
<sup>2</sup> Deeplink template				
1 Image deeplink items	(1)			
Drawing deeplink items	(i)			
Customer number	(1)			
3 User name	(i)			
Password	i			
	Add ne	ext record	Save record	Cancel

- h. Deeplink template: Refer to a template for the deeplink to items.
- i. Image deeplink items<sup>12</sup>: Set an URL-template for the item image
- j. Drawing deeplink items: Set an URL-template for the item drawing
- k. Access to supplier website: If you have an account which lets you access a suppliers website for download of information, you can use the following fields:
  - i. Customer number: Your customer number at supplier.
  - ii. User name: Your username, as you use it on the supplier's website.
  - iii. Password: Your username, as you use it on the supplier's website.
- 4. Click on *Save record* to save the supplier.

## 12.4 Add assortment

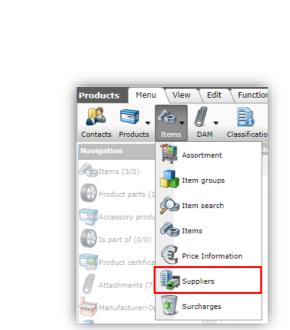
To add an assortment for the supplier:

1. Through the Menu, go to *Items > Suppliers*.

- % prdcode%: the product code
- %prdGTIN%: GTIN of the product
- % prdgroup%: product group code

<sup>&</sup>lt;sup>12</sup> <u>Note</u>: URL a deep links can be built up to an image or drawing. For example <u>http://catalogus.fabrikant.nl/f.asp?f=foto.jpg&art=%prdcode%</u>

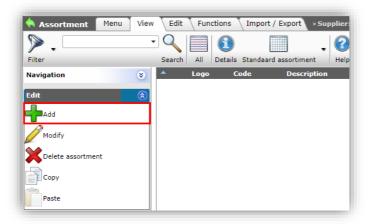
The following 'wildcards' can be used:



2. In the overview, select the supplier and, under Navigation, click on Assortments.

Suppliers Menu Vi	ew Edit Function	s 🔪 Import / Exp	port		
⋟					
Filter	Search All	Details Manage	e screen layouts He	lp	
Navigation	😞 🔺 Archive	ed Code	GLN code	Short name	Description
Assortments					
. 9					
Hems (0/0)					
Logo		COMPANO		Compano BV	and the second s
Memo (0/0)					

3. On the next screen, under *Edit*, click +*Add* to add a new assortment for this supplier:



4. In the pop-up window:

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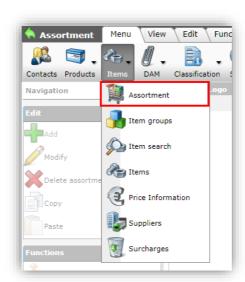
Assortments	Item manager 🔨 Countries	s Memo Translations		
Supplier	i	and the second second		▼ ₩₩∕
Туре	(i)	Purchasing	<b>~</b>	
Item type	(i)	Buy 🗸		
Code	(i)			
Description	(i)			<b>~</b>
Contact code	(1)	Automatic		
Renumber Code	(			
DUNS Number				
Logo	i			
Data manager				- **
Item Number				
Ranking	i			
Data				
Update frequency		Month	~	
Next update	(			
Publication date		( ) III (	2	
Latest export	i		9	
		Add next record	Save record	Cancel

- a. Supplier: This field is automatically set to the supplier you selected.
- b. Type: Set the type of assortment to either *Purchasing* (default) or *Sales*.
- c. Item type: Set the type of item in the assortment to *Buy* (default), *Rentals* or *Service*.
- d. Code: Set a letter code for the assortment. <u>Note</u>: Usually this is the same code as set for the Supplier.
- e. Description (optional): Enter a description for the assortment.
- f. Logo (optional): Upload a (supplier) logo for the assortment.
- g. Data manager (optional): Set a data manager for the assortment. <u>Note</u>: only the data manager can add or edit the assortment.
- 5. Save the assortment by clicking on *Save record*.

# 12.5 Add individual items linked to products

Items *linked to a corresponding product* can be added to the assortment:

1. Through the main menu, go to *Items > Assortment*.



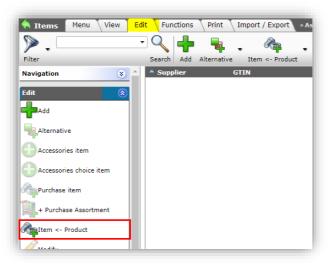
2. Under Navigation, click on *Items*.

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Assortment Menu View	Edit Functions	Import / Exp	ort	
▶.	- 🔍 🔲 🧯			2.
Filter	Search All Det	ails Standaard	_	Help
Navigation 🛞	Logo	Code	Description	
Hitems (0/0)				
		<u>COMPANO</u>	Compano BV	
Logs (0/0)				
Item groups (0/0)				
Transfer rules			1000	
Memo (0/0)			100.000	

3. Next, under *Edit* click on the *Item < Product* button. This way an item will be created, linked to a product already in the system:



- 4. On the next screen, select one or more products:
  - a. (Quick)Filter and/or search one or more products (1)

- b. Select the product(s) by clicking in the overview (2) and click on *Select Product*. The selected product(s) will be moved to the *Shopping cart*<sup>13</sup>.
- c. Next, click on *Transfer* (4) to generate the item(s) based on this product(s).

0	- Q	All Details Somen Lavou	- Car Car Car Transh	Stop Hep	1.	
Sacturer Descr	iption Code	GTIN		Irand	Type	A Quick Filter
	140143898	06955712666215	a und soolen soods cT		T3 EcoMax	Manufacturer
	140141979	06956712666222	LED E TS batten 600 9W		T5 EcoMax	<ul> <li>Opple (OPP)</li> <li>Beand</li> </ul>
	140043900	06956712664239	LED & TS betten 1200		T7 EcoMer	<ul> <li>Opple Series</li> </ul>
	140043901	06956712666246	LED & TS batter 1200	-	Tš EcoMax	Type
	140093902	06950712660253	LED E TS batten 900 11W		TE 5 with switch	Group (masterdata)
	140143903	06956712666260	LED E TS batter 600 9W 5		T3 5 with switch	
	140043904	06956712666277	Id Id 5 2000 8	_	TI 5 with ewitch	Association
	140243967	08956321843472	LEDPandRo G SqS99- 36W-3000-WH-CT		Orte	Product Classes
	140043958	06955321843489	LIDPanelRo-G SqSM- 36W-4000-WH CT		Gria	Productmodels
	140043959	06956321843410	LEDParelie G Sq298-	_	Grile	Product
	140043970	06955321843427	LEDParelle G 54193-		Gria	Other sites
	140243971	04956321843458	LIN 4000 NH CT		Grile.	Deeplask 7a wylaste of Ocula
	140043972	06956321843465	I I CDPareite-G fa290-	_	Grie	Country of origin
	140243973	06956321843434	LEDParelike G Re166-		orie	<ul> <li>Diversion</li> </ul>
	140043974	06955321843481	LEDPareRc-G Rel60- 21W-4000-INH CT		Grie	Status and data Standard Product
	140044049	06456321843731	CT	_	Pole	Spicessing
	140244030	00958321843748	d d utbrighter tradutto-cr		Bracket	Classification
	140244034	06956321843557	Cal LtDPanelRp-G Sqt98-		Surface Module	Included in
	140244055	06956321843564	LEDParaiRc-G Re290- Surface Rodule-CT		Surface Module	
	240044036	08998321843498	I ILEDPareiRt-G 54298-		Surface Hodule	*
tember of Han	ufaiturer Description	Code GTIN	A P Product desce	plion		
1.00 Upp	u.	140241830 0695871	atessaa iii sooke a	épo sw	Shopping cart	

Once the item(s) has been created you can fill out more detailed *Item information*:

- 1. Through the main menu, go to *Items > Items*
- 2. On the View tab, use *Filter* and/or *Search* to find the Item you just created:

tems Menu View	Edit	Functions	Print I	Import / Export					
140043898	Search	Add Access	ories selector	r Article Item <- Pro	duct	Modify	Delete record (s)	Copy Help	
lavigation	<u>م</u>	<ul> <li>Supplier</li> </ul>		5	С	Item no	. Image	Item description	Item description (de-DE)
Price Information (5/0)		0.000				<u>1400438</u>	98 🔬	LED E T5 batten 600 9W 800lm 3000K CT	LED E T5 batten 600 9W 800lm 3000K CT
Surcharges (1/0)					-	1400438	98 🔬	LED E T5 batten 600 9W 800lm 3000K CT	LED E T5 batten 600 9W 800lm 3000K CT
						1400438		LED T5 Batten 600mm	LED Lichtleisten

3. Go to the *Edit* tab and click on *Modify* to change/add any Item information:

tem description	• X+ 043899 e 15 batten 600 9w 800lm 4000k ct e 15 batten 600 9w 800lm 4000k ct 56712666222	
ihort description Lad tem description ① Led Description 1 Description 2 Division ① ① ① ① ① ① ① ③ DBSH Division ② ② ③	e 15 batten 600 9w 800lm 4000k ct e 15 batten 600 9w 800lm 4000k ct 56712666222	
tem description	e 15 batten 600 9w 800im 4000k .cl	
Description 1	56712666222	
Description 2		
STIN () 0699 Own item number () Division		
Dwn item number ()		
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	- 24	
ssortment 🕕	- 26	
condition group code PLU		
Condition Group PLU		
Group Code		
Group (masterdata)	v 🗱	
Inits		
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actors		
lumber CU per OU		
lumber of PU per OU		
1inimum purchase in Order Units 🔹 🕕 10.00	D pieces	
order increment	piece	

<sup>&</sup>lt;sup>13</sup> <u>Note</u>: The shopping cart is limited to 1000 records.

- a. Supplier: Select the supplier of the item.
- b. Item number: The item number is an *item identification code*. Within an assortment, the item number must be unique.
- c. Short description: Enter a description for the item (max. 70 characters).
- d. Product description: Enter a description for the item (max. 256 characters).
- e. Description 1: Only used with the *Arge Neue Medien* export format (max. 40 characters)
- f. Description 2: Only used with the *Arge Neue Medien* export format (max. 40 characters)
- g. GTIN: Enter the Global Trade Item Number for the item.
- h. Own item number: Optional code for internal item reference which is different from the Item Number.
- i. Assortment: Select the assortment to which the item should be added.
- j. Condition group code: Enter the code identifying the condition group for this item.
- k. Group code: Enter the Item Group code. <u>Note</u>: an assortment can be ordered hierarchically based on the MGSI structure. (Main Group, Group, Sub-Group, Item).
- I. Calculation unit: Select the unit which is used for calculation of item cost.
- m. Order unit: Select the unit which is used to order the item.
- n. Number of CU per OU: The number of Calculation Units which make up an Order Unit.
- o. Number of PU per OU: The number of Price Units per Order Unit is a conversion factor which indicates the ratio between the price unit and the order unit, with the purpose of calculating the price per order unit. This is required if it is an orderable item (Code Orderability = TU). It is advisable to reserve 3 decimal places for this attribute.
- p. Minimum purchase in Order Units: The minimum purchase in Order Units indicates the minimum number of units that must be ordered. For example, the minimum purchase in order units for LED bulbs is 10 pieces (i.e. 1 box).
- q. Order increment: Order increment is the step size of the order, based on the minimum purchase. For example, based on the minimum order of 10 pieces (i.e. 1 box) and an order increment of 5, boxes of 10 LED bulbs can be ordered in the quantities 5, 10, 15, 20, 25 etc.

## 12.6 Add surcharge

Surcharges can be entered which will be added to the net price of an item:

- 1. Through the Menu, go to Items > Items.
- 2. Select an Item and, under Navigation, click on Surcharges.

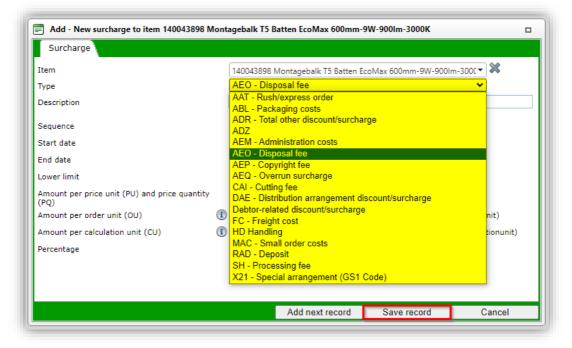
🍠 🌖 💭

🔦 Items 🛛 Menu 🗍 View 🛛 E	dit Functions Print Impor	t / Export × Assortr	nents:
2.		-	12
Including archive	Search All Details	Screen Layout Pri	ce Reference date
Navigation 🛛 🛞 🗅	Supplier	A Item no.	Abbreviatio
Price Information (2)	<ul> <li>And the segment of</li> </ul>	14004389	<u>8</u> pce
	and the second second	14004389	<u>9</u> pce
Item - Item relations	and the supervise	<u>14004390</u>	<u>0</u> pce
(parent) (3)	and the second second	<u>14004390</u>	<u>1</u> pce
Item - Item relations (child)	State of the second	14004390	<u>2</u> pce
Surcharges (1)	and the second second	14004390	3 pce
	and a spin of	14004390	4 pce
Accessories (0)			

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

Surcharges Menu View	v \	Edit	Functions	s 🔪 Import / Ex	port × Assortments:
▶.	- (	2			0.
Filter	S	earch	All Deta	ails Manage scree	n layouts Help
Navigation 🛞		x	Assortmen	it Item	Туре
Partem: 140043898 Montag	Þ		100.00	<u>140043898</u>	AEO - Disposal fee
Assortments:					
Edit 🛞					
Add					
Madify	Î.				

4. On the pop-up screen:



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- a. Item: Is automatically filled-out.
- b. Type: Select a type of surcharge, for example: **AEO Disposal fee**.
- c. Description: Type a description for the surcharge.
- d. Sequence\*: Set the sequence in which this surcharge appears on the overview.
- e. Start date\*: Set a start date for the surcharge.
- f. End date\*: Set an end date for the surcharge.
- g. Lower limit\*: Set a lower limit for the surcharge.
- h. Amount per price unit (PU) and price quantity (PQ) \*: Set the surcharge amount per PU and PQ.
- i. Amount per order unit (OU) \*: Set the surcharge amount per OU.
- j. Amount per calculation unit (CU) \*: Set the surcharge amount per CU.
- k. Percentage\*: Set the surcharge as a percentage of the gross price.

\*) Optional fields

# **12.7 Copying products/items**

Products and items can be copied using either the CTRL-C, CTRL-V hotkeys, or the Copy and Paste option from the Edit menu:

Filter Search Add Modify Delete record Avigation  Fdit Add Add Add Add Add Add Add Add Add Ad	Export
Navigation   Archived Manufacturer Description  Add  Modify Delete record(s)  Line edit on	Z .
Edit (S) Modify Delete record(s) Line edit on	(s) Line edit on Copy
Add Modify Delete record(s) Line edit on	cription Code
Add Modify Delete record(s) Line edit on	<u>140043898</u>
Modify Delete record(s) Line edit on	<u>140043900</u>
Delete record(s)	140043903
Line edit on	140043904
	140043967
Сору	140043968
in Copy	140043969
Paste	<u>140043970</u>

<u>Note</u>: When copying Products and Items, the *GTIN* data field will be left empty in the *copy* as no two products or items can have the same GTIN.

## 12.7.1 Copying products

To be able to copy products, the *Product Number Template* has to be set at the Manufacturer; see also <u>12.1 Add manufacturer</u>.

#### 12.7.2 Copying items

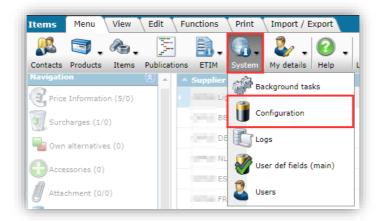
Should your Items be linked to items in a Purchase assortment, this link will *not* be copied to a copy of that item; i.e. the *copy* will not be linked to the same Purchase Item.

## 12.8 Adding product / item groups

Product and item groups are managed through the Configuration menu:

1. Through the main menu, go to *System > Configuration*.

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2. In the next window, click on either *Item Groups* or *Product Groups*.

Configuration Menu View	Edit Functions
▶	!♀, 🔲 🚯 🛛 📝 । ⊘ .
filter	Search All Details Manage Screen layouts Help
Edit 🛞	Image overview Description
Line edit on	Accessory items
Functions	Accessory_products
Manipulate	Alternatives
	Attachment Type
	Attachments
	of the second se
	Conversion tables
	Countries
	O Currencies
	E-Mail Template
	Field orders
	Item Groups
	Languages
	Lavouts
	Packaging forms
	Periodic tasks
	Product list
	Productgroups
	Transfer lines
	§ Units

3. Continuing this example with *Product Groups*, click on *Add*, to add a new product group:

CED modares		
Add - New productgroup		
Productgroup Commercial description	Technical description User def fields Additional text Translations	
Manufacturer	- X+	
Main code	▼ 💥	
Code	WALL	
Description	LED Wall-mounted	
tevel	❶	
	Save Cancel	

Product groups have an hierarchical structure. First, add all level 1 groups, next select one of the level 1 groups and add the level 2 groups. For instance, the level 1 group LAMPS has 7 underlying level 2 groups:

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Productgroups Menu	/iew Edit Fun	ctions 🔨 Import / E	Export	
filter	Search All	Details Screen Layo	+ 🕜 +	
Navigation	🖹 🔺 Code	Manufacturer	Main Description	Description
2	LUMS	1.00		LED Luminaires
Productgroups (7/0)	LAMPS 1	1000		LED Lamps
Products (0/0)	MODU	1.00	LED Lamps	LED Modules
Attachment (1/0)	STREET	1.00	LED Luminaires	LED Road/Streetlight
	FILA	100	LED Lamps	LED Filament Lamps
Configuration	TUBE	100	LED Lamps	LED Tubes
-			Les La La La	LOD D PLU

To add lower level groups:

- 1. Select (1) the group to which you want to add lower level groups
- 2. Under *Navigation*, click on *Productgroups* (2)
- 3. On the next screen, add any level 2 product groups using Add(3):

🔦 Productgroups 🛛 Menu	View Edit	Functions Impo	rt / Export > Product	t <b>group:</b> LAMPS LED Lamps
filter	Search All	Details Screen Lay	out Help	
Navigation 4	Code	Manufacturer	Main Description	Description
	CNDL	08	LED Lamps	LED Candles and Lusters
Productgroups (3/0)	FILA	08	LED Lamps	LED Filament Lamps
Level 3 groups Products (0/0)	HPBS	08	LED Lamps	LED High Power Bulbs
Attachment (1/0)	MODU	08	LED Lamps	LED Modules
	REFL	0.0	LED Lamps	LED Reflector Lamps
Productgroup:LAMPS LE	STD	08	LED Lamps	LED Standard Bulb
	TUBE	08	LED Lamps	LED Tubes
Edit 3 (k) Add Modify		Level 2 g	roups under L/	AMPS

4. Each level 2 group can, in turn, have further lower-level groups (4), and so on...

## 12.8.1 Assigning product / item groups

To assign products to a product group, simply add the group code to the product:

Product Classification	Model \Cor	nmercial description	Technical description	Status	User def fields	\ Translations	$\mathbf{X}$
General							
Manufacturer	i	Opple (OPP)			•	·₩₽∕	
Code	(1	140043898					
Product description	(	LED E T5 batten 600 9	9W 800lm 3000K CT				
		Automatic				/	
GTIN	G	CONTRACT					
#CompanyCode Country of origin		China				- 💥	
	C.	China				•••	
Division Group Code	(i	E_T5	LED T5 Batten EcoMax				
Group (masterdata)		E_T5 LED T5 Batten Eco	Max			- 💥	
Brand	(						
Series	(1	LED Batten					
Туре	(i	T5 EcoMax					]
					Save	Cancel	

🍠 🌮 💭

## 12.8.2 Copying product / item groups

Product and/or Item groups can be copied from one manufacturer to another, or from assortment to another.

<u>Note</u>: The copy-actions need to be performed on the Manufacturer > Product groups overview, or the Assortment > Item groups overview

# **13 Appendix A: FTPS access**

Implementation of an FTPS account for (new) Compano customers consists of:

- Adding one or more FTPS-user accounts (by Consultant)
- Automated generation of account folders and settings (by FileZilla FTPS server)
- Optional: FTP account management (Compano customer)

Three types of FTPS-accounts can be added:

- Standard FTPS user: Used for downloading (large) analyses and other (data)files generated by the application. A free FTPS user account is included with most Compano applications. Standard FTPS users have access to the folders:
  - o *Download*
  - o Attachments
- Upload FTPS user: Used for uploading data; i.e. (automated) import. This extra FTPS user is only available as an extra paid service. Please contact <u>sales@compano.com</u> for options and pricing. Upload FTPS users have access to the folder:
  - o Uploads (and any subfolders)
- Download FTPS user: Used for downloading data from a specified (set of) folder(s). This extra FTPS user is only available as an extra paid service. Please contact
  - sales@compano.com for options and pricing. Upload FTPS users have access to the folder:
    - o Downloads (and any subfolders)

# 13.1 Add FTPS user

The first FTPS account for Compano customers is free of charge. This concerns a standard FTP account with access to FTPS folders *Downloads* and *Attachment*. Any extra, paid-for, FTPS-accounts can be used to automate data imports, or give access to upload or download information to specified folder(s).

Please contact <u>sales@compano.com</u> for more information on options and pricing.

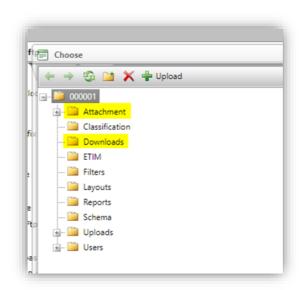
Note: It is recommended to have FTPS accounts added by a Compano consultant.

# 13.2 FTPS-folder access

Access to FTPS-folders depends upon the *type* of FTPS-user.

#### 13.2.1 Standard FTPS-user

A standard FTPS-user will have access to the folders:



- Attachment: Used for uploading attachments for products, items, product groups, item groups, feeds, etc.
- Downloads: Used for downloading large data files or reports; some application functions can generate large, usually compressed, data files. These files can be downloaded from this location.

## 13.2.2 Extra FTPS-user

For extra FTPS-user accounts access to additional folder(s) can be set, such as:

- Uploads: Used for (automated) data file uploads. When uploaded files are to be used for imports, it is recommended to add an additional Import subfolder under **Uploads**.
- Downloads: To allow only download access to the **Downloads** folder or any subfolders thereof.

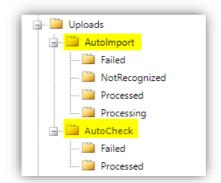
For automated imports, two additional subfolders can be added:

- AutoCheck: An Industry Standard data file (PAB, INSBOU, SALES or BMEcat) placed in this folder will be compared *within the hour* with the current dataset, based on Global Location Number (GLN)<sup>14</sup>. A report will be send to the e-mail address indicated in the parameters.xml of the data file. <u>Note</u>: The file must *always be manually* placed in the *AutoImport* folder for actual processing, unless the following is indicated in the parameters.xml of the data file:
   <PublishMethod>AutoAcceptStagingData</PublishMethod>
- AutoImport: Any data file placed in this folder will be imported and processed within the hour. For Industry Standard data files, a report is sent to the e-mail address indicated in the parameters.xml of the data file. For other data files, a report is available through the Log files.

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<sup>&</sup>lt;sup>14</sup> When offering an Industry standard file (PAB, INSBOU, DICO/SALES, BMEcat) and a *new GLN* is detected in the dataset, a new Assortment, Manufacturer and Supplier will be created.

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<u>Note</u>: *Failed*, *Processed* and *NotRecognized* folders will be generated automatically after a failed/successful import.

# 13.3 Add FTPS folders

Additional folders need to be added by the Compano consultant. <u>Note</u>: This includes the Uploads (root) folder!

To add a folder:

User Groups Memo		
Jser interface	FTPS	
Contact (local)		
Jsername	UPLOAD	
mail		
anguage	en-GB English (United Kingdom) 👻 💥	
lame		
TP		
Jsername	C03035UPLOADPreRelease	
RootMapFtp	Import x /Data/Environments/000003/Uploads/Import	
Security		
Allowed IP Addresses	(1) 58.151.11.17	
Active user	es ○ No	
icense		
Read only	🔿 Yes 🖲 No	

2. In the next pop-up window, click on the *folder* + icon:



3. Enter a folder name, for instance Uploads:

🌱 🌮 💭

📄 Cho	ose	
+ -	🕨 😘 🔛 🗙 🕂 Upload	
	000003	
÷(	Attachment	
	Enter the new folder name	X
	Enter the new folder name Uploads	

4. Click on OK to add the new folder.

<u>Note</u>: The file explorer is similar to Microsoft Explorer and can be used to add folders and different levels.

# 13.4 Security settings

#### 13.4.1 IP address

To further prevent unwanted access, logon attempts can be limited to a (set of) IP addresses:

Add - New user				
User Groups Memo				
Contact (local)				- 💥
Name	ftp			
Username stem (FTP)	FTP_Opple			
Email	ftp@opple.nl			
Language	nl-NL Dutch (Netherlands)			- 💥
FTP				
Username	C03035FTP_OpplePreRelease			
RootMapFtp	x			
Security				
	80.20.30.30;192.168.1.2;88.15.12	.20/24		
Allowed IP Addresses	3			
Active user	• Yes O No			
License				
Read only	🔿 Yes 🖲 No			
User interface	FTPS 🗸	j –		
	Add r	next record	Save record	Cancel

Notes:

- Setting Allowed IP Addresses is mandatory<sup>15</sup>.
- Multiple allowed IP addresses should be separated by semicolons;

<sup>&</sup>lt;sup>15</sup> IP-addresses are mandatory as of April 1st, 2023.

• IP ranges such as **88.15.12.20/24** are allowed.

When in doubt, ask your system administrator or IT department about the correct IP Address for your organization.

When *working from home*, make sure to add your public IP address. This can be **found by googling 'what is my ip' or visit:** <u>https://whatismyip.com/</u>

#### 13.4.2 FTPS security and firewall settings

The FTPS protocol uses *encrypted data transfer* for which the following settings are mandatory:

- Encryption: Use explicit FTP over TLS on port 21
- Data transfer: Ports 64441 through 64447

Inform your system administrator or IT department about the correct settings for ports in the firewall **of your organization's network**.

For questions, please contact Compano Support, <u>+31882667202</u> or <u>support@compano.com</u>.

#### 13.4.3 Read only

By setting the Read only option to **Yes**, the FTPS-user can only make use of FTPS to download any data. Also, this user **will not 'see' any other folder(s) on the FTPS server and will not be able to** delete any files on the FTPS server.

# 13.5 FTPS folder recycling (clean-up)

FTPS folder are regularly 'recycled', which means their content is cleaned-up. The recycle schedule is as follows:

FTP folder	Production application	Prerelease application
Downloads / Uploads	Every 6 months	Every 6 months
Temp	Every 13 months	Every 4 months

For files larger than 1 Gb, a shorter period is used when cleaning old files in the *Downloads* directory. In a Production environment they are removed after 2 weeks and in a PreRelease/Test environment after 1 week. In addition, the *Uploads* directory is now included in the cleanup. It uses the same periods as with *Downloads*.

## 13.6 Periodic tasks

Periodic tasks, such as *Import products*, also depend upon FTPS. This way, automated imports can be set. For a detailed explanation of the automated import, please see contact your Compano consultant or <u>support@compano.com</u>.

## 13.7 FTPS URLs per application type

Application type	FTP URL		
Production	Ftps.compano.com		
PreRelease	FtpsPreRelease.compano.com		
Test	<pre>FtpsTest.compano.com</pre>		

## 13.7.1 FTPS port settings (firewall)

FTPS communication uses a custom *port range*. The following port range on a *firewall* should be set to *allow* traffic:

Port range: 64441 - 64447

# 13.8 Industry standard data (AutoImport/AutoCheck)

FTPS can be used in combination with the FTPS folders **AutoImport** and/or **AutoCheck** to automate the import of industry standard data files PAB, DICO/INSBOU, DICO/SALES or BMEcat.

<u>Note</u>: This combination makes use of an extra FTPS user account for uploads and needs to be setup by a Compano consultant. Please contact <u>sales@compano.com</u> for options and pricing.

#### 13.8.1 Submit data to Artikelbeheer.nl

For use of FTPS to submit data to Artikelbeheer.nl, please see the manual *Aanleveren aan Artikelbeheer.nl* (Dutch only) which is available from the <u>Compano Help website</u>.

#### 13.8.2 Submit data to own assortment

<u>Important</u>: The FTPS protocol uses encrypted data transfer. For added security, the upload of data is only allowed from certain IP addresses.

Delivery via FTPS:

- The data must be offered in one of the following industry formats: *PAB, INSBOU, DICO/SALES or BMEcat).*
- On the FTPS server there are 2 folders ready:

₩ •   <b>B = = = # 2 # 8 </b> 1, 1, = 0, 9 <b>%</b>			
fost: Gebruikersnaam: Wachtwoord:	F	oort: Snelverbinden 💌	
atus: Ingelogd atus: Mappenlijst ophalen			
itus: Mappenlijst van "/" opmaken geslaagd itus: Mappenlijst van "/AutoImport" ophalen			
atus: Mappenlijst van "/AutoImport" opmaken geslaagd			
atus: Mappenlijst van "/AutoImport" ophalen atus: Mappenlijst van "/AutoImport" opmaken geslaagd			
okale site: C:\Users\Henk-Jan Boven.COMPANO\Documents\eriks\		Externe site: /AutoImport	
Bureaublad			
		- ? AutoCheck	
Deze pc		AutoImport	
T <del>T</del>			~
estandsnaam	Bestand	e Bestandsnaam 3 Bestandsty Laatst gewijzigd	
SALES005.zip	32.331.904	je	
SALES005.zip	32.331.904	Lege mappenlijst	
SALE5005.zip	32.331.904		
SALES005.zip	32.331.904		
SALES005.zip	32.331.904		
		Lege mappenlijst	
	32.331.904	Lege mappenlijst	
pestand. Totale grootte: 32.331.904 bytes		Lege mappenlijst	
estand. Totale grootte: 32.331.904 bytes erver/Lokal bestand Richting Extern bestand Groot		Lege mappenlijst	
vestand. Totale grootte: 32.331.904 bytes srver/Lokaal bestand Richting Extern bestand Groot 8712423016224@Ftps.comp		Lege mappenlijst	
estand. Totale grootte: 32.331.904 bytes rver/Lokaal bestand Richting Extern bestand Groot 8712423016224@Ftps.comp	te Prioriteit Ti	Lege mappenlijst	
8712423016224@Ftps.comp	te Prioriteit Ti 04 Normaal 19	Lege mappenlijst	

 AutoCheck: Data file is compared with current dataset on Artikelbeheer.nl; a report is drawn up and sent. <u>Note</u>: After approval, the file must ALWAYS be manually placed in the *AutoImport* folder for actual processing, unless the parameters.xml of the data file indicate sthe following:

<PublishMethod>AutoAcceptStagingData</PublishMethod>

This is only possible for the PAB, INSBOU and DICO/SALES data file types. A parameters.xml can be added manually to the BMEcat zip file containing the following code:

```
<?xml version="1.0" encoding="utf-8"?><UCProcessParameters
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://www.2ba.nl"><<PublishMethod>AutoAcceptStagingData</Pub
lishMethod><ReportAllCheckDetailMessages>false</ReportAllCheckDetail
Messages><SendReportToEmail>mijn-
email@adres.com</SendReportToEmail><ReportLanguage
/></UCProcessParameters>
```

- AutoImport: Databestand wordt ingelezen en verwerkt. Een rapport wordt verstuurd naar het e-mail adres dat is aangegeven in de parameters.xml van het databestand.
- The data processing via FTPS is automated.

When importing industry standard data into your own assortment, please consider the following:

- Imports of industry standard data *cannot* be scheduled through Periodic Tasks
- Data files placed within folders AutoImport/AutoCheck will be processed *within the hour*.
- The Global Location Number (GLN) in the offered industry standard data file will be compared with the GLNs of existing assortments:
  - In the event of a *match*, you will receive a report in which existing data has been compared with supplied data (when placed in AutoCheck folder), or the existing assortment will be updated (data placed in or moved to AutoImport folder).
  - When there is *no match*, manufacturer(s), supplier and assortment entries are created on the basis of the supplied data file and filled out with the relevant new data. When the data file is placed in the **AutoCheck** folder, you will receive an import analysis report indicating that these entities will be created on import. When the data file is placed in the **AutoImport** folder, these entities are created directly.

<u>Note</u>: Failed and processed folders will be automatically created for all folders used for an Import.

Compano Online Software

# 14 Appendix B: Unit definitions

# 14.1 Units

Price unit (PU), often combined with Price quantity (PQ): Unit on which the gross price is based.

#### Example

When a price is set *per* Price quantity, these units have to be set as follows:

- Price per  $m^2$ : PH = 1, PE =  $m^2$
- Price per 100 m<sup>2</sup>: PH = 100, PE = m<sup>2</sup>

Important: When the unit is **PIECE** (**PCE**), there is sometimes confusion whether *pieces* is intended as Items or Boxes. However, Piece is always meant to indicate an Item, never any other unit, such as Length, Box, Roll etc.

Order unit (OU): Unit in which the item is ordered. This can be **piece**, **m2**, **m**, etc. Calculation unit (CU): Unit used to calculate with this article. This can be a somewhat difficult unit for suppliers to determine. But often also **piece**, **m2**, **m**, etc.

Packaging form: Unit for packaging of the Item, for instance: **Box, Roll, Bucket**, etc. When not known or not packaged, then **Unpackaged** can be used.

# 14.2 Ratios

Furthermore, a number of *ratios* are important:

Number of PU per OU: The number of Price units per Order unit.

Example Suppose an insulation board is ordered per plate (pieces), the price unit is  $m^2$  and the size of the plate is 1000 x 1200 mm = 1.2 m<sup>2</sup>. The number of PU (m2) per OU (pieces) is then 1.2

Number of CU per OU: The number of Calculation units per Order unit.

Example

Suppose an insulation board is ordered per plate (pieces), the calculation unit is  $m^2$  and the size of the plate is 1000 x 1200 mm = 1.2 m<sup>2</sup>. The number of CU (m2) per OU (pieces) is then 1.2

# 14.3 Other variables

Minimum order quantity: The minimum purchase expressed in number of order units. This can, for example, be set to **10** if a supplier always has to take at least **10** rolls of roofing material.

Step size: The step size expressed in number of order units.

Example

When step size is set to 5, orders always have to be in quantities of five (15, 20, 25, etc). In practice, it is recommended to keep it the same as the minimum order quantity.

Enkele voorbeelden van aangeleverde data zijn:

- Dit is een redelijk goed aangeleverd databestand. Enige dat hier niet ok is, is de Besteleenheid Plaat. Dat moet eigenlijk Stuk zijn, maar zetten we aan onze kant in een conversietabel om dus die loopt lekker door.

dikte	Groep	Merk	Korte omschrijving	Lange	Brutopriis	Prijshoeveelheid (PH):	Prijseenheid(PE)
uikte	Oldep	INCIK	Unischnijving	Unschrijving	Diutophija.	(111).	
			PolyTop 30 mm	EPS-100 SE 1000*1200*30			
				mm			
				ongecacheerd			
30	ongecacheerd	IsoBouw		RD 0,80	4,46	1	m2

Dit is een voorbeeld van een bestand waar ik een bewerkingsslag overheen gooi:

Je ziet hier dat de prijs per 100 stuks is, maar het artikel wordt verpakt in een doos met 450 stuks. In de gele kolommen zet ik de verschillende eenheden en verhoudingsgetallen zodanig dat wij ze kunnen importeren. De besteleenheid DS wordt dan bij import weer geconverteerd naar Stuk.