

COS Basics Manual Compano Online Software

Version L5.1

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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

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 Online Software

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 support@compano.com, 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)

Products Menu View Edit	t Functions Print I	mport / Export					
Contacts Products Items DAM	Classification System My	details Help Logout	Menu				70,439
Navigation 🛞 🚔	X Manufacturer Des	cription Code	GTIN	F T Product description	Brand (product)	Type (product)	Quick Navigation
Htems (3/0)	Opple	140043898	06956712666215	LED E TS BATTEN 600 9W 800LM 3000K CT (langer)	LED	E_TS	Quick Filter 🛞
Loft side-	Opple	140043899	06956712666222	LED E TS BATTEN 600 9W 800LM 4000K CT	LED	E_TS	Manufacturer
Left side-	Opple	140043900	06956712666239	LED E TS BATTEN 1200 18W 1600LM 3000K CT	Opple	E_75	Right side-
paner	Opple	140043901	06956712666246	LED E TS BATTEN 1200 18W 1600LM 4000K CT	LED	E_T5	panel
Is part of (0/0)	Opple	140043902	06956712666253	LED E TS BATTEN 900 11W S 3000K BL	LED	E_T5	Group (masterdata)
Product certificates (1/0)	Opple	140043903	06956712666260	Ied e tS batten 600 9w s 3000k bl	LED	E_TS	* Suppliare
Attachments (74/0)	Opple	140043904	06956712666277	O		E_TS	
Manufacturer: Opple (6	Opple	140043967	06956321843472	Overvie	w	E_85	Assortments
	Opple	140043968	06956321843489	4000-wh-ct	Opple	Grille	Assigned classes
Floader group te_13 cc	Opple	140043969	06956321843410	ledpanelrc-g sq298-11w- 3000-wh-ct	Opple	Lekbak	Productmodels
Edit	Opple	140043970	06956321843427	Iedpaneirc-g sq298-11w- 4000-wh-ct	wisa	kraan	MC000138 Perilex socket outlet (re
Add	Opple	140043971	06956321843458	LEDPanelRc-G Re298- 36W-3000-WH-CT	Opple	Grille	MC000176 Panel radiator (1) MC000346 Heat recovery unit for a
Modify	Opple	140043972	06956321843465	LEDPanelRc-G Re298- 36W-4000-WH-CT	Opple	Grille	Product (R)
Delete record(s)	Opple	140043973	06956321843434	LEDPanelRc-G Re166- 21W-3000-WH-CT	Opple	Grille	Deeplink
Line edit on	Opple	140043974	06956321843441	LEDPanelRc-G Re166- 21W-4000-WH-CT	Opple	Grille	Deeplink To website of Opple
	Opple	140044049	06956321843731	LEDHIGHBAY-POLE-CT	LED	PERFORMER	Country of origin Belgie
Copy	Opple	140044050	06956321843748	LEDHIGHBAY-BRACKET10 CT	LED	PERFORMER	General
Paste	Opple	140044054	06956321843557	LEDPanelRc-G Sq598- Surface Module-CT	Opple	Surface Module	Status Succession #
Functions	Opple	140044055	06956321843564	LEDPanelRc-G Re298- Surface Module-CT	Opple	Surface Module	Classification
Manipulate	Opple	140044056	06956321843496	LEDPanelRc-G Sq298- Surface Module-CT	Opple	Surface Module	Additional

3.1 Main menu

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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:

Products Menu View Edit	Functions Print Import / Exp	oort						
		. 0.						
Filter	Search All Details Screen Layout	Help						
Navigation 🛞 🔶	 X Manufacturer Description 	Code	GTIN	F	T Product description	Brand (product)	Type (product)	· · · · · · · · · · · · · · · · · · ·
Agitems (3/0)	Opple	<u>140043898</u>	06956712666215		BOOLM 3000K CT (langer)	LED	E_TS	
Reduct parts (1/0)	Opple	140043899	06956712666222		LED E TS BATTEN 600 9W 800LM 4000K CT	LED	E_T5	
	Opple	140043900	06956712666239		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	
(0/0) Is part of (0/0)	Opple	140043902	06956712666253	2	LED E TS BATTEN 900 11W S 3000K BL	LED	E_TS	
Product certificates (1/0)	Opple	140043903	06956712666260	2	led e t5 batten 600 9w s 3000k bl	LED	E_TS	Overview of Product
Attachments (74/0)	Opple	140043904	06956712666277	2	led 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
	Opple	140043968	06956321843489	1	ledpaneirc-g sq598-36w- 4000-wh-ct	Opple	Grille	
	Opple	140043969	06956321843410		ledpaneirc-g sq298-11w- 3000-wh-ct	Opple	Lekbak	
Edit 🛞	Opple	140043970	06956321843427	2	ledpaneirc-g sq298-11w- 4000-wh-ct	wisa	kraan	
Add	Opple	140043971	06956321843458	2	LEDPanelRc-G Re298- 36W-3000-WH-CT	Opple	Grille	
Modify	Opple	140043972	06956321843465	2	LEDPanelRc-G Re298- 36W-4000-WH-CT	Opple	Grille	
Delete record(s)	Opple	140043973	06956321843434		LEDPanelRc-G Re166- 21W-3000-WH-CT	Opple	Grille	
Line edit on	Opple	140043974	06956321843441		LEDPanelRc-G Re166- 21W-4000-WH-CT	Opple	Grille	
	Opple	140044049	06956321843731		LEDHIGHBAY-POLE-CT	LED	PERFORMER	
= Coby					LEDHIGHBAY-BRACKET10-			

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 E	t Functions Print Import / Ex	port						
▶.	े 🧣 🖉 🗙		. 0.					
iter	Search Add Modify Delete record(s)	Code	GTIN	F	T Product description	Brand (product)	Type (product)	
Jiama (2/0)	Opple	140043898	06956712666215		LED E TS BATTEN 600 9W 8001 M 3000K CT (langer)	LED	E_T5	
Trems (5/0)	Opple	140043899	06956712666222	2	LED E TS BATTEN 600 9W	LED	E_TS	
Product parts (1/0)	Opple	140043900	06956712666239		LED E TS BATTEN 1200 18W 1600LM 3000K CT	Opple	E_75	
Accessory products (3)	Opple	140043901	06956712666246		LED E TS BATTEN 1200 18W 1600LM 4000K CT	LED	E_T5	
Is part of (0/0)	Opple	140043902	06956712666253	1	LED E TS BATTEN 900 11W S 3000K BL	LED	E_T5	Overview of Product
Product certificates (1/0)	Opple	140043903	06956712666260		led e t5 batten 600 9w s 3000k bl	LED	E_T5	records
Attachments (74/0)	Opple	140043904	06956712666277	2	led e t5 batten 300 4.5w s 3000k bl	LED	E_T5	
Manufacturer:Opple (6	Opple	140043967	06956321843472		ledpanelrc-g sq598-36w- 3000-wh-ct	LED	E_85	
	Opple	140043968	06956321843489	-	ledpanelrc-g sq598-36w- 4000-wh-ct	Opple	Grille	
Froduce group.E_15 LE	Opple	140043969	06956321843410		ledpanelrc-g sq298-11w- 3000-wh-ct	Opple	Lekbak	
lit 🛞	Opple	140043970	06956321843427		ledpanelrc-g sq298-11w- 4000-wh-ct	wisa	kraan	
Add	Opple	140043971	06956321843458		LEDPanelRc-G Re298- 36W-3000-WH-CT	Opple	Grille	
Modify	Opple	140043972	06956321843465		LEDPanelRc-G Re298- 36W-4000-WH-CT	Opple	Grille	
Delete record(s)	Opple	140043973	06956321843434		LEDPanelRc-G Re166- 21W-3000-WH-CT	Opple	Grille	
2					LEDPanelRc-G Re166-			

Note: 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 Functions Print Import / E								xport			
٦.			•	Q		1		. (?	•		
Filter				Search	All	Details	Screen Layout	н	lelp			

- 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 Fun	ctions Vri	nt 🔪 Import / E	xport		
▶.□		- Q	+ 🥖	' 🗙			0.
Filter		Search	Add Modif	y 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	w 🔪 Ed	it Funct	ions	Pri
	•	Q	•		
		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	mport / Expo	rt			
		- Q		The second second	2ba	Install Data	2	E	%
		Search	Transfe	r 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 downloaded¹.
- 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*.

		\mathbf{X}
🔍 Yes 🔾 No		
🔘 Yes 🔾 No		
	Close	
	● Yes ○ No ● Yes ○ No	● Yes ○ No ● Yes ○ No ● Yes ○ No Close

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

¹ 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>.



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:

Products Menu View Edi	it Functions Print Imp	ort / Export		_		_
	🕂 🧷 🗙		. 0 .			
Search	Add Modify pelete record (s)	Line edit on Copy	Help			
Navigation 🛞 📤	Manufacturer Description	Code	GTIN	MC F	T Product description	Brand
Ttems (9/0)		<u>140043898</u>	100000-00000-00	2	LED E T5 batten 600 9W 800lm 3000K CT	
Readuct parts (0/0)	Party.	<u>140043899</u>	100103-0000	2	LED E T5 batten 600 9W 800lm 4000K CT	1914
		140043900	Sector Science 10		LED E T5 batten 1200 18W 1600lm 3000K CT	199
Accessory products (0)	-	<u>140043901</u>	000072300240	2	LED E T5 batten 1200 18W 1600lm 4000K CT	1.0
Is part of (0/0)	Tara	140043902	000000000	2	LED E T5 batten 900 11W S 3000K BL	1.0
Attachment (33/0)		<u>140043903</u>	1000 C 1000 C	2	LED E T5 batten 600 9W S 3000K BL	
Manufacturer:Opple (O	(Taple)	140043904	CONTRACTOR OF STREET	2	LED E T5 batten 300 4.5W S 3000K BL	Testin .
	Tarke .	<u>140043967</u>	Sector Sector Sector	2	LEDPanelRc-G Sq598- 36W-3000-WH-CT	1997
	reader -	140043968	CONTRACTOR OF THE OWNER.	2	LEDPanelRc-G Sq598- 36W-4000-WH-CT	1.0
Edit 🛞	1976	140043969	CHRISTIAN CHART	2	LEDPanelRc-G Sq298- 11W-3000-WH-CT	1.0
Add	1994	140043970	1000 C 1000	2	LEDPanelRc-G Sq298- 11W-4000-WH-CT	
// Modify	Date:	<u>140043971</u>	Contract Contract	2	LEDPanelRc-G Re298- 36W-3000-WH-CT	Testa:
Delete record (s)	inter .	<u>140043972</u>	Contraction of the local division of the loc	4	LEDPanelRc-G Re298- 36W-4000-WH-CT	100
Line edit on	rain .	140043973	0000030-0000	2	LEDPanelRc-G Re166- 21W-3000-WH-CT	in the second
Conv	1974	140043974	00000-000	2	LEDPanelRc-G Re166- 21W-4000-WH-CT	100
	light -	140044049	Contraction of the local distance	2	🔬 LEDHighbay-POLE-CT	100
Paste	a porte	<u>140044050</u>	And a second second	2	A LEDHighbay-Bracket10-CT	100

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:

🔦 Produc	ts Menu	View	Edit	Functio	ns P	rint Impor	t / Expo	rt	> Productgroup:01.7 Gas standard > Productgroup:COIL GAS
			- Q		(1)				_
filter	Back bu	tton	Search	All	Details	Screen Layout	н	elp	•

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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	Fun	ctions	Import / Export				
⋟.	•			1 💽 🔒 . 📀 .				
filter		Search	All	Details Screen Layout Help				
Navigation 3	$\widehat{}$	▲ X	Т	Full name	Street and housenumber	Place	Telephone	E-mail
(1/0)			. 	Compano BV				
Contact persons (1/0)			. 	1000		The second s		
Attachment (0/0)			Æ	Photo (Marco)	The share is	No.	In Province	ACCESSION AND
				Service -				
				term many period systems	No. of Concession, Name	Set .	In the second	the state of the second second
Edit	۲			Net Street (Sectors 11)				
Organization				Name and a strategy of the strategy	Television (C	No.	and provide the	CONTRACTOR AND AND A

<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. <u>Note</u>: 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 Im	port / Export
Contacts Products Items DAM	Publications Classification	System My details Help Logout
Navigation 🛞 🔺	▲ Supplier	Background tasks
Price Information (1)	The second se	Configuration
(parent) (0)	Taxa Ing	Layouts
(1) Surcharges (0)	Inter Internet Inter C	Logs
Accessories (0)	Intel Tester Intel Tester	User-defined fields (main)
Attachments (0)	Inter Traine	
% Purchasing Conditions	Line Tester	<u>28210460</u> m 28366540 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.

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.



View 5

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:



Filter 5.1

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



Apply a filter 5.1.1

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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	. Q		1		? .	
	Sear	ch All De	tails	Screen Layout Price Reference	date Help	
Filter						
Item Product Cla	ssifica	ation 🔪 Statu	IS	Logistics Other User def f	ields Translations	
Supplier	i	equal	Ŧ			_
Item Number	i	between	۲	140044000	140044050	
GTIN	i	start	•			
Own item number	i	start	•			
CBS Code	i	start	•			
Country of origin	ī	equal	•	Belgium		•
Item description	ī	start	•			
Commercial description		contains	•			
Technical description		contains	۲			
Description 1		start	•			
Description 2		start	•			
Division						
Assortment	i	equal	•	NAMES AND ADDRESS OF TAXABLE		•
Condition group code		start	•			
Group Code	i	start	۲			
Group (masterdata)		equal	۲	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
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 <mark>≠ value</mark>
Amount of attachments	> value ≥ value
AddOnProductCount	< value ≤ value
	between
Sub produce counc	outside

- = value: Filters records where the data field value is *equal* to the filled out value.
- \neq 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	5	

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	er-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 Vie	w Edit
Filter	• (s
Filter	
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	start	~			
Brand (product)	start	~			
Series (product)	(I) start	~			
		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	
е	Product Classification	Model Additional User-defined fields Translations
е	Manufacturer	1 = value v
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	Fun	ctions	Print	Import	/ Export	
Filter	er	Search	All	1 Details	Compano	+ 🕜	•
Navigation 🛞		A A	chived	Manu	facturer Co	ode	Manufacture
Items			I .	<u>69563</u>	21800000		Opple
Product parts							

<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	٦
C	
Product group	
🗹 Valves	
Product line	
Solution Not applicable	
	ŋ
Ball valves - Accessories - Gear (19)	
Ball valves - Accessories – Gear (11)	
Ball valves - Accessories - Handles (9)	1
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	\otimes
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
	bsh 🔻	Q III 🗊 II . 🕢 .
Filter	bsh A	Search All Details Datapool Help
Navigatio	bsh0401p06f2a	Manufacturer Code Manufacturer Description
Items	bsh0401p07a2a	8712423008878
	bsh0401p07f2a bsh0401p16a2a	8712423008878
Produ	bsh0401p16f2a	8712423008878
Acces	bsh0401p17a2a	
	bsh0401p26a2a	8/12423008878
	bsh0401p26f2a	8712423008878
Produ	bsh0401p27a2a	8712423008878
Attack	bsh0401p36a2a	8712423008878
	bsh0401p36f2a	8712423008878
Manut	bsh-bmh	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	A	Item no.	Abbreviation	Item description	Gross / CU	Disc%	Purchase / CU
	1000 A.		<u>140043898</u>	pce	LED E T5 batten 600 9W 800lm 3000K CT	€ 22.00	0.00%	€ 22.00
	107 M 16		<u>140043899</u>	pce	LED E T5 batten 600 9W 800lm 4000K CT	€ 22.00	0.00%	€ 22.00
	1074 M		<u>140043900</u>	pce	LED E T5 batten 1200 18W 1600lm 3000K CT	€ 29.00	0.00%	€ 29.00
	09.836		<u>140043901</u>	pce	LED E T5 batten 1200 18W 1600lm 4000K CT	€ 29.00	0.00%	€ 29.00
	0993336		<u>140043902</u>	pce	LED E T5 batten 900 11W S 3000K BL	€ 29.00	0.00%	€ 29.00
	1999 15		<u>140043903</u>	pce	LED E T5 batten 600 9W S 3000K BL	€ 22.00	0.00%	€ 22.00
	1000		<u>140043904</u>	pce	LED E T5 batten 300 4.5W S 3000K BL	€ 17.50	0.00%	€ 17.50

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 Print In	nport / Export		
▶		-	•	 .
Filter	Search All Details S	creen Layout Pr	rice Reference date	Help
Navigation 📀 📤	Supplier	A	Item no.	Abbreviation
Rice Information (3/0)			<u>140043898</u>	pce
			140043899	pce
Surcharges			140043904	pce
Own alternatives			<u>140043967</u>	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:

	atten 600 9W 800im 3000K CT	
Item Gross price Addition	al Image Drawing Alternatives Synonyms Accessories	Order information Price history Surce
Supplier	1	4
Item Number	140043898	
Product	140043898 LED E T5 BATTEN 600 9W 800LM 3000K CT (langer)	
Original item number	140043898	Scroll button
Short description	LED E T5 batten 600 9W 800im 3000K CT	
Item description	IED E T5 batten 600 9W 800im 3000K CT	
GTIN	1 06956712666215	
General		
Assortment		
Condition group code	PLU	
Links		
Deeplink		
	Show previous Show next	Modify 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 View	Edit Functions Prir	nt Import / Export		
filter	Search All D	etails Screen Layout	Price Reference date Help	•
Navigation	A Supplier	Screen Layo	ut default	

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*-branded² layouts are available for the following overviews:

- Products
- Items

² 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								
» ·											
lavigatie	Fabrikantscode	Fabrikant omschrijving	GLN code	мс	s	GTIN	Code	F	Product omschrijving Omschrijv	vina kort	Me
Artikelen (1/0)	-	Server of			Geen		100		Wandcontactdoos GT 16A 5p 400V 6h IP44 beh. 90x87 beh. 90x88	actdoos GT OV 6h IP44 7	-
Product onderdelen (0/0)			_		Geen		101		Wandcontactdoos GT 32A 5p Wandconta	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 Men	u V	iew	E	dit	Function	s Print	
⋟.	•	•	2		1	\	2.
Filter		Se	earch	All	Details	Go to report layouts	Help
Navigation	۲		A	т	Name		
		•	m	9	2ba pren	nium	
Edit	۲		m	9	Company	,	
Add			m	0	Datapool		
Modify							

4. In the pop-up screen:

Add - New layou	t					
Layout Fields	Sorting	Quick Filte	er Memo			
Туре			Screen		\sim	
Name						
Application			🔿 🖬 Within the co	ompany	🔘 🖁 For m	e
			Add next record	Save n	ecord	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:

🗐 Add - New layout				
Per view and type Fields Sorting	Quick Filter 🔪 Me	emo		
- Available fields-		- Selected fields -		
📺 🗉 All fields		Field	Header	
		Supplier brief description	Supplier	
ty category		Availability	Α	
		Item Number	Item no.	
		Calculation Unit abbreviation	Abbreviation	^
	<	Description	Item description	v
		Gross price per calculation unit	Gross / CU	
		Purchase Discount	Disc%	
		Purchase price per calculation unit	Purchase / CU	
Properties				

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:

J Add - New layout					
Per view and type Fields Sortin	g Quick Filter M	1em			
Available fields		-s	elected fields	Header	
Active purchase condition			Supplier brief description	Supplier	
+ Assortment			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 Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields Image: All fields I	> (Memo -Selected fields- Field Supplier brie Availability Item Numbel Calculation u Description Gross price p	f description nit abbreviation er calculation unit	Header Supplier A Item no. Abbreviation Item description Gross/CU	∧ ▼
	Ado	d 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 properties³, 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:

³ Which properties are available will depend on the type of data field.
🥩 🌮 💭

- 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...

Per view and type Fields Sorti	ng 🔷 Quick Filter 🔷 Memo					
vailable fields		י ר	-Selected fields			
Active purchase condition		•	Field	Header		
Active Sales Condition			Supplier brief description	Supplier		
Assortment			Availability	A		
Calculation Unit			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		
 Condition group category 		>	Purchase Discount	Disc%		
Country of origin		<	Purchase price per calculation unit	Purchase / CU		
Currency						
Deliverytime unit						
Future price info						
Gross price						
Group (masterdata)						
tem						
Order Unit						
The original Supplier						
		1				
ader	Gross / CU		Automatic			
ump Width	Standard T					
mber format	2 decimals (#0.00)					
ro show	Vec No					
ow Euro symbol	Yes No					
ltip	Gross Price per unit of & nbs	p; without VA	π			
	.,					
						•
					0	

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**:



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>
I" 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				

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	m	Q	lakin na pani pa 1776
	8	0	bising any paralogue (s. 6)
Apply		EQ.	My lay-out
Print 🛞 ,	8	0	produktion in antiquest
		0	production which product every
Print	m	Q	production and international residues and the

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



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 descriptio	n Technical description	Status User def fields	Translations
General				
Manufacturer	i			- *+/
Code	(1-23498024-w			
Product description	LED T8 Batten			
				11
	Automatic			
GTIN	16956712666045			
#CompanyCode	٩ (1)			
Country of origin	(1) China			- 🗙
Division				
Group Code	BAT_T8	LED T8 Batten		
Group (masterdata)	BAT_T8 LED T8 Bat	ten		- 💥
Brand	i			
Series	T8			
Туре	(1) Batten			

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	rt			
Search	Add Modify Delete record (s) Line edit o	Copy Help			
Navigation 🛞 📤	Edit - 140043898 LED E T5 batten 600 9	V 800lm 3000K CT			
(9/0)	Product Classification Model	Commercial description 🔪 Technica	al description 🔨 Status	User def fields	Translations
Product parts (0/0)	General				
Accessory products (0)	Code	140043898			••••
Is part of (0/0)	Product description	LED E T5 batten 600 9W 800lm 3	000K 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 Ba	tten EcoMax		
Add	Group (masterdata)	E_T5 LED T5 Batten EcoMax			- *
Modify	Brand	1			
	Series	LED Batten			
Line edit on	туре	U D ECOWAX			
Сору				Save	Cancel
Paste		674	📼 📼 LEDDownli	inhtRc-H7 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*⁴ (permanently).

The Archive Status of a record is handled by the data field Archived⁵:



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*.

 ⁴ <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.
 ⁵ 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.

Products Menu View Edit	t Functions	Print Import / Ex	port			
2.	- 0		. 🕜 .			
Including archive	Searc	h All Details Com	pano Help	0	07711	a 1
Navigation 🛞 -	- Archived	Manufacturer Code	Manufacturer Description	None	06956/12666215	Code 140043898
PItems (1/1)						
Product parts (0/0)						
	8		the second se	None	06956712666222	<u>140043899</u>
Accessory products (0)						
Is part of (0/0)						
Product certificates (0/0)			and the second sec	None	06956712666239	140043900
Attachments (74/0)						

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 7.1.2 From archive.

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 Archived column (X)



- 2. Select the archive record(s) and click on *Delete record(s)*
- 3. A pop-up window will display the following message:

~~~		орріс	L_1
	Are you sure you want to <b>de</b>	lete 1 product?	
	OK Cancel		

4. 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):

	А		F		
3	Archived	-	Item no. 🔽		
4	No		140043898	https://	.compano.com/Data/Enviror
5	No		140043899	https://	.compano.com/Data/Enviror
6	Yes		140043900	https://	.compano.com/Data/Enviror
7	Yes		140043901	https://	.compano.com/Data/Enviror
8	Yes		140043902	https://	.compano.com/Data/Enviror
9	Yes		140043903	https://	.compano.com/Data/Enviror
10	No		140043904	https://	.compano.com/Data/Environ
11	No		140043967	https://	.compano.com/Data/Enviror

#### 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_Pro with impactreport: All except the pro	ducts_Items_PIM_Basic_r2-3	103.vlsv		
Test Importof file Template_New_Pro with impactreport: All except the pro	ducts_Items_PIM_Basic_r2-3	1.03.xlsx		
	duct class reatures			
<ul> <li>Product code</li> <li>Manufacturer code (GLN)</li> <li>Brand (product)/Nederlands (Ned</li> <li>Series (product)/Nederlands (Ned</li> <li>Type (product)/Nederlands (Nede</li> <li>Long description (product)/Nederl</li> <li>Short description (product)/Nederlands</li> </ul>	erland) erland) rland) ands (Nederland) lands (Nederland)			
Layout1	Products and It	tems (v2.3)		
Import entity	Product	,		- 💥
Import layout	Excel import lay	y-out 'Product imp	ort L04' on Screen pr	roducts 👻 🗱
Archive not imported records	🖲 Yes 🔾 No			

<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:

Product classifications	Menu V	iew	Edit Functions	Print	Import /	Export
Be aware, there is a filter	l 🔍   🕂	P	×		H H H H H H H H H H H H H H H H H H H	2.
active!	Search Add	Modify	Delete record (s)	Line edit on	Сору	Help

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

Products Menu View Edit	Functions Print Import / Exp	ort							
Including archive	Search Add Modify Delete	record(s) Line edit off Copy	🕜 🗸						
Navigation 🛞 🔶	<ul> <li>Archived Manufacturer Code</li> </ul>	Manufacturer Description	s	GTIN	Code	F	Product description	Brand (product)	Series (product)
Product parts (1/0)	6956321800000	Opple	None 🗸	06956712666215	<u>140043898</u>	80	LED E TS BATTEN 600 9W 800LM 3000K CT (langer)	Opple	LED Batten
Accessory products (3)	<b>5956321800000</b>	Opple	None	06956712666222	<u>140043899</u>	620	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 E	Edit \ Functions \ Print \ Import / Export		
⋟.	· 🔍 🕂 🧪 🗶 🛛 🞽	- <b>()</b>	
Filter	Search Add Modify Delete record(s) Line edit	on Copy Help	
Navigation 🛞	Manufacturer Code Manufacturer Descr	iption S	GTIN
Ttems (1/1)	<u>6956321800000</u>	None	06956712666215
Readuct parts (0/0)	<u>6956321800000</u>	None	06956712666239
Product parts (0/0)	6956321800000	None	06056712666260

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 Descripti     Copy	GTIN
Titems (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.

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:

2220000042857 les	t fabrikant 2ba	
Manufacturer Organizati	on Item manager Translations	
Code (GLN) Manufacturer Logo	() () () () ()	<b>^</b>
Manufacturer type Data manager Product number template	Manufacturer	
	Edit the previous on Edit the next one Save record Ca	▼ ncel

<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.

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# 6.6 Edit multiple records

To edit multiple records, see the function <u>7.1.1 Manipulate</u>

# 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.

<u>Note</u>: 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*.

Products Menu View	Edit Fu	Inctions Print Impo	ort / Export						
▶.	- Q	🔹 🚳 .		J	<ol> <li>.</li> </ol>				
Filter	Filter Search Manipulate Part of Generate product sheet From archive Help								
Navigation	A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A     A	Archived Manuacturer	Description	Code	GTIN		T Product description	Brand (product)	Type (product)
Items		Opple		140043898	06956712666215	2	LED E T5 BATTEN 600 9W 800LM 3000K CT (langer)	LED	E_TS
Product parts		Opple	$\overline{}$	<u>140043900</u>	06956712666239		LED E TS BATTEN 1200 18W 1600LM 3000K CT	Opple	E_75
		Opple	$\sim$	<u>140043903</u>	06956712666260		led e t5 batten 600 9w s 3000k bl	LED	E_TS
Accessory products		Opple		140043904	06956712666277		led e t5 batten 300 4.5w s 3000k bl	LED	E_TS
Is part of		Ondo		140042067	06056221942472	A	🙀 ledpaneirc-g sq598-36w-	1 ED	E 0F

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:

🥩 🌮 💭

j Manipuleren				 	-	X
Manipulating User	-defined fields	Translat	tions			
Manufacturer	No action	~				1
Code	No action	~				1
Description (product)	No action	~				1
Short description (product)	No action	~				1
Commercial description (product)	No action	*				1
Technical description (product)	No action	~				
GTIN	No action	~				1
Company-specific product code	No action	~				1
ERP code	No action	~				1
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	~				
Type (product)	Grant	~	New Type			
Standard product	No action	~				
cl						

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:

Í	Products	Menu	View	Edit Functions	Print 🐧	Import	: / Export	
ŀ						6	-	?.
ł	Including arch	ive		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:

o Online Software	🧳 🌮 1	
Jan		📄 Filter
du		Product Classific
		Assortments
		Status
		 Available
		BIM Status
		Predecessor code

		<u></u>		,	18W 1600LM 3000K CI		
Filter	-						×
Product Classification		del Additional	User-defined fields	Translations			
Assortments		= value 🗸 🗸					.11
			100 B	the second	- <b>1</b>		
			10000				
Status							
Available	1	= value 🗸	None		Run in		
			Running out				
BIM Status		= value 🗸	None		Under construction		
	-		🗌 📟 Ready		🗌 📕 Test		
Predecessor code	1	start 🗸					
Code successor	i	start 🗸					
GTIN Predecessor	1	start 🗸					
GTIN Successor	i	start 🗸					
Data							
Archive moment		filled 🗸					
Start date	1	= value 🗸					
End date		= value 🗸					
Time created							-
			Apply	Empty	Empty and close	Save as	
					LED E TE BATTEN 200		

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

Products Menu View Ed	it	Functions	Print Tmport	/ Export		
▶.	- 0	λ   🔹	0.		J	<ul><li><b>○</b> .</li></ul>
Filter	Sea	arch Manipul	ate Part of G	enerate product sheet	From archive	Help
Navigation  🛞 📤	•	Archived	Manufacturer D	escription	e GT	IN
Items		1	100	1400	<u>043899</u> 069	56712666222
Product parts		<b>I</b> .		1400	<u>043901</u> 069	56712666246
		81	-	<u>140</u>	043902 069	56712666253
Accessory products		al		140	062610 060	45720452051

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

# 7.2 **Products**

Products	Menu View Edit Fund	ctions Pri	nt Import / Export		
▶.□	• 9	٠		J	0.
Filter	Search	Manipulate	Generate 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 Ed	it Functions Print	Import / Export			
▶.	- 🤍   🤞		<b>I</b>	MG	J	0
Filter	Search Manip	ulate 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*.

Assortment Menu View	Edit	Functions	Import / Export				
·	- Q	2ba	Data	2	3	J	0.
Filter	Search	Transfer 2BA	Transfer InstallDat	a Quality Control	Update	From archive	Help
Navigation 🛞	-	Logo	Code De	scription	4		
Ttems (3153)		abren	INCOME. STAT	(INT)			
Logs (39)		akavan	month bow	(NL)			
Jtem groups (0)		akeven	Industry Law	(Purcha	ase assor	tment)	
Transfer rules		ali rent	mobile period	в.а. (в	E)		
Memo (0)		deres a	and shadow. The same	nce 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 the	-
Edit	NITS NL	
	Updating selected items. This concerns:	
Add	Prices,	
	Packing code,	
Modify	Calculation unit,	
	Delivery unit,	
Delete assortment	Status,	
	VAT code,	
Conv	Order unit,	
COPY	Number of CU per OU	
C Prote	Number of PU per OU,	
Paste	GTIN Successor,	
	GTIN Predecessor,	
Functions	Gross weight,	Idea
	Weight unit,	
Transfer with scheme	Packing height,	
	Packing length,	
Transfer AB	Packing width,	
	Packing size unit,	
Transfer 2RA	Stock,	
2ba Transfer 2BA	Processable, The following fields are not only if the one process in the only one strength	
Install	Delivery time	
Data Transfer InstallData	Delivery time, Minimum order supptitu	
<b>A</b> .	Increment	
Quality Control	Start date	
Update Update		
From archive		

# 7.6 Publications



# 7.6.1 Export publication

Export the selected publication:

🍠 🌮 💭

en English		- 🗙
🔾 Yes 🖲 No		
🖲 Yes 🔿 No		
🔾 Yes 🖲 No		
🖲 Yes 🔿 No		
	en English Yes No Yes No Yes No Yes No Yes No	en English Yes No Yes No Yes No Yes No

• Email address: Send the export to this email address.

#### 7.6.2 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.

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

#### 7.6.3 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 Classe	5 Menu View Fun	ctions 🔷 Import / Expor	t
	• 9	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>.

Compano Online Software

# 7.8 Background tasks

Background tasks	Menu View	Functions			
▶.	Q	<ul> <li></li></ul>		STOP	0.
Filter	Searc	h 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.

# 7.9 Layouts



#### 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

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Users	Menu View Edit	Function	s Impor	t / Expor	t					
⋟.	Re aware there is a filter		<b></b>	Į	2	<b>0</b>	<b>§</b>	J	?	•
Filter	active!	Search	Manipulate	Login as	Change Password	Send password	Create Administrator	From archive	Help	

#### 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

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:

<b>DAT</b> 44722 e	ASHEE TOUCH-wifi	Т	e	THORNA'
	₹ Mar Har = (2) (2) (2)			
Article number	44722			
Brand				
Type Series	e100CH-wifi			The second se
With the new, s controller, the B control via app,	mart thermostat eTC asy Start-Up program the temperature of a or the Google Assistan ntelligence is convinc	UCH wifi it is even more conve n for easy initial installation and i room is easily controlled - no it. The large display is easy to ing for a uniform and fully autr m or combination thermostat a	nient to heat and save money. In addition to t the new app make controlling the heating matter where in the world. It can also be op read and easy to control thanks to the touch matic optimization of the heating system in nd complies with the ecodesign directive. Cr	the intuitive operation of the even easier. With the remote erated by voice control with pad at the touch of a finger. The order to save energy. It can be liser binh-ness white
Amazon Alexa o ECO + control i switched as por temperature rai rating: IP21,	wer control, floor, roc nge: 5-40°C, sensor o	able length: 3 m (max. 50 m),	switching current: 16A, mounting: on flush-	mounted switch box, protection
Amazon Alexa o ECO + control i switched as po temperature rai rating: IP21, Model	wer control, floor, roc nge: 5-40°C, sensor i	on/Off	switching current: 16A, mounting: on flush- Measuring range minimum value	5 Degrees celsius
Amazon Alexa c ECO + control i switched as poi temperature rai rating: IP21, Model Type of power :	ver control, floor, roc nge: 5-40°C, sensor i supply	able length: 3 m (max. 50 m), On/Off 230 V AC Two-wire (running out)	switching current: 16A, mounting: on flush- Measuring range minimum value Measuring range	5 Degrees celsius 5/40 Degrees celsius 40 Degrees celsius
Amazon Alexa ECO + control i switched as poi temperature rai rating: IP21, Model Type of power : Connection With receiver	ver control, floor, roc nge: 5-40°C, sensor i supply	able length: 3 m (max. 50 m), On/Off 230 V AC Two-wre (running out) wes	switching current: 16A, mounting: on flush- Measuring range minimum value Measuring range maximum value Number of heater rutinuts.	5 Degrees celsius 5/40 Degrees celsius 40 Degrees celsius 1
Amazon Alexai ECO + control switched as poi temperature rai rating: IP21, Model Type of power : Connection With receiver External sensor	ver control, floor, roc nge: 5-40°C, sensor i supply	able length: 3 m (max. 50 m), On/Off 230 V AC Two-wire (running out) yes	witching current: 16A, mounting: on flush- Measuring range minimum value Measuring range Measuring range maximum value Number of heater outputs Differential value	5 Degrees celsius 5/40 Degrees celsius 40 Degrees celsius 1 15/5 Kelvin
Amazon Alexa c ECO + control i switched as poi temperature rai rating: IP21, Model Type of power : Connection With receiver External sensor Thermal feedba	ver control, floor, roc nge: 5-40°C, sensor i supply	Cn/Off 230 V AC Two-wire (running out) yes Parallel	switching current: 16A, mounting: on flush- Measuring range minimum value Measuring range maximum value Number of heater outputs Differential value Max. contact voltage	5 Degrees celsius 5 Jod Degrees celsius 40 Degrees celsius 1 515 Kelvin 230 Volt
Amazon Alexai 2 ECO + control i switched as por temperature rai rating: IP21, Model Type of power: Connection With receiver External sensor Thermal feedba	ver control, floor, roc nge: 5-40°C, sensor i supply ck eristic	Ch/Off 230 V AC Two-wire (running out) yes Parallel Other	Measuring range minimum value Measuring range minimum value Measuring range Measuring range maximum value Number of heater outputs Differential value Max. contact voltage Max. contact load	5 Degrees celsius 5/40 Degrees celsius 40 Degrees celsius 1 5/5 Kelvin 230 Volt 16 Ampere
Amazon Alexai 2 ECO + control is switched as poo temperature rar rating: IP21, Model Type of power : Connection With receiver External sensor Thermal feedba Control charact Heating	ver control, floor, roc nge: 5-40°C, sensor i supply ck eristic	On/Off 230 V AC 230 V AC Yes Yes Parallel Other Yes	switching current: 16A, mounting: on flush- Measuring range minimum value Measuring range maximum value Number of heater outputs Differential value Max. contact voltage Max. contact voltage Max. contact load Height	5 Degrees celsius 5 Jod Degrees celsius 40 Degrees celsius 1 515 Kelvin 230 Volt 16 Ampere 75 Milinetre
Amazon Alexai 2 ECO + control is switched as poor temperature rai rating: IP21, Model Type of power : Connection With receiver External sensor Thermal feedba Control charact Heating Cooling	ver control, floor, roc nge: 5-40°C, sensor i supply ck enstic	On/Off 230 V AC Two-wire (running out) yes Parallel Other yes no	Measuring range minimum value Measuring range Measuring range Measuring range Number of heater outputs Differential value Max. contact voltage Max. contact load Height	5 Degrees celsius 5/40 Degrees celsius 40 Degrees celsius 1 5/5 Kelvin 230 Volt 16 Ampere 75 Millimetre 75 Millimetre
Amazon Alexai e ECO + control is switched as poo temperature rar rating: IP21, Model Type of power : Connection With receiver External sensor Thermal feedba Control charact Heating Cooling Adjustable diffe	ver control, floor, roc nge: 5-40°C, sensor i supply ck eristic rential	On/Off 230 V AC Two-wire (running out) yes Parallel Other yes no yes	witching current: 16A, mounting: on flush- Measuring range minimum value Measuring range maximum value Number of heater outputs Differential value Max. contact voltage Max. cont	5 Degrees celsius 5 j60 Degrees celsius 40 Degrees celsius 1 5/5 Kelvin 230 Volt 16 Ampere 75 Millinetre 15 Millinetre 15 Millinetre

# 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*.

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

Products Menu \\	/iew Edit	Functions	Print Imp	oort / Export		
⋟	-	् । 🗞	0.		3	<li>? .</li>
Filter		Search Manipul	ate Part of	Generate product s	heet From arc	hive Help
Navigation		<ul> <li>Archived</li> </ul>	Manufacture	r Description	Code	GTIN
Items					<u>140043898</u>	06956712666215
			100		<u>140043900</u>	06956712666239
			- 10 C		140043903	06956712666260
Accessory products					140043904	06956712666277
🚯 Is part of			100		140043967	06956321843472

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

	LED E TEL UL KODO			5
📄 Generate product sheet			×	а
Generate product sheet				a
Layout	Report lay-out 'Opple Product sheet (EN)' on product sheet	×		a
Language	nl-NL Dutch (NL)	×		a
Overwrite existing product sheet	🔿 Yes 💿 No			a
Filename product sheet	LED_E_T5_%productcode%			
Description product sheet	LED T5 Batten luminaire 600 9W 800lm 3000K CT			ſ
Title product sheet	LED T5 Batten luminaire 600			m
				m
	Generate product sh	Close		n
(	EDBanelBo-G Be208-			1

- 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 data⁶.
- 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.

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

- 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.
- 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)*.

Product: 140043898 LED.         Filter         Search         From archive         Help           Archived         Sequence number         Description         Ttle         Location         Attachment type         Attachment type           17         Standard Group CF         17 Statten luminaire 600 SWL 800/m         LED TS Batten luminaire 600         LED TS Ts 140043898         Link to Sheet         CHB	🔦 Attachment 🏾 M	enu View Edit Functions	Import / Export > Product:140043898 L	ED E TS batte	
Product:140043898 LED.     Filter     Search     From archive     Help       Archived     Sequence number     Description     Title     Location     Attachment type     Attachment type       17     100 K CT     17     100 K CT     LED TS Batten luminaire 600 SW 800 ^{III} LED TS Batten luminaire 600     LED TS Batten lum	3	▶	- 🔍 📄 👘 -		
Archived         Sequence number         Description         Title         Location         Attachment type         Attachment type           Image: Provide the second seco	Product:140043898 LED	. Filter	Search From archive Help		
12 JUDI 75 Battern Juminaire 600 9W 800lm LED T5 Batten Juminaire 600 LED E T5 140043898 Link to Sheet CHR	Archived S	Sequence number Description	Title	Location	Attachment type Attachment
		LED TS Batten Jumir	aire 600 9W 800im		Liek to Chest CHD

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



# 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*.

Items Menu View Edit	Functions Print	Import / Export				
▶.	- 🔍   🔹		🍇 🐶	J	2.	
Filter	Search Manipulate	Generate item sheet Sales	Items » Update	From archive	Help	
Navigation 🛞	Supplier	GTIN	Product	Item no.	Item description	CU
Price Information	10000	06956712666215	140043898	140043898	LED E T5 batten 600 9W 800lm 3000K CT	PCE
Surcharger		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>
Own alternatives		06956321843472	<u>140043967</u>	<u>140043967</u>	LEDPanelRc-G Sq598- 36W-3000-WH-CT	PCE
Accessories		06956321843489	<u>140043968</u>	<u>140043968</u>	LEDPanelRc-G Sq598- 36W-4000-WH-CT	PCE
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*.

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Items Menu View	Edit	Functions P	Print Import / Expo	t		
▶.	•	9 🔍   🦉	5	Ē	. ?	
Filter		Search Produc	t class Printing options	Managing Product class I	ayouts Help	
Navigation		Supplier	GTIN	Product	Item no.	Item descrip
Price Information		-	0695671266	6215 <u>140043898</u>	<u>140043898</u>	LED E T5 batte 9W 800im 300
Surebarase			0695671266	6222 <u>140043899</u>	<u>9 140043899</u>	LEDPanelRc-G 36W-3000-WH
Surcharges			0695671266	6277 <u>140043904</u>	<u>4 140043904</u>	LED E T5 batt 4.5W S 3000K
Own alternatives		> <b>•</b>	0695632184	3472 <u>14004396</u>	<u>7 140043967</u>	LEDPanelRc-G 36W-3000-WF
Accessories			0695632184	3489 <u>140043968</u>	<u>140043968</u>	LEDPanelRc-G 36W-4000-WH
Attachments			0005033104	2440 440042000	140043050	LEDPanelRc-G

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

Printing options		
Print		
∟ Print		
O Product class		
● List		
C Options		
O Using the layout which per Item has been set.		
For all selected Items using the following layout.		
		<u> </u>
Print	Close	
1400440	45 140044	049

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

ilter:				Geen filter		
Selectie:				4 van 944 Items		
Supplier	A	Item no.	Abbreviation	Item description	G	ross/CU
OPPLE Lighting		140043899	pce	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				
				DEMO		

## 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:

Printing options
Print
Print-
Product class
OList
_ Options
O Using the layout which per Item has been set.
For all selected Items using the following layout.
×
Print Close

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

Item					
Item Number	140043899				
Item description	LEDPanelRc-G Sq598-36	W-3000-WH-CT			
Classification system	ETIM Dynamic				
ProductClass					
Material heat exchan	ger	Aluminium			
Material quality		Other			
Closed version		Yes			
Operation as open m	odel (air supply) possible	No			
Condensing		Yes			
Nominal power, 80-6	0°C	234 Kilowatt			
Nominal power, 50-3	0°C	234 Kilowatt			
Nominal load upper v	alue	23 Kilowatt			
Nominal load lower v	alue	3 Kilowatt			
Heating capacity adju	ustable	Yes			
Suitable for natural g	as	No			
Control signal 0-10 V		Yes			
Burner controller high	n/low	Yes			
Max. supply tempera	Max. supply temperature (operating temperature) 23 Degrees celsius				
Min. return temperatu	Ire	23 Degrees celsius			
Max. allowable opera	ting 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

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

• A Swedish product sheet template needs to be prepared

<u>Note</u>: 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 Elementen	Productoverzicht	Memo		
Туре	Re	port	Ŧ		
Name	My	print lay-out			
Application	•	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		
Visible		• Yes O No		
Text		#IO.ReportDetailProductClass		
New page		None	~	
Productklasse				
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		FTIM 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.

<b>BE20:</b> Jaws (universal) BE/TH-Profile 20x2	
Commercial information	

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

Lay-out Eigenschappen	Elementen Productgege Automatisch	evens Toebehoren Memo		
Marge boven	5,00	Automatisch		
Marge onder	2,00	Automatisch		
Marge links	1,50	<ul> <li>Automatisch</li> </ul>		
Marge rechts	1,50	🗹 Automatisch		
Vatermerk			Automatisch	
Koptekst	Automatisc	h		
초 🐡 Ω - 🐰 🗈 🛍	▶ ♥ ▼ Wer ▼ B I			
📓 🚰 🔝 🛂 Voeg codefrag	gment in 🔻 🕐 Veld toevoegen	💷 • 📩 🐺 🍋 💷 📑 🎽 💷 💷	18 🏞 🗹 🗹	
[ProductRecord.C	ode/]: [ProductRecord	ShortDescriptionen-GB/]		
-		· · · · · · · · · · · · · · · · · · ·		-

Compano Online Software

#### 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 Elementen	Productdata	Item	Item details	Memo		
Available fields		Field Field Item number Description Commercial des Product product	cription class classificatior	H It It C d d d d system	eader em no. em escription sommercial escription assification rstem	× V
		Add next recor	d Save red	cord	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.

Configuration Me	enu View	
P .	Search All Details Manage screen lavouts Hein	
- near	Image overview Description	Used by Is read
	Accessories selections	Accessories product, Product
	Attachment type	Attachment
	Certificate types	Certificate
	Sector Choice items	Choice items selection list
	Condition classifications	Division, Paired condition group
	Condition groups	
	Conversion tables	Conversion Value, ETIM Product class feature
	Countries	Address, Item, Assortment land, Product
	Credentials sales organizations	
	Currencies	Supplier
	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 Menu	iew 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	
	LNK Deeplink	
Add	LOG Logo	
Modify	MAN Instructions	
	MTE Installation- & maintenance docume	ent
	OTA Other Attachments	
Functions	OTD Other document	
Manipulato	OTV Other visual element	
	PHI Image for printing	
	PPT Tmage 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 <u>Compano Help-website</u>.

Certificate types Menu Vie	ew Edit Fur	nctions V Import / Export
».	- 🔍 🔲	1
Filter	Search All	Details Manage screen layouts Help
Navigation 🛞	▲ Code	Description
Configuration	ACS	Sanitary Conformity Certificate
	ADR	European Agreement concerning the International Carriage of Dangerous Goods by Road
Edit 🛞	ART	mark (motor-)cycle locks
Autofill	AVCP	Assessment and Verification of Constancy of Performance Certificate
	BATTERY	Air freight inspection of batteries and accumulators
Add	BOIS	EU Timber Regulation
Modify	BREEAM	Declaration BREEAM (Building Research Establishment Environmental Assess-ment Method)
	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 <u>Compano Help-website</u>.

Conversion tables Menu	View Edit
▶.	-♀ ■ ①
Filter	Search All Details Manage screen layouts Help
Navigation	Code Description
Lines (0)	ORDUNIT Order units
Configuration	
Edit	1
Modify	
Pelete record(s)	

# 9.4 Countries

Per Country, the following settings can be made:

Code	DE		
Description	Germany		
	Automatic		
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:

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/Export Handlei	iding		
Filteren	Zoeken Alles Details CWD Help			
Navigatie	🔊 🔺 Icoon Hoofdmenu item	Volgorde Omschrijving	Locatie	Level
Menu's (5)	for construction	1 Handleidingen		1
Configuratie	G Handleidingen	2 Google	www.google.nl	2
Bewerken	A Handleidingen	2 Afhandeling tarieven	Afhandeling tarieven met prio versie 1	2
Toevoegen	Handleidingen	4 nos.nl	https://www.nos.nl	2
Wijzigen	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	anno secole al A	
Menu		
Hoofdmenu item	× •	<b>^</b>
Icoon	for construction	
Volgorde	1	- 1
Omschrijving	Handleidingen	
Locatie	<b>x</b>	_
	Vorige bewerken Volgende bewerken Bewaar record Annu	uleer

- 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.
- 4. Save the record.

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



# 9.6 Languages

Manage languages available for translations in your application:

Languages Menu View Edit Functions						
	- 🔍 🔲		0.			
Filter	Search All	Details Manage screen layouts	Help			
Navigation 🛞	▲ ISO Code	Description	Language environment	Use multilingual fields	Hide in user interface	Memo
Field translations (27120)	> de	German				3
	de-DE					
Configuration	en	English		✓		1
	en-GB					
Edit 🛞	fr	French		<b>V</b>		1
Autofill	nl	Dutch	×	✓		
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).

Fields fallback Menu	View Ed	lit Functions 1	Import / Export	
⋟.	- Q			0.
Filter	Sea	rch All Details N	lanage screen layouts	Help
Navigation		X Entity	Language	Description
Configuration		Product	<u>da-DK</u>	Brand (product)/da-DK (product)
U		Product	<u>de-DE</u>	Brand (product)/de-DE (product)
Edit	$\otimes$	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	<u>fr-FR</u>	Brand (product)/fr-FR (product)
Product		Product	<u>it-IT</u>	Brand (product)/it-IT (product)
Readuct group		Product	<u>nl-NL</u>	Brand (product)/nl-NL (product)
		Product	<u>sv-SE</u>	Brand (product)/sv-SE (product)
Modify		Item group	<u>da-DK</u>	Commercial description (item group)/da-DK (item group)
		Item group	<u>de-DE</u>	Commercial description (item group)/de-DE (item group)
		Item group	en-GB	Commercial description (item group)/en-GB/Default (item group)
Functions	۲	Item group	en-US	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	<u>fr-FR</u>	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 Menu View	v Edit Functions Import / Export
▶.	$\mathbb{I} \mathbb{Q} = \mathbb{Q}$
Filter	Search All Details Manage screen layouts Help
Navigation 🛞	Code Description
Outrame (60)	08 Oneway pallet
(ou)	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 <u>Compano Help-website</u>.

Periodic tasks Menu	View Edit Functions	
Filter	Search All Details Manage screen layouts He	) . elp
Navigation Configuration	A         Periodic task type         Report type           Export         Export	Description Weekly price list export
Edit Add		
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

🍠 🌮 💭

My Company settings		×
Purchasing Item manager System settings Number pattern Inter	national	
Purchasing		
Update when number is adjusted O Yes O No		
	Close	

• 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 Item manager

Purchasing Item manager Svs	tem settings Number pattern Vinternation:	al
rentiability rectinitionager (5)	tern settings (Hamber pattern (Internation	
Download item		
Send mutation email to:	1	
Automatic export	O Yes 🖲 No	
Export day	🕚 Wednesday 🗸 🗸	
Automatically export purchase analysis	○ Yes ● No	
Impact report presentation	Vertical 🗸	
Create items		
Transfer product description	(1) • Yes O No	
Product group overnemen	(1) • Yes O No	
Automatically read data		
Automatic transfer	(1) O Yes (1) No	
Product view		
Transfer scheme products		•
ICS		
Standard classification system	ETIM Dynamic 🗸	
		Close

Download items These settings are mostly for Art-Select users.
- Send mutation email to: Enter an e-mail address to which the report with price and item mutations will be send. If this field is left empty, the report will be sent to the administrator.
- Automatic export: If set to **Yes**, an export will be sent to you for each specified export frequency and export day. There is a program available for the automatic export of Item files AB-Download. The item file is created at night, so that you can retrieve your files directly from your mailbox in the morning.
- Export day: Select the day of the week at which you will receive the data export.
- Automatically export purchase analysis: Set to **Yes** if you want the purchase analysis to be automatically generated on a weekly basis.
- Impact report presentation: Specifies whether old value and new values in the impact report are presented below each other or next to each other in the report.

# Create items

Settings when manually creating items based on products.

- Transfer product description: Set to **Yes** to copy the Product Description to the Item Description when items are created based on products.
- Transfer product group: When creating an item based on a product, whether or not to copy the product group to article group (yes) or leave it empty (no)

# Automatically read data

- Automatic transfer: This is a setting mainly for Artikelbeheer, version 1. If an assortment is added locally, it must then be checked and published (Transfer). If there are no errors during checking, the assortment will be transferred to the central environment
- Transfer scheme product: Set the selected ETL transfer schema as the default transfer scheme for products.
- Standard classification system: Set the classification system which is to be used as the standard for this application.

# 9.10.3 System settings

Purchasing Item manager	System settings	Number pattern International	
Ct.			
System		_	
Login from the central area	🔘 Yes 🤇	⊃ No	
Phone number template			
		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.

#### 9.10.4 Number pattern

Set the default number patterns for several automatically numbered entities:

My Company settings			
Purchasing Item manager Syste	em settings	Number pattern	International
Number pattern			
Number pattern for contacts	REYY0	00001	
Number pattern for support contract	ADYY0	0001	
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.

#### 9.10.5 International

Purchasing 🔪 Item manager	System settings Number pattern	International	
International			
Country	(I) Netherlands		•
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:

Encoding fallback for import	① Default	~
	Default Ansi-Windows-1252	
	IBMPC-DOS-437	

# **10 Import data**

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

(tems	Menu 🔨 \	/iew 🔪	Edit	Function	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>.



# **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	LO3	
Template New Products and Items	Standaard artikel import in Excel –	Importing item data
(DICO/SALES005)	LO3	
Template Price Updates	Standaard prijsupdates in Excel – L03	Importing (new) price information
Template Import Accessories	Standaard import toebehoren	Importing accessories or parts
	product – L03	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.

⁷ <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
5907791600004;5907791600042;"01-001Z-3/8""";011001060000;"EE bocht bi/bu zwart 01-001Z-3/8""";2,70;5907791600042
5907791600004;5907791600073;"01-001Z-1/2""";011001080000;"EE bocht bi/bu zwart 01-001Z-1/2""";2,40;5907791600073
5907791600004;5907791600103;"01-001Z-3/4""";011001120000;"EE bocht bi/bu zwart 01-001Z-3/4""";4,20;5907791600103
5907791600004;5907791600103;"01-001Z-3/4""";011001120000;"EE bocht bi/bu zwart 01-001Z-3/4""";4,20;5907791600103
5907791600004;5907791600103;"01-001Z-3/4""";011001120000;"EE bocht bi/bu zwart 01-001Z-3/4""";4,20;5907791600103
```

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,  $\grave{a}$ ,  $\hat{e}$ ,  $\in$ ,  $\Box$ ,  $\mu$ ,  $\beta$  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

💕 🌮 💭

🥩 🌮 💭

	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	EE hocht hi/hu 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:	
<ul> <li>Item item number</li> <li>Item supplier code</li> </ul>		
• Туре		
Start date     Amount per PULLING		
Sequence		
Lower limit		
Lower limit unit		
Layout1		
Title	Blad1	
		- 💥
Import entity	Surcharge	
Import entity	Surcharge	

Or at System > Layouts:

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

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

Layouts Menu View Edit	Fund	tions			
▶.	- 🤇		1		. ⑤
Filter	Search	All	Details	Manage screen layouts	Help
Navigation 😵	<b>^</b> s	tandard	A	Name	
r. Ia	•				
Ealt					
Feed layout			8		
Add OData lavout					
Free form					
Add export layout		~	8		
		~			
Add import layout		~			
Add report tomplate		_	_		

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



⁸ 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	~			
Name	Item import from Exc	el		⊐∥	
Application	◯ III Within the comp ● [©] For me	any 🔿 🖧 For al	l members		
	Add next record	Save record	Cancel		
					ł

- 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				3
Add - New layout				0
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 file⁹. Erroneous data will *not* be imported.

Fields tab:

⁹ 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.

Layout Properties Fields	Memo			
Available fields		Selected fields		
		Field	Header Pos	
🖃 🗉 Alphabetically by letter		Item Number	Item	
🛨 🗉 by category		Supplier code	Supplier 2	
🖃 Standard fields		Supplier gln code	GLN 3 Code	
	>			
Add data fields		Remove unwant	ed fields	
Properties				l
Header	5	Supplier	<u>^</u>	
		Automatic		
Field position	2	🗹 Automati	c 💊	
Fixed value	l l	Compano (2220000074100)	• 🗛	
Maintain		U Yes ♥ No		
Continue on error		🔾 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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	accocaron		
📄 Wijzigen			
Layout Properties Fields Mem	10		
Number of header rows	0		<b>^</b>
Format	Character separated		~
Separation character	TAB		
Decimal separator character			
Decimal group character	,		
Date separator character	1		
Time separator character	:		
Text enclosure character			
Continue import on errors	🔾 Yes 🔍 No		
	Add post moord	Cause record	Canad
	Add next record	Save record	Cancel

- 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 file¹⁰, and click on *Next*.

🗐 Import					
Import					
Import File		1	emplate_Nieuwe_Producter	Select	
		Previous	Next	Close	
140043972	140043972	CEDI UNCIKE O KEZ	PCF	1.00	1 00 PC

3. In the next dialog window, you will be presented with one or more data Layouts¹¹. 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-Items.	CSV				
Import entity	ltem			-	×	
Import layout				-	<b>₩</b> ₽	
Layout2						
Title	Excel-Produc	ts.csv				
Import entity	Product			-	×	
Import layout				-	<b>X+</b>	
						_
			Novt			

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*.

 ¹⁰ 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.
 ¹¹ Note: Industry standard files will be auto-detected; no Import layout is necessary.

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-					
Import					
Summary					
Importof file Multiple-data-set.zip with impactreport: Full					<b>^</b>
Import van Products met layout Standai Country of origin code GTIN Manufacturer code Brand Series Type Code Short description Product group code Product Class code (ETIM Dynamic) Import van Products met layout Standai Country of origin code	ard product import Unicode TAB-gescheic ard product import Unicode TAB-gescheic	en.txt en velden: en.txt en velden:			
<ul> <li>Manufacturer code</li> <li>Brand</li> <li>Series</li> </ul>					-
Manufacturer code     Brand     Series Settings					<b>*</b>
Manufacturer code Brand Series Settings Reporting level	Full		<u>~</u>		•
Manufacturer code Brand Series Settings Reporting level Is testrun	Full O yes ® No		<u> </u>		T
Manufacturer code Brand Series Settings Reporting level Is testrun Fill conversion list	Full ○ Yes ● No ○ Yes ● No		<b></b>		T
Manufacturer code Brand Series Settings Reporting level Is testrun Fill conversion list Selected Files	<mark>Full</mark> ○ Yes ● No ○ Yes ● No ✓ Excel-Items.csv (Standaari	l product	✓ Excel-Products	.csv (Standaard produ	Ŧ

- 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		6	0
Import	_		_	
Import				
Summary				
Importof file Multiple-unicode-dat with impactreport: Full	aset.zip			<b>^</b>
Import van Items met layout Star Supplier GLN code Assortment code Item Number GTIN Short description Gross price info (with new star Gross price info (with new star Gross price info (with new star Gross price info (with new star 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	ıdaard artikel import Unicode TAB-gesch tdate) price/pu + pq tdate) price quantity tdate) price unit (pu) code	eiden.txt en veld	len:	Ţ
Layout1				
Title	Unicode-items.txt			-
Import entity	Item			
Import layout	Text import lay-out 'Sta	ndaard artikel imp	oort Unicode TAB-geschei	ide <b>* AP</b>
Layout2 Title	unicode-product.txt			
Import entity	Product			- ×
Import layout	Text import lay-out 'Sta	ndaard product in	nport Unicode TAB-gesch	eic 🕇 🎇 🗭
			_	

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	unctions Import	: / Export			
▶.□	- Q	A		<b>M</b>	2ba	. ⑤
Filter	Search	Export assortments	Import Item exp	ports Export images	Import 2BA	Help

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

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0/14101999999		UK		_
Import 2BA				E
Import 2BA				
Supplier	(8715847000008)			)
Item format	DICO/SALES005		~	3
Products (product data + class)	🔍 Yes 🔾 No			
Add new manufacturers	● Yes ○ No			
Changes since	E			
Testrun only	● Yes ○ No			
Authorize URL	https://authorize.2ba.nl			
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>.

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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 E	Edit Functions	Import / Expo	rt		
▶		3			?.
Filter	Search Export ass	ortments Import	Item exports	Export images	Help
Navigation 📀	Logo	Code	Description		
August (890/151)					
		COMPANO	Compano BV		
Logs (0/0)					
Item groups (0/0)			100		
Transfer rules			1000		
Memo (0/0)	>	OPP NL	OPPLE Lightin	g	
>				per se	
Edit 🛞					

3. In the pop-up window:

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I EDDanelDo-	C 54598-		
Item exports			
Send export to			
Software package	Other		~
Free text export	🔾 Yes 🔍 No		
tem Format	#Sales005		~
Prices	Gross prices		~
Products (product data + class)	🔿 Yes 💿 No		
Features (technical product specifications)	🔾 Yes 🔍 No		
o classification system	EDynamic		~
Changes since:			
Price Reference date:	30/05/2022	1994	
Start Date	06/05/2022	1994	
End Date			
Country	België		- 🗙
#ItemsLanguages	de German		
	en English		
	In Dutch		
Catalog version			
Add images + attachments	🔿 Yes 🔍 No		
		Firment	Olara
		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
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
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
	#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

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**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):

A Items Menu View	E	dit	Fur	octions	Print	Import /	Export	» Assortmen	t:Opple (Belgie) (O	PP_B
batten		•	Q		•		-	12	2.	
filter			Search	deselect	Details	Screen Lay	yout	Price Reference	date Help	
Navigation	2		🔺 Supj	olier			А	Item no.	Abbreviation	Item description
Price Information			OPPL	E BE				<u>140043898</u>	pce	LED E T5 batten 600 9W 800lm 3000K CT
Surcharger		Þ	OPPL	E BE				<u>140043899</u>	pce	LED E T5 batten 600 9W 800lm 4000K CT
Surcharges		Þ	OPPL	E BE				<u>140043900</u>	pce	LED E T5 batten 1200 18W 1600lm 3000K CT
Own alternatives			OPPL	E BE				<u>140043901</u>	рсе	LED E T5 batten 1200 18W 1600lm 4000K CT
Accessories			OPPL	E BE				<u>140043902</u>	pce	LED E T5 batten 900 11W S 3000K BL
Attachment			OPPL	E BE				140043903	pce	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	» Assortment:	)pple (Belgie) (O	)PP_B
batten		- Q	. 🔺	4		8			. ⊘
_		Sear	ch Expor	t Import	Manage layout	ts Excel Import	Excel Update	Item exports	Help

5. In the pop-up window:

🥩 🌮 💭

🗐 Item exports	(200				×
Item exports					
Send export to	Yorick.Elling@opple	e.com			1
Software package	Other		T		
Free text export	🔍 Yes 🖲 No				
Item Format	PAB 2.03		•		
Prices	Gross Prices		•		
Products (product.txt / ProductData.xml)	🔍 Yes 🖲 No				
features (PAB prodspec.txt / ProductData.xml)	🔍 Yes 🖲 No				
AttachmentIndex2.txt	🔍 Yes 🖲 No				
To classification system	EDynamic		T		
Links (links.txt)	🔍 Yes 🖲 No				
Manufacturersinfo in export	🔍 Yes 🖲 No				
Changes since:					
Price Reference date:	24/06/2019				
Start Date	19/02/2018				
End Date					
Country	Netherlands			- 💥	
Language	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*:

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

Send export to	An
Software package	Other 🗸
Free text export	🔿 Yes 🖲 No
Item Format	Sales005 V
Prices	PAB 2.0 PAB 2.03
Products (product.txt / ProductData.xml)	INSBOU 003
features (PAB prodspec.txt / ProductData.xml)	INSBOU 004
Classification system	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.

🦻 🌮 🛄

germany	Search All	Details Screen Layout				
Navigation		Code Description	ISO Code	Currency code	Country number	Use c
Configuration		DE Germany	DEU	EUR	49	
r.Ja		📄 Erit - Germany				
an a		Country Translations				
Autofill		Code	DE			
Add	×	Description	Germany			
Modify		ISO Code	DEU			
	<u> </u>	Currency code	EUR			
		Language	de-DE German	(Germany)	- 💥	
Functions	۲	VAT Rate high	19.00	%		
Manipulate		VAT Rate low	7.00	%		
<b>A2</b>		County number	49			
		Use country-specific fields	● Yes ○ No			
		Editorovia	us Edit povt	Sava record	Cancol	_

<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>.

Country-specific fields of Product in Item field selector

All country-specific fields of Product can now be selected in the field selectors of Item (screen layout, export layout).

Note: These fields will not appear on the pop-up screens of Detail, Edit and Filter.

<u>Important</u>: Available Product country-specific fields are listed in the field selector under the category *Item > Country-specific fields*, with the prefix **Product**.

# 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'.

	ription (product) 🔪 Tech	nical description (product) 🔨 Additiona	User-defined fields	Translations	Country-specific fie
Denmark					i
EL number					
/VS number					
Finland					
#FI_LVINumber					
Sweden					
SEG number					
RSK number					
United States					
<b>United States</b> Height (imperial)	0.59	Inch 🗹 Automatic			<b>-</b>
<b>United States</b> Height (imperial) Length (imperial)	0.59 0.47	Inch 🗹 Automatic Inch 🗹 Automatic			
<b>United States</b> Height (imperial) Length (imperial) Width (imperial)	0.59 0.47 0.59	Inch ☑ Automatic Inch ☑ Automatic Inch ☑ Automatic			
United States Height (imperial) Length (imperial) Width (imperial) Size unit (imperial)	0.59 0.47 0.59 INH Inch	Inch ☑ Automatic Inch ☑ Automatic Inch ☑ Automatic		•	
United States Height (imperial) Length (imperial) Width (imperial) Size unit (imperial) Volume	0.59 0.47 0.59 INH Inch 0.00	Inch 🗹 Automatic Inch 🗹 Automatic Inch 🗹 Automatic Gallon (VS) 💟 Automatic		•	
United States Height (imperial) Width (imperial) Size unit (imperial) Volume Volume	0.59 0.47 0.59 INH Inch 0.00 GLL Gallon (VS)	Inch 🗹 Automatic Inch 🗹 Automatic Inch 🗹 Automatic Gallon (VS) 🗹 Automatic		•	) <b>X</b>
Jnited States Height (imperial) Journal (imperial) Size unit (imperial) Jolume Jolume unit Vet weight (imperial)	0.59 0.47 0.59 INH Inch 0.00 GLL Gallon (VS) 0.0198	Inch 🗹 Automatic Inch 🗹 Automatic Inch 🗹 Automatic Gallon (VS) 💟 Automatic pound 💟 Automatic		•	] <b>X</b> ] <b>X</b>

#### 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):

I	tems	Menu	View	Edit	Function	s P	rint	Import / Export			
	⋟.			•	2				2	?	
	filter				Search	All	Details	Article description	Price Reference date	Help	

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**:

Export items				C
Export items				
Use screen layout	● Yes ○ No			
Prepare for import	🔾 Yes 🖲 No			
Summary				
Filter: Filter: Filter: Fields: Supplier description GTIN Product code Item Number Description Calculation unit code Minimum purchase per CU Increment decrease Price unit code Condition group code Packing Form code Stock item Gross price price date Number of PU per OU Number CU per OU Gross price price/pu + pq Currency symbol Disposal	ED E T5 batten 600 9W 8	00lm 3000K CT'		•
	tems       Image: Conversions         items       Image: Conversions         isyout       Image: Conversions         import       Image: Conversions         v: Items       Item: 'OPPLE Lighting 140043898 LED E TS batten 600 9W 800lm 3000K CT'         r description       Image: Conversions         code       Image: Conversions         ite code       Image: Conversions         r description       Image: Conversions         r code       Image: Conversions         r of PU per OU       Image: Conversi			

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 Edit	Fund	ctions Print	Impo	rt / Export
. 🖉	<b>•</b>		٨		?.
Filter		Search	Export products	Import	Help

3. In the pop-up window:

🝠 좐 🛄

Export products				1
Export products				
Use screen layout	<mark>⊖ Yes ● No</mark>			
Export layout			- X 🕂	
Prepare for import	🔿 Yes 💿 No			
Summary				
Export view: Products Filter: Selection: product: '140043898 LED E T5 B	ATTEN 600 9W 800LM 3000K CT (langer)	Opple 06956712666	215'	

- 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			
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		- 🗙
Number	RE190004	
Name	and the second se	
Short name		
Communications		
Telephone		
Visiting address		
Street + house number	and the second sec	
Zip code	100.0	
City		
Mailing address		
Different postal address	🔾 Yes 🖲 No	
Street + house number		
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

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- % 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 Vi	ew Edi	t Fund	tions	Print	Import / Exp
ے 🌾		•		♣		×
Filter			Search	Add	Modify	Delete record(s)
Navigation		۲	🔺 Ar	chived	Manu	ıfacturer Descri
Edit		۲	•			i
Add						
Madify						

3. In the pop-up window:

Product tab

Product Cl	assification Model Commercial description (product) (en]	) 🔨 Technical de
Manufacturer		- X+/
Code	1 7532116346	
Short description (product)	LED E T5 BATTEN 600 9W 800LM 3000K CT	
Description (product)	IED E T5 BATTEN 600 9W 800LM 3000K CT longer	r
GTIN	06956712666215	
Company-specific product code	1	
ERP code		
Country of origin	Duitsland	- 💥
ProductPublish	On internet In catalog ✓ On webshop ERP Datapool Calculation	
General		
UNSPS code		
Product group code		
Group (masterdata)		- 💥
Brand (product)	1	
Series (product)	E T5     E T5     E	
Type (product)	Batten	
	Add next record Save record	Cancel

- 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			- ×+
Status			
Available	Running out	<b>v</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	O Yes O 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			- 26
Volume			
Volume Unit			<b>-</b> X
Net Weight	195.0000 kilogram	m	
Weight Unit	Kilogram		<b>-</b> ×
data			
Start date			
End Date			
Import Time	06-11-2020 14:00 (1)		

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

Add - New supplier		
Supplier Organization	Item manager Links Memo Translations	
Organization	() <b></b>	<b>-</b>
Code		
Description	and the second sec	🗹 Automatic
Supplier		
Logo		
Condition assessment	Exact	
GLN code	1	
Manufacturer		<mark>-</mark> ₩⊕
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: Enter the Global Location Number of the supplier. <u>Note</u>: If the data of **this supplier will not be exported in an industry standard format, a 'dummy' GLN** can be used. More information is available from your Compano consultant
- g. Manufacturer: Select the manufacturer to which items of this supplier are to linked.

#### Links tab

	Hiser	ise climate Solutions	BV	
Add - New supplier				
Supplier Organization	Item manager	Links Memo	Translations	
Deeplink template				
Image deeplink items	1			
Drawing deeplink items	()			
Customer number	()			
User name	(1)			
Password	(i)			
		Add next record	Save record	Cancel

- h. Deeplink template: Refer to a template for the deeplink to items.
- i. Image deeplink items¹²: 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

¹² <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 Vie	w Edit Function	s \ Import /	/ Export		
▶.	- 🤍 📘				
Filter	Search All	Details Ma	inage screen layouts He	lp	
Navigation	😞 🔺 Archive	d Code	GLN code	Short name	Description
Assortments					
Not contained			_		
California (0/0)					
Plans.					
		COMPANO	2	Compano BV	
Memo (0/0)					and the second se

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 It	em manager Countries Memo Translations	
Supplier		- ₩+/
Туре	Purchasing	
Item type	🗊 Buy 🗸	
Code		
Description		
Contact code	(1)	
Renumber Code	1	
DUNS Number		
Logo	1	
Data manager		<mark>-</mark> ¥⊕
Item Number		
Ranking	(1)	
Data		
Update frequency	Month 🗸	
Next update		
Publication date		
Latest export		

- 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	assortiment	Help
Navigation 📀	🔺 Logo	Code	Description	
Titems (0/0)				
		<u>COMPANO</u>	Compano BV	
Logs (0/0)			1.0	
Item groups (0/0)				
Transfer rules			100	
Memo (0/0)				
3				

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)
🌱 シ 💭

- 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*¹³.
- c. Next, click on *Transfer* (4) to generate the item(s) based on this product(s).

• 0	- 9		. A Carton Carto	·	
effecturer Description	Code	GTIN	A F T Product description Brand	Туун	Courts Filter
	140043098	06955712666215	a usp s TS betten 600 9W	T3 EcoMax	a Manufacturer
	140141979	06956712666222	LED E TS batten 600 9W	T5 EcoMax	Copple (OPP) Brand
	140043900	06956712566239	d LED # 75 hemen 1200	T3 EcoMes	< Opple Interies
	140243901	06956712666246	I I LED 6 75 batter 1200	Tš BooMax	Type
	140043902	06956712666253	LED E TS batten 900 11W	TS S with weitch	Course Construction (
	140143903	06956712666260	LED E 75 batten 400 9W 5	T3 5 with switch	(materials)
	140043904	06456712666277	d LED E 75 batter 300 4.5w	TI 5 with exitch	Association
	140043967	08056321843472	2 CEDPanetic G Saster	Orle	Product Classes
	140043958	06956321843489	a UEDParaRe-G SqSM-	6ria	Productmedials
	140141040	04956321643410	I GI LEDPareRic G Sq298	p.lz	- 1011 +000 2501+
	140043970	06956321843427	a UIDPareRo-G 54295-	Crite.	Other sites
	140043971	04054321843458	28 29 LEPereRe G Re298	p la	Despitak Te antiste of Osula
	105243073	00050311843405	144 344 36W-3000-Wite-CT	for the	Country of origin
	* #10233872		Call Sew 4000-WH CT	614	<ul> <li>Division</li> </ul>
	110010000		Int. Int. 21W-3000-WH-CT	one -	Status and data
	130551272	00495351543611	14 44 21W 4000 WH CT		Secondary Products
	140044049	00995321863731		Pore .	Classification
	140044054	06956321841557	a ca LabPanelRo-G Satst-	Surface Module	Included in
	140544055	06456331823564	CALLEDPareRo-G Re290-	Surface Module	
	140044086	00050321843436	Call Call LEDPartelRo-CT	Curfare Hodyle	
	Concession of the local division of the loca	Code Citta		100 m	
1.00 tipper	and the second states	140041010 06958712	SAS222 III Statter 600 SW	Shonning 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:

Items Menu View	Edit	Functions Print Imp	ort / Export				
140043898	Q	+ 🕀	<u></u>		×	1.0.	
	Search	Add Accessories selector Ar	icle Item <- Product	Modify De	elete record (s)	Copy Help	
Navigation		<ul> <li>Supplier</li> </ul>	S C	Item no.	Image	Item description	Item description (de-DE)
Price Information (5/0)		OPERation		<u>140043898</u>	1 🔬	LED E T5 batten 600 9W 800im 3000K CT	LED E T5 batten 600 9W 800lm 3000K CT
Surcharges (1/0)		1000.000	=	<u>140043898</u>	3 🕰	LED E T5 batten 600 9W 800lm 3000K CT	LED E T5 batten 600 9W 800lm 3000K CT
9			<b>□</b> b	1/100/13898		LED T5 Batten 600mm	LED Lichtleisten

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

Item Prices Additional	Commercial descript	on \Technical description \Pro	duct \ Memo \ User o	lef fields 🔪 Transl
Supplier	1			<mark>-</mark> ¥⊕∕
Item Number	140043899			
Short description	Led e t5 batt	en 600 9w 800lm 4000k ct		
Item description	Led e t5 batte	n 600 9w 800lm 4000k ct		
Description 1				
Description 2				
GTIN	(1) 0695671266	6222		
Own item number	1			
Division				
Assortment	(i)			<mark>-</mark> ₩#/
Condition group code	PLU			
Condition Group	PLU			
Group Code	(i)			
Group (masterdata)				- 🗙
Units				
Calculation Unit	Piece			- ×
Order Unit	Piece			- ×
Factors				
Number CU per OU	1.00			
Number of PU per OU	I.00			
Minimum purchase in Order Units	(10.00)	pieces		
Order increment	1.00	piece		
			Sava	Cancel

¹³ <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.
- 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.

🍠 🌖 💭

A Items Menu View Edit	: Functions Print II	nport / Export » Assortme	nts:
		1	12
Including archive	Search All De	etails Screen Layout Price	Reference date
Navigation 🛞 📤	▲ Supplier	A Item no.	Abbreviatio
Brice Information (2)	<ul> <li>And the second se</li></ul>	140043898	pce
Price Information (2)	and the second second	<u>140043899</u>	pce
Item - Item relations	and a special	<u>140043900</u>	pce
(parent) (3)	and the second sec	<u>140043901</u>	pce
Item - Item relations (child)	The second	140043902	pce
Surphysers (1)	and the second second	140043903	рсе
Surcharges (1)	AND A REPORT OF	140043904	pce
Accessories (0)			

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

Surcharges Menu View	Edit	Functions	Import / Exp	ort × Assortments:
▶. □	- 🔍			0.
Filter	Search	All Details	Manage screen	layouts Help
Navigation 🛞	<b>^</b> x	Assortment	Item	Туре
Htem: 140043898 Montag	×	100.00	<u>140043898</u>	AEO - Disposal fee
Assortments:				
Edit 🛞				
Add				
Modify				

4. On the pop-up screen:



- 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:

Products Menu View I	dit Functions Print Import / Export	
⋟.	⊇ 🔍 📫 🦉  📈 💋	
Filter	Search Add Modify Delete record(s) Line edit	on Copy
Navigation 😵	Archived Manufacturer Description	Code
Edit		<u>140043898</u>
Add		140043900
		140043903
Modify		140043904
Delete record(s)		140043967
Line edit on		140043968
Сору		<u>140043969</u>
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*.



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

Configuration Menu View	Edit Functions
▶.	- < □ () □ 2.
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
	& <u>Choice items</u>
	Conversion tables
	Countries
	Currencies
	E-Mail Template
	Field orders
	Item Groups
	Lavouts
	Packaging forms
	Periodic tasks
	Product list
	Productgroups
	Transfer lines
	S Units

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

	inca	
🗧 📰 Add - New produ	ictgroup	
s Productgroup	Commercial description Technical description User def fields Additional text Translations	
s Manufacturer	10.00 (DP)	<b>X</b> +
⁴ Main code		<b>×</b>
Code	WALL	
^S Description	LED Wall-mounted	
Level	Image: Second secon	
14	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 View	Edit Funct	ions 🔪 Import / E	xport	
▶.	- 🔍 🔲	1	. 🕜 .	
filter	Search All I	Details Screen Layo	ut Help	
Navigation 🔗 🛞	▲ Code	Manufacturer	Main Description	Description
2	LUMS	100		LED Luminaires
Productgroups (7/0)		100		LED Lamps
Products (0/0)	MODU	100	LED Lamps	LED Modules
Attachment (1/0)	STREET	100	LED Luminaires	LED Road/Streetlight
	FILA	100	LED Lamps	LED Filament Lamps
Configuration	TUBE	100	LED Lamps	LED Tubes
·	0.000		Length 1 - 1	ISBN 111

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):

A Productgroups Menu	View Edit	Functions Impo	rt / Export > Product	tgroup:LAMPS LED Lamps
filter	Search All	Details Screen Laye	vut 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
Products (0/0)	HPBS	08	LED Lamps	LED High Power Bulbs
Attachment (1/0)	MODU	08	LED Lamps	LED Modules
	REFL	08	LED Lamps	LED Reflector Lamps
Productgroup:LAMPS LE	STD	08	LED Lamps	LED Standard Bulb
-	TUBE	08	LED Lamps	LED Tubes
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 N	1odel 🔪 C	commercial description	Technical description	Status	User def fields	Translations	$\mathbf{X}$
General							
Manufacturer		<li>Opple (OPP)</li>			•	• ▓ᠿ∕	
Code		140043898					
Product description		LED E T5 batten 600 9	9W 800lm 3000K CT				
		Automatic				/.	
GIIN #Company/Code							
Country of origin		China				• 🗶	
Division						_	
Group Code		E_T5	LED T5 Batten EcoMax				
Group (masterdata)		E_T5 LED T5 Batten Eco	Max			- 💥	
Brand		1					
Series		<ol> <li>LED Batten</li> </ol>					
Туре		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)¹⁴. 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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¹⁴ 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	
Email		
anguage	en-GB English (United Kingdom)	 . 🗙
Name	Support and State	
FTP		
Jsername	C03035UPLOADPreRelease	
RootMapFtp	Import x /Data/Environments/000003/Uploads/Import	
Security		
Allowed IP Addresses	(1) 68.151.11.17	
Active user	● Yes ○ No	
License		
Read only	○ Yes ● No	

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



3. Enter a folder name, for instance Uploads:

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📄 Ch	noose	
+	🔶 😘 🔛 🗙 🕂 Upload	
	000003	
	- 🚞 Attachment	
	Enter the new folder name	×
	Enter the new fairles areas	
	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:

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	1			
Active user	• Yes O No			
License				
Read only	🔿 Yes 🖲 No			
User interface	FTPS 🗸	J		
	Add	next record	Save record	Cancel

Notes:

- Setting Allowed IP Addresses is mandatory¹⁵.
- Multiple allowed IP addresses should be separated by semicolons;

¹⁵ 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	<pre>FtpsPreRelease.compano.com</pre>
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:

₩ ' ≝			
lost: Gebruikersnaam: Wachtwoord:	P	ort: Snelverbinden 💌	
tatus: Ingelogd tatus: Mappenlijst ophalen tatus: Mappenlijst van "/" opmaken geslaagd			
atus: 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			
Deze pc		AutoCheck	
estandsnaam	Bestand I	Bestandsnaam 3 Bestandsty Laatst gewijzigd	×
		<b>.</b>	
SALES005.zip	32.331.904	e la construction de la construc	
SALES005.zip	32.331.904	e Lege mappenlijst	
SALES005.zip	32.331.904	e Lege mappenlijst	
SALES005.rip	32.331.904	e Lege mappenlijst	
SALES005.zip	32.331.904	e Lege mappenlijst	
SALES005.zip	32.331.904	e Lege mappenlijst	
SALES005.zip	32.331.904	e Lege mappenlijst	
sALES005.zip pestand. Totale grootte: 32.331.904 bytes	32.331.904 (	c Lege mappenlijst	
sALES005.zip pestand. Totale grootte: 32.331.904 bytes erver/Lokaal bestand Richting Extern bestand Grou	32.331.904 i otte Prioriteit Tij	e Lege mappenlijst < Lege map. Reden	
sALE5005.zip vestand. Totale grootte: 32.331.904 bytes srver/Lokaal bestand Richting Extern bestand Grov 8712423016224@Ftps.comp \\a-h04\Sites\Artikelbehee>> /8716741000002_20221214-115 32.331.	32.331.904 otte Prioriteit Tij .904 Normaal 15	C Lege mappenlijst C Lege mappenlijst C Lege map. C Lege map. C Lege map. C Lege Map	
sALE5005.zip pestand. Totale grootte: 32.331.904 bytes erver/Lokaal bestand Richting Extern bestand Groo 8712423016224@Ftps.comp \\a-h04\Sites\Artikelbehee>> /8716741000002_20221214-115 32.331.	32.331.904 o otte Prioriteit Tij .904 Normaal 15	<      Lege mappenlijst      Lege mappenlijst      Lege map.      Reden	

 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:

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- 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 m²: PH = 100, PE = m²

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 m². 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 m². 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.