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# Compano Online Software

## 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

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

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](mailto:support@compano.com), or call +31 88 266 7 202.

### 2.1 Which browser to use?

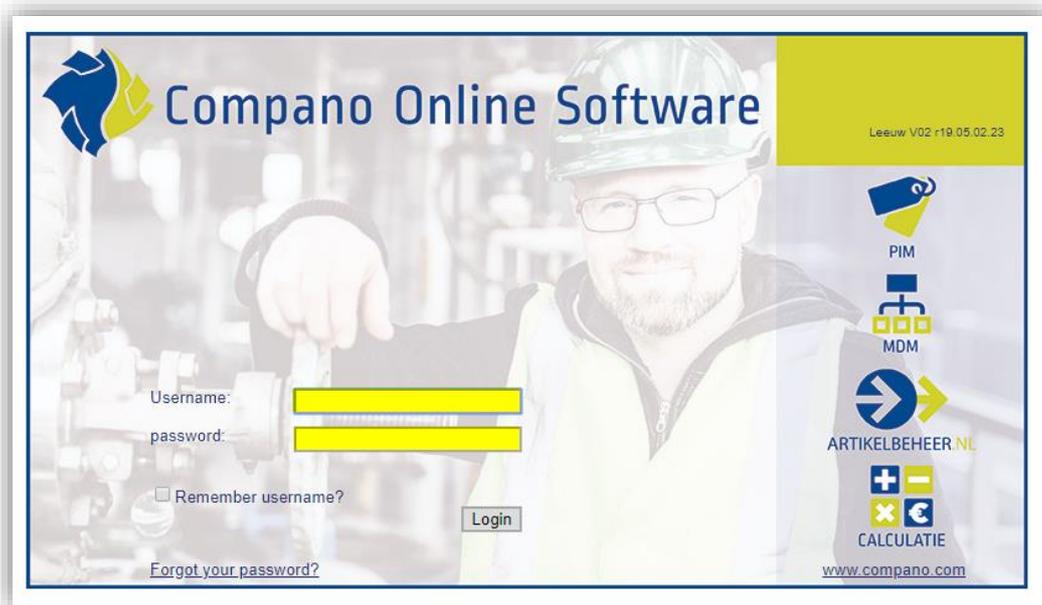
Compano software is browser-independent, so you are free to use any of the commonly available web browsers. However, Compano recommends to either use the latest version of the Microsoft Edge browser, or Google's Chrome browser.

### 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](https://[your_company_name].compano.com)



## 2.4 Prerelease environment

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: <https://pimprerelease.compano.com>

For a dedicated environment: [https://\[compano\\_name\]test.compano.com](https://[compano_name]test.compano.com)

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

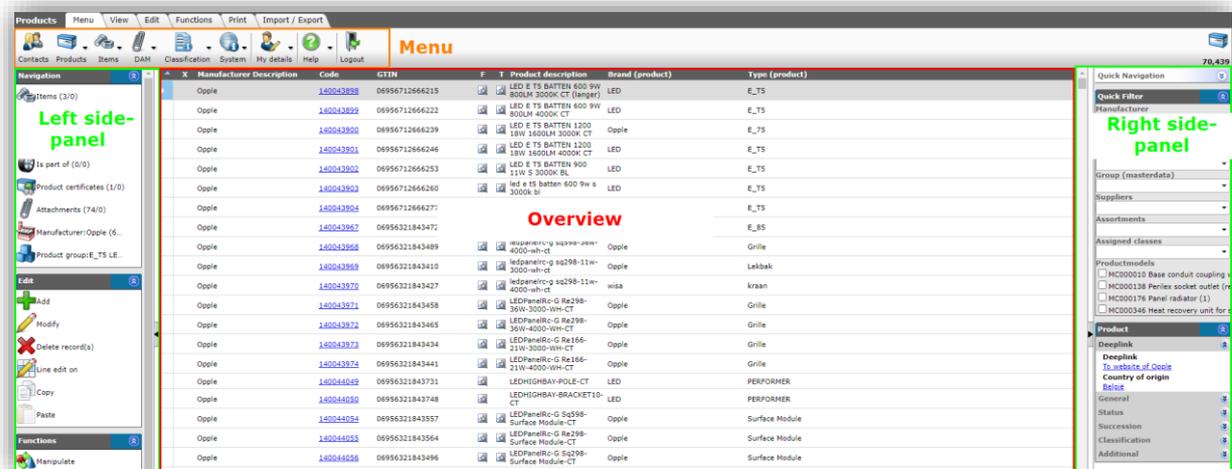
## 2.5 Login timeout

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)



### 3.1 Main menu

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

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

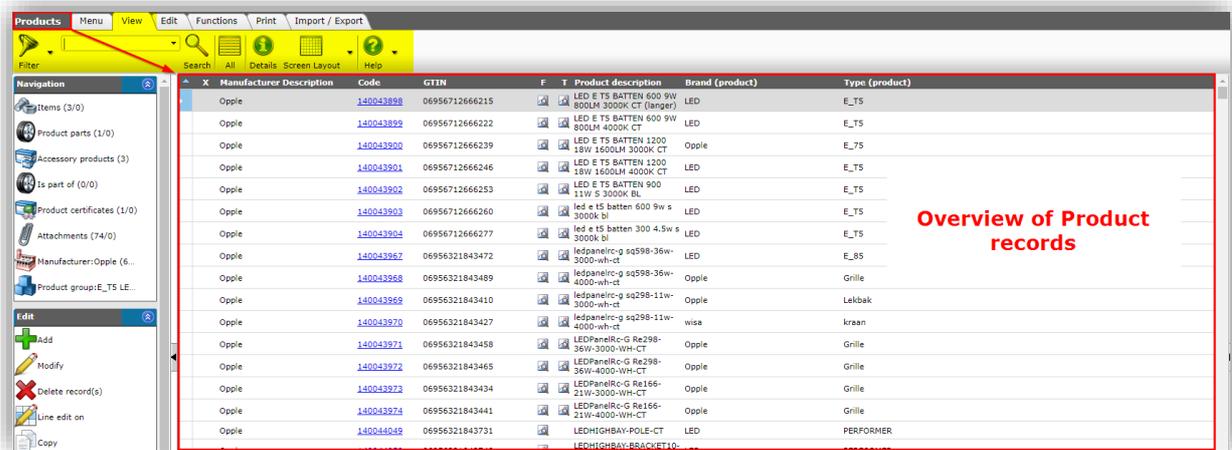
- Classification: Overview of the latest ETIM standard (ETIM dynamic).
- System: System configuration, logs and users.
- My Details: Change user details, company settings, screen settings.
- Help: Access to main Help website, support, release notes and system information.
- Logout: Log out option to terminate login session.

For more information on the main menu choice see chapter: [4. Main menu](#).

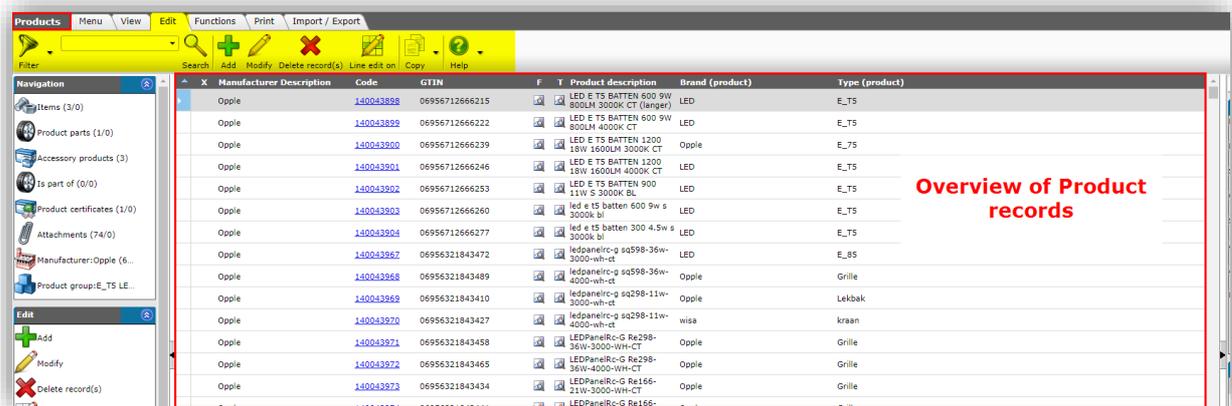
### 3.2 Submenu tabs

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:



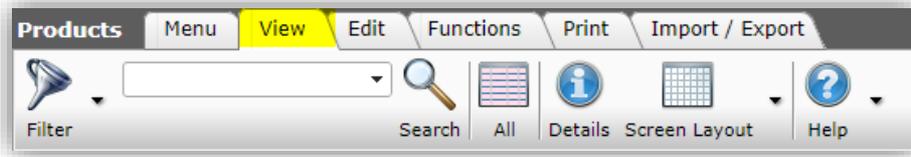
Once you switch to the *Edit* tab, different functions become available, such as *Search*, *Add*, *Modify*, *Delete record(s)*, *Line edit on*, *Copy*, for changing or modifying data of product records:



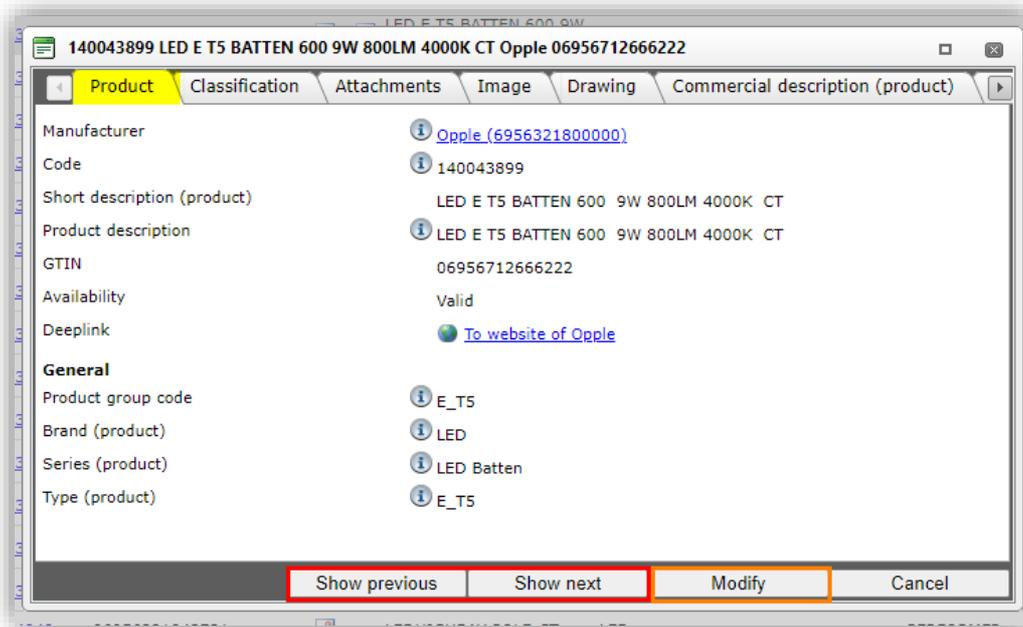
*Note: The menu options from the Edit, Functions and Print tab are also available in the left side panel.*

### 3.2.1 View

The *View* tab contains the options:



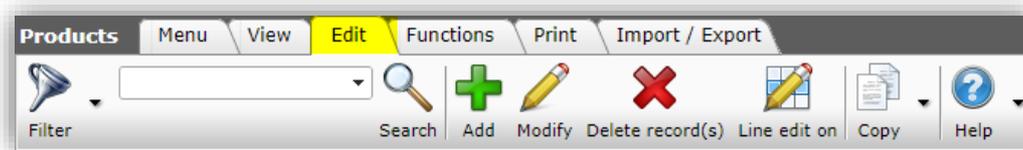
- Filter: Filter records in the overview, using one or a combinations of data fields.
- Search: Find all records containing a text string.
- All/Deselect Select all / deselect all active records in the current overview.
- Details: Show all data fields of the record *which contain data* in a pop-up window:



- Show previous and Show next: Use these buttons to leaf through the records in the Overview.
- 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:



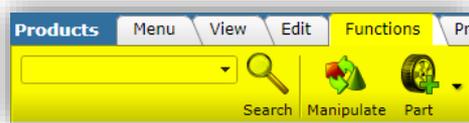
- Filter: Filter records in the overview, using one or a combinations of data fields.
- Search: Find all records containing a text string.
- Add: Add a new record.
- Modify: Modify the selected record.
- Delete record(s): Delete the selected record(s).

- 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.

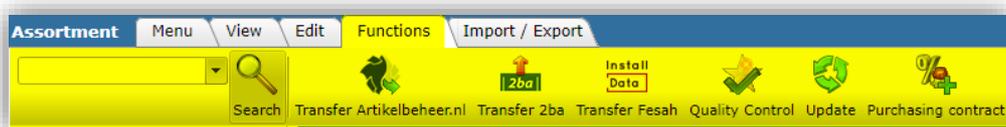
### 3.2.3 Functions

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

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



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

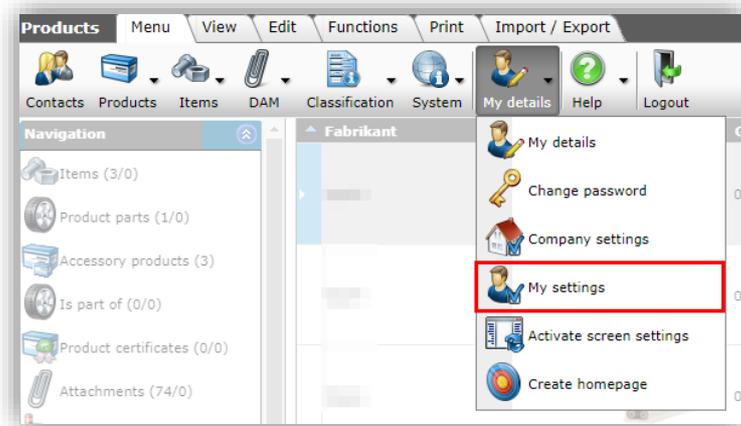
- Search: find all records containing a text string.
- Export [entity]: export (filtered/selected) records using either the screen layout or a predefined layout.
- Import: import data / records using a predefined layout and import file.
- Item exports: export (filtered/selected) records using an industry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

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

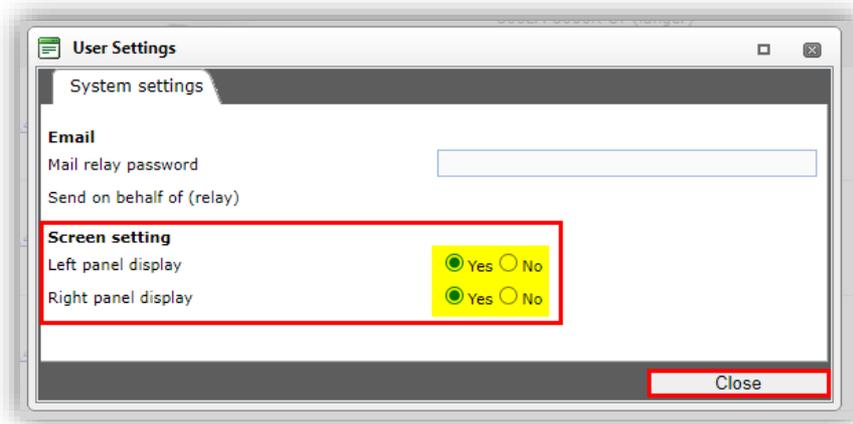
### 3.3 Side panel navigation

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

1. Through to *Menu* go to *My details > My settings*:

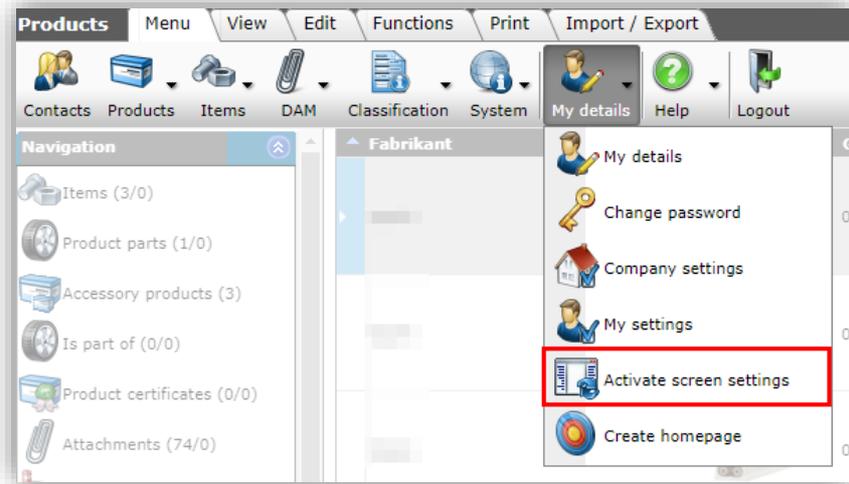


2. Under *Screen Settings* set the option for *Left panel display* and *Right panel display* to *Yes* and click on *Close*.



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

<sup>1</sup> You should have received FTPS-account login details from your Compano consultant. For FTPS download, Compano recommends the freely available FTP-software [FileZilla](http://FileZilla.com).



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

Note: 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.

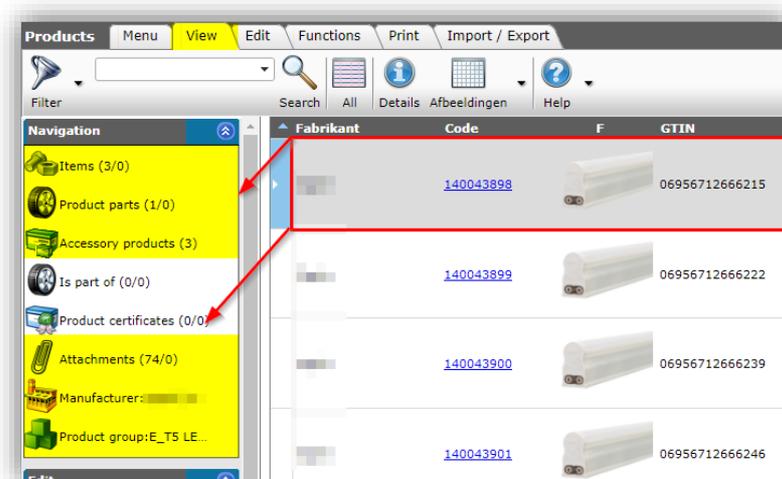
### 3.3.1 Related navigation

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.

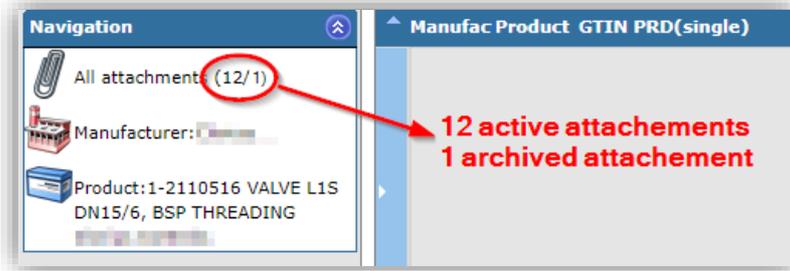
Relational navigation is available in the top left side panel. For instance:

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:



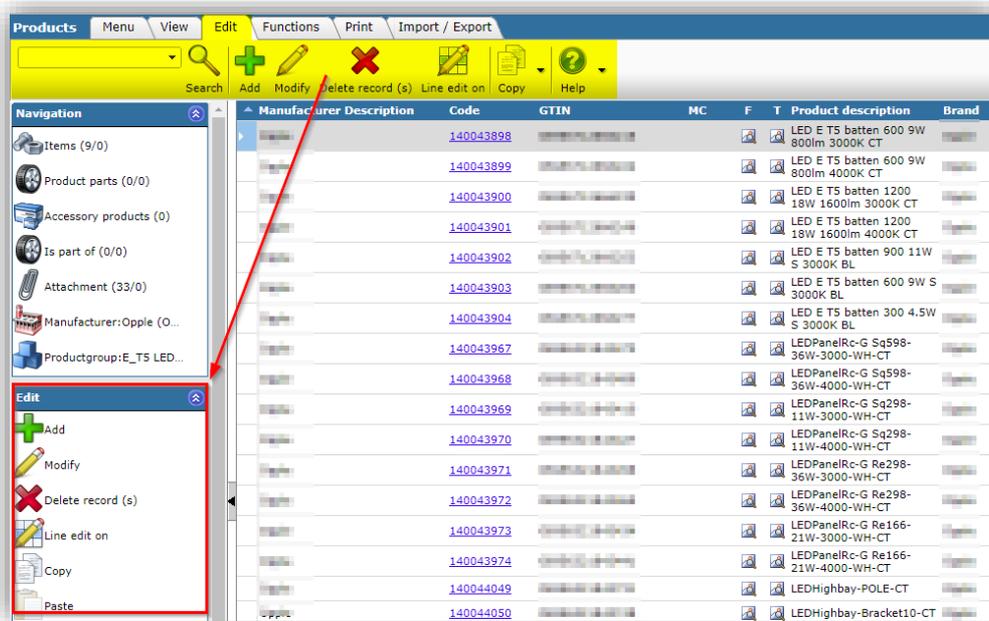
In the example above, you can navigate to Product parts (1/0) of the selected item, Attachments (74/0), three Items (3/0) and the corresponding Product group: E\_TS LED.

Note: 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:



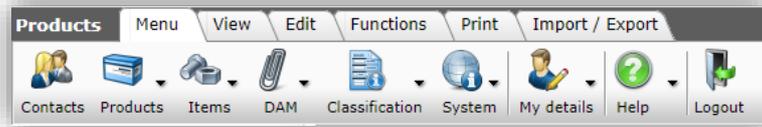
### 3.4 Back button

Note: 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:



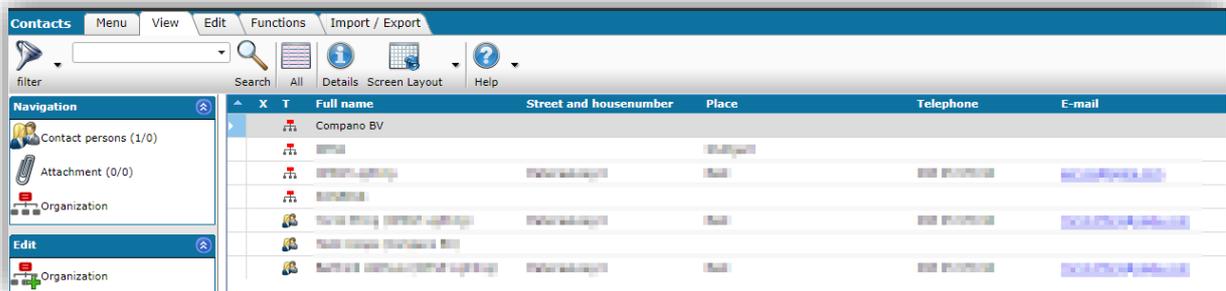
## 4 Main menu

The main menu contains the main navigation for the application:



### 4.1 Contacts

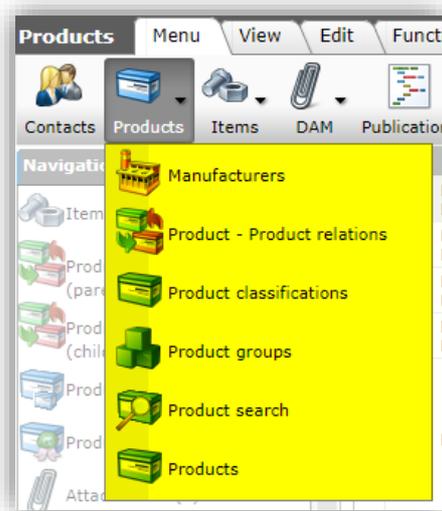
In *Contacts* you will find the name, address and other data of organisations or persons which are used in the application. For instance, your company, users of the PIM software, et. Cetera.



Note: 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.

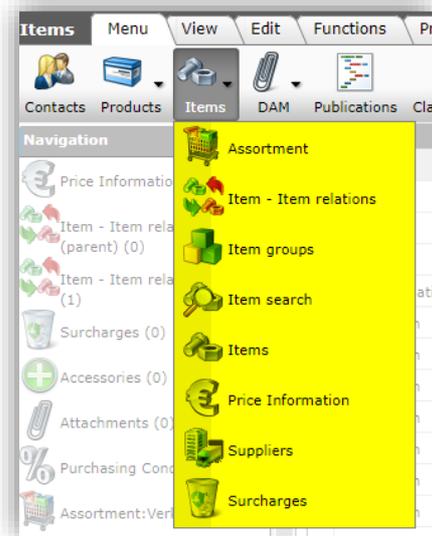
Product groups: An overview of all product groups which are in use.

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

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

### 4.3 Items

Under *Items* you can View/Edit:



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

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

Incidental export: Pre-defined exports of item data.

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

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

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

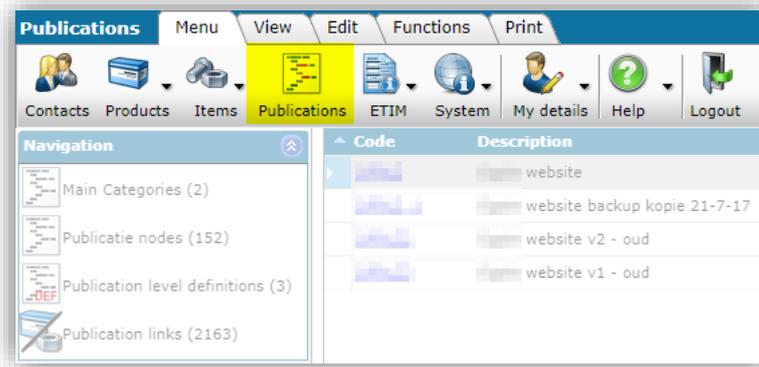
Item Search: A quick, searchable overview of all your items. Note: This menu option is for Compano Artikelbeheer.nl customers only. Compano PIM customers can use the search box on the Item overview instead.

Suppliers: An overview of all suppliers.

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

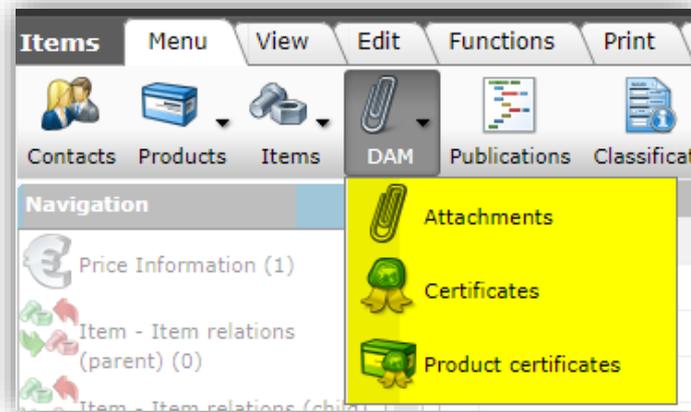
### 4.4 Publications

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



## 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

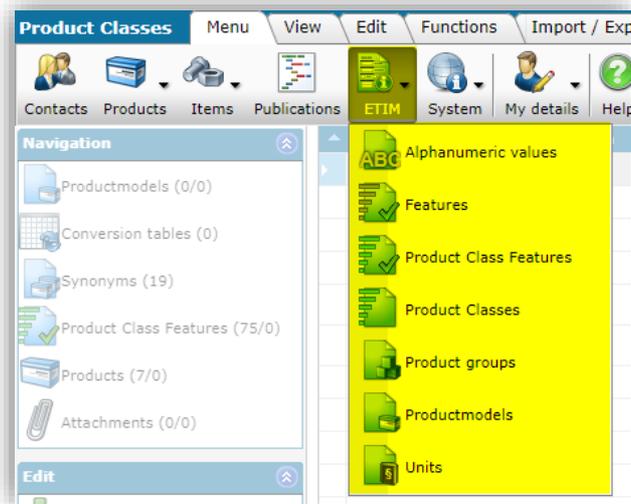
Currently, only an overview of all your attachments is available.

### 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

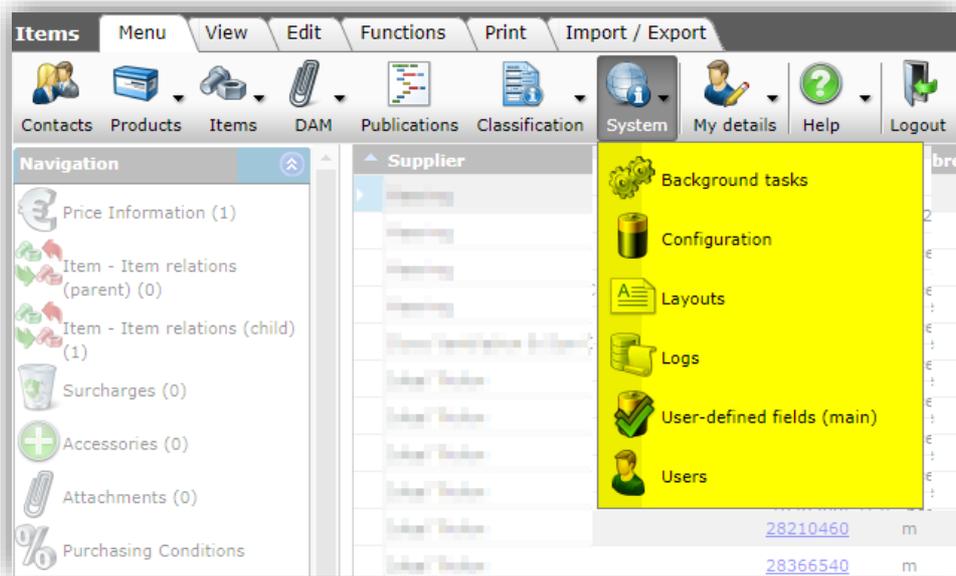
The *ETIM* menu option, provides an overview of the latest ETIM classification:



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

## 4.7 System

Under *System* you will find:



**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. Note: you can also find and download system reports under *Logs*.



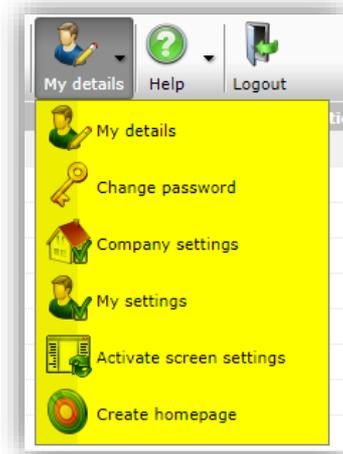
User-defined fields (main) (*optional*): If you need extra data fields beyond the standard fields, you can manage them here. Only available if you have a dedicated application.

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.

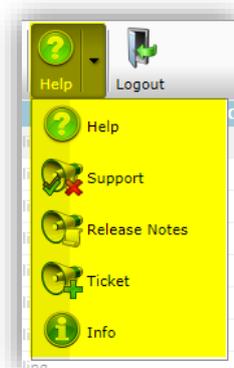
My settings: Screen settings (left and/or right sidepanel).

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.

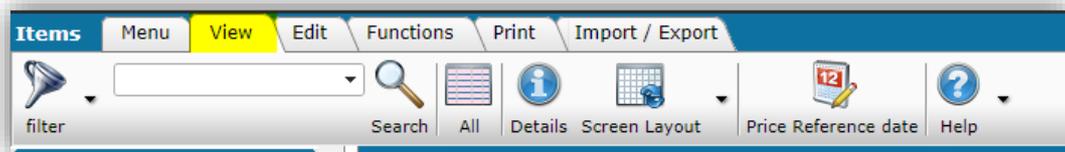
## 4.10 Logout

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



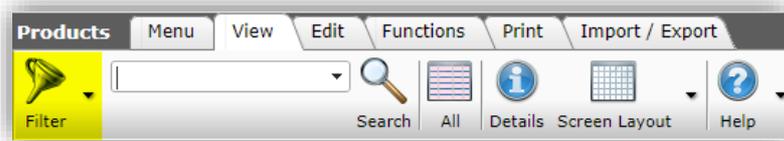
## 5 View

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



### 5.1 Filter

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

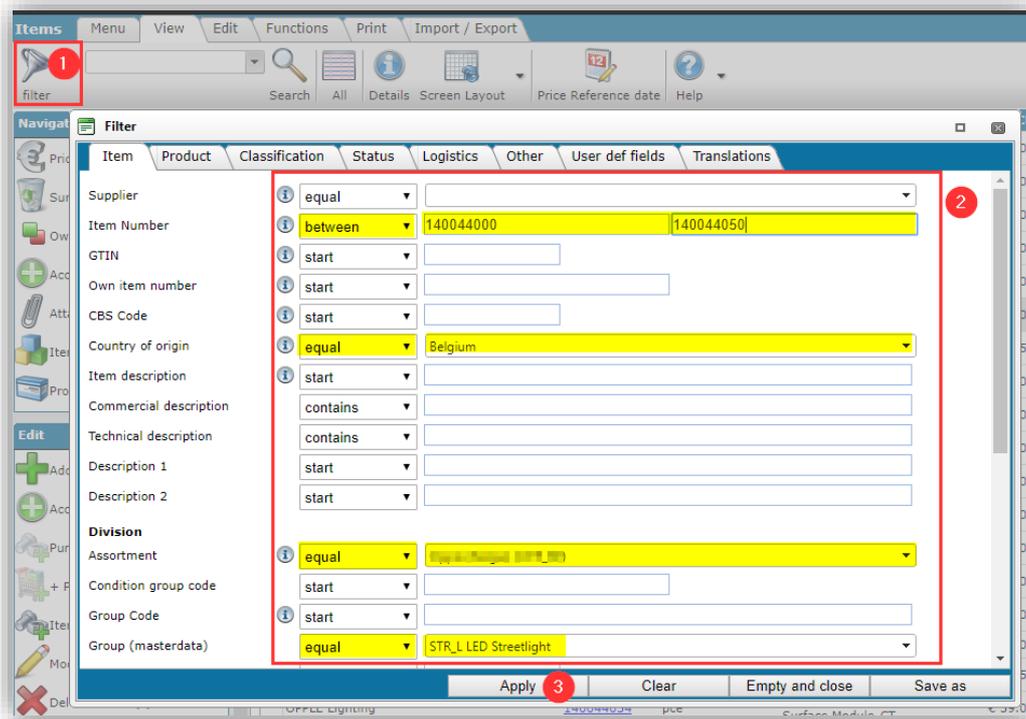


#### 5.1.1 Apply a filter

To apply a filter:

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

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

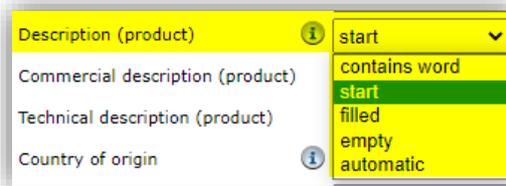


3. Click on *Apply*(3) to activate the filter.

## 5.1.2 Filter options

### 5.1.2.1 Text filter options

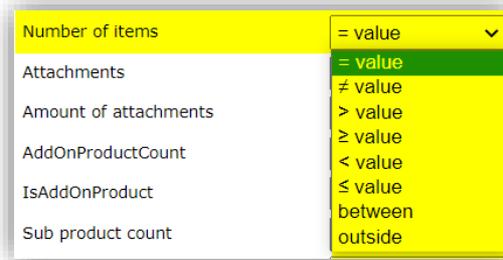
For data fields which contain an alpha-numeric text value, these options are available:



- 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

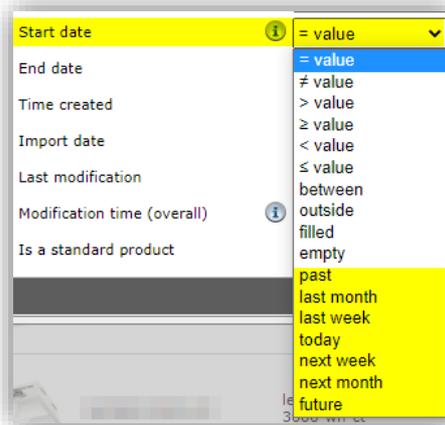
For data fields which contain a number value, these options are available:



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

### 5.1.2.3 Date field options

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



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

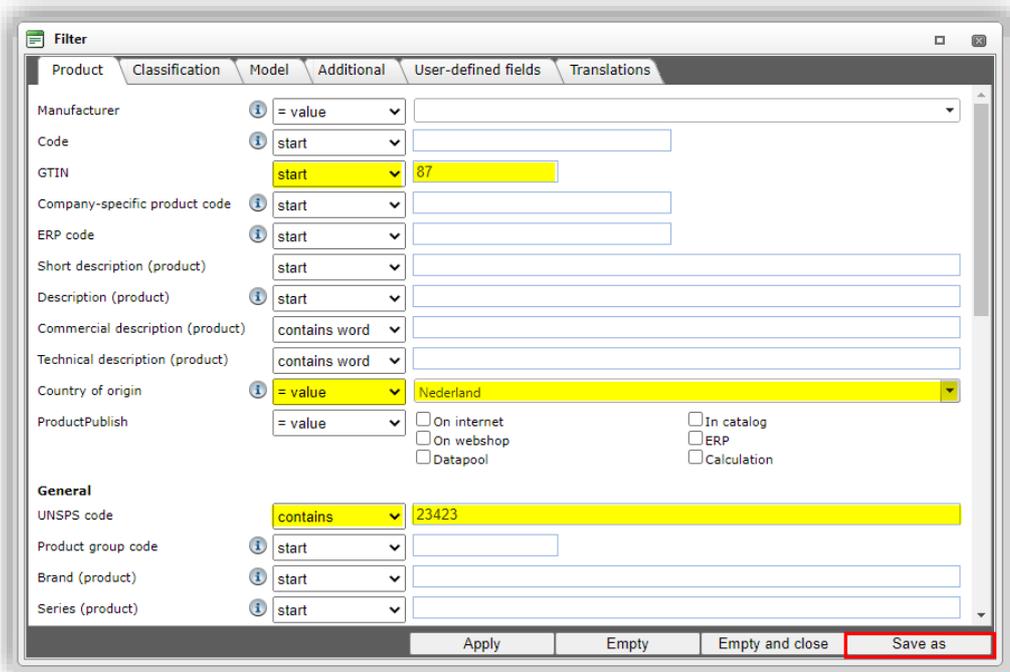
- Contains: Filters records where the data field value contains the filled out value.
- Contains not: Filters records where the data field value does *not* contain the filled out value.
- Ends with: Filters records where the data field value ends with the filled out value.

- 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.

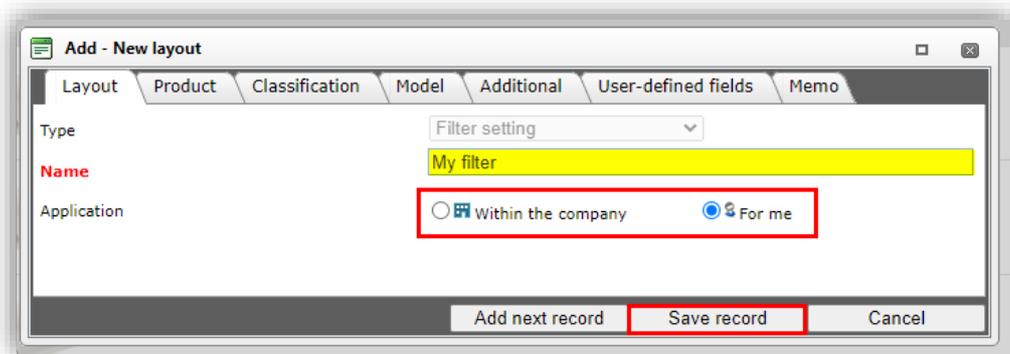
### 5.1.3 Save a filter

If you need to save a filter for future use:

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



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:

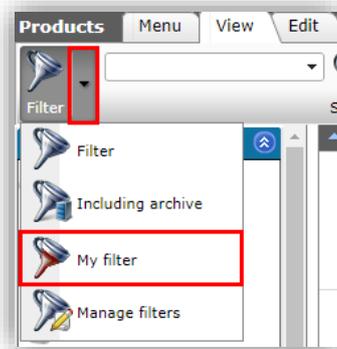


3. Click on the *Save* button.

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

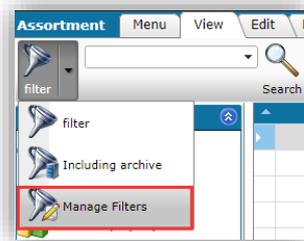
### 5.1.4 Use a saved filter

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:

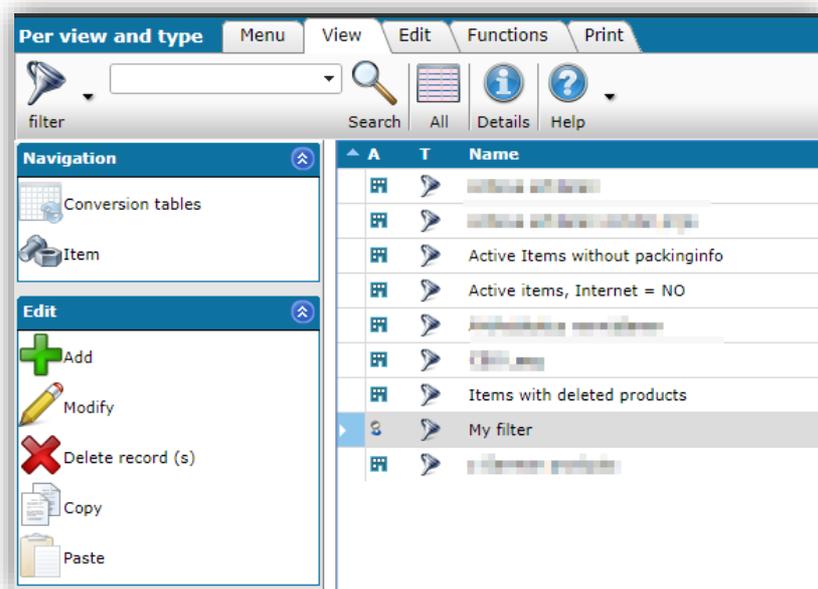


### 5.1.5 Edit a filter

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

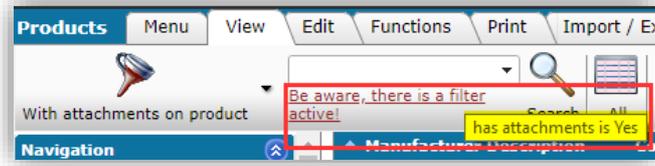


This option will show a list of saved filters which you can edit, copy/paste or delete, using the buttons in the *Edit* menu:



### 5.1.6 Clear a filter

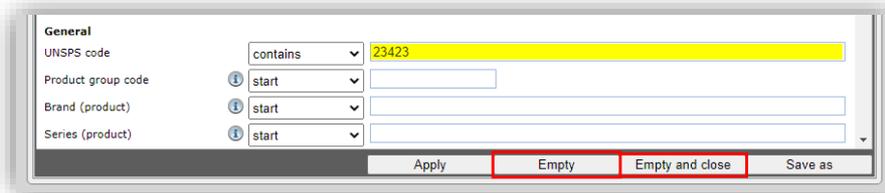
Once you have applied a filter, a warning message will alert you that a filter is active:



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

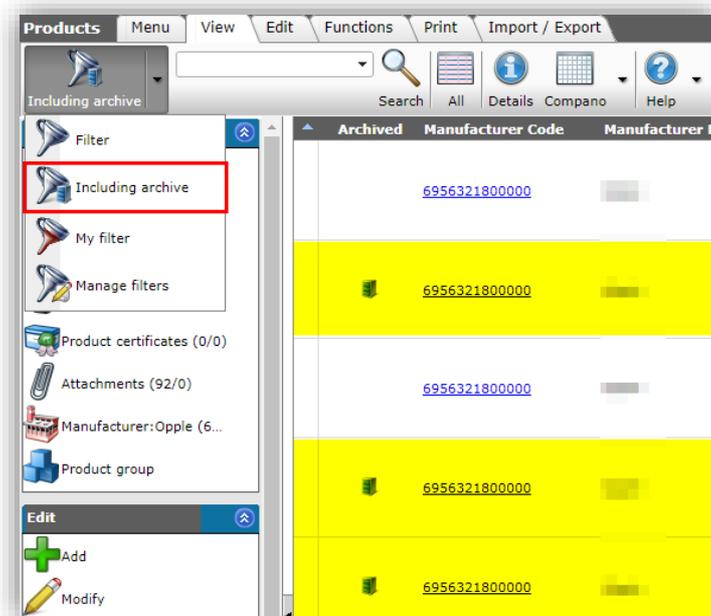
To clear a filter:

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



### 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*.



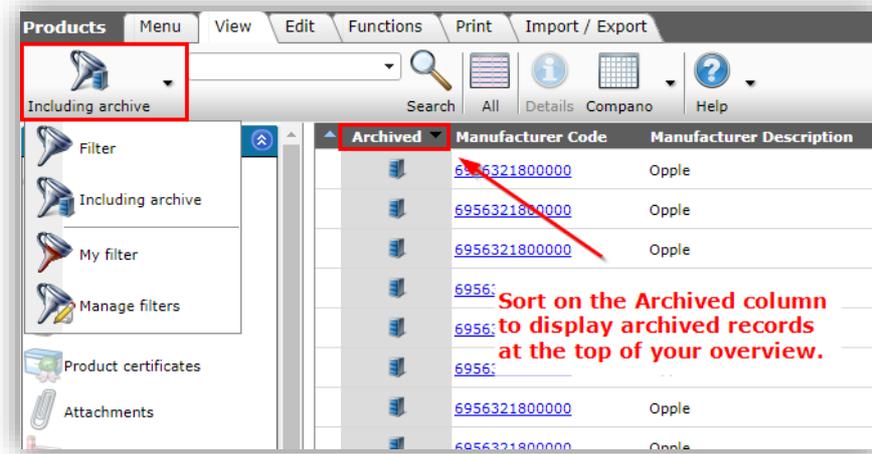
If your screen layout contains the data column *Archived*, this column will show a 'file cabinet' icon next to any archived records.

*Important: 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.*

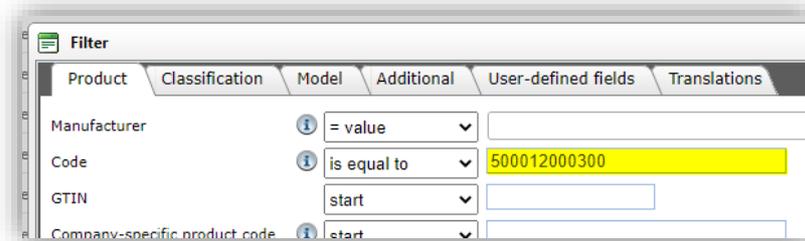
### 5.1.7.1 Additional filter options on archived records

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

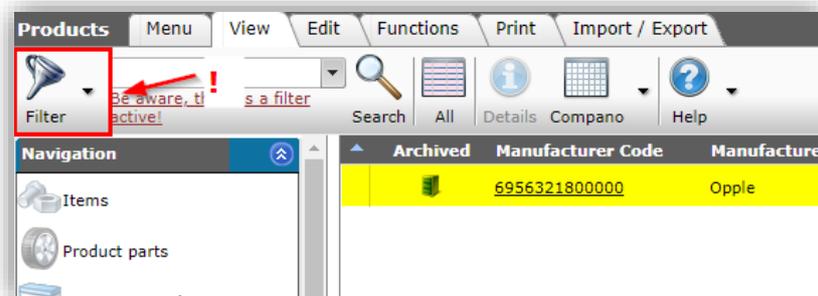
1. First, filter your products/items using the *Include archive* filter option:



2. Tip: 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**:



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



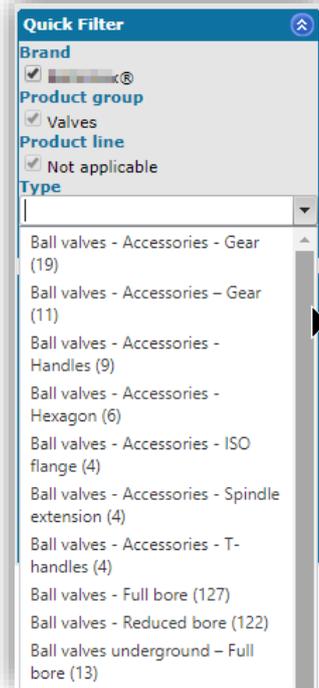
Note: While the overview *will* show records, including archived ones, the *Filter* button will reset to 'Filter'.

## 5.2 Quick filter

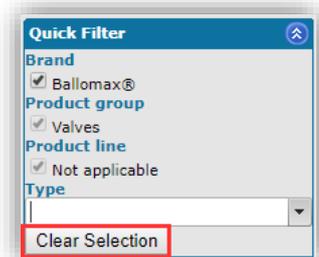
The right side panel contains a *Quick Filter*. With this filter you can make quick selections of records, based on information available in your application.

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:

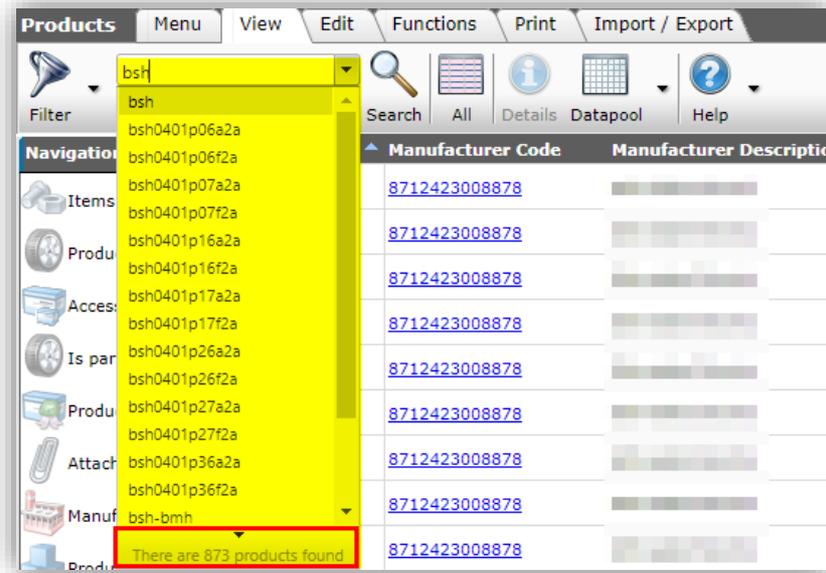


To reset the quick filter, use the *Clear Selection* button:



## 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:



Note: 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

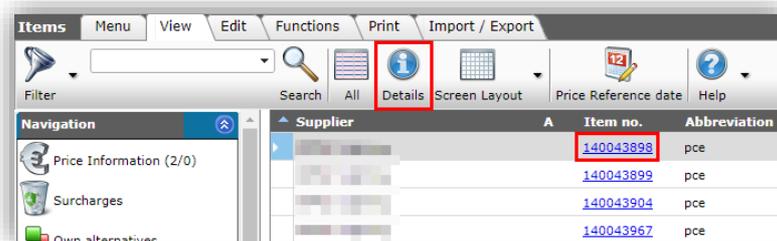
To select a record, click on the line in the overview. The selected record will display as a grey line. Use SHIFT- and CTRL-click to select multiple records. Use the arrow-keys to extend your selection:

Supplier	A	Item no.	Abbreviation	Item description	Gross / CU	Disc%	Purchase / CU
		<a href="#">140043898</a>	pce	LED E T5 batten 600 9W 800lm 3000K CT	€ 22.00	0.00%	€ 22.00
		<a href="#">140043899</a>	pce	LED E T5 batten 600 9W 800lm 4000K CT	€ 22.00	0.00%	€ 22.00
		<a href="#">140043900</a>	pce	LED E T5 batten 1200 18W 1600lm 3000K CT	€ 29.00	0.00%	€ 29.00
		<a href="#">140043901</a>	pce	LED E T5 batten 1200 18W 1600lm 4000K CT	€ 29.00	0.00%	€ 29.00
		<a href="#">140043902</a>	pce	LED E T5 batten 900 11W S 3000K BL	€ 29.00	0.00%	€ 29.00
		<a href="#">140043903</a>	pce	LED E T5 batten 600 9W S 3000K BL	€ 22.00	0.00%	€ 22.00
		<a href="#">140043904</a>	pce	LED E T5 batten 300 4.5W S 3000K BL	€ 17.50	0.00%	€ 17.50

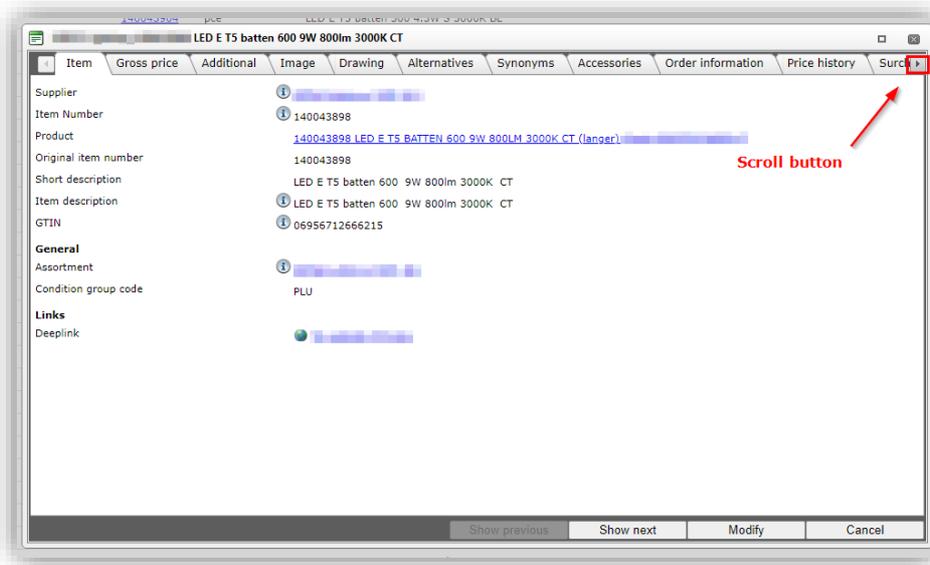
Note: To select records, do *not* click on any links in the Overview as this will open an information window instead.

## 5.5 Details

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



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:



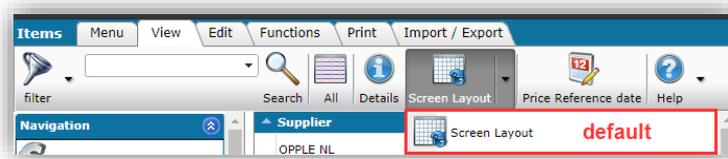
## 5.6 Screen layout

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:



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

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

- Products
- Items

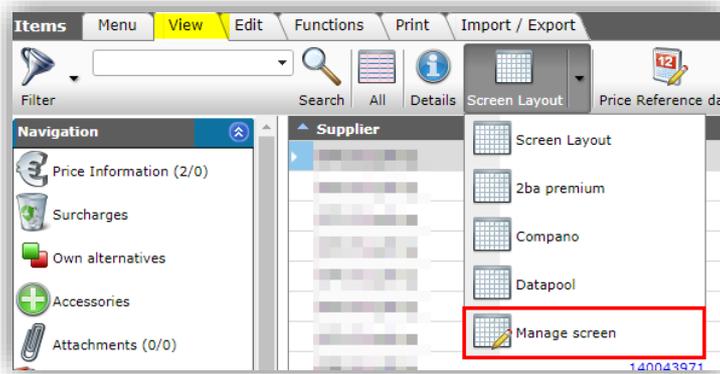
<sup>2</sup> Depending your application version, these layouts are called either *Datapool* or *Compano*. *Datapool*/layouts include the *Short description* field for both Products and Items and are thus SALES005-ready.



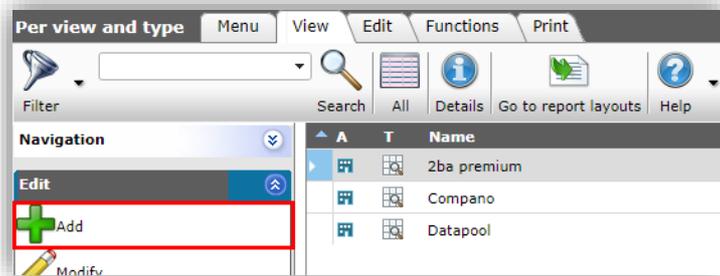
### 5.6.3 Custom layout

To add a custom layout or your own design:

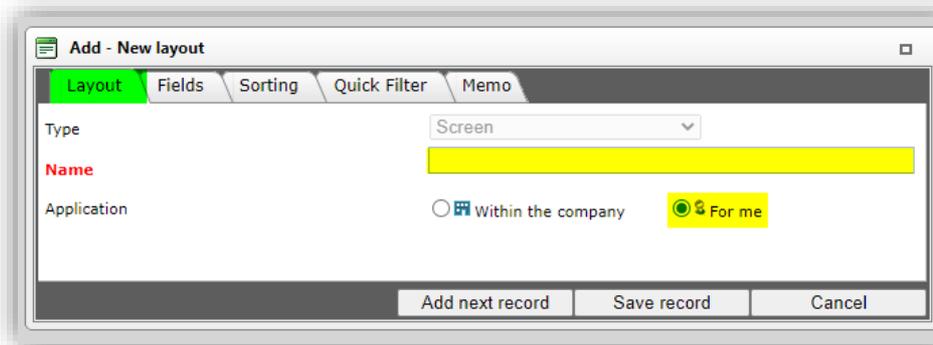
1. Navigate to the Overview where you need to add a screen layout.
2. On the View tab, go to *Screen Layout > Manage Screen*.



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



4. In the pop-up screen:



Layout tab

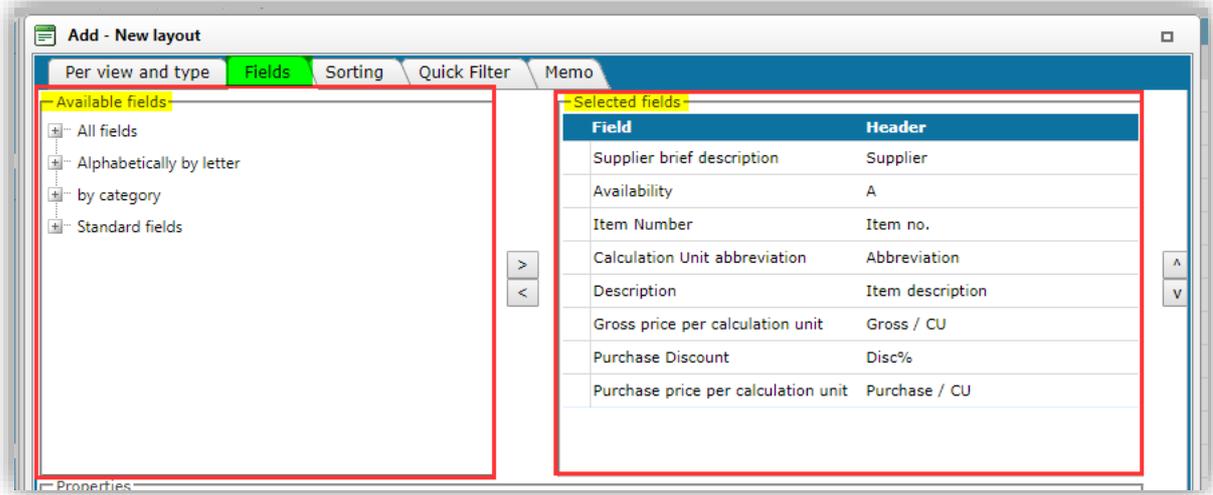
- a. Type: Type of layout (automatic).
- b. Name: Type a name for your layout. This name will show in the drop-down selection menu.

- 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:

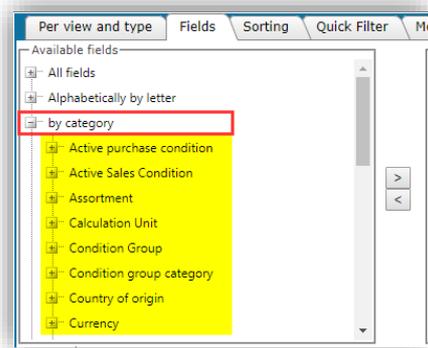
- a. Available fields: Lists data fields that can be added to your layout, organised in four different ways (*All fields*, *Alphabetically*, *By category*, *Standard fields*).
- b. Selected fields: Lists the data fields that are currently in your screen layout. Note: by default, a new layout will contain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



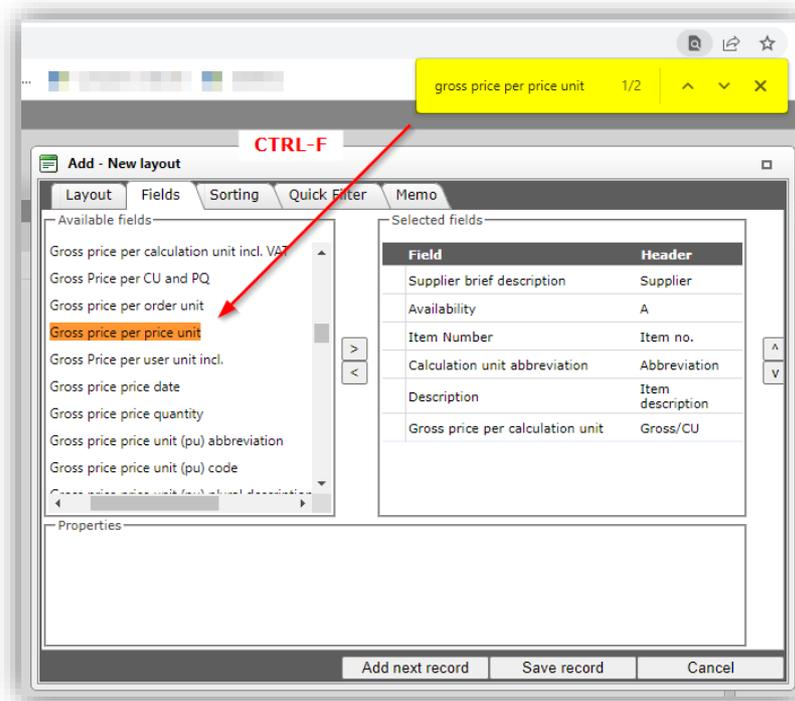
**5.6.3.1 Adding/removing data fields**

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

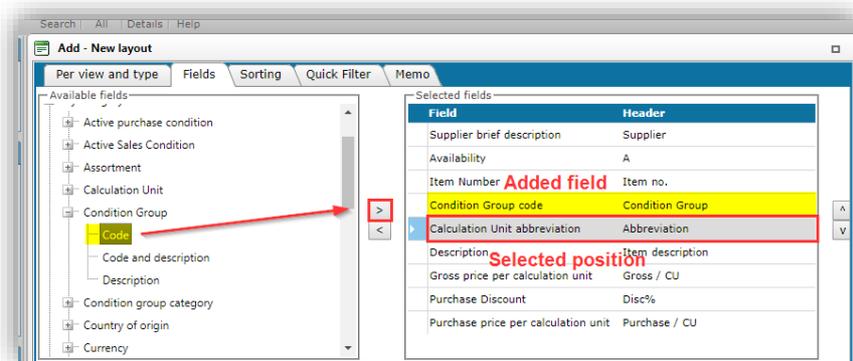
1. Either *double-click* the field, or use the left/right arrow buttons, to add/remove fields from one list to the other. Note: you *cannot* add/remove multiple fields at the same time.
2. When *adding* a field, first find the field in the *Available fields* window. To find the right field, searching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



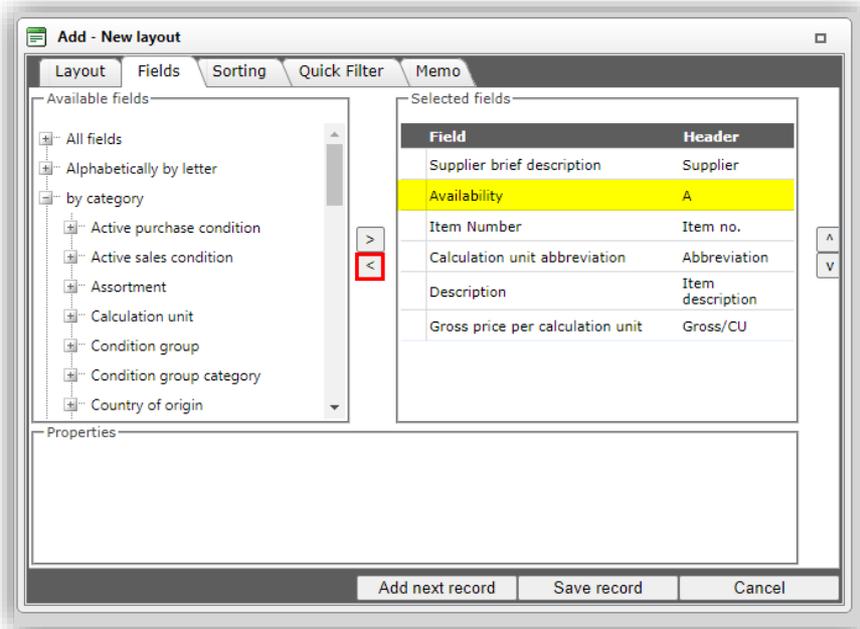
Note: By extending *All fields*, the CTRL-F search option of the browser can be used to quickly find a data field:



- 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:

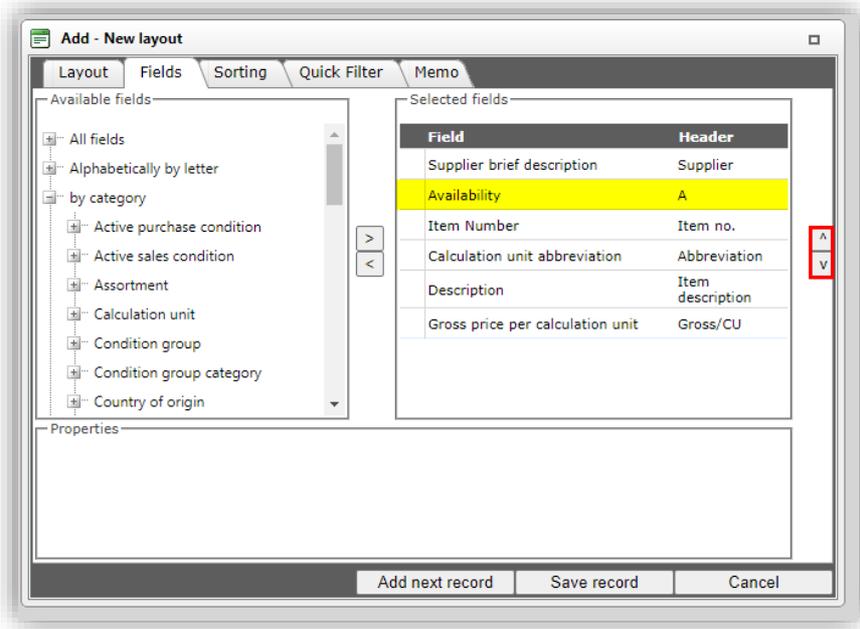


- To *remove* data fields, simply double-click any unwanted fields in the *Selected Fields* list or move them to the left with the arrow button:



### 5.6.3.2 Reorder fields

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



### 5.6.3.3 Customize layout properties

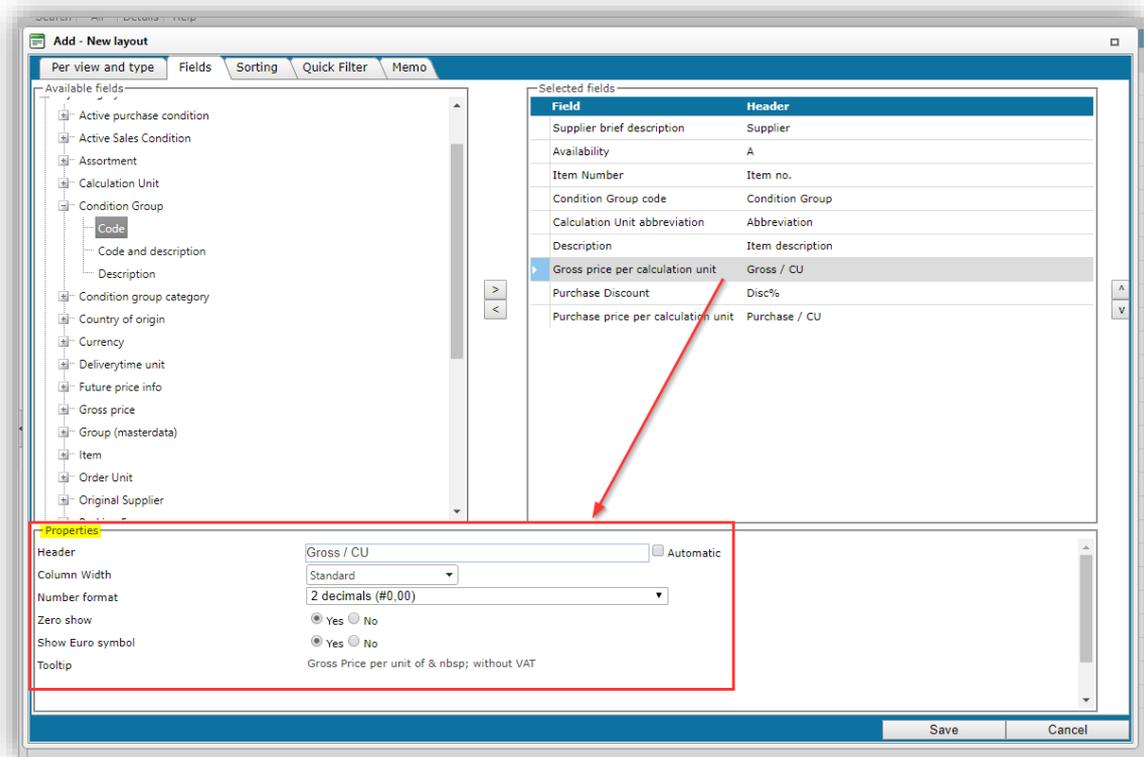
You can customize each data field in your layout in the *Properties* window:

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

<sup>3</sup> 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.

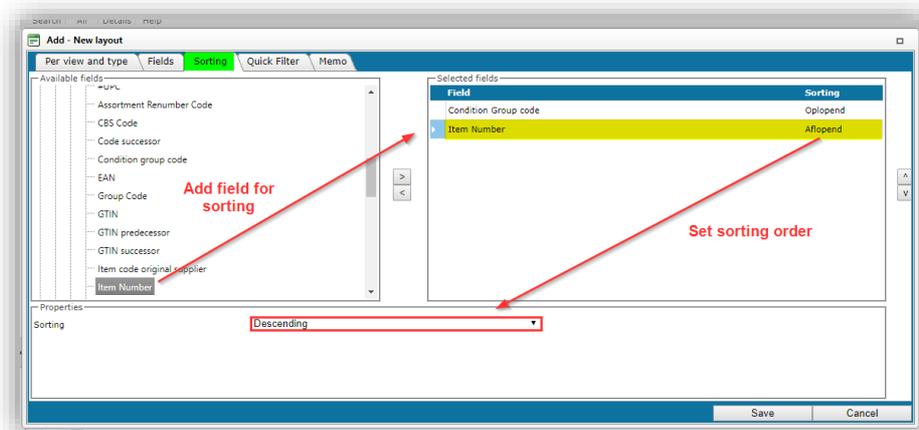
c. Other properties...



#### 5.6.3.4 Sorting

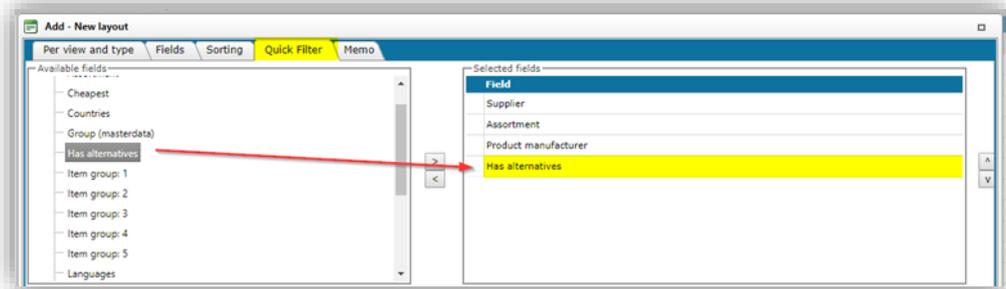
The sorting of records in your layout can be set on the *Sorting* tab:

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**:



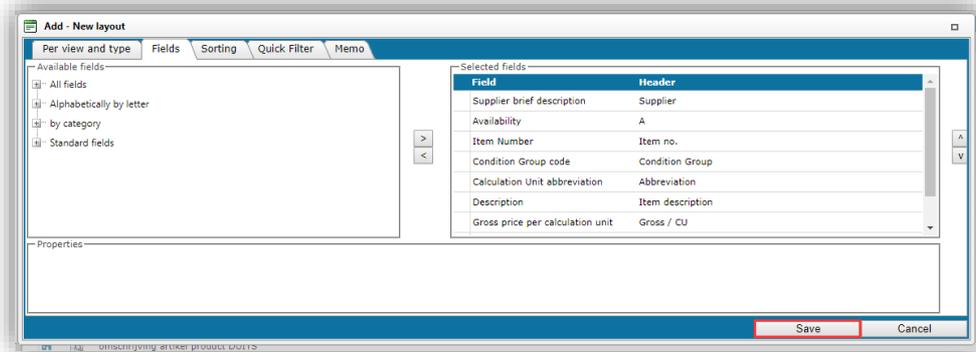
### 5.6.3.5 Quick filter

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:



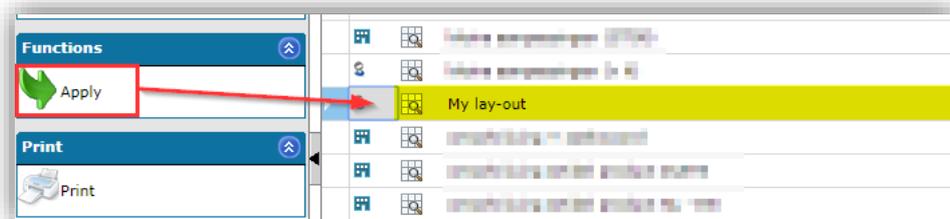
### 5.6.3.6 Save a layout

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

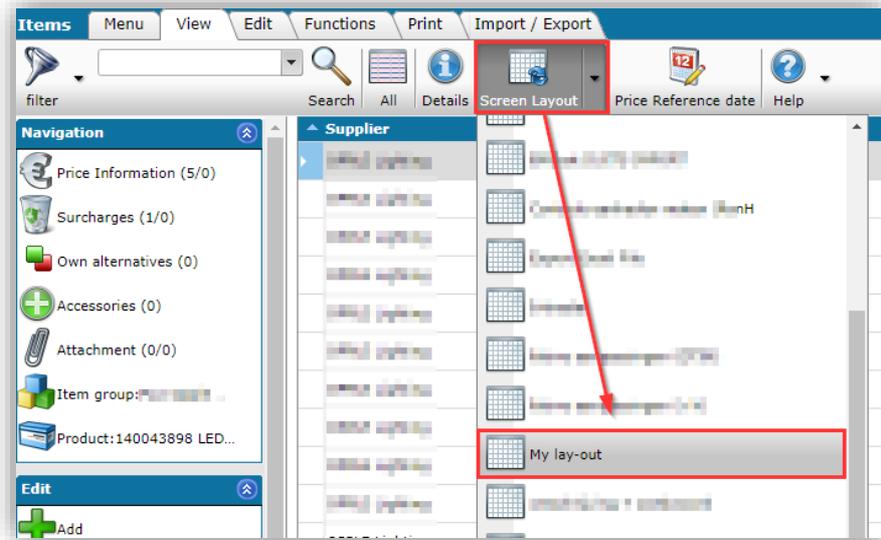


### 5.6.4 Activate a layout

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



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.

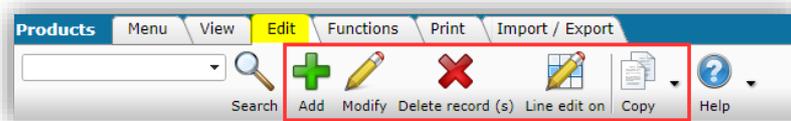
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*When you need a slightly different variant of a layout, use the Copy and Paste buttons to quickly copy an existing layout. Then use the Modify button to change the copied layout to your needs.*

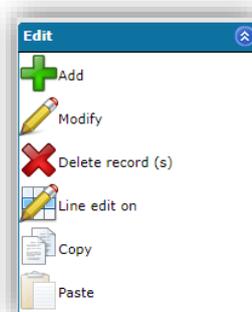
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## 6 Edit

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.

The screenshot shows a software window titled "Add - New product" with several tabs: Product, Classification, Model, Commercial description, Technical description, Status, User def fields, and Translations. The "Product" tab is selected. The form is divided into sections: "General" (Manufacturer, Code, Product description, GTIN, #CompanyCode, Country of origin) and "Division" (Group Code, Group (masterdata), Brand, Series, Type). A red arrow points to the "Country of origin" dropdown menu, which is currently set to "China". The "Save" button at the bottom right is highlighted with a red border.

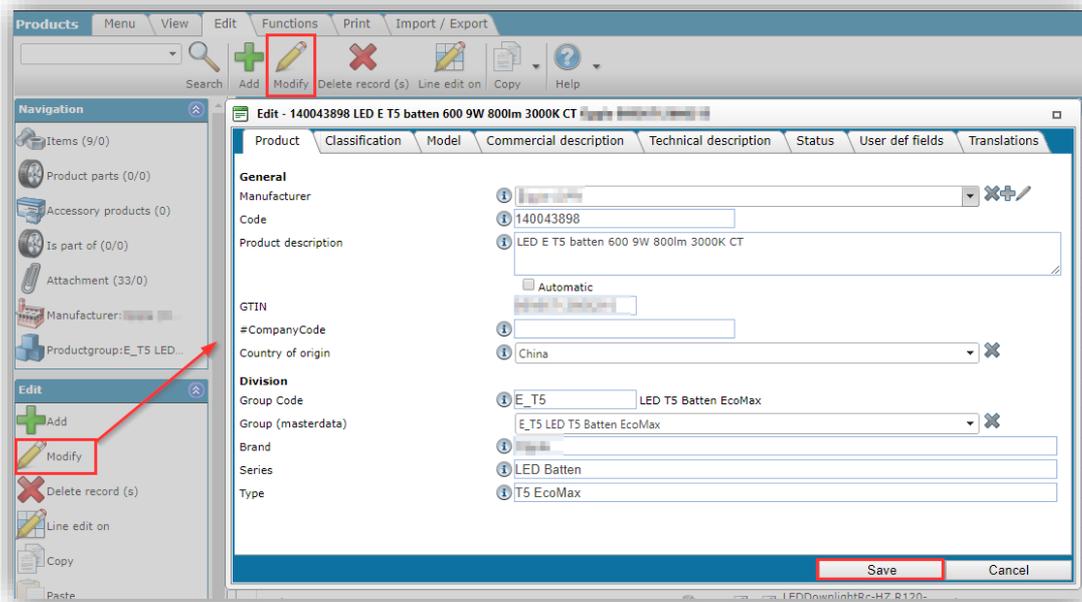
4. *Save* the new record.

Note: 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.

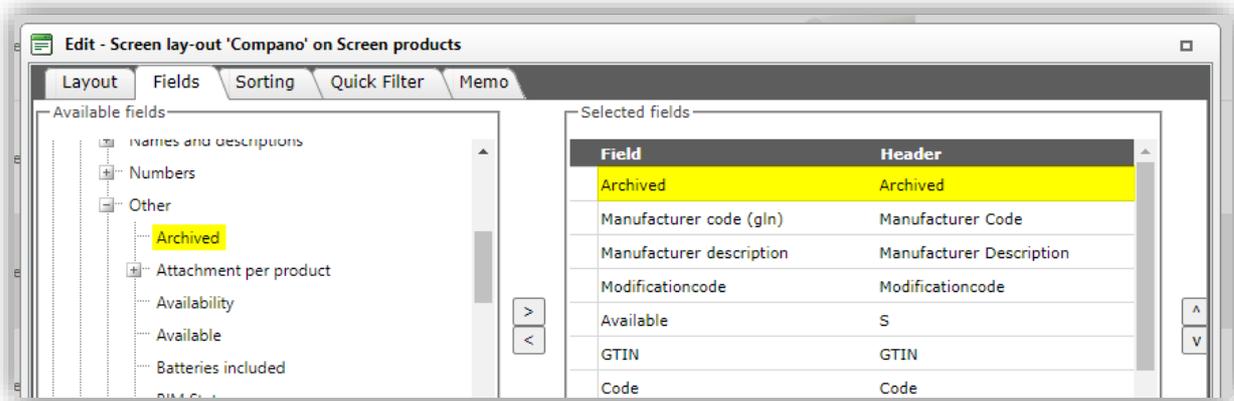


### 6.3 Archive / Delete

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

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

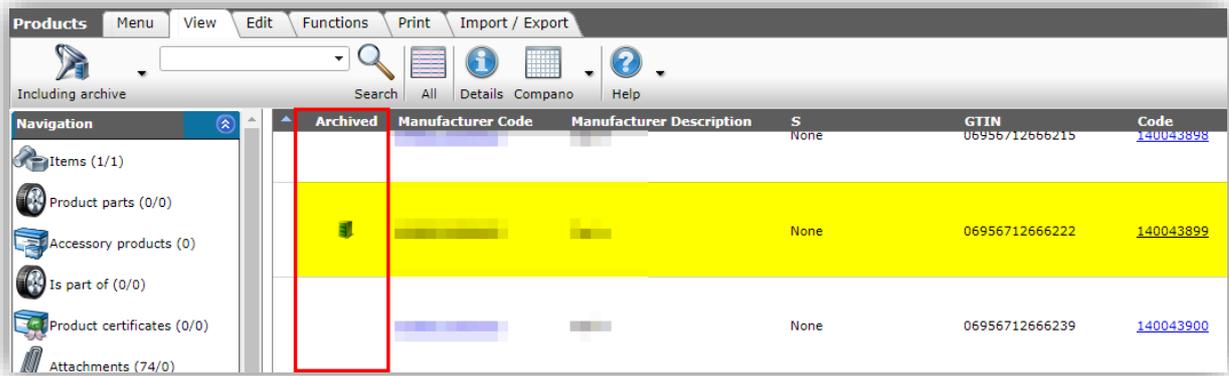
The *Archive Status* of a record is handled by the data field *Archived*<sup>5</sup>:



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

<sup>4</sup> **Important:** Deleting an archived record is an irreversible action. Should you need to retrieve accidentally deleted records, you will have to contact Compagno Support and have them restore a backup of your data.

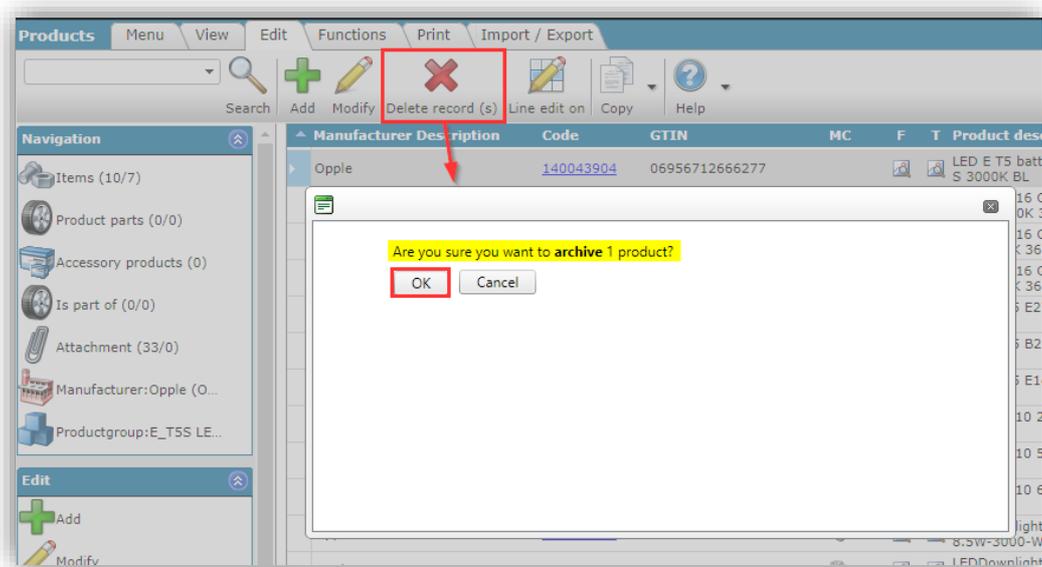
<sup>5</sup> In previous versions of COS, the field Mutation Code (MC) was used to indicate the Archived status. **Note:** This field has been deprecated.



### 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.

Note: 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](#).

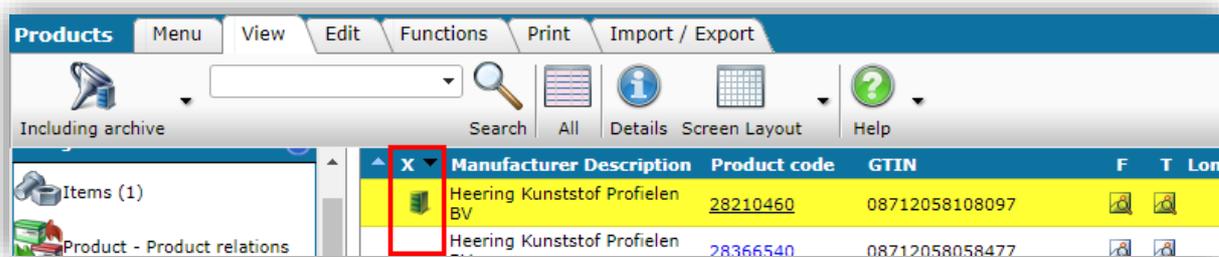
### 6.3.3 Unarchive a record

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:



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):

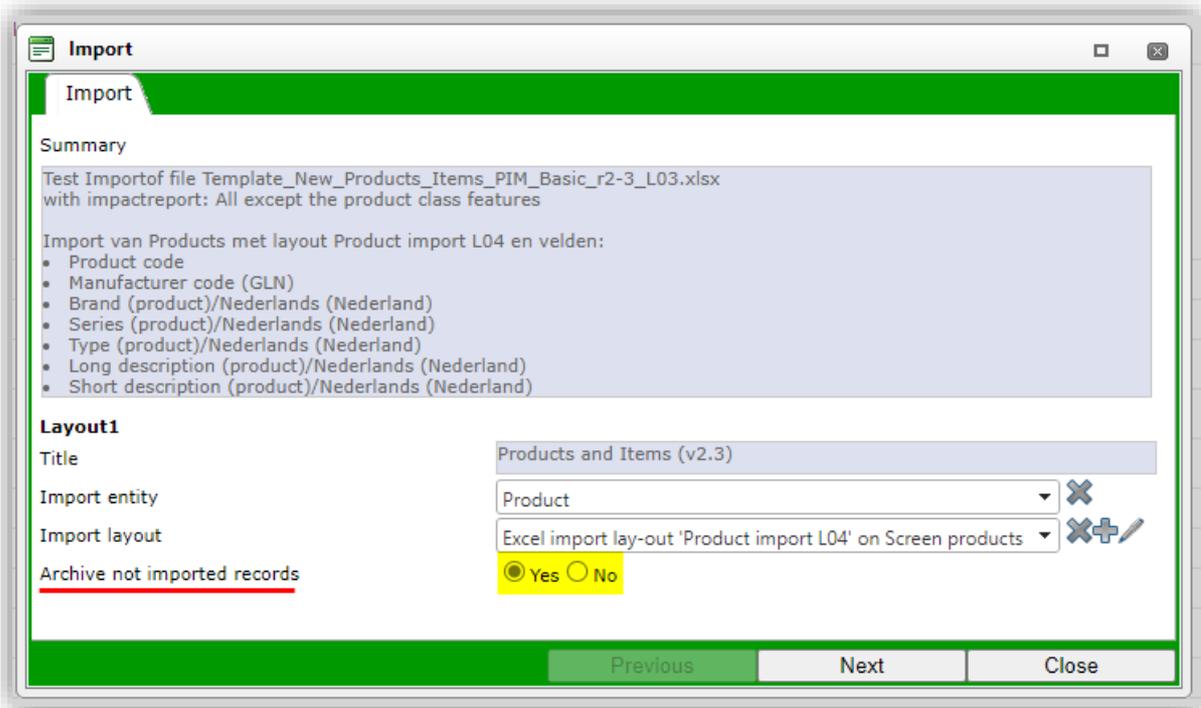
	A	F	
3	Archived	Item no.	
4	No	140043898	https://...compano.com/Data/Environ
5	No	140043899	https://...compano.com/Data/Environ
6	Yes	140043900	https://...compano.com/Data/Environ
7	Yes	140043901	https://...compano.com/Data/Environ
8	Yes	140043902	https://...compano.com/Data/Environ
9	Yes	140043903	https://...compano.com/Data/Environ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

#### 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.

**Important:** 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.



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

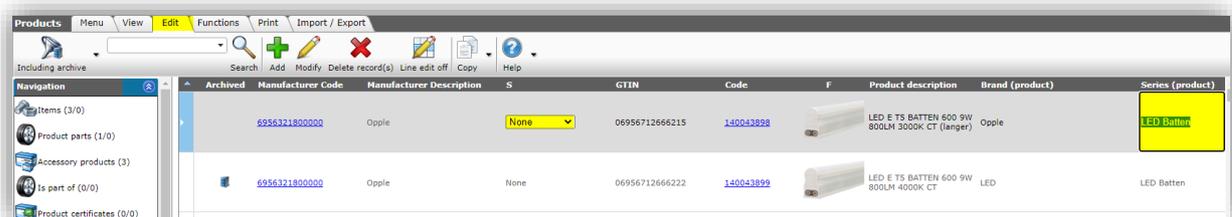
## 6.4 Line edit

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:



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



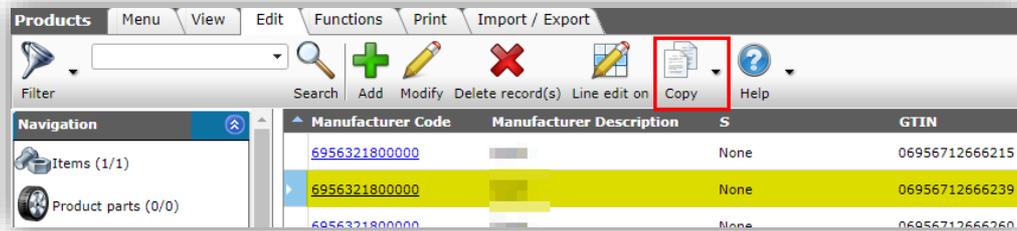
Note: User-defined fields *cannot* be edited using line edit.

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

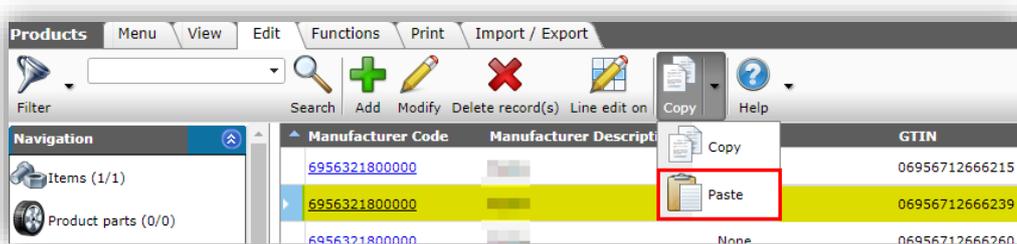
## 6.5 Copy / Paste

To copy a record:

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



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

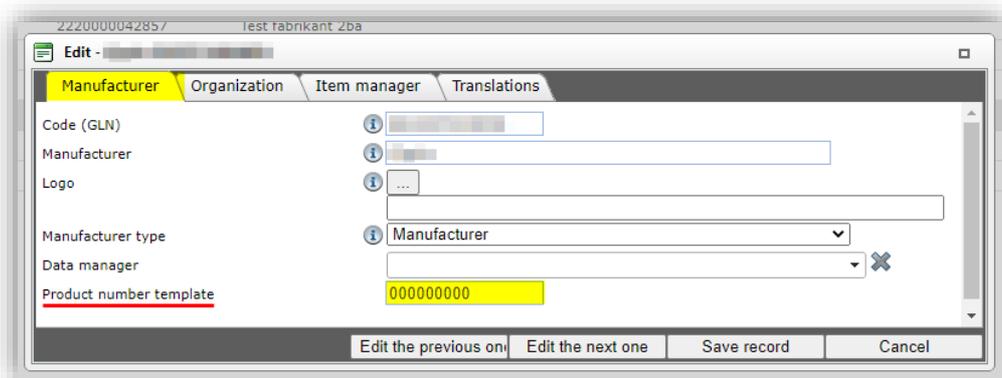


Note: The copy/paste function is well-suited for copying products, layouts or filters, but will return an error message when you try to copy an item, product group or item group. The reason being that item-, and group codes cannot be copied as they need to be unique.

### 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:



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



## 6.6 Edit multiple records

To edit multiple records, see the function [7.1.1 Manipulate](#)

## 7 Functions

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

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

### 7.1 Common functions

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

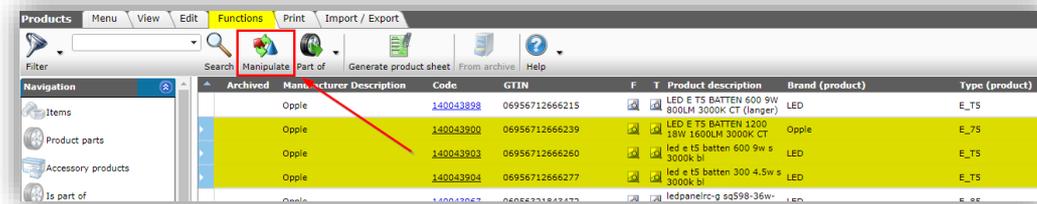
- Manipulate: Change data of one or more data fields for multiple records;
- From archive: Change the status of a record from *Archived* to *Unarchived*.

#### 7.1.1 Manipulate

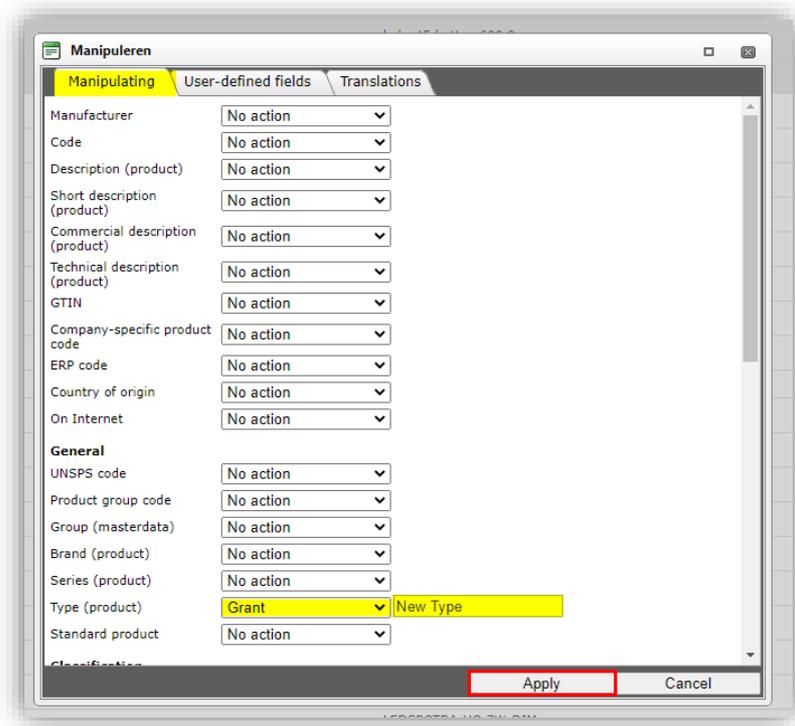
Change the data of *multiple records* at the same time, using the function *Manipulate*.

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

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



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:

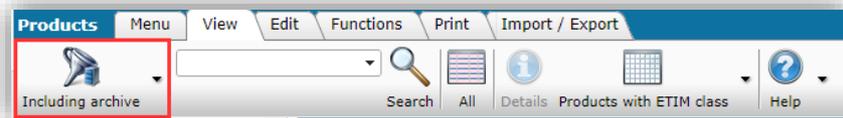


3. Click on *Apply* to save the changes.

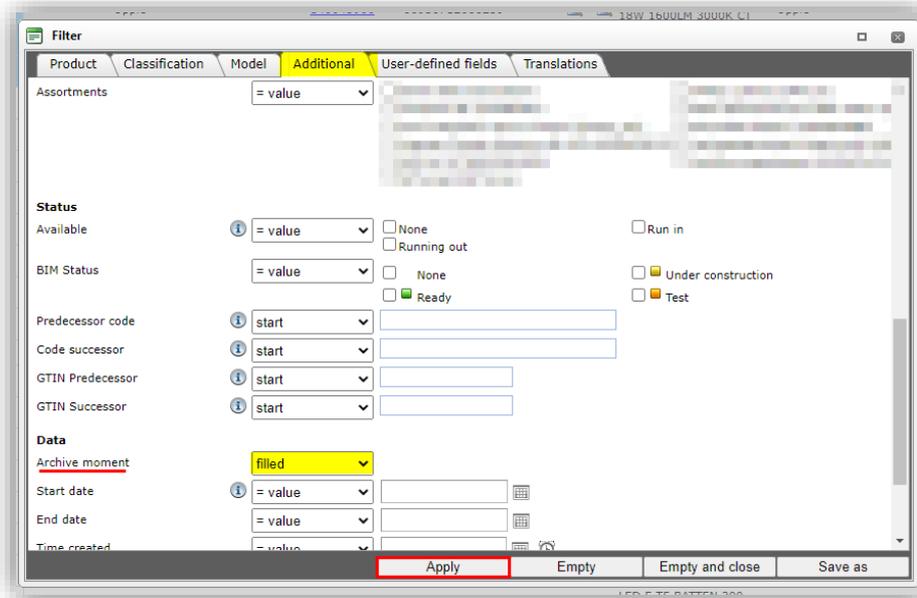
### 7.1.2 From archive

To unarchive a record:

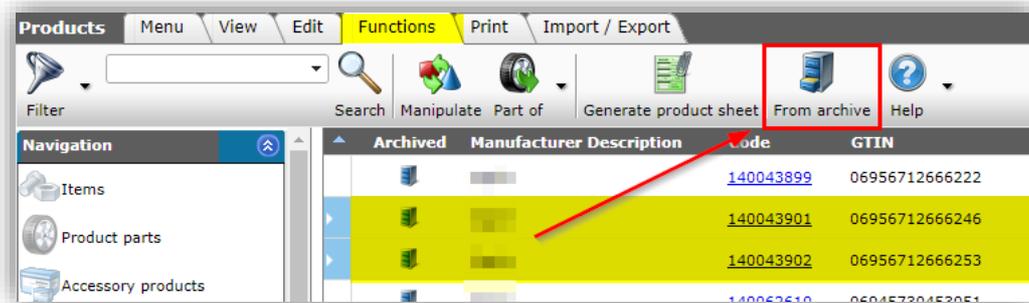
1. On any overview, on the View tab, first select the *Including archive* filter option:



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

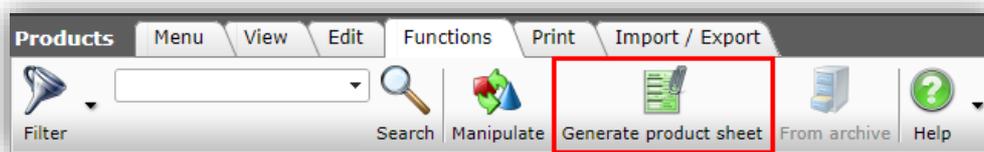


3. Next, select any archived record(s) and, under Functions, click on *From archive*:



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

## 7.2 Products

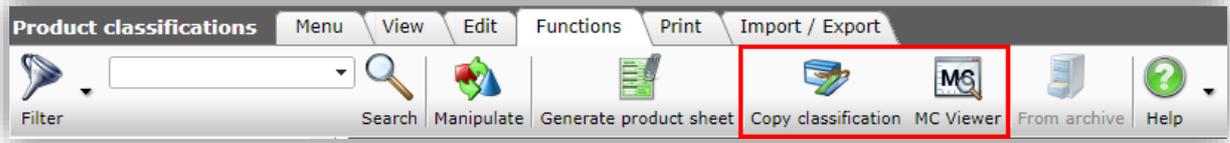


### 7.2.1 Generate product sheet

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



### 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 [Compano Help-website](#).

### 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 [Compano Help-website](#).

## 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 [Compano Help-website](#).

### 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 [Compano Help-website](#).

### 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 [Compano Help-website](#).



#### 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 [Compano Help-website](#).

#### 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.

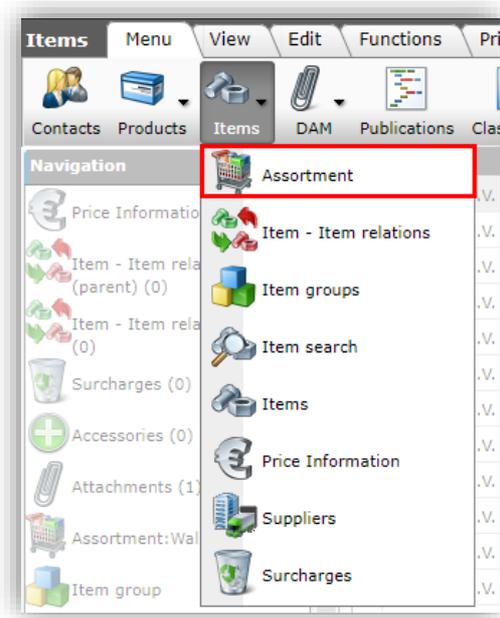
More information is available in the *Manual Classification*, which is available from the [Compano Help-website](#).

#### 7.4.6 Update

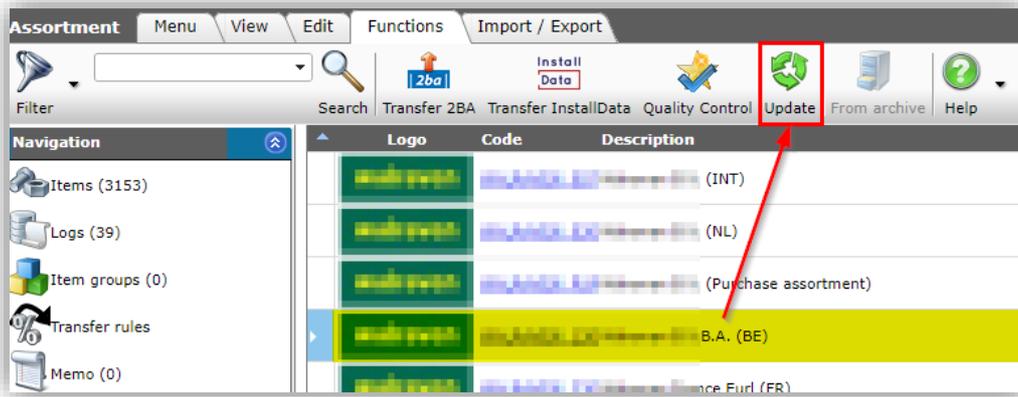
Use the Update function to update your Item data, for instance when data in the Purchase assortment has been changed.

To update a sales assortment:

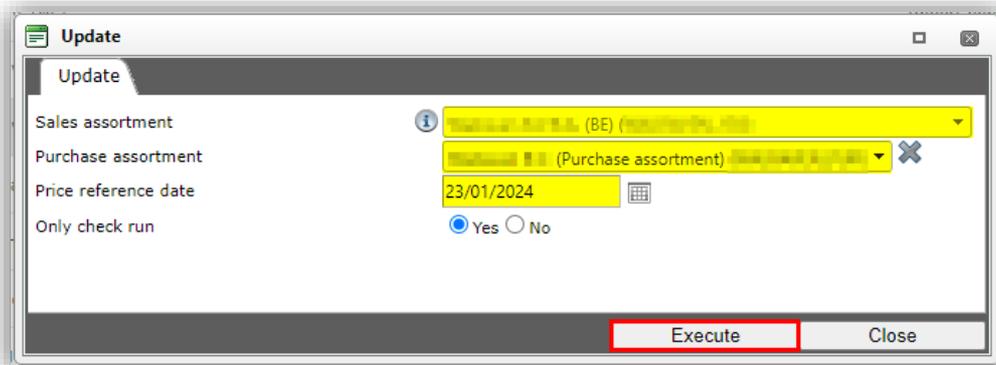
1. Through the Menu, go to *Items > Assortment*.



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



3. In the pop-up window:



- Sales assortment: The selected sales assortment.
- Purchase assortment: The selected sales assortment will be updated with data from this purchase assortment.
- 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.
- 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

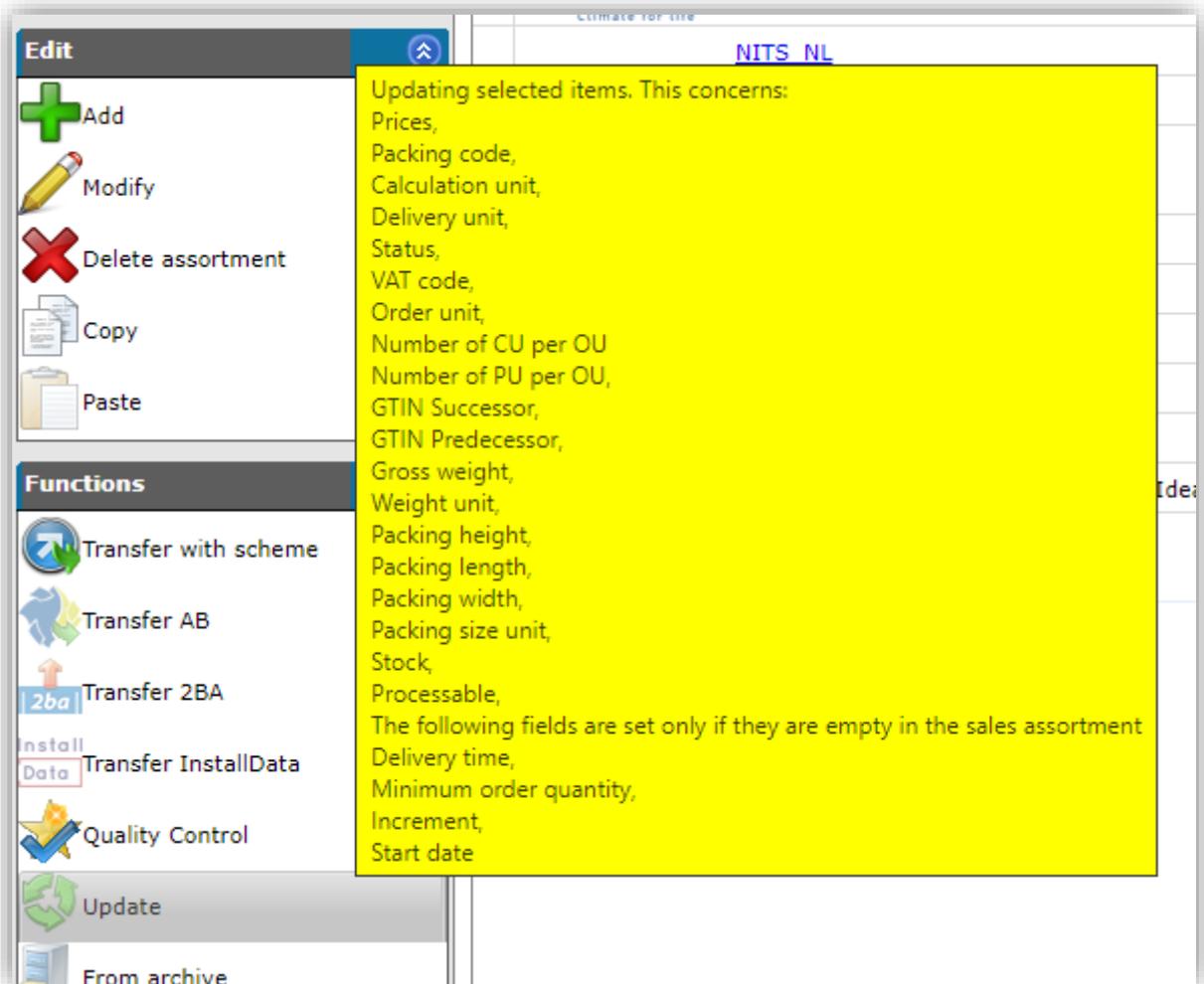
The *Generate product sheet* function generates product sheets for all selected products. More information can be found in paragraph [8.3 GENERATE ITEM SHEETS](#).

### 7.5.2 Generate sales items

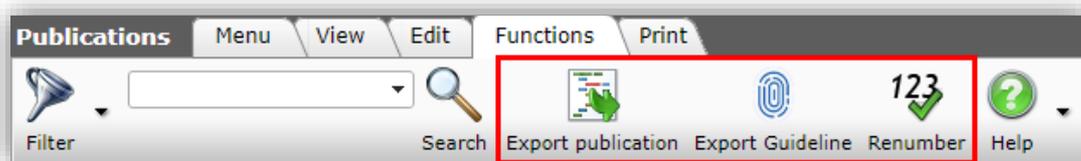
Use this function on Purchase Items to generate corresponding Sales Items. The dialog allows the selection of the Sales Assortment where the Sales Items need to be generated.

### 7.5.3 Update

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

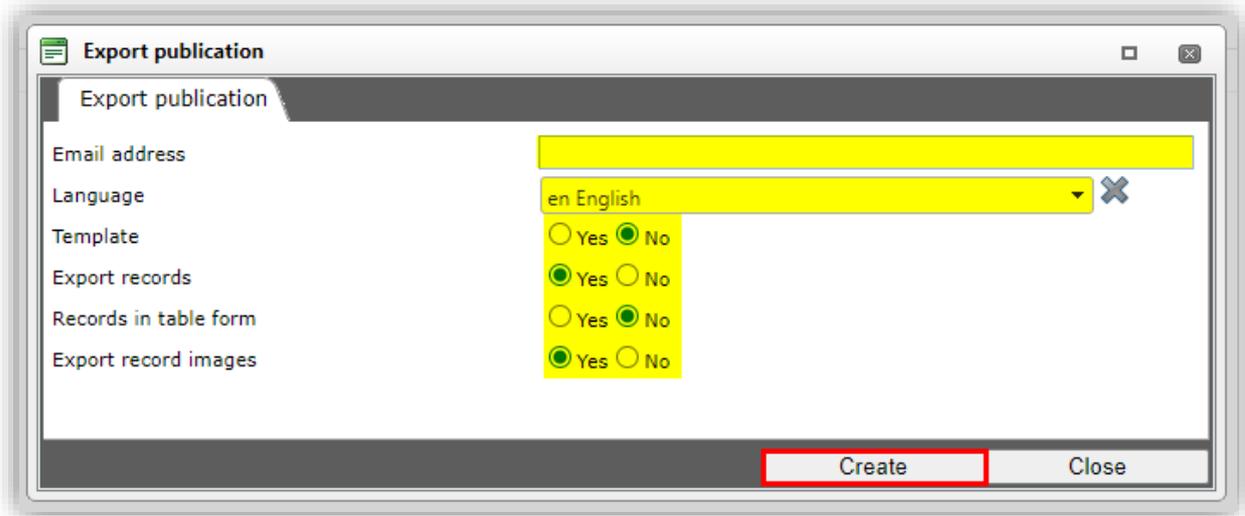


## 7.6 Publications



### 7.6.1 Export publication

Export the selected publication:



- 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.

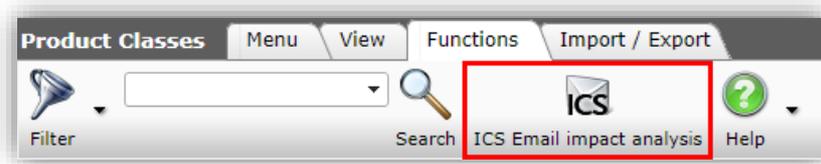
More information is available in the *Manual Publications*, which is available from the [Compano Help-website](#).

### 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 [Compano Help-website](#).

## 7.7 Product classes



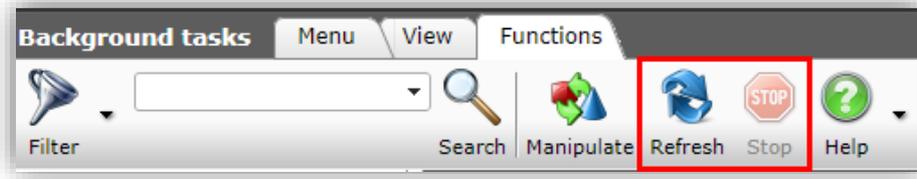
### 7.7.1 ICS Email impact analysis

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 [Compano Help-website](#).



## 7.8 Background tasks



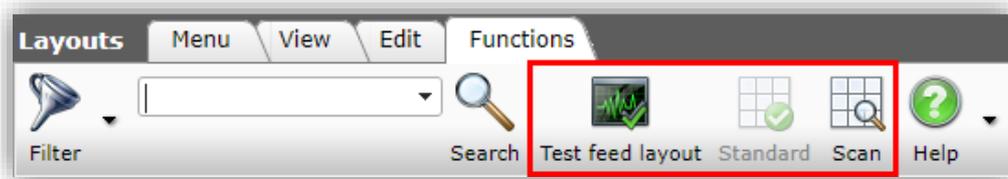
### 7.8.1 Refresh

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.

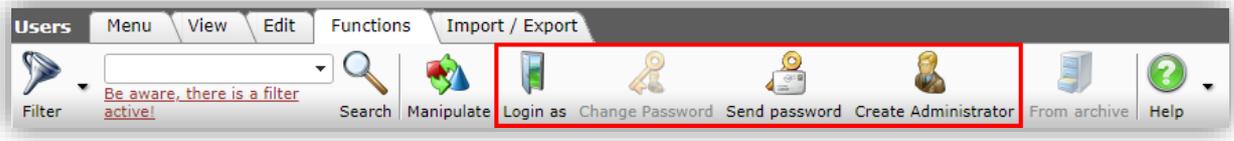
### 7.9.3 Scan

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



### 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

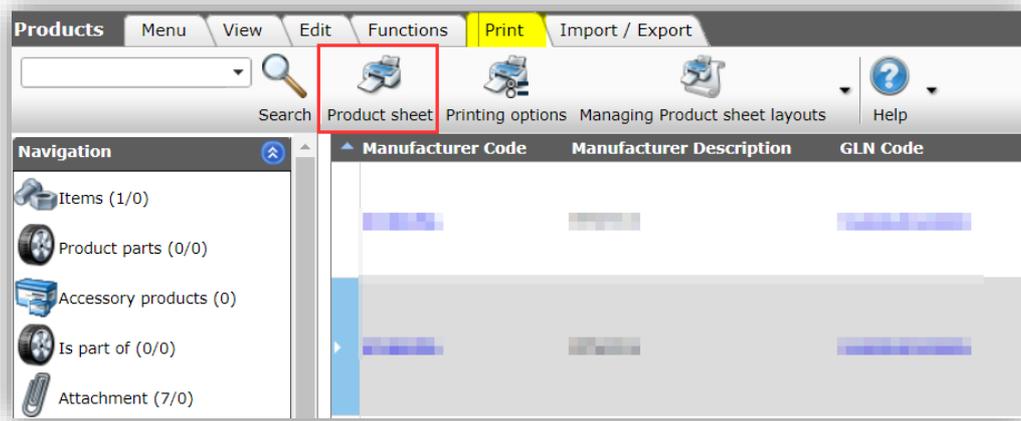
For each product a product sheet can be printed as a PDF, according to a product sheet *print layout*.

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

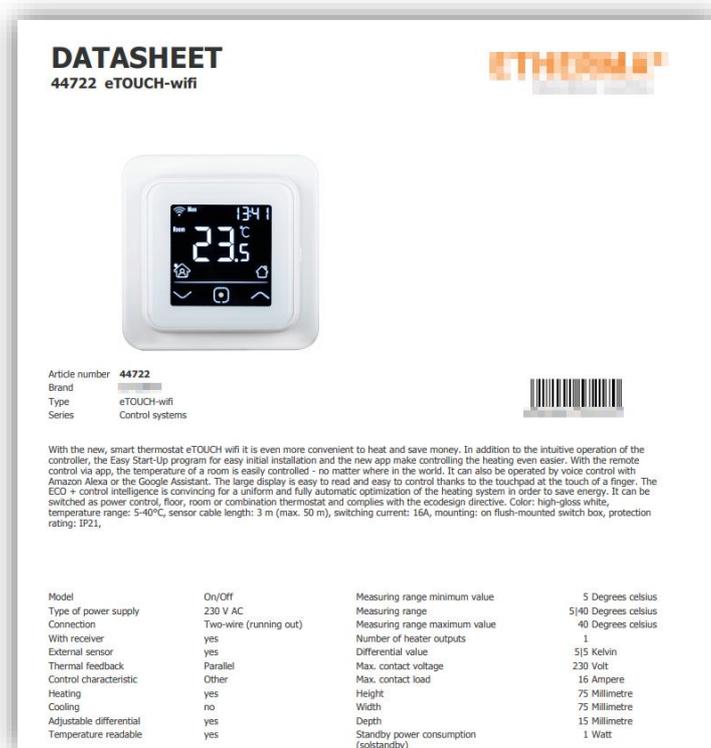
- Basic product information (brand, series, type, product number, description)
- Product image and drawing
- Barcode (EAN or GTIN)
- Commercial description
- Product class and product class features information

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:



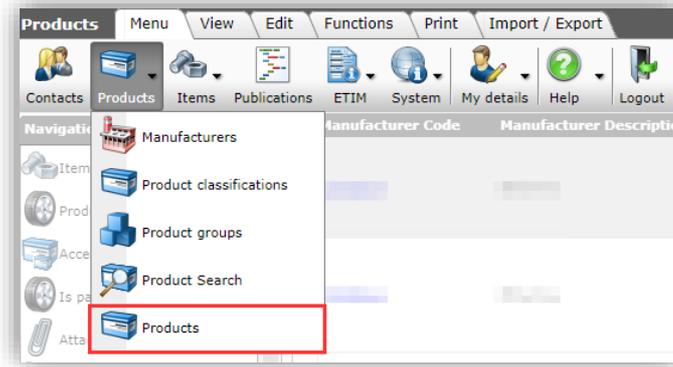
## 8.2 Generate product sheets

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

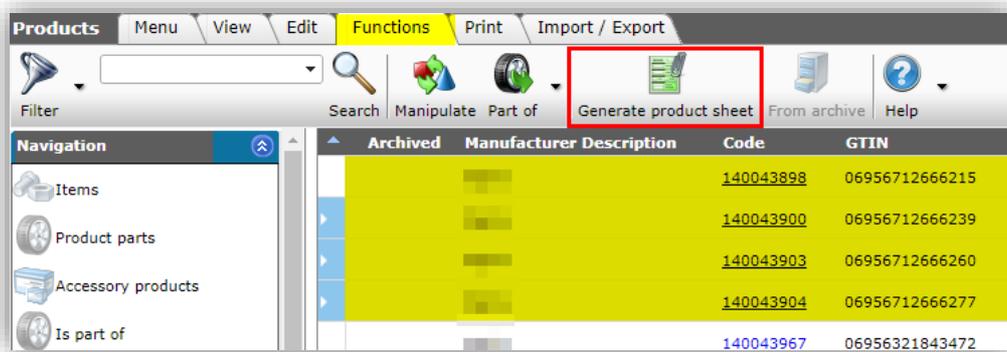
- Select different print layouts, optionally in different translations;
- Automatically add product datasheets as an attachment to your products;
- Generate product datasheets for all products or a selection of products;
- Download the product datasheets from an FTPS-location.

To generate product sheets:

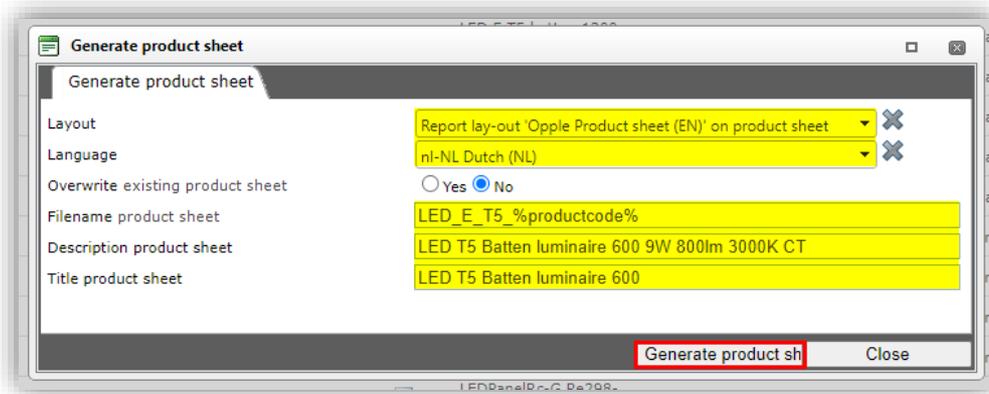
1. Through the Menu go to *Products > Products*.



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



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



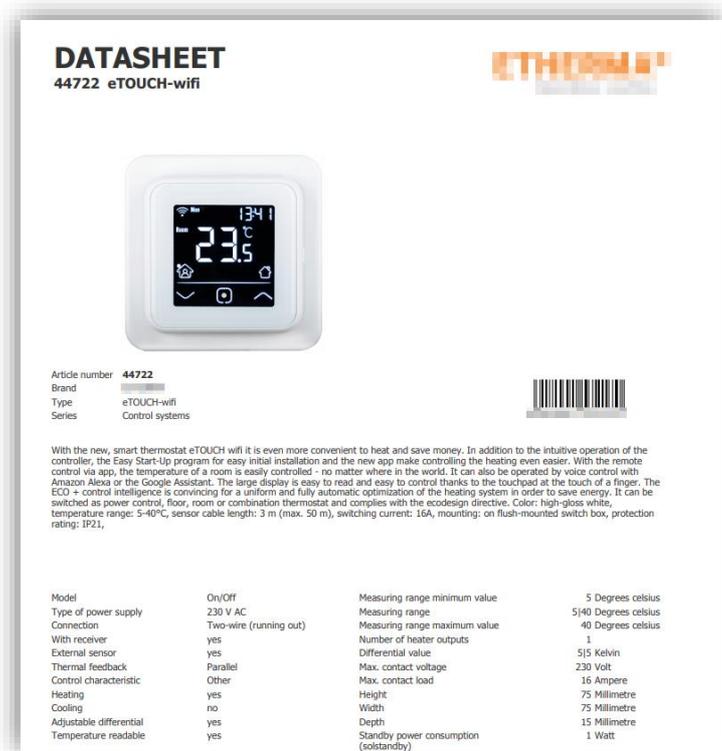
- a. Layout: Select the print layout for the product sheet. **NB:** You will be provided with a default print layout. For custom layouts, including **your company's logo** or stationary, contact [sales@compano.com](mailto:sales@compano.com).
- b. Language: Select the language for the product data<sup>6</sup>.
- c. Overwrite existing product sheet: Set this option to *Yes*, if you need to generate a new version of the product sheet. This will overwrite the existing version of the product sheet which is attached to your product.

<sup>6</sup> This option is only available if you have acquired the multi-language module. Contact [sales@compano.com](mailto:sales@compano.com) 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 Language code to filename, for instance **nl** 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)*:



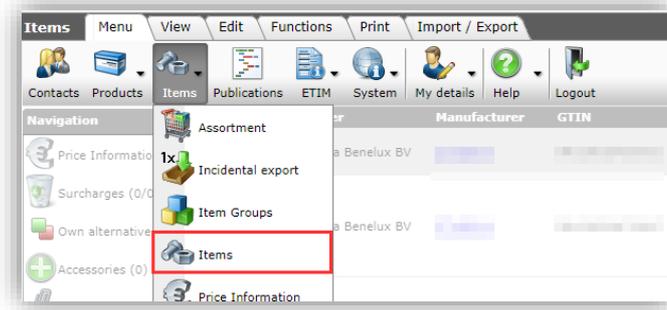
5. Click on the link to view the Product Sheet:



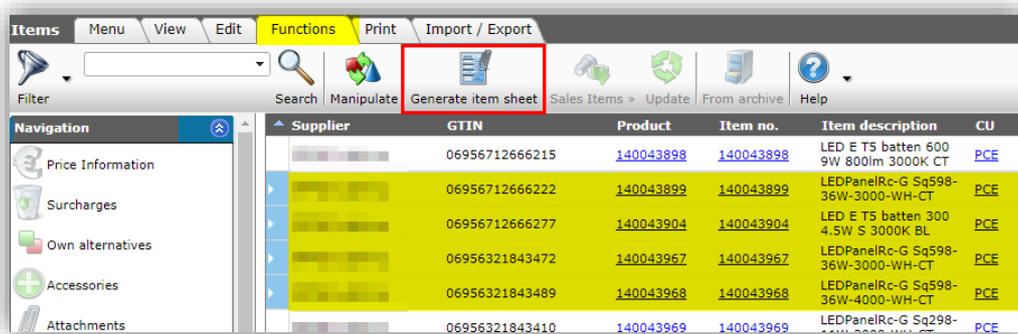
### 8.3 Generate item sheets

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*.



3. Follow the instructions as per *8.2 Generate product sheets*, 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 [sales@compano.com](mailto:sales@compano.com).

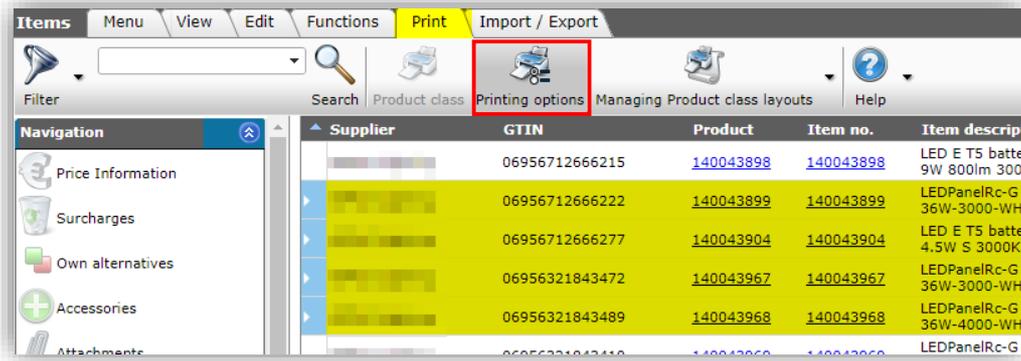
## 8.4 Printing options

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

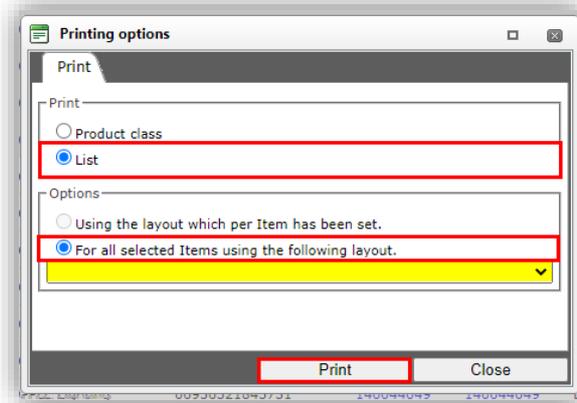
### 8.4.1 Print list

To print a list of records:

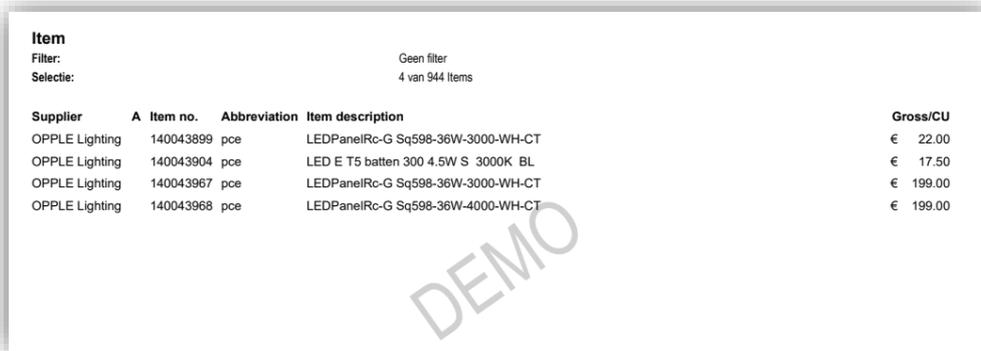
1. Select the records which you want to print and, under Print, click on *Printing options*.



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



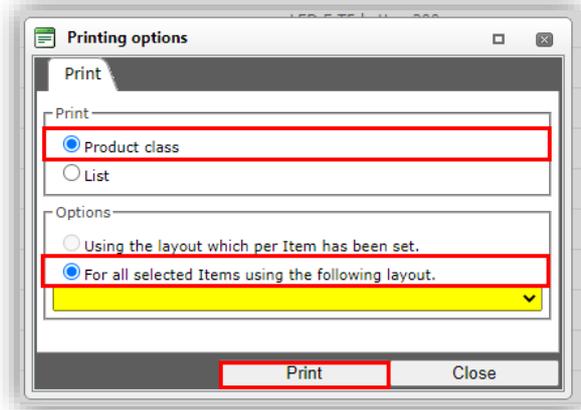
3. Click on the *Print* button. A printable PDF will open in a new browser tab:



### 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:



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 Sq598-36W-3000-WH-CT
Classification system	ETIM Dynamic
ProductClass	
Material heat exchanger	Aluminium
Material quality	Other
Closed version	Yes
Operation as open model (air supply) possible	No
Condensing	Yes
Nominal power, 80-60 °C	234 Kilowatt
Nominal power, 50-30 °C	234 Kilowatt
Nominal load upper value	23 Kilowatt
Nominal load lower value	3 Kilowatt
Heating capacity adjustable	Yes
Suitable for natural gas	No
Control signal 0-10 V	Yes
Burner controller high/low	Yes
Max. supply temperature (operating temperature)	23 Degrees celsius
Min. return temperature	23 Degrees celsius
Max. allowable operating 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:

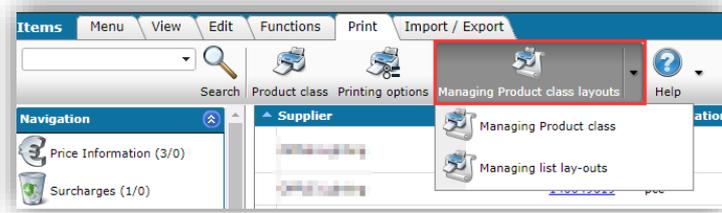
- A Swedish product sheet template needs to be prepared

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

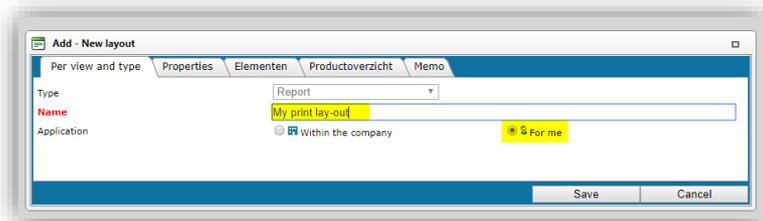
## 8.6 Manage print layouts

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

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



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

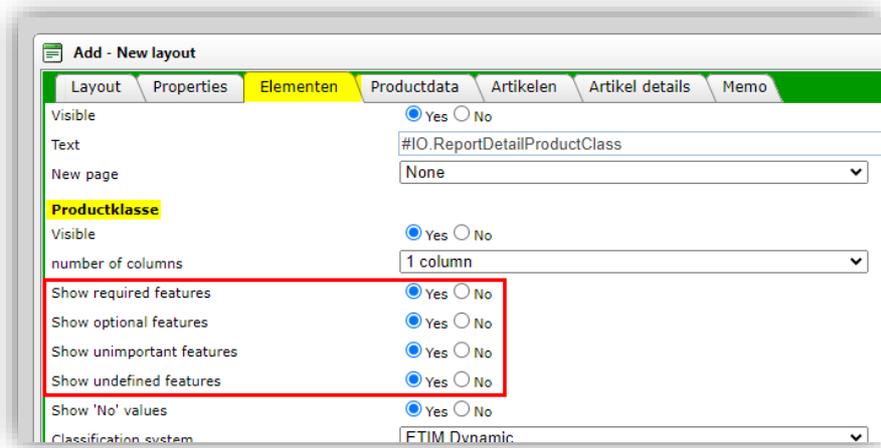


4. On the *Properties*, *Elements* and *Productoverzicht* tab, format the layout.
5. Save your layout.

Note: 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 [sales@compano.com](mailto:sales@compano.com) 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:



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

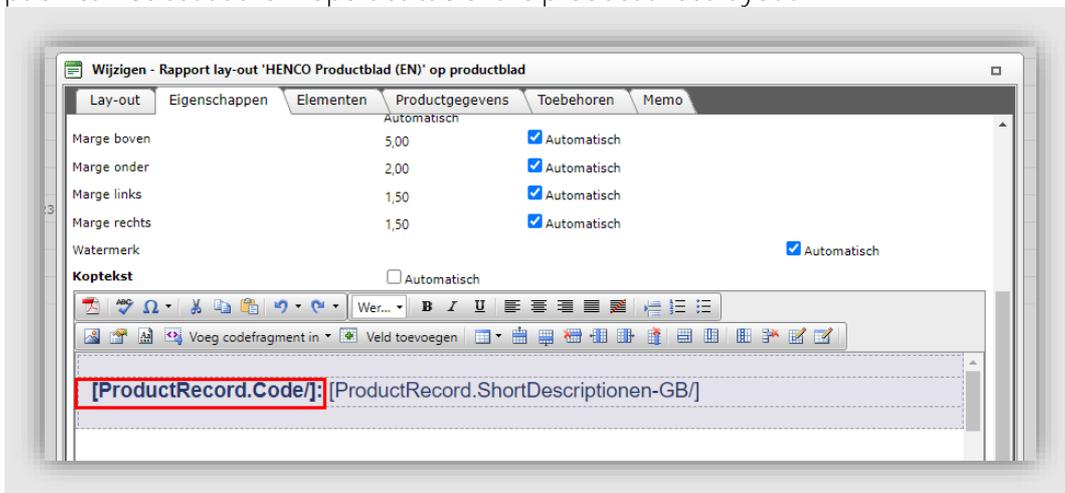
- Required features
- Optional features
- Unimportant features
- Undefined features

### 8.6.2 Show product number in header/footer

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

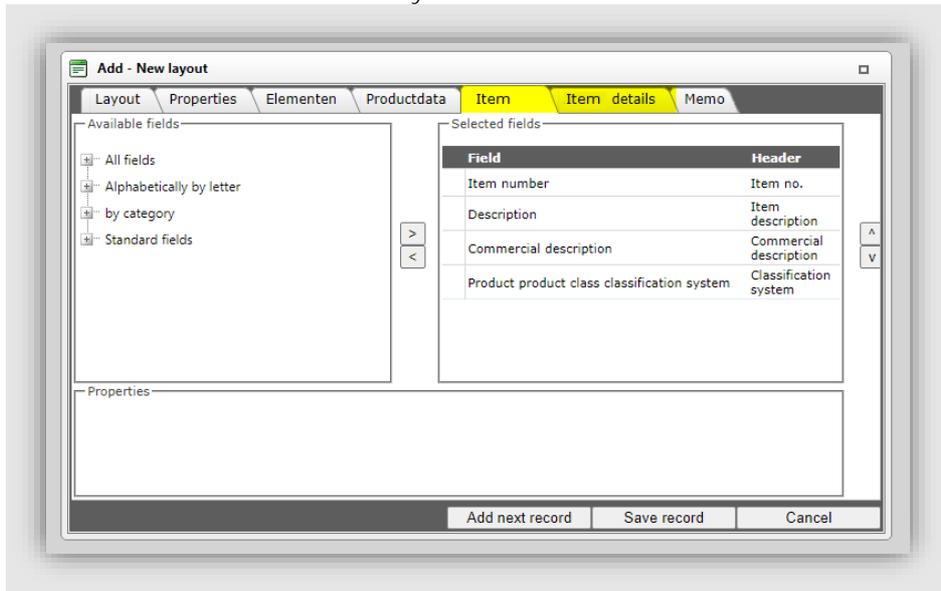


This option can be set at the Properties tab of the product sheet layout:



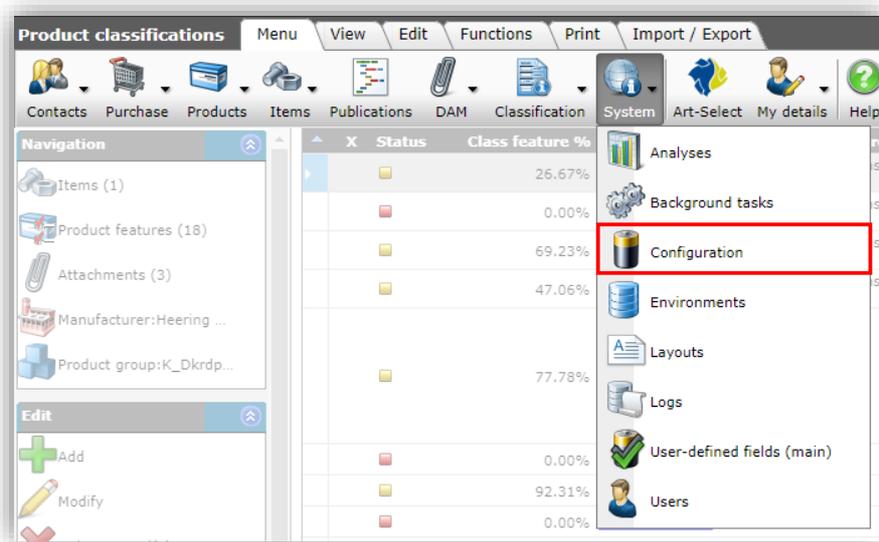
### 8.6.3 Show item data fields on product sheets

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:



## 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.



**Warning:** Care must be taken when changing or adding configuration as this can severely disrupt your application. If unsure how to proceed, please contact [support@compano.com](mailto:support@compano.com) and have things explained to you.

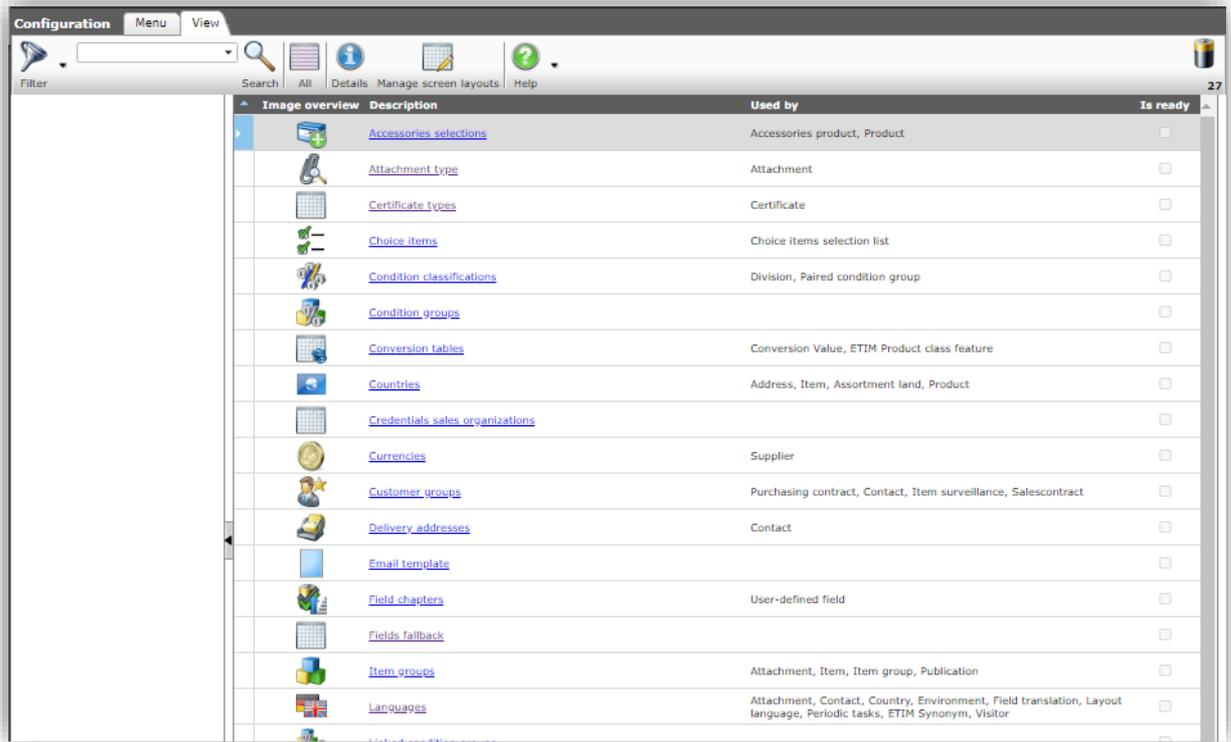
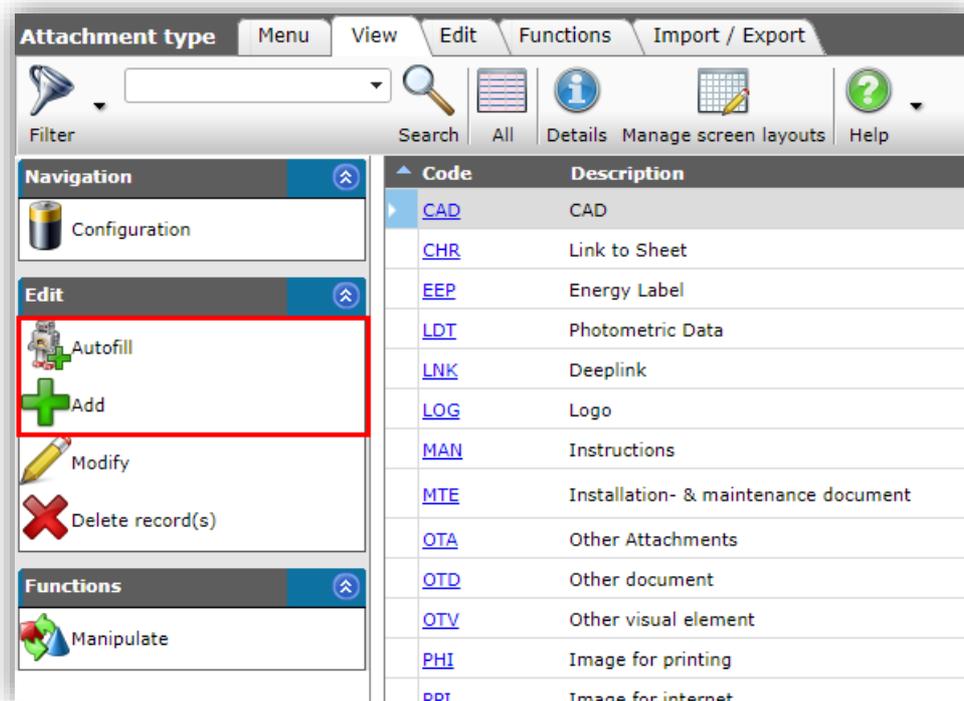


Image overview	Description	Used by	Is ready
	<a href="#">Accessories selections</a>	Accessories product, Product	<input type="checkbox"/>
	<a href="#">Attachment type</a>	Attachment	<input type="checkbox"/>
	<a href="#">Certificate types</a>	Certificate	<input type="checkbox"/>
	<a href="#">Choice items</a>	Choice items selection list	<input type="checkbox"/>
	<a href="#">Condition classifications</a>	Division, Paired condition group	<input type="checkbox"/>
	<a href="#">Condition groups</a>		<input type="checkbox"/>
	<a href="#">Conversion tables</a>	Conversion Value, ETIM Product class feature	<input type="checkbox"/>
	<a href="#">Countries</a>	Address, Item, Assortment land, Product	<input type="checkbox"/>
	<a href="#">Credentials sales organizations</a>		<input type="checkbox"/>
	<a href="#">Currencies</a>	Supplier	<input type="checkbox"/>
	<a href="#">Customer groups</a>	Purchasing contract, Contact, Item surveillance, Salescontract	<input type="checkbox"/>
	<a href="#">Delivery addresses</a>	Contact	<input type="checkbox"/>
	<a href="#">Email template</a>		<input type="checkbox"/>
	<a href="#">Field chapters</a>	User-defined field	<input type="checkbox"/>
	<a href="#">Fields fallback</a>		<input type="checkbox"/>
	<a href="#">Item groups</a>	Attachment, Item, Item group, Publication	<input type="checkbox"/>
	<a href="#">Languages</a>	Attachment, Contact, Country, Environment, Field translation, Layout language, Periodic tasks, ETIM Synonym, Visitor	<input type="checkbox"/>

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.



Code	Description
<a href="#">CAD</a>	CAD
<a href="#">CHR</a>	Link to Sheet
<a href="#">EEP</a>	Energy Label
<a href="#">LDT</a>	Photometric Data
<a href="#">LNK</a>	Deeplink
<a href="#">LOG</a>	Logo
<a href="#">MAN</a>	Instructions
<a href="#">MTE</a>	Installation- & maintenance document
<a href="#">OTA</a>	Other Attachments
<a href="#">OTD</a>	Other document
<a href="#">QTV</a>	Other visual element
<a href="#">PHI</a>	Image for printing
<a href="#">PPI</a>	Image for internet

Navigation
Configuration

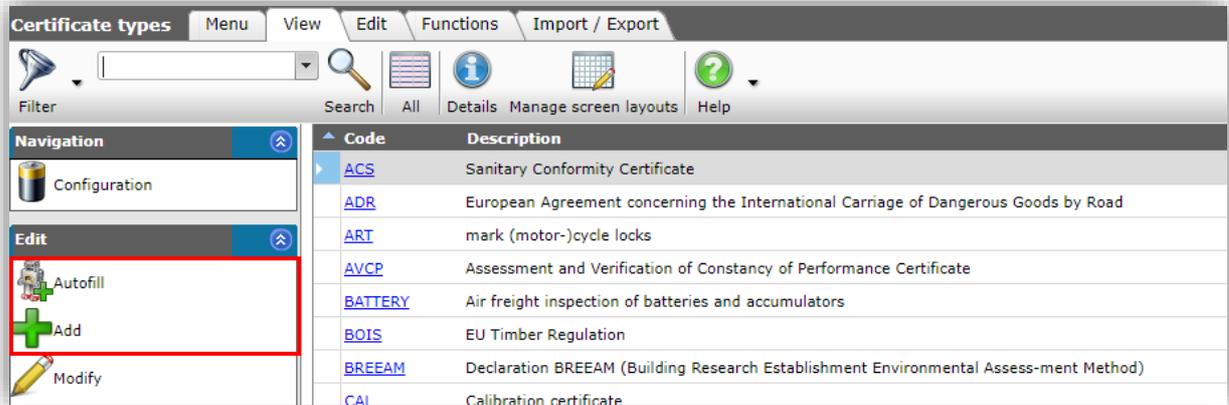
Edit
Autofill
Add
Modify
Delete record(s)

Functions
Manipulate

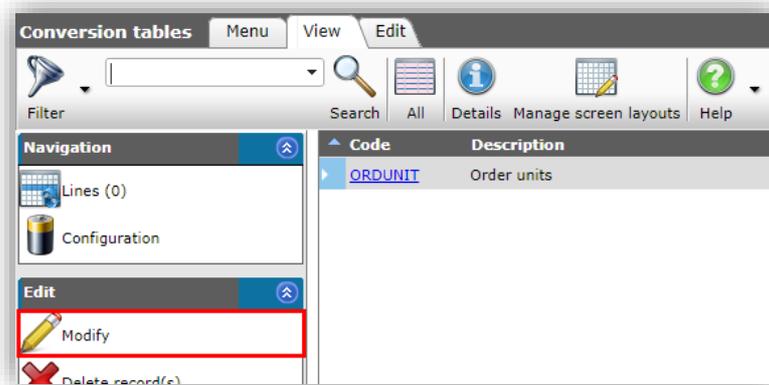
## 9.2 Certificate types

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



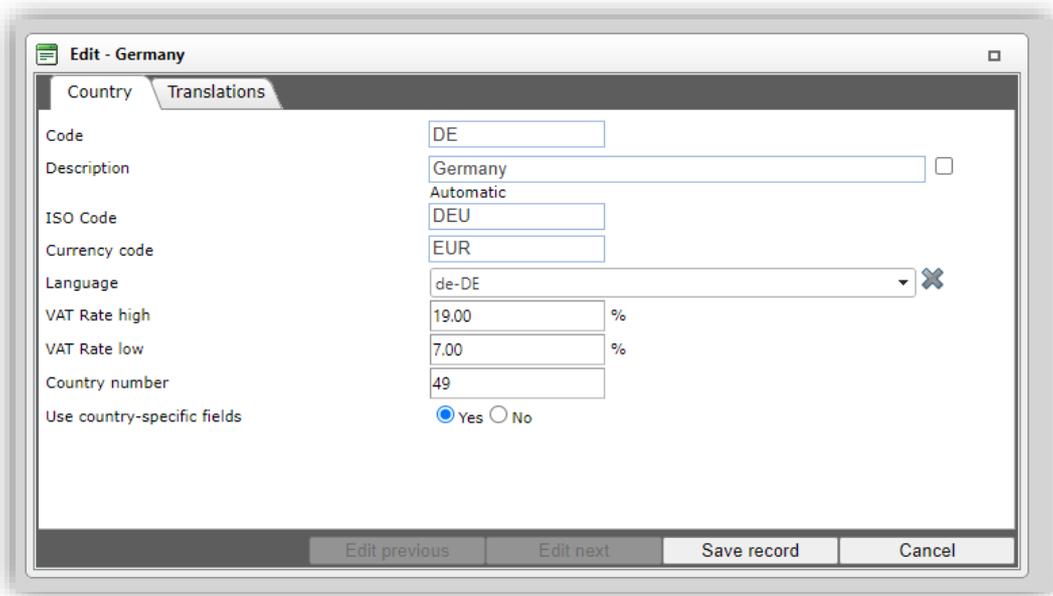
## 9.3 Conversion tables

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



## 9.4 Countries

Per Country, the following settings can be made:



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

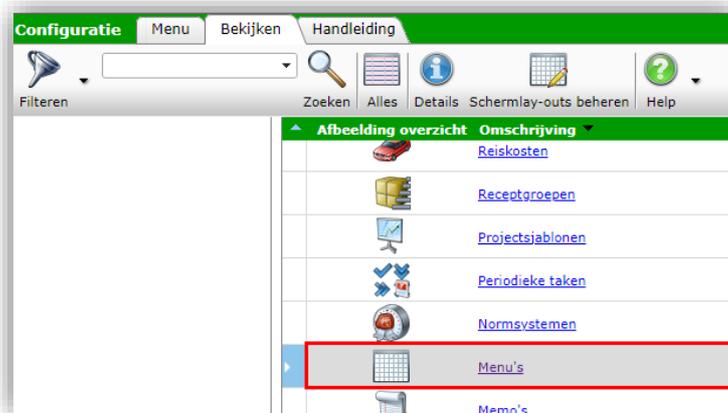
## 9.5 Custom menu

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*.

Note: The Custom menu option is only available with a paid license. Please contact [sales@compano.com](mailto:sales@compano.com) should you need this option.

To create your own menu:

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

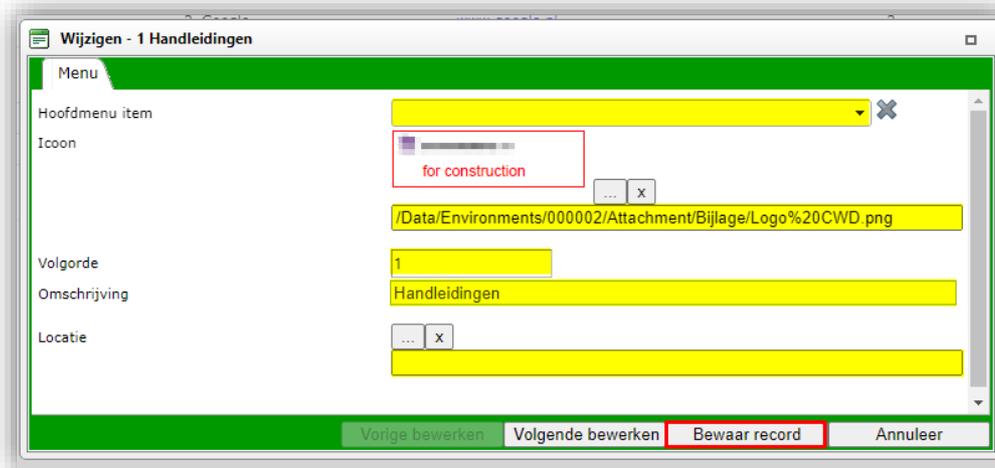


2. To add a menu, under Edit, click + *Add*.



Icon	Hoofdmenu item	Volgorde	Omschrijving	Locatie	Level
		1	Handleidingen		1
	Handleidingen	2	Google	<a href="http://www.google.nl">www.google.nl</a>	2
	Handleidingen	2	Afhandeling tarieven	<a href="#">Afhandeling tarieven met orio versie 1</a>	2
	Handleidingen	4	nos.nl	<a href="https://www.nos.nl">https://www.nos.nl</a>	2
	Handleidingen	6	NU	<a href="https://www.nu.nl">https://www.nu.nl</a>	2
	Handleidingen	7	Tabel kabels 10kV	<a href="#">Tabel kabels 10kV</a>	2

3. In the pop-up window:



Wijzigen - 1 Handleidingen

Menu

Hoofdmenu item:

Icon:

Volgorde:

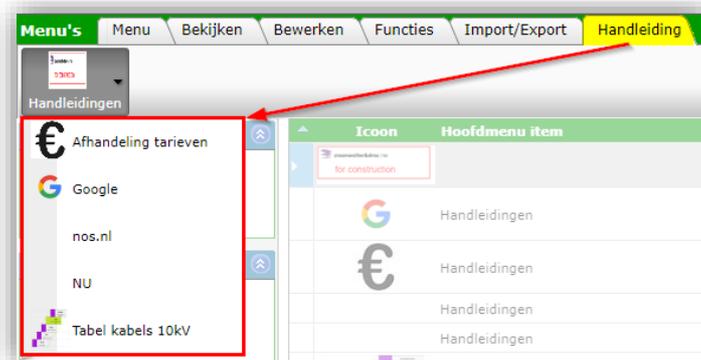
Omschrijving:

Locatie:

Vorige bewerken | Volgende bewerken | **Bewaar record** | Annuleer

- 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.
  - Icon (optional): Upload an icon (image) for the menu.
  - Order: Type a number for the order in which this menu item is displayed in relation to other items.
  - Description: Type a description for the menu item; this is also the text shown on the menu button.
  - 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:



Menu's | Menu | Bekijken | Bewerken | Functies | Import/Export | **Handleiding**

Handleidingen

€ Afhandeling tarieven

Google

nos.nl

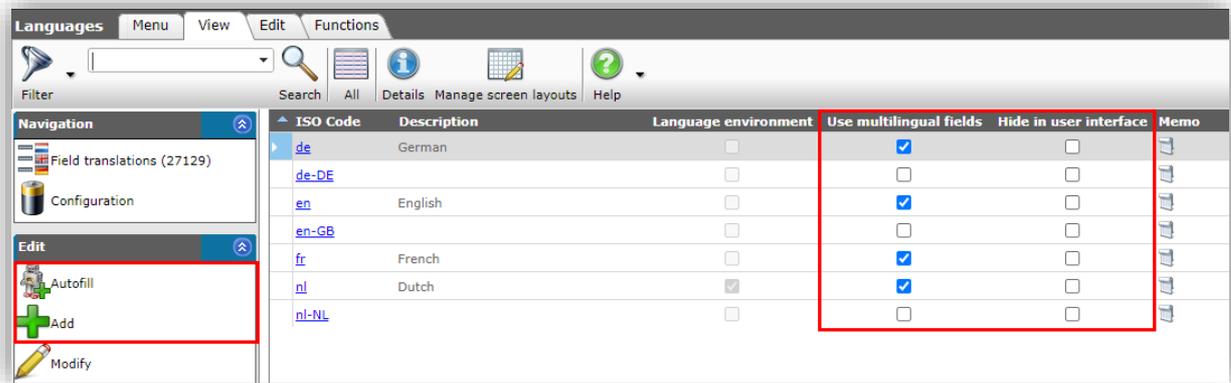
NU

Tabel kabels 10kV

Icon	Hoofdmenu item
	Handleidingen
	Handleidingen
	Handleidingen
	Handleidingen

## 9.6 Languages

Manage languages available for translations in your application:



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

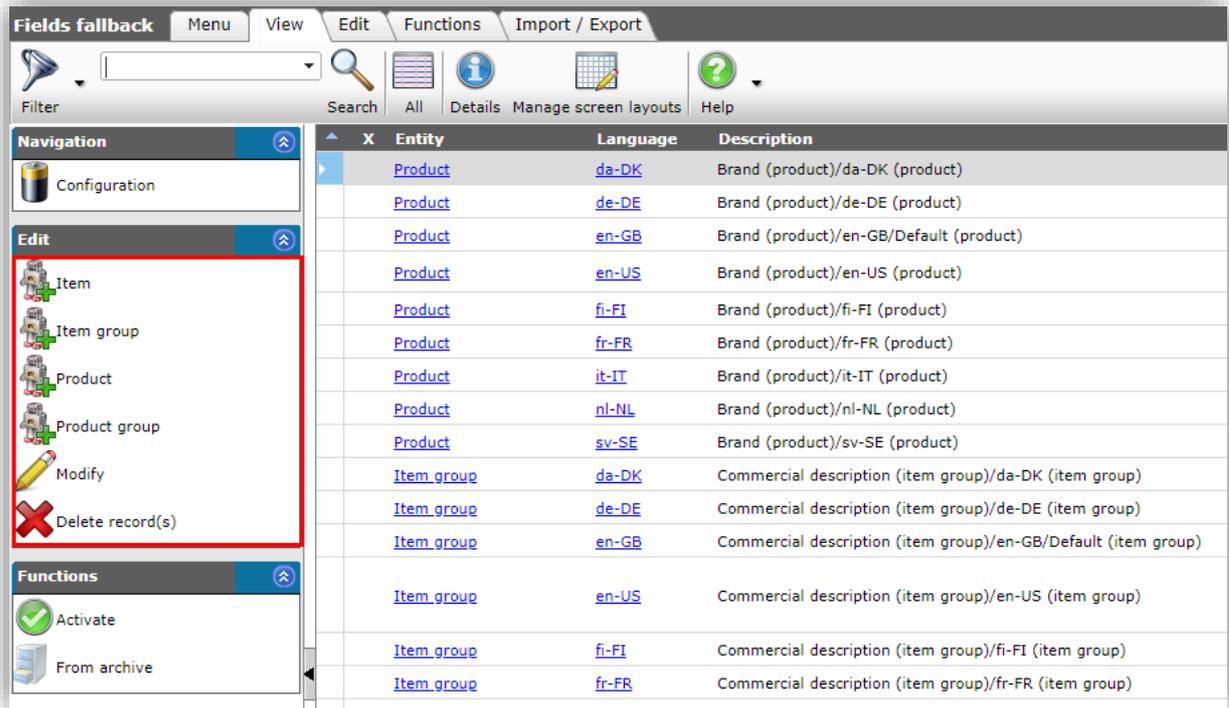
Settings per language are:

- Use multilingual fields
- Hide in user-interface

For more information, see the *Manual Multilingual Data* on the [Compano Help-website](#).

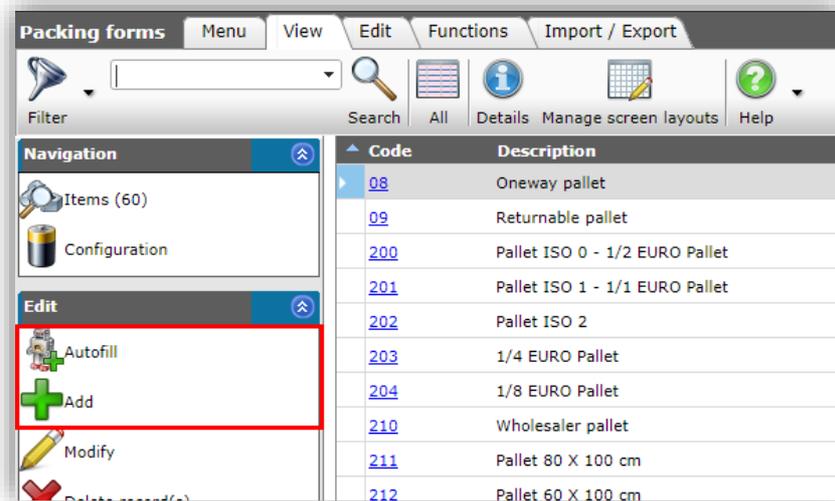
## 9.7 Fields Fallback

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).



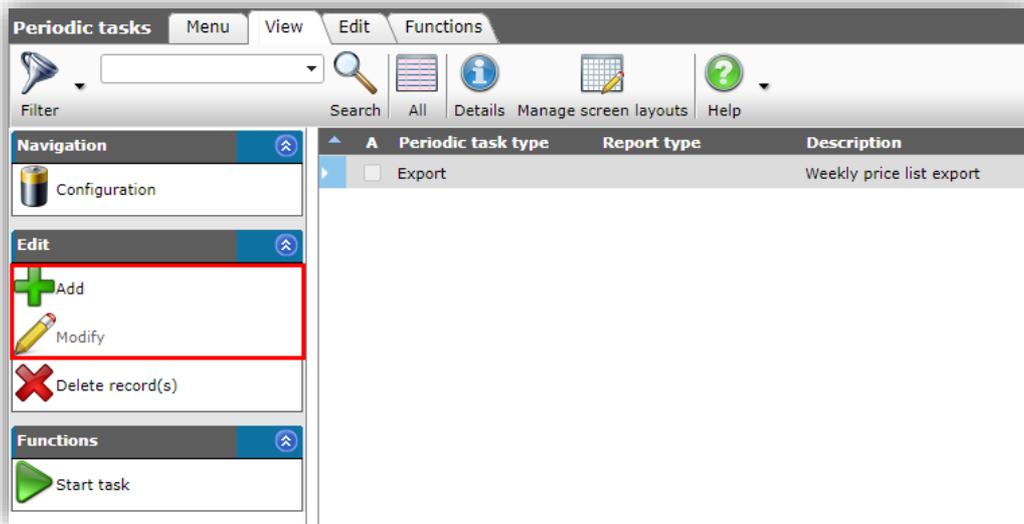
## 9.8 Packing forms

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



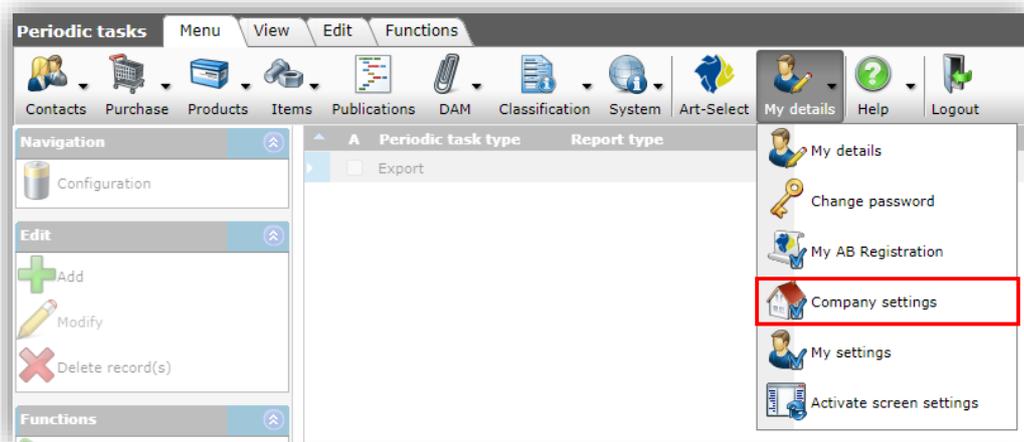
## 9.9 Periodic tasks

Add or manage Periodic Tasks to automate certain COS-processes, such as Import, Export 2BA, Export, Feed export, etc. Also see the *Manual Periodic Tasks* on the [Compano Help-website](#).



## 9.10 Company settings

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

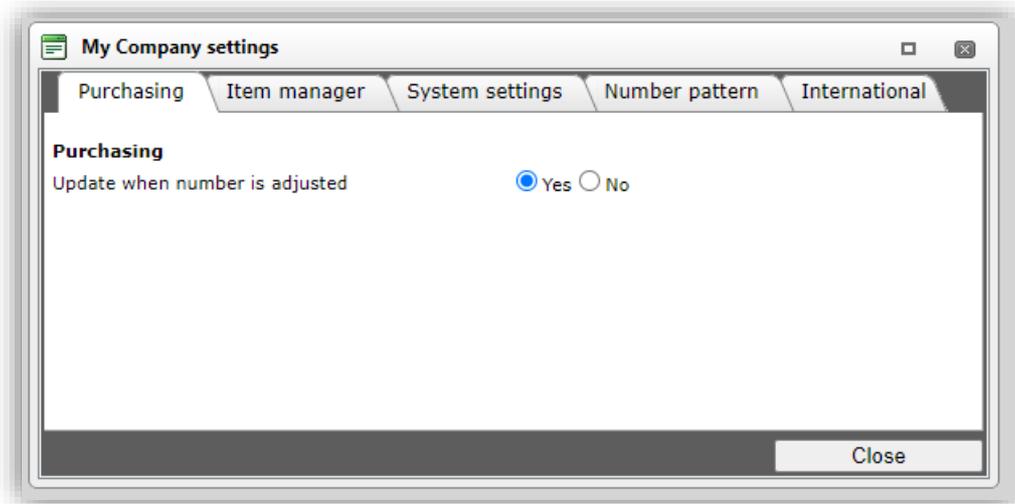


**Warning:** Care must be taken when changing or adding Compano settings as this can severely disrupt your application. If unsure how to proceed, please contact [support@compano.com](mailto:support@compano.com) and have things explained to you.

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:

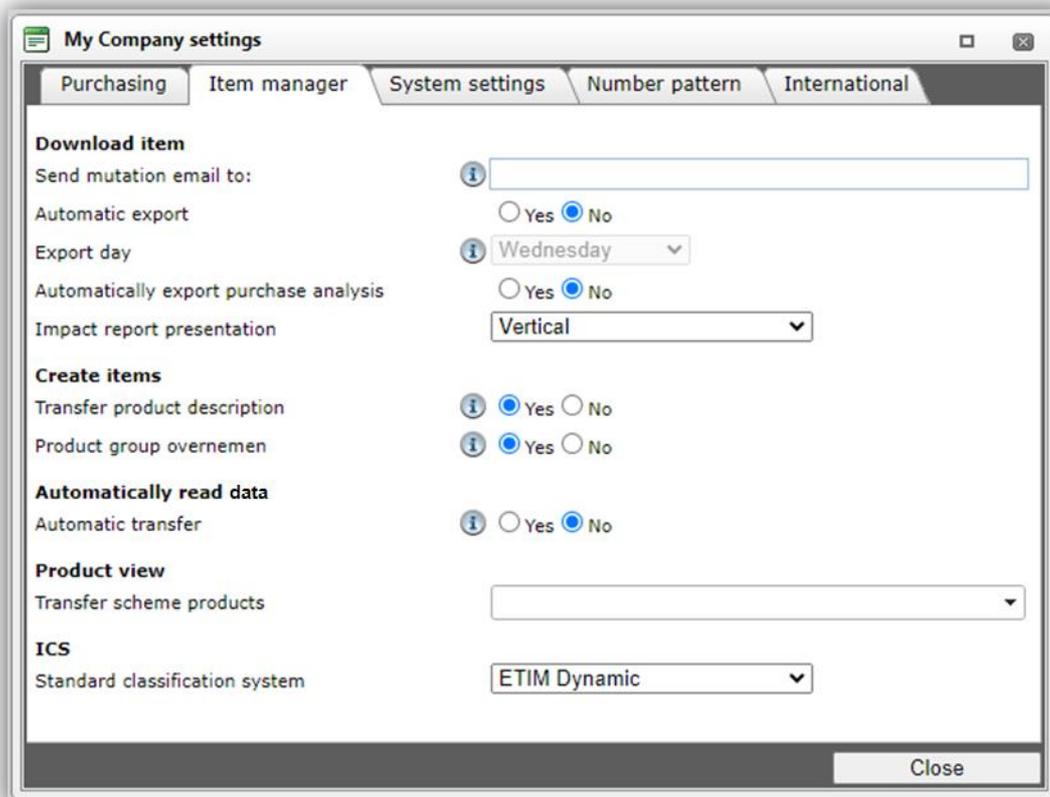
- Project administration settings
- Calculation/Offer settings
- Purchase settings
- Financial administration settings
- Etc.

### 9.10.1 Purchasing



- 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



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

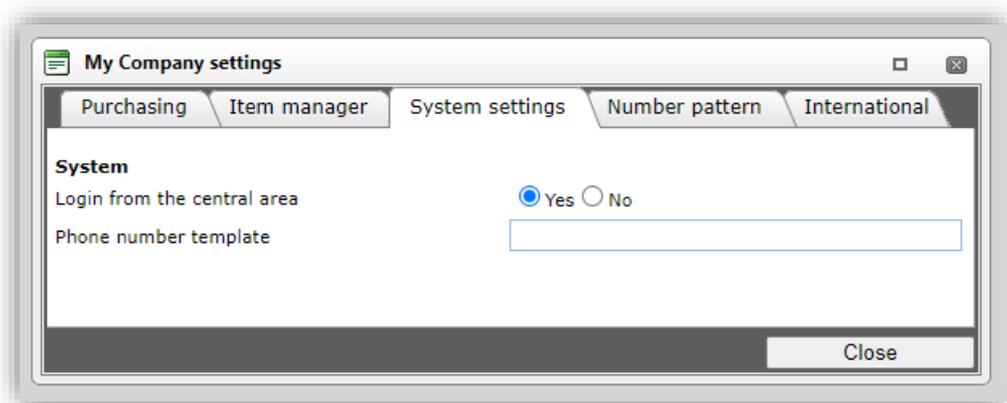
Settings when manually creating items based on products.

- 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.

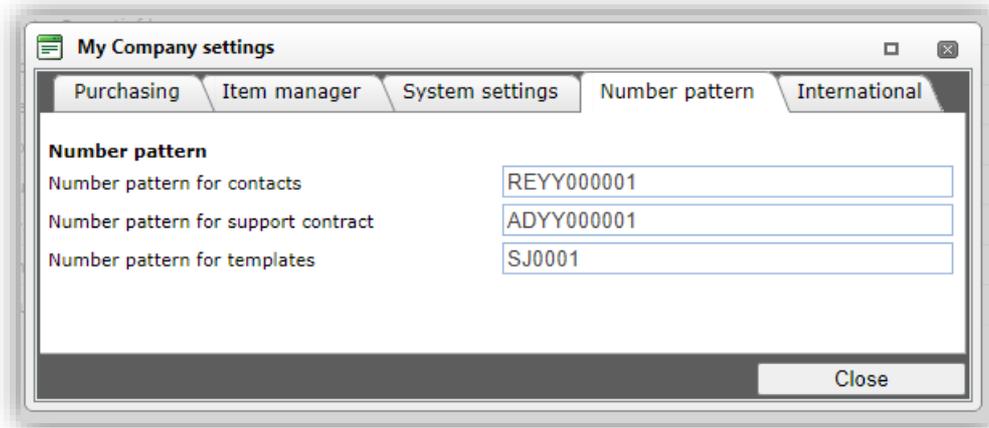
### 9.10.3 System settings



- Login from the central area: When set to **No**, logins initiated in the main environment are blocked. Note: 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

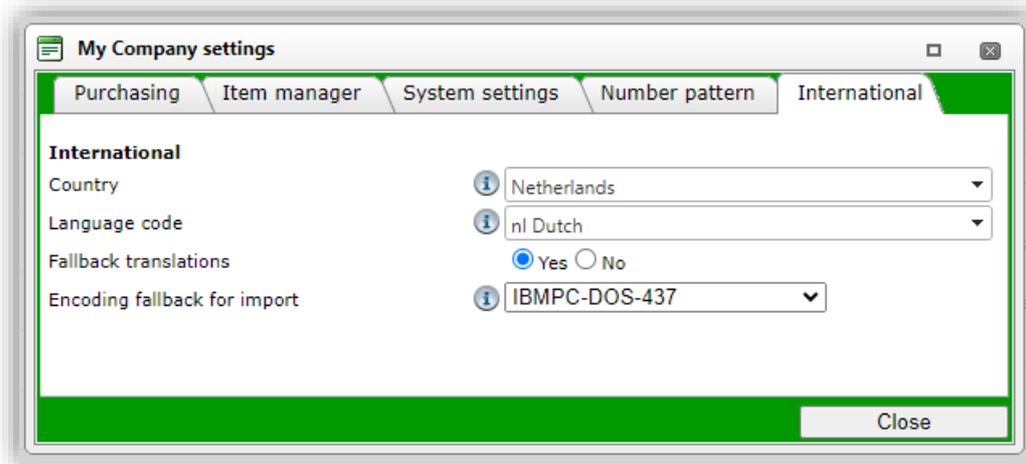
Set the default number patterns for several automatically numbered entities:



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



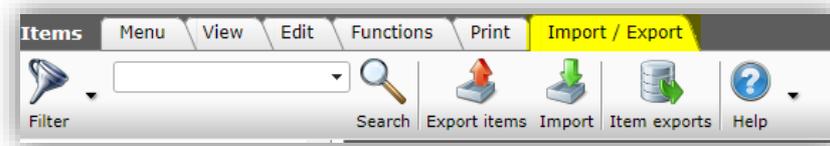
- Country: Default country. The country selected will be used as the default country when adding a new relation.
- Language: Default language. The language selected will be used as the default user-interface language when adding a new relation and/or user account.
- Fallback translations: Default at **Yes**. Set this option to **No** if you want to make use of the Fields Fallback system instead of the default Translation fallback. Also see *Manual Multilingual Data*.

- Encoding fallback for import: If the correct character set cannot be determined from an import file, fallback to the character set which is specified here:



## 10 Import data

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



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

Note: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](#).

### 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.

Note: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](#).

### 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

Note: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](#).

### 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 [Compano Help website](#).

Excel template	Import layout	Used for
Template New Products and Items (DICO/SALES005) <sup>7</sup>	Standaard product import in Excel – L03	Importing product data
Template New Products and Items (DICO/SALES005)	Standaard artikel import in Excel – L03	Importing item data
Template Price Updates	Standaard prijsupdates in Excel – L03	Importing (new) price information
Template Import Accessories	Standaard import toebehoren product – L03	Importing accessories or parts information
Template Import Accessories	Standaard import toebehoren product met GTIN – L03	Importing accessories or parts 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*).

Note: 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* (<https://www.7-zip.org>) to create these files.

#### Example

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

<sup>7</sup> Note: 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:

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

However, beware of saving and/or re-opening in CSV format (!). CSV is notoriously tricky when it comes to **encoding 'special' characters** such as é, à, ê, €, □, μ, β ç, et cetera; basically anything that is not part of the basic [ASCII-127](#) 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).

Warning: 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

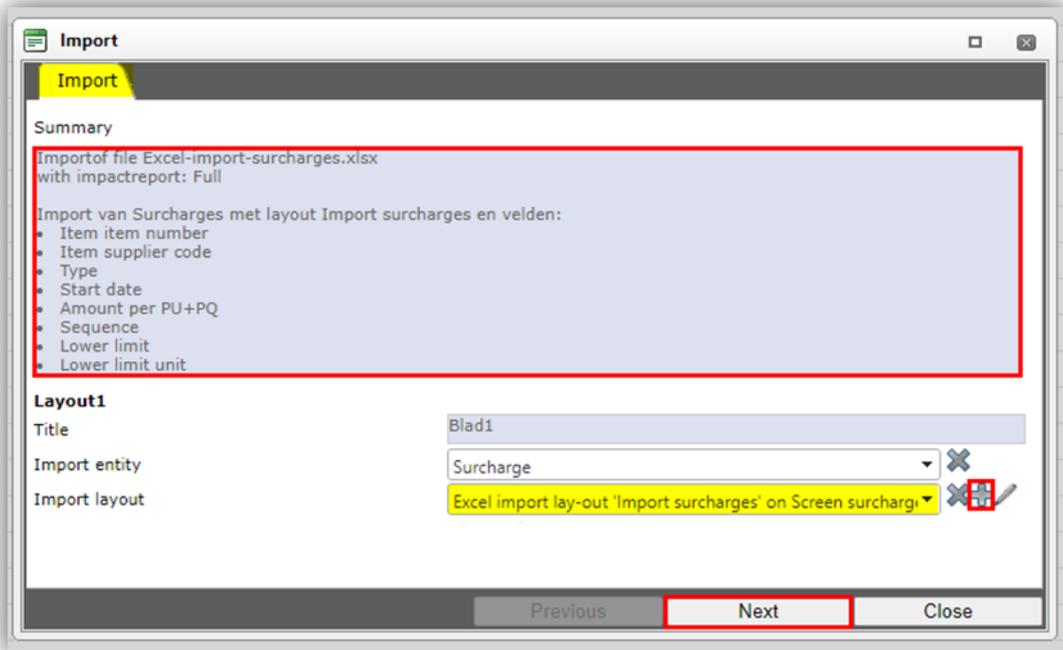
	A	B	C	D	E	F	G	H
	GLN	GTIN	ARTKORT	ARTNUMMER	ARTFAK_OM	ART_PRI_V	PRODCODFAB	KORTGROEP
2	5907791600004	5907791600011	01-001Z-1/4"	011001040000	EE bocht bi/bu zwart 01-001Z-1/4"	2,25	5907791600011	'01
3	5907791600004	5907791600042	01-001Z-3/8"	011001060000	EE bocht bi/bu zwart 01-001Z-3/8"	2,70	5907791600042	'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	01-001Z-2.1/2"	011001400000	EE bocht bi/bu zwart 01-001Z-2.1/2"	26,75	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

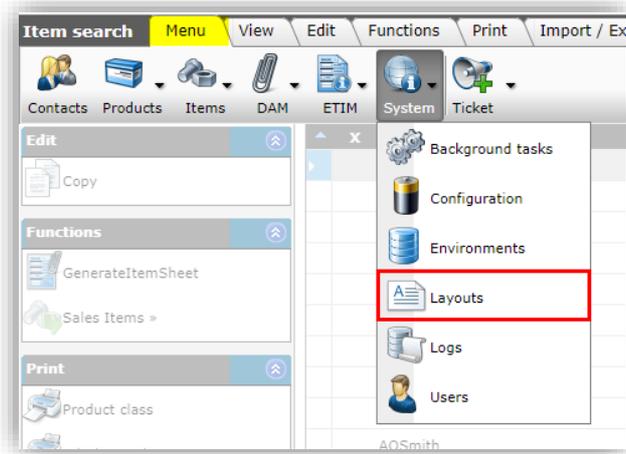
Custom import layouts can be created:

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

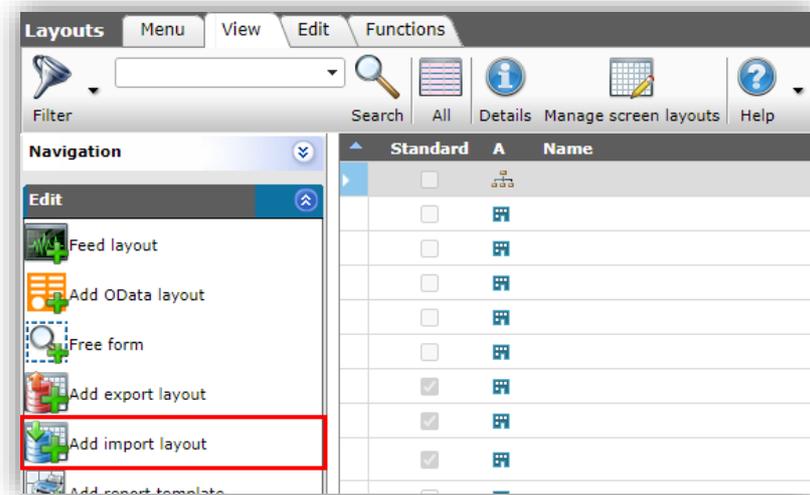


Or at System > Layouts:

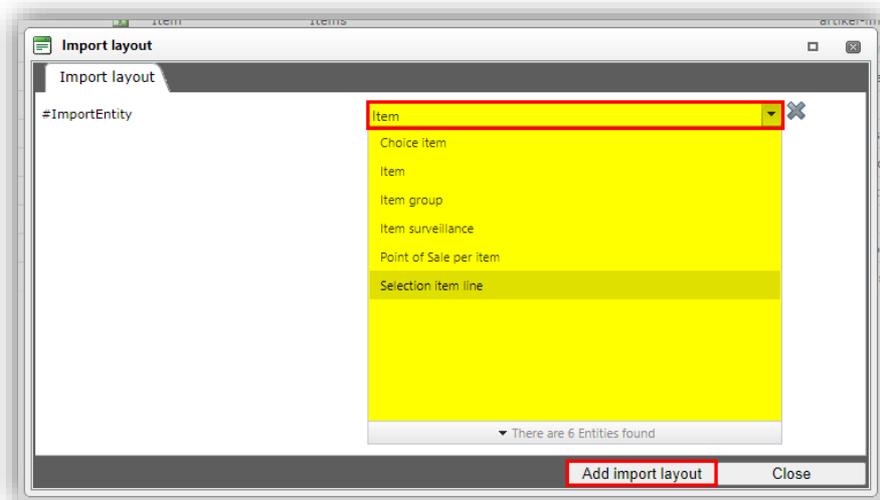
1. Through the Menu, go to *System > Layouts*.



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



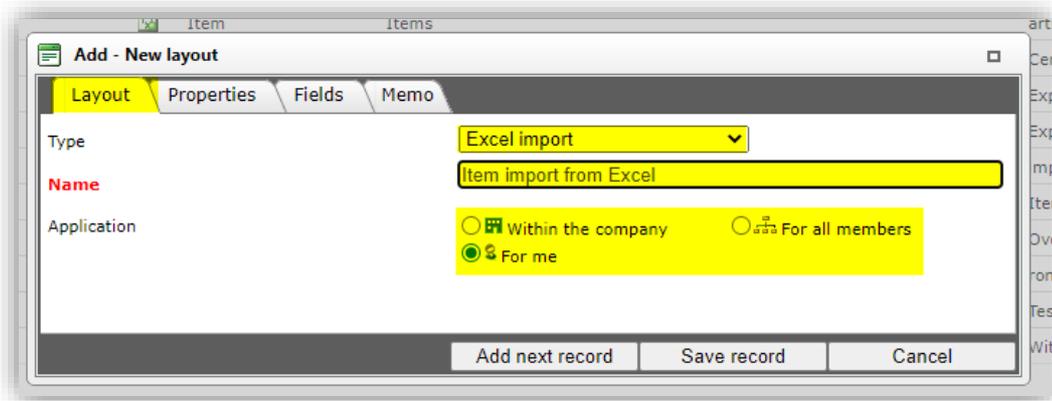
3. In the pop-up window, select the *Entity*<sup>8</sup> for which you want to define the layout, in this example *Item*.



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

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

Layout tab:



- 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*)

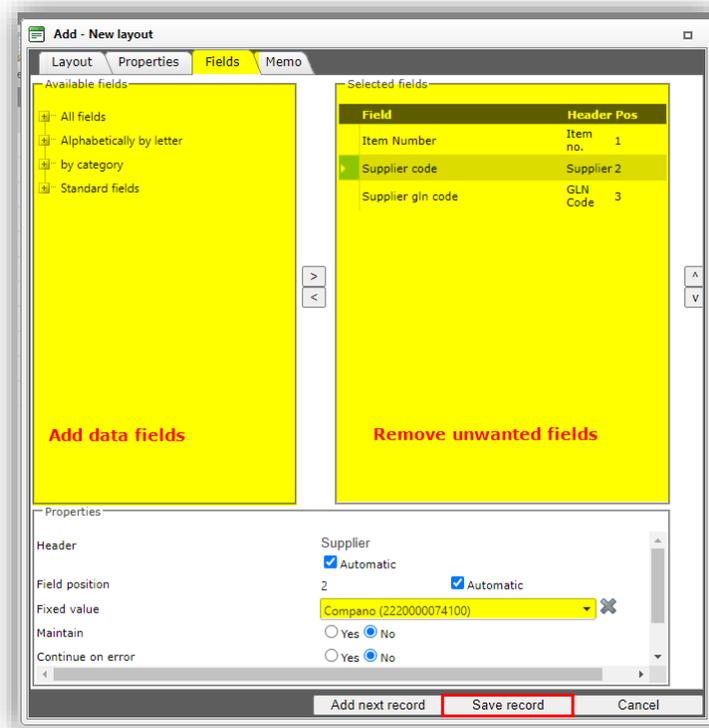
Properties tab:



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

Fields tab:

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



- 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. **Note:** 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

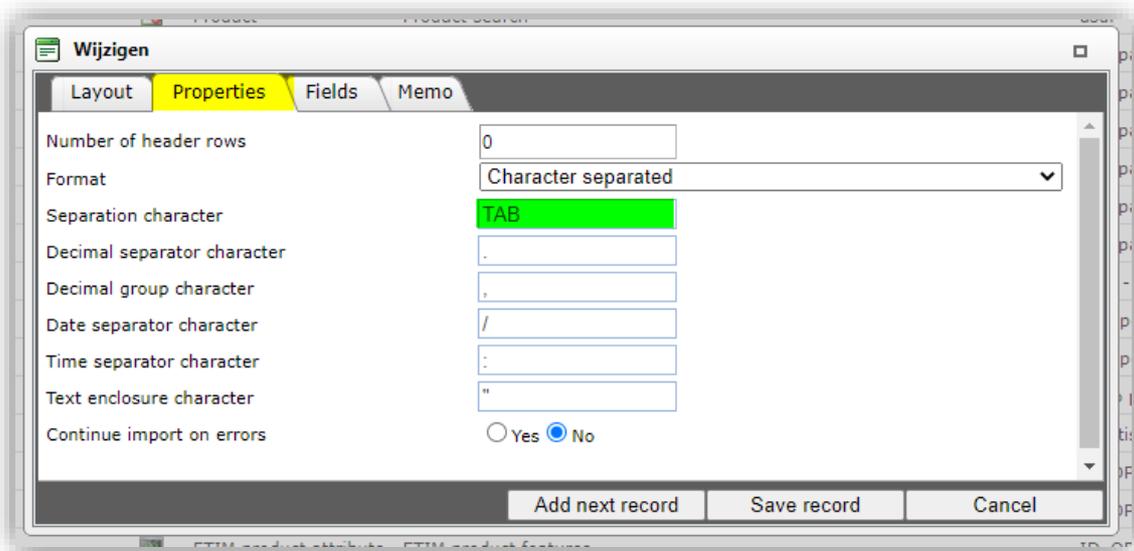
You can use the memo tab to make a note for which purpose this layout was made and how it may be used.

**Note:** Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](http://www.compano.com/help).

### 10.4.3 Properties for Text import layouts

**Important:** 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++* <https://notepad-plus-plus.org>.

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



- 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. Note: 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.

Note: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](#).

### 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

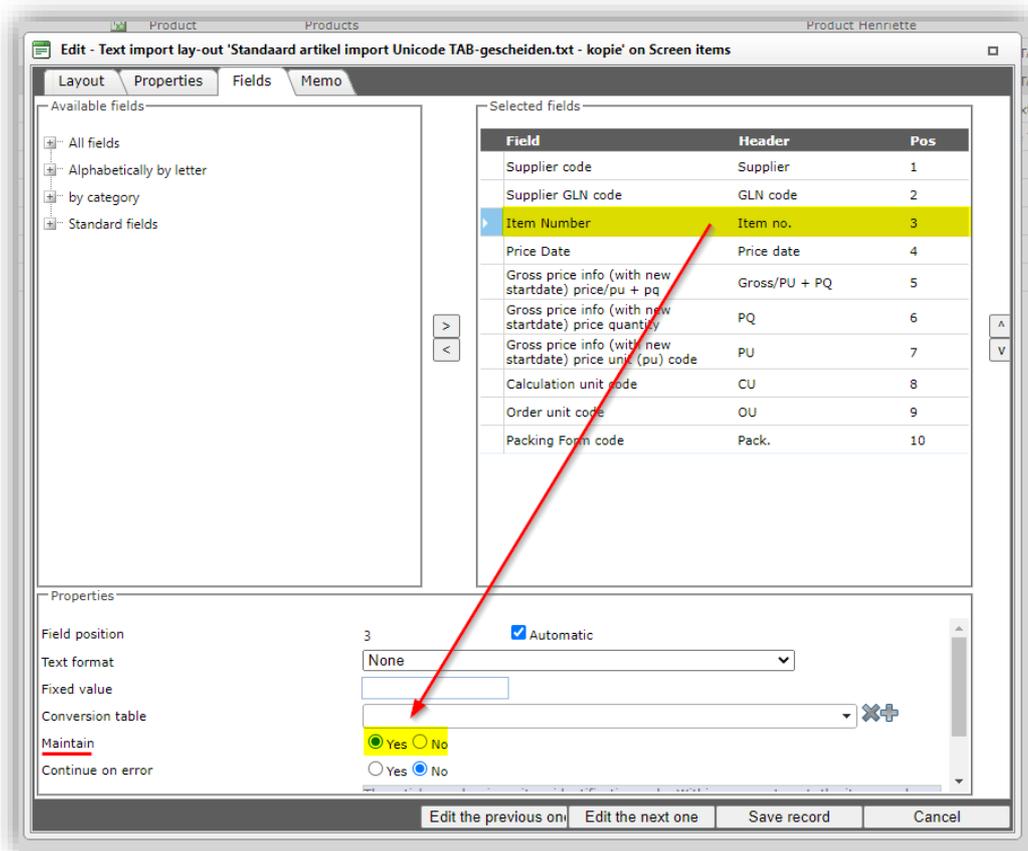
For some fields in your layout, *fixed values* can be used. Two scenarios with fixed values are:

- 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:

Note: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](#).

### 10.5.3 Maintain data [no overwrite]

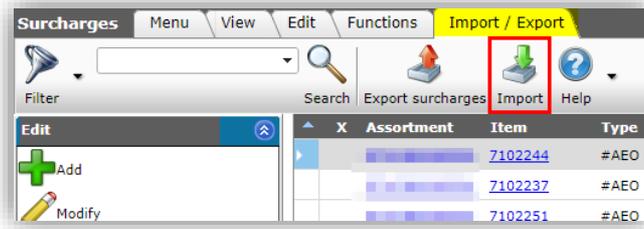
To prevent overwriting of data in COS on import, set the *Maintain* option of a data field to *Yes*.



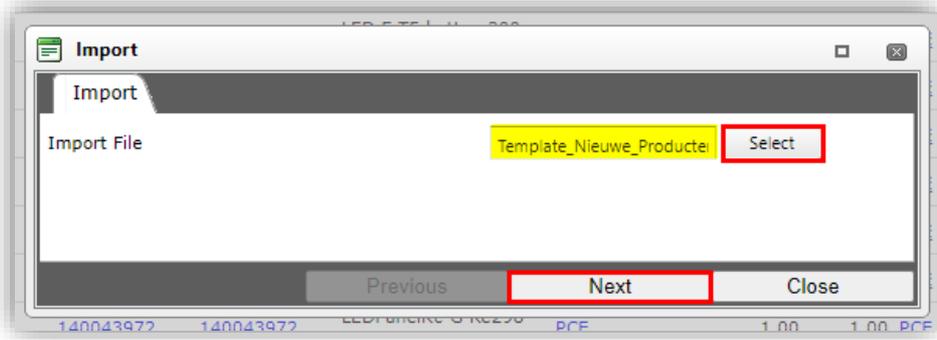
## 10.6 Importing data files

To import any type of data file:

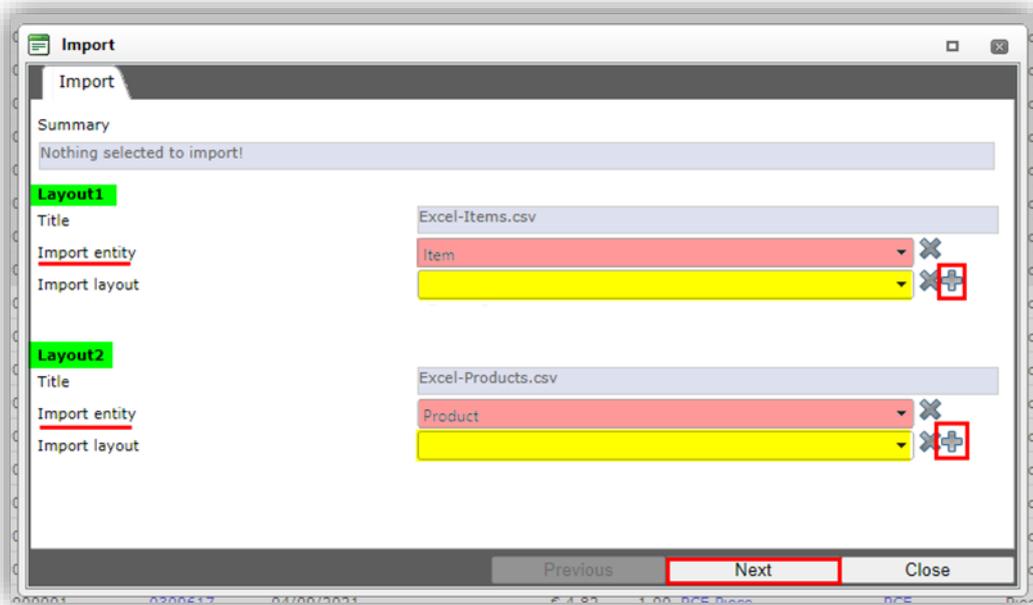
1. Go to the *Import/Export* tab of any Entity and click on *Import*.



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



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

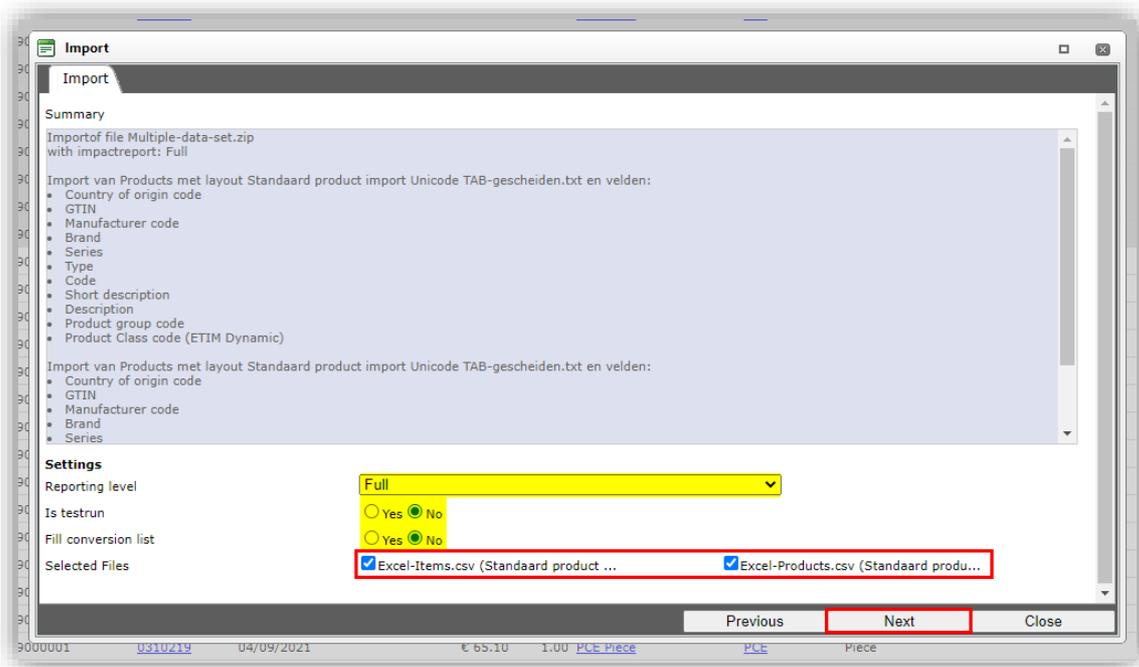


For each Layout:

- Import entity: Select an Import entity.
  - Import layout: Select an Import layout, or—alternatively—, add a create an import layout using the **+**-buttons. *Note*: Optionally *skip importing* of a data Layout by *not selecting* an Import entity and/or Import lay-out.
- Click on *Next* for the *Import settings*.

<sup>10</sup> *Note*: Excel files with multiple worksheets or compressed files (ZIP, BZIP) containing multiple data files can also be imported. For importing multiple data sources, multiple import layouts need to be selected.

<sup>11</sup> *Note*: Industry standard files will be auto-detected; no Import layout is necessary.



- c. Reporting level: Select the reporting level for the import report:
    - i. None: Do not 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.

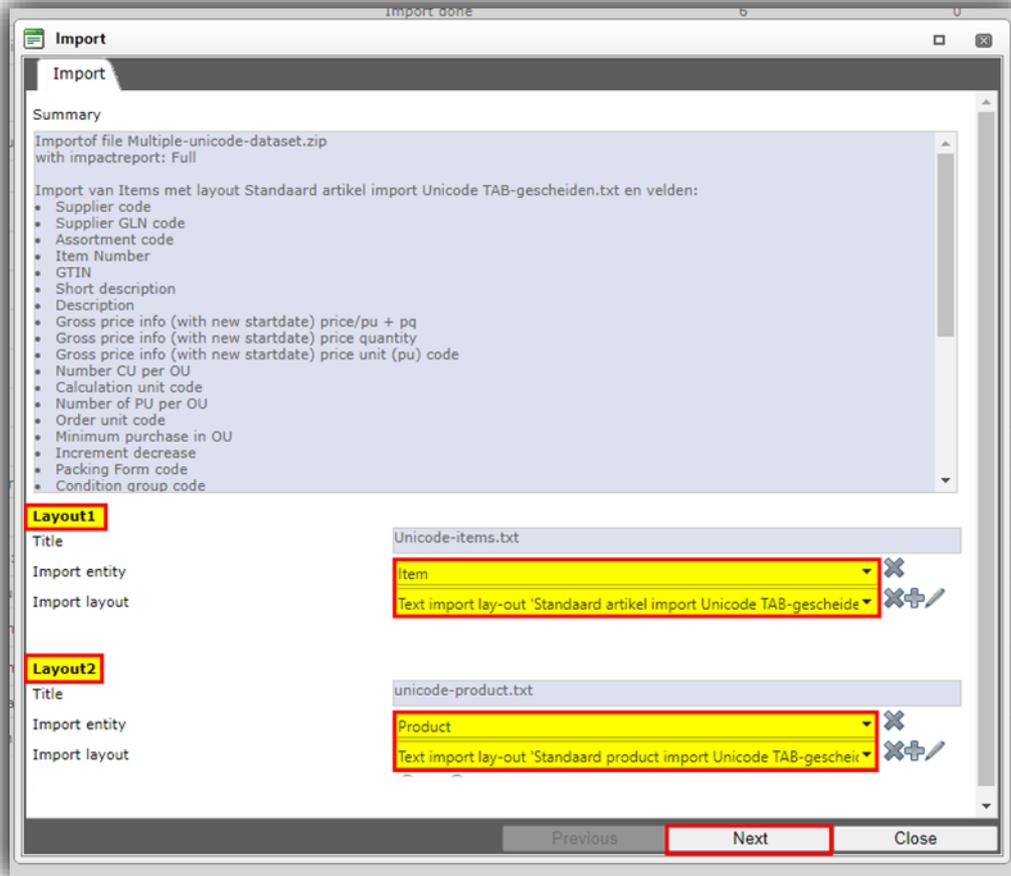
### 10.6.1 Multiple data sources

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

Important: 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:



For more information on Importing multiple data source, see the *Manual Universal Import/Export* available from the [Compano Help website](#).

## 10.7 Import 2BA

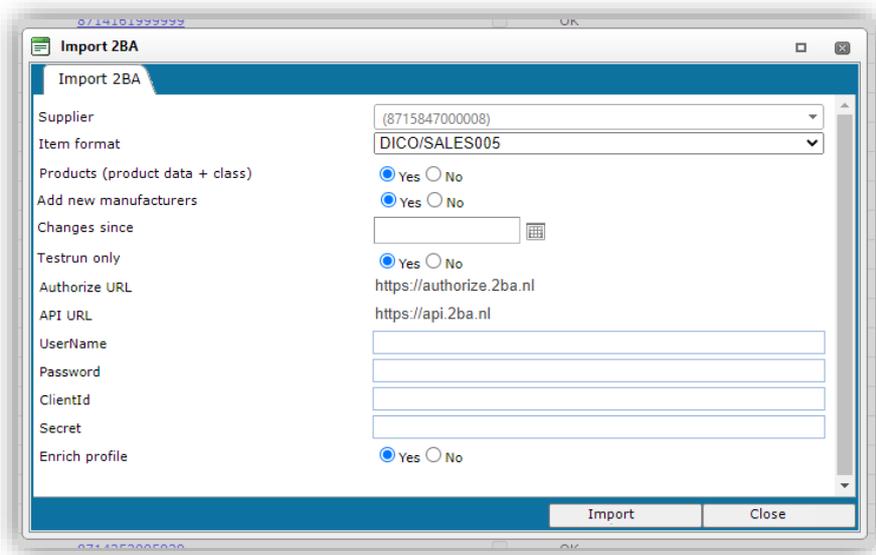
Depending upon the setup of your version of the Compano software, a direct import of assortments from data pool 2BA is an option:

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

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



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



- 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
- l. Secret: Enter your 2BA account secret code
- m. Enrich profile: Set to *Yes* to enrich product information based on product GTIN.  
Note: 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 [13.8 INDUSTRY STANDARD DATA \(AUTOIMPORT/AUTOCHECK\)](#).

### 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 [Compano Help website](#).

## 11 Export data

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

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

Note: 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.

Note: Detailed information on exporting data is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](#).

### 11.1 Standard export formats

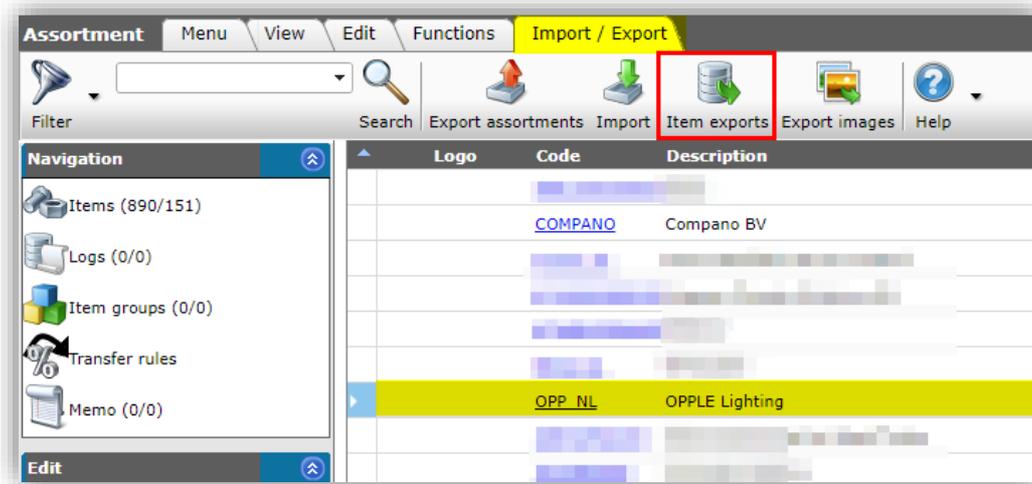
Should you choose to export data using one of the industry exchange formats, you have the option to either export all items of an assortment, or export (a selection of) items directly.

Warning: **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.

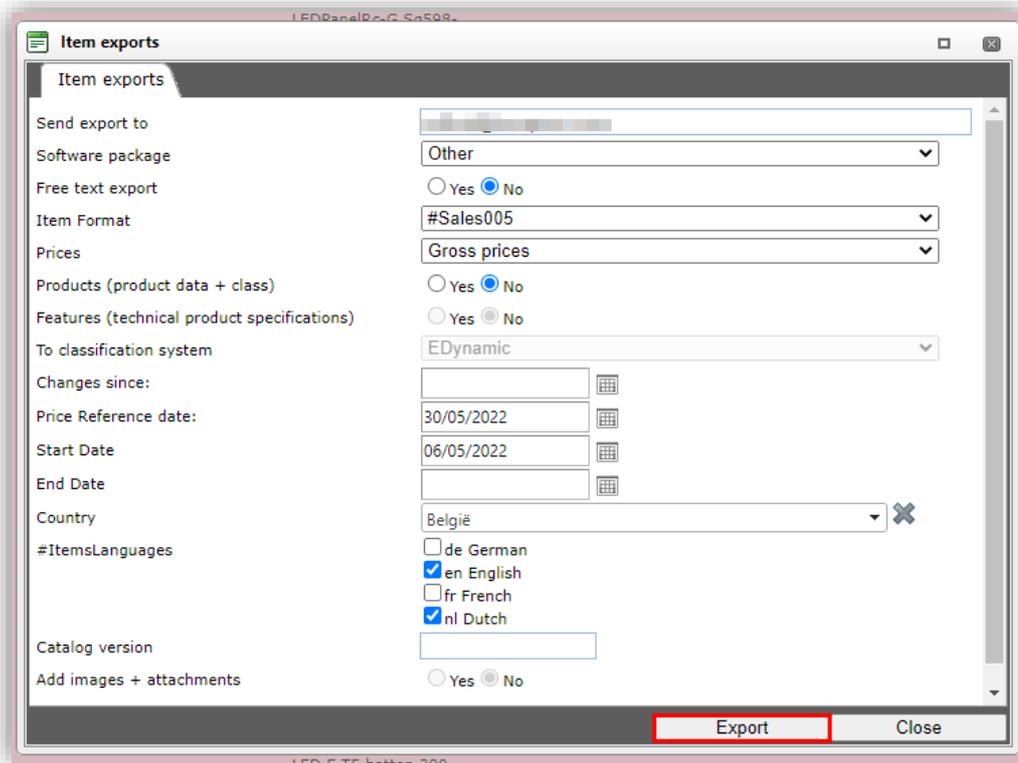
#### 11.1.1 Export Assortment

To export all items of an assortment:

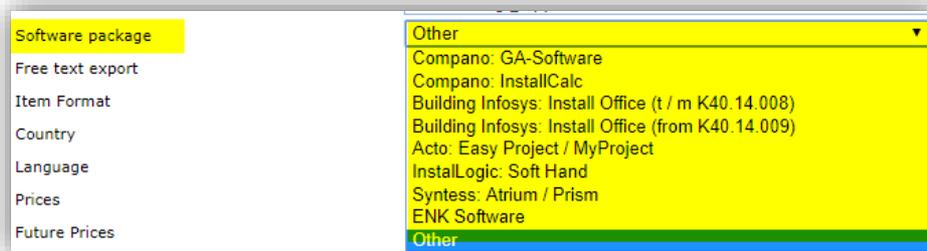
1. Through the main menu go to *Items > Assortment*.
2. Go to *Import / Export tab*, select an assortment and click on *Item exports*.



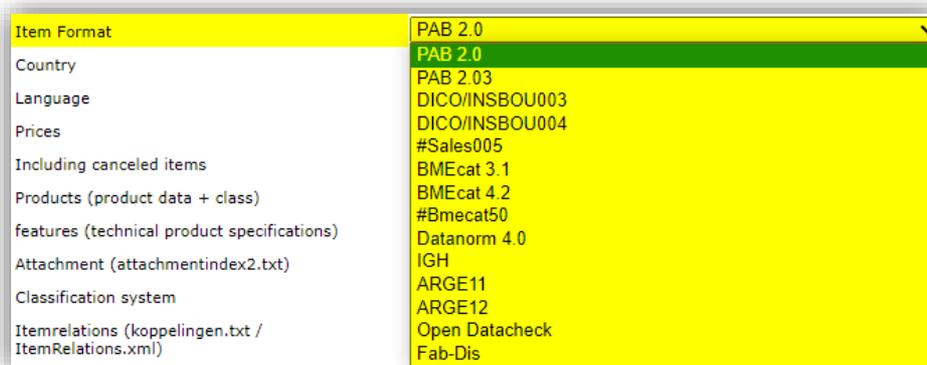
3. In the pop-up window:



- 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*:



- 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:



Note: 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

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

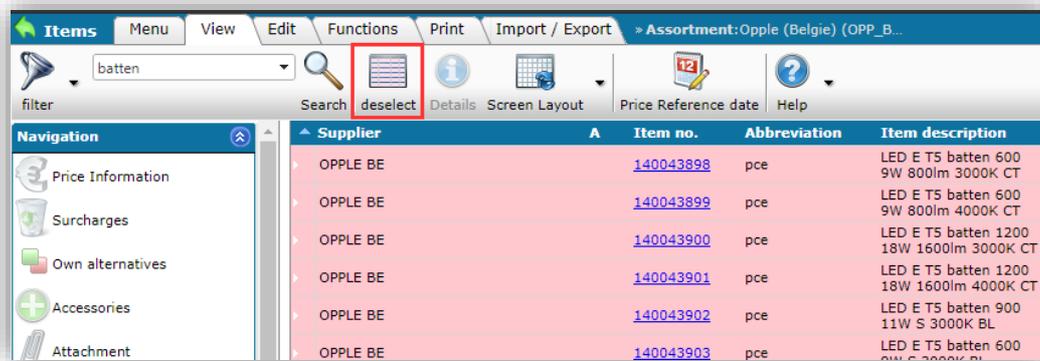
been set to 'Yes'. You will be notified via e-mail of the FTPS-location, where you can download the attachments as a ZIP-file. As this option differs from the usual download protocol, *no* log entry will be made.

Note: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](#).

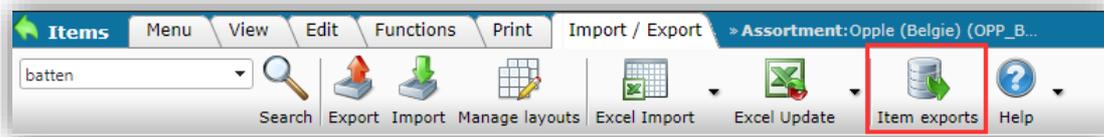
### 11.1.2 Export Items

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

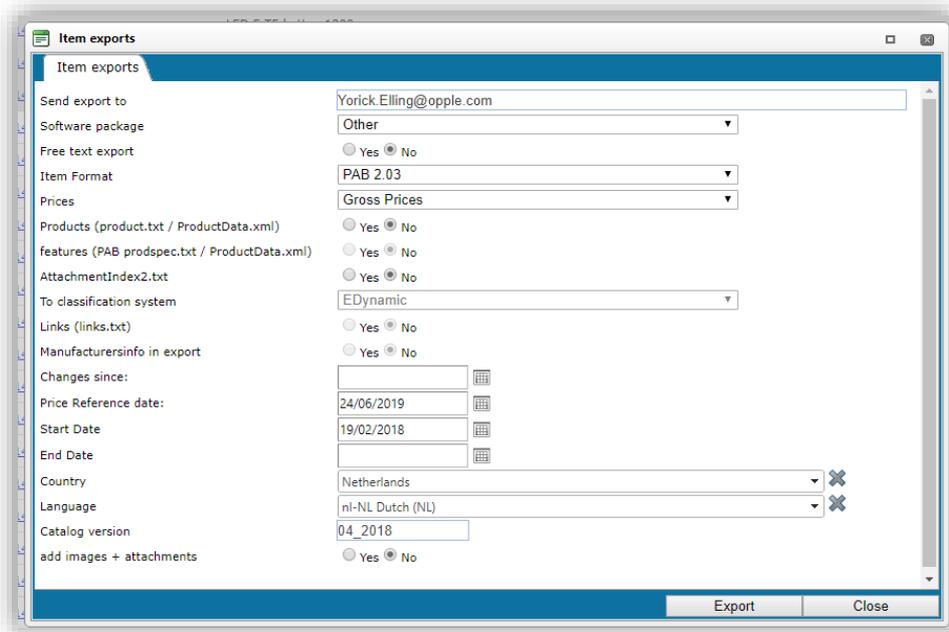
1. Through the main menu, either go to *Items > Items*, or *Items > Assortment > Items*
2. Using the *Quickfilter*, the *Filter* and/or *Search*, make a selection of items
3. On the View tab, click on the *All/Deselect* toggle button, to select all items in your selection (or, CTRL-A):



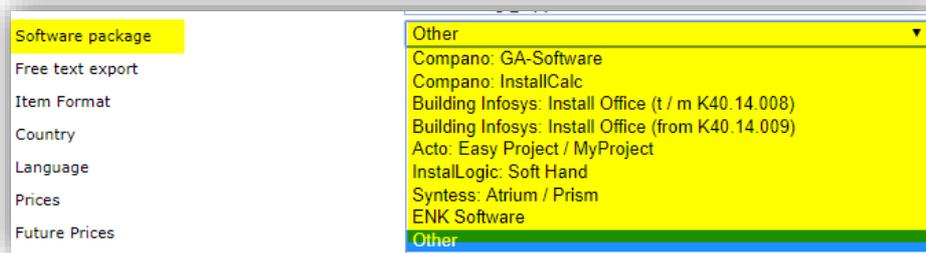
4. Go to the *Import/Export* tab and click on the *Item exports* button:



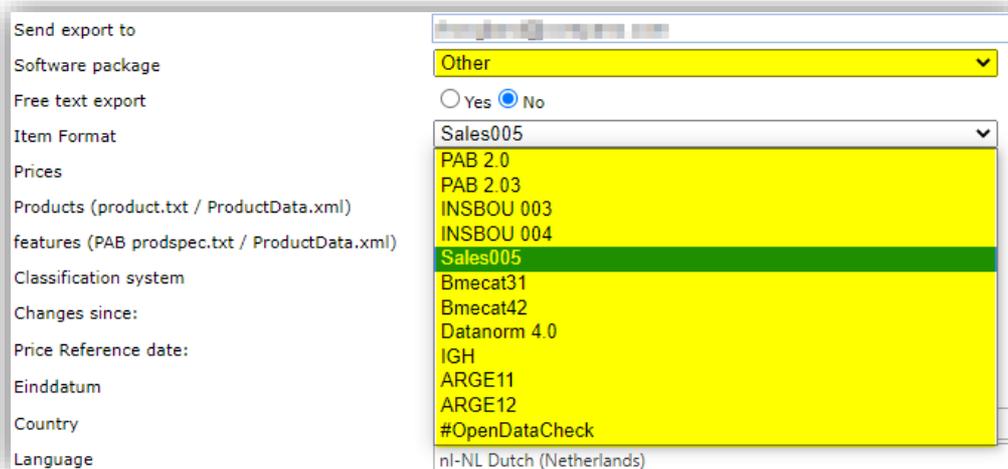
5. In the pop-up window:



- 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*:



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



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

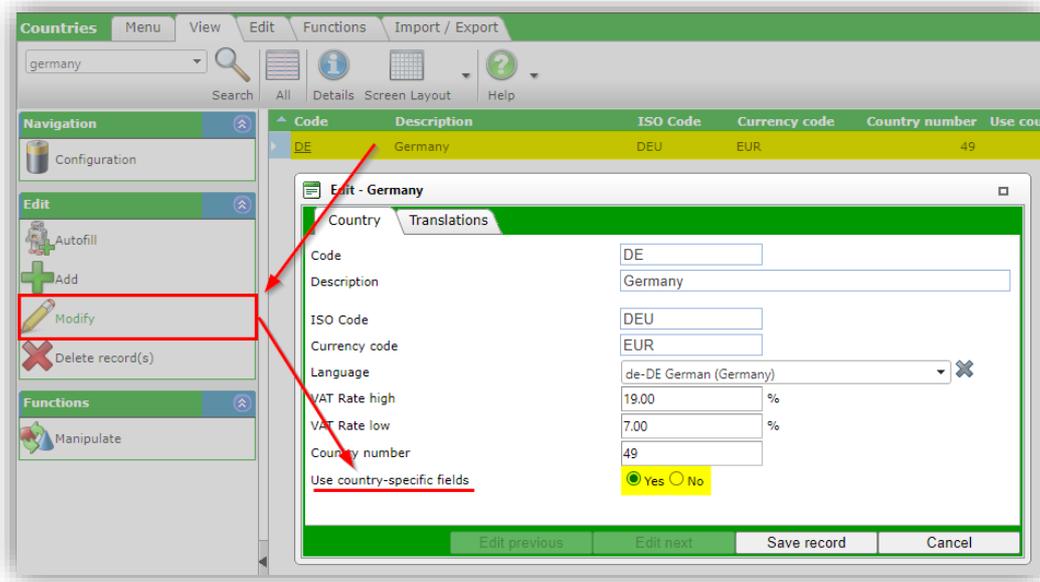
- a. Prices: select which prices should be exported
- b. Including cancelled features: (BMECat)
- c. Products: Yes/No; choose whether to export Product class
- d. Features: Yes/No; choose whether to export Product class features
- e. AttachmentIndex: Yes/No; export fixed length text file containing product/item 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)
- l. 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

Note: Detailed information on exporting data is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](#).

### 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.:



Note: Detailed information on country-specific fields is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](#).

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.

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

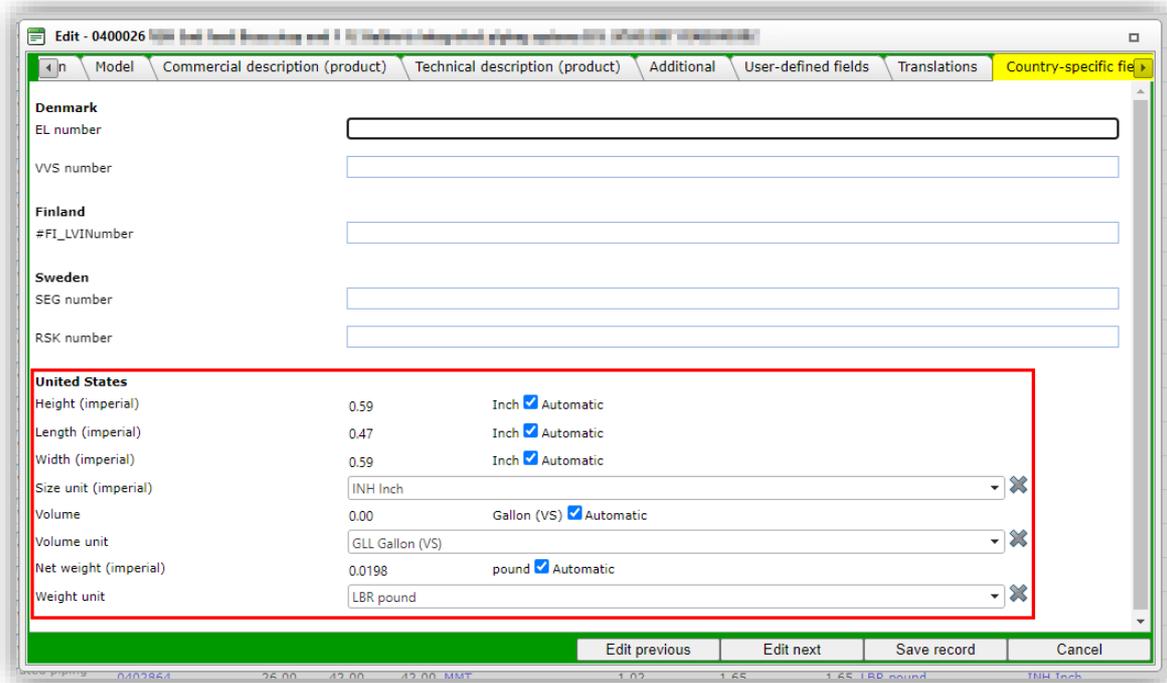
#### 11.1.4 Metric/imperial system fields

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 [Manual Metric/Imperial](#).

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.

Note: 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**.

Note: 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'.



### 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

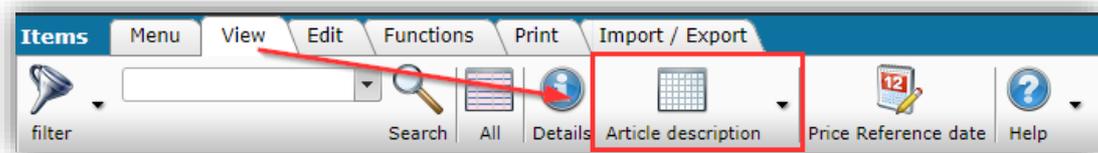
Should you wish to export data from COS using your own custom data layout, you have two options:

- 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):



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



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



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

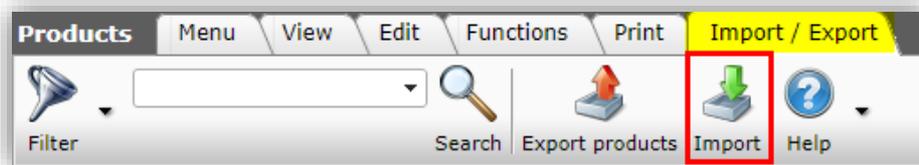
Note: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](#).

### 11.2.2 Export with custom layout

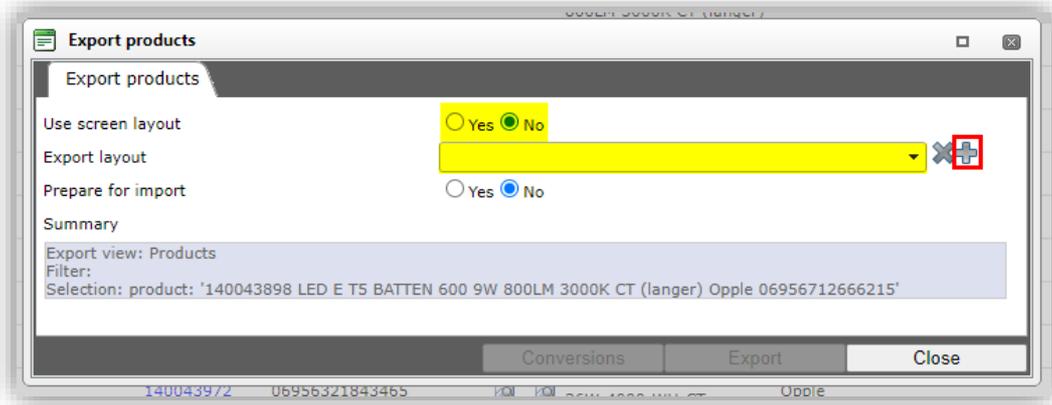
Alternatively, you can design your own export layout.

To export with your own screen layout:

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



- In the pop-up window:



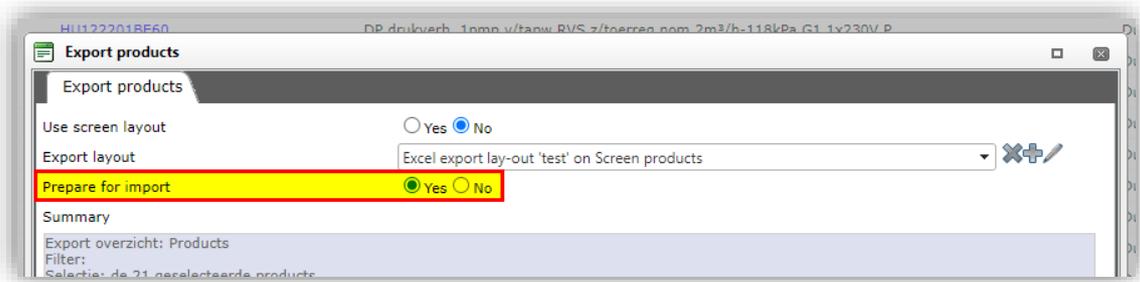
- a. Use screen layout: Set to **No**.
- b. Export layout: Either select a premade Export layout, or create a new one using the + -button; The process for designing the layout is similar to [10.4.2 Custom import layout](#).
- c. Prepare for import: Set the option *Use screen layout* to **No**.
4. Next,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

Note: Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](#).

### 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*:



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

---

*Important:* 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.



**Important:** 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.

**Note:** Detailed information on importing data is available in the *Universal Import/Export Manual*, which can be download from the [Compano Help website](#).

### 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 [Compano Help website](#).

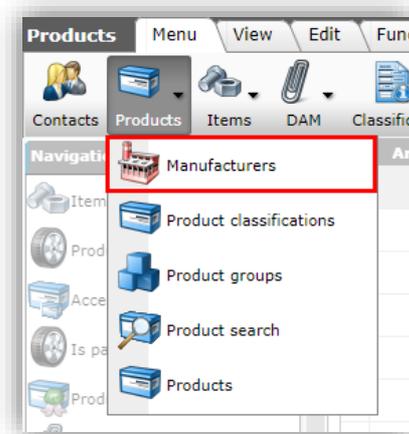
## 12 Manually entering data

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.

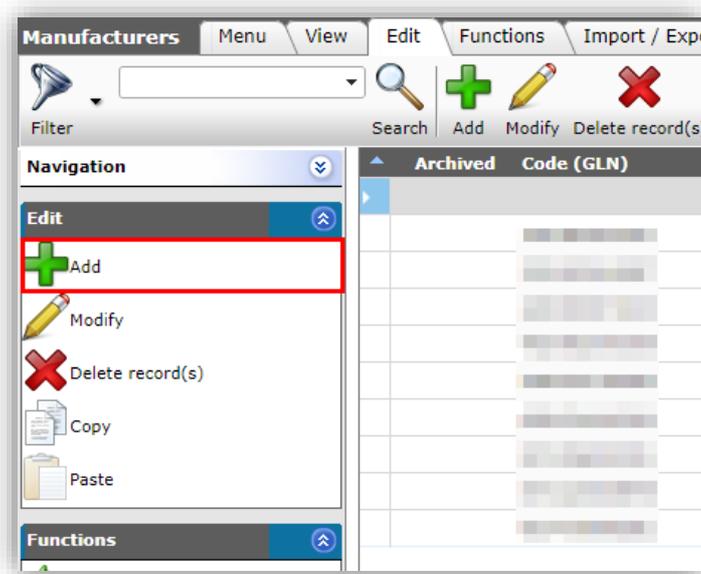
### 12.1 Add manufacturer

To add a (new) manufacturer:

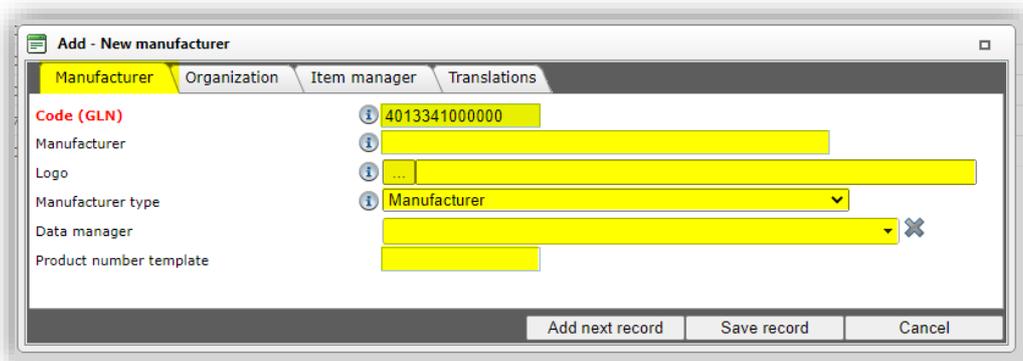
1. Through the Menu, go to *Products > Manufacturers*:



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



3. In the pop-up window:

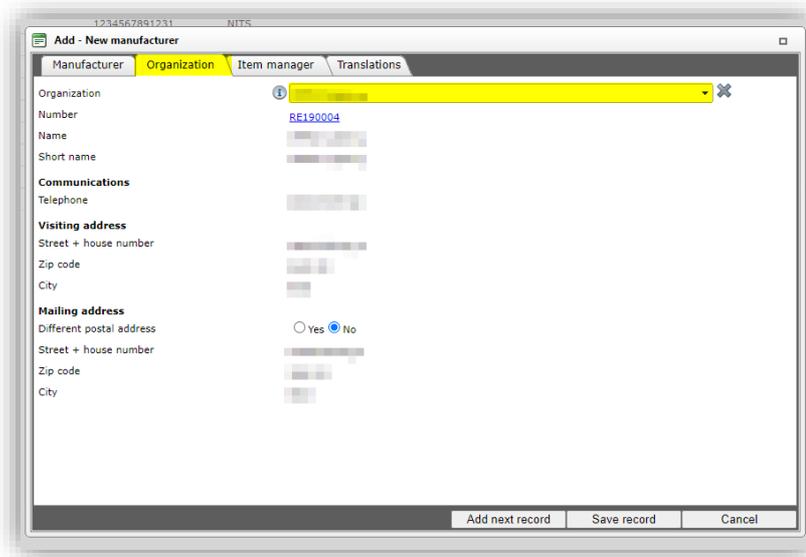


#### Manufacturer tab

- Code (GLN): Enter the *Global Location Number* of the manufacturer
- Manufacturer: Enter a name/description of the manufacturer
- Logo (optional): Upload a logo of the manufacturer
- Manufacturer type: Select the manufacturer type:
  - Manufacturer*: Default option.
  - Standard manufacturer*: Used with standardised products (standardisation system).
  - Unknown*: No longer used (Artikelbeheer.nl)
- Data manager (optional): Select a relation who is responsible for data management of product data.
- 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.

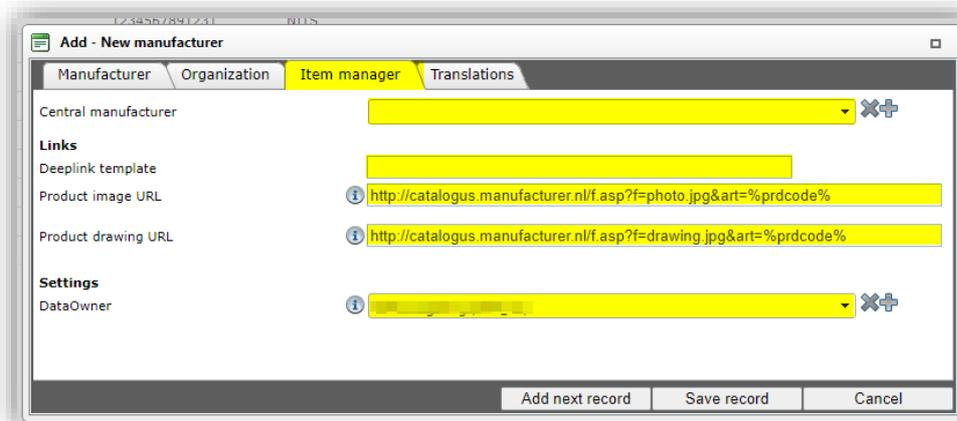
Note: The #-character can be used as a wildcard in the template. For instance, if you have two product number variants, NA-0000 and RX-0000, then the product number template should be ##-0000; thus products with both number variants can be copied.

## Organization tab (optional)



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

## Item manager



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

## URL wildcards

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

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

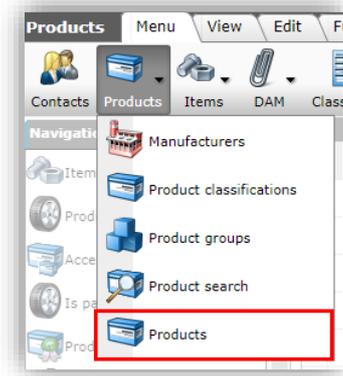
- % prdgroup%: product group code
- %erpcode%: ERP code

5. Save by clicking on *Save record*.

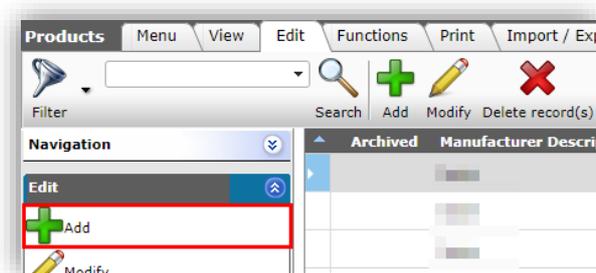
## 12.2 Add individual product

To add a product:

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



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



3. In the pop-up window:

Product tab



- 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). Note: 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.
- l. Brand: Enter the *Brand* name.
- m. Series: Enter the product *Series*.
- n. Type: Enter the product *Type*.

Other tab



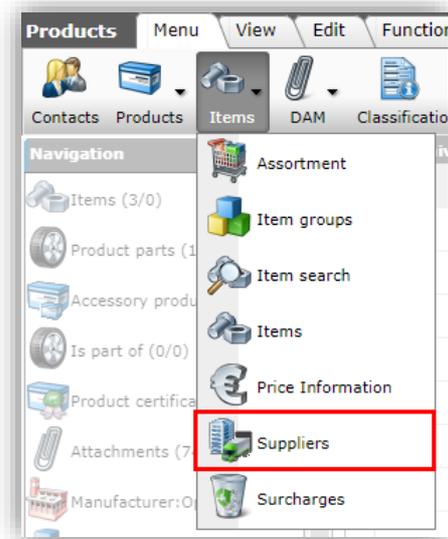
Additional product information can be filled out on the *Other* tab, including:

- 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

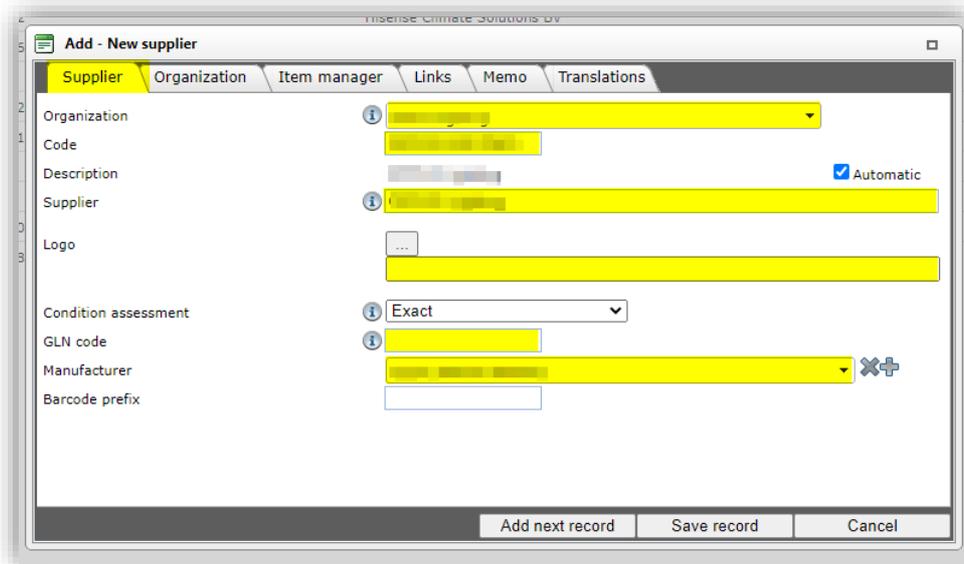
To enter a (new) supplier:

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



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

### Supplier tab



- 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. Note: 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. Note: 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

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

## 12.4 Add assortment

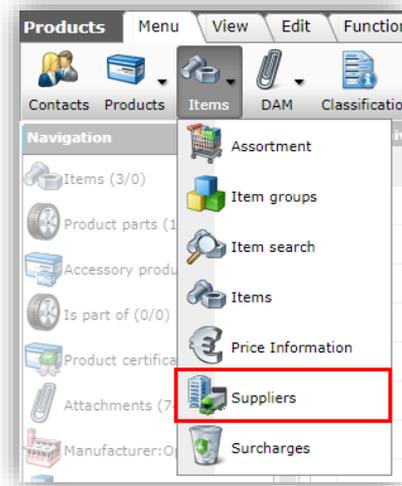
To add an assortment for the supplier:

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

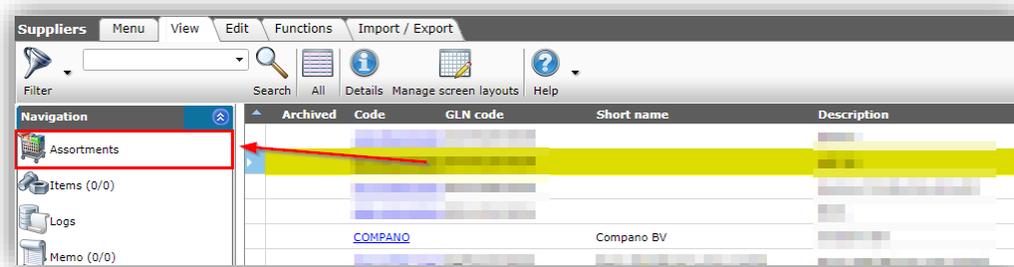
<sup>12</sup> Note: URL a deep links can be built up to an image or drawing. For example <http://catalogus.fabrikant.nl/f.asp?f=foto.jpg&art=%prcode%>

The following 'wildcards' can be used:

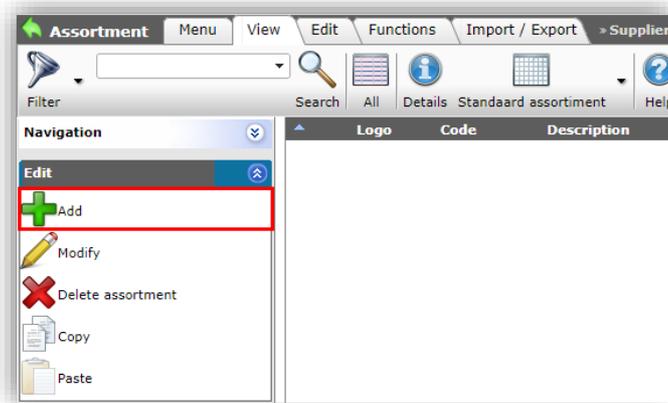
- % prcode%: the product code
- %prdGTIN%: GTIN of the product
- % prdgroup%: product group code



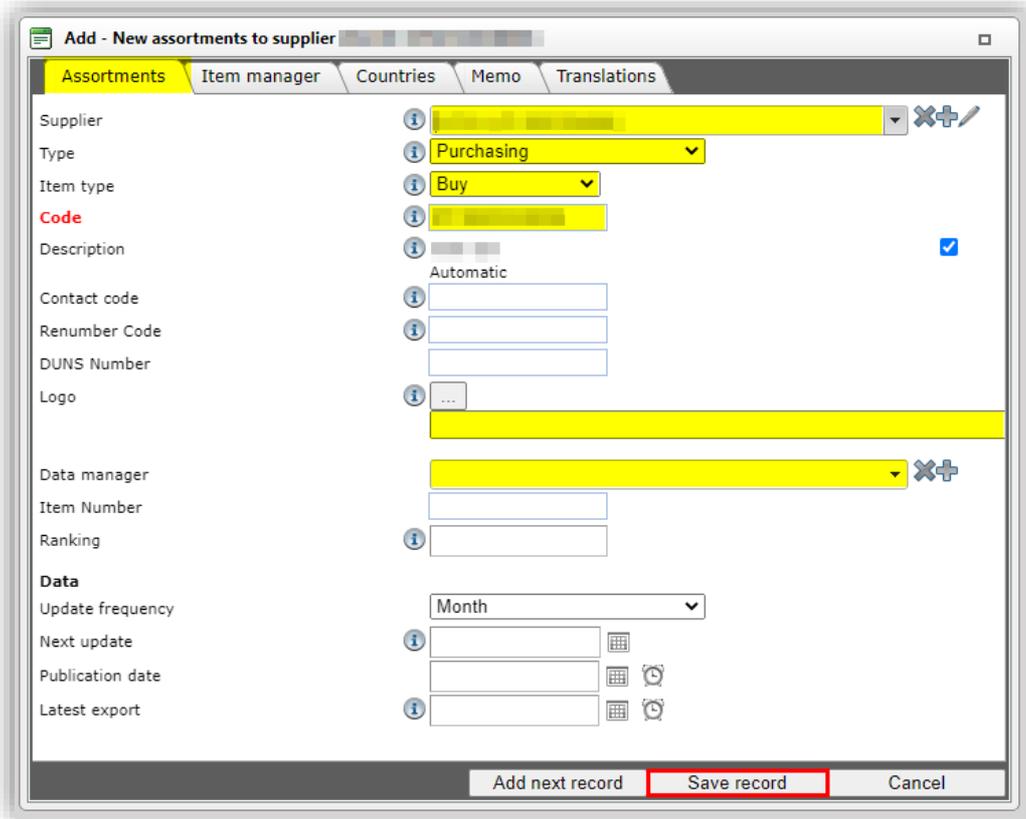
- In the overview, select the supplier and, under Navigation, click on *Assortments*.



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



- In the pop-up window:



- 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. Note: 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. Note: only the data manager can add or edit the assortment.
5. Save the assortment by clicking on *Save record*.

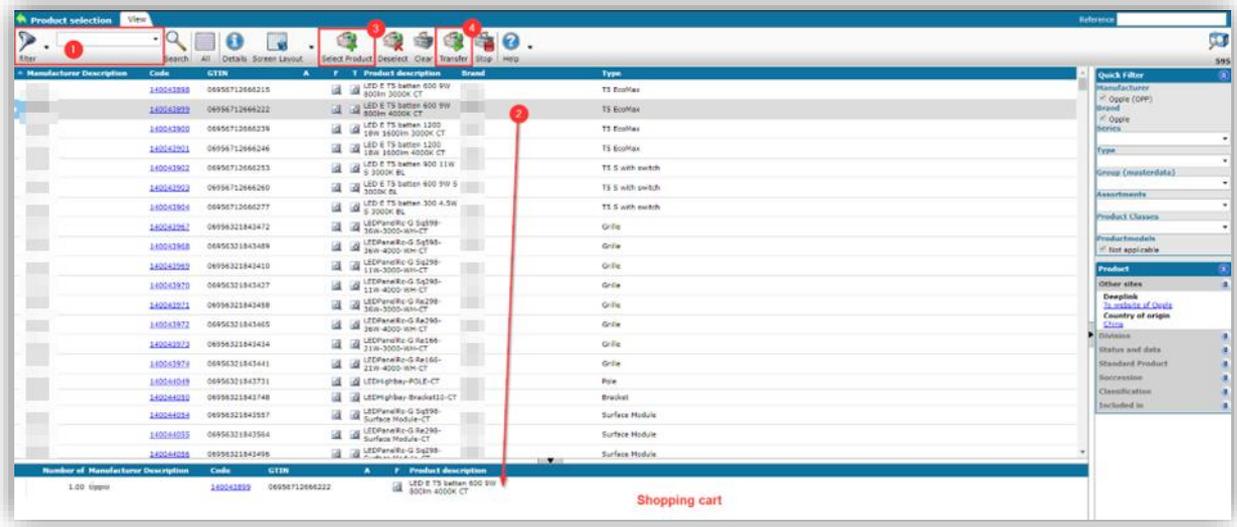
## 12.5 Add individual items linked to products

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

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

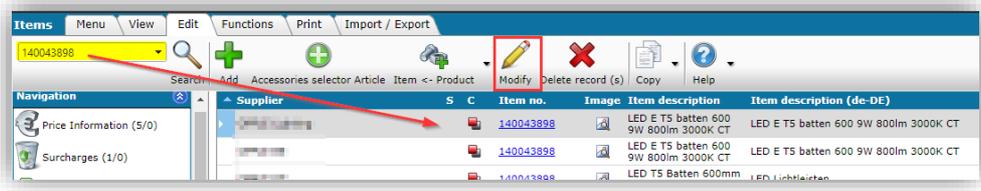


- b. Select the product(s) by clicking in the overview (2) and click on *Select Product*. The selected product(s) will be moved to the *Shopping cart*<sup>13</sup>.
- c. Next, click on *Transfer*(4) to generate the item(s) based on this product(s).

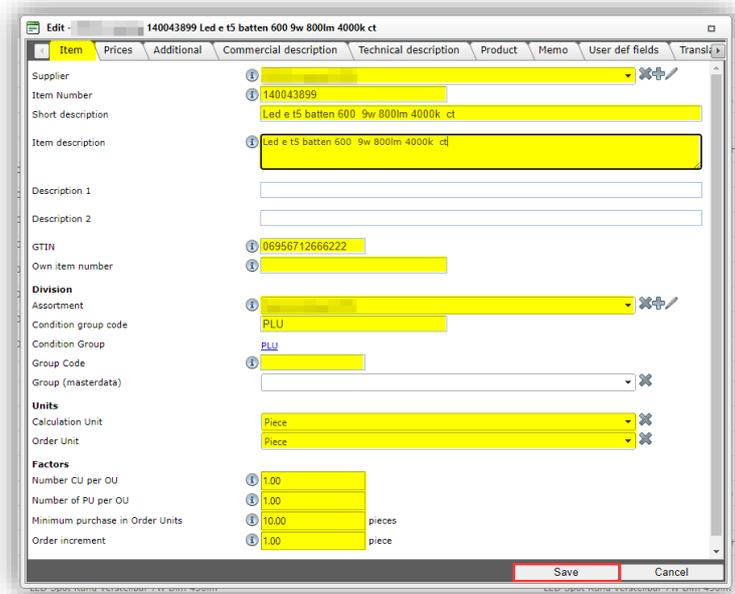


Once the item(s) has been created you can fill out more detailed *Item information*:

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:



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



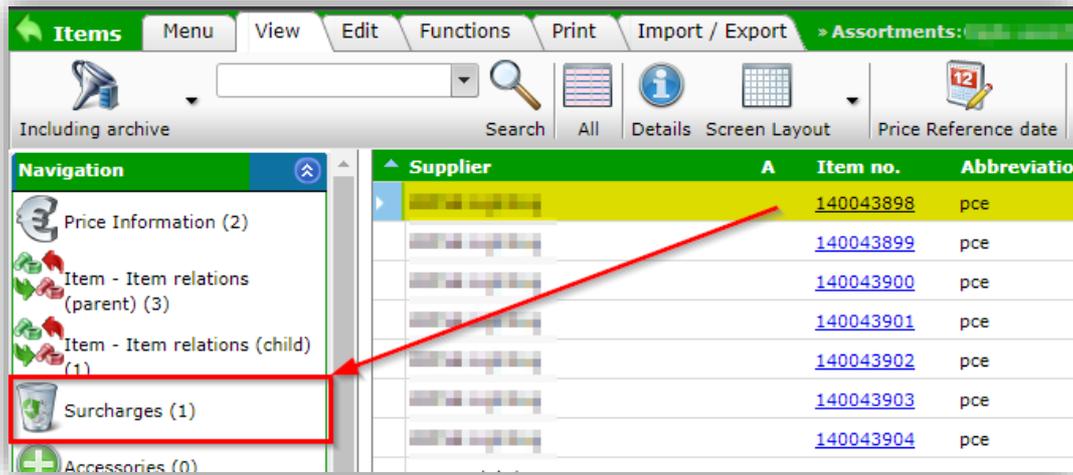
<sup>13</sup> Note: The shopping cart is limited to 1000 records.

- 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. Note: an assortment can be ordered hierarchically based on the MGS structure. (Main Group, Group, Sub-Group, Item).
- l. Calculation unit: Select the unit which is used for calculation of item cost.
- m. Order unit: Select the unit which is used to order the item.
- n. Number of CU per OU: The number of Calculation Units which make up an Order Unit.
- o. Number of PU per OU: The number of Price Units per Order Unit is a conversion factor which indicates the ratio between the price unit and the order unit, with the purpose of calculating the price per order unit. This is required if it is an orderable item (Code Orderability = TU). It is advisable to reserve 3 decimal places for this attribute.
- p. Minimum purchase in Order Units: The minimum purchase in Order Units indicates the minimum number of units that must be ordered. For example, the minimum purchase in order units for LED bulbs is 10 pieces (i.e. 1 box).
- q. Order increment: Order increment is the step size of the order, based on the minimum purchase. For example, based on the minimum order of 10 pieces (i.e. 1 box) and an order increment of 5, boxes of 10 LED bulbs can be ordered in the quantities 5, 10, 15, 20, 25 etc.

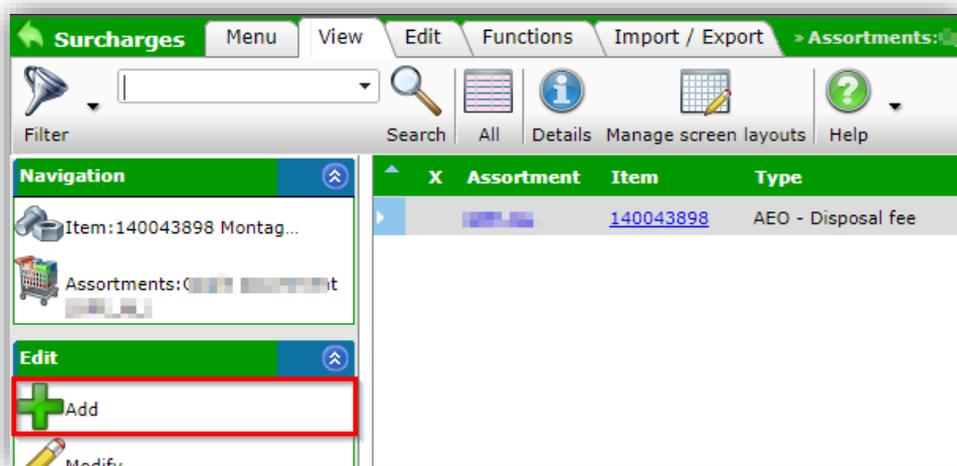
## 12.6 Add surcharge

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

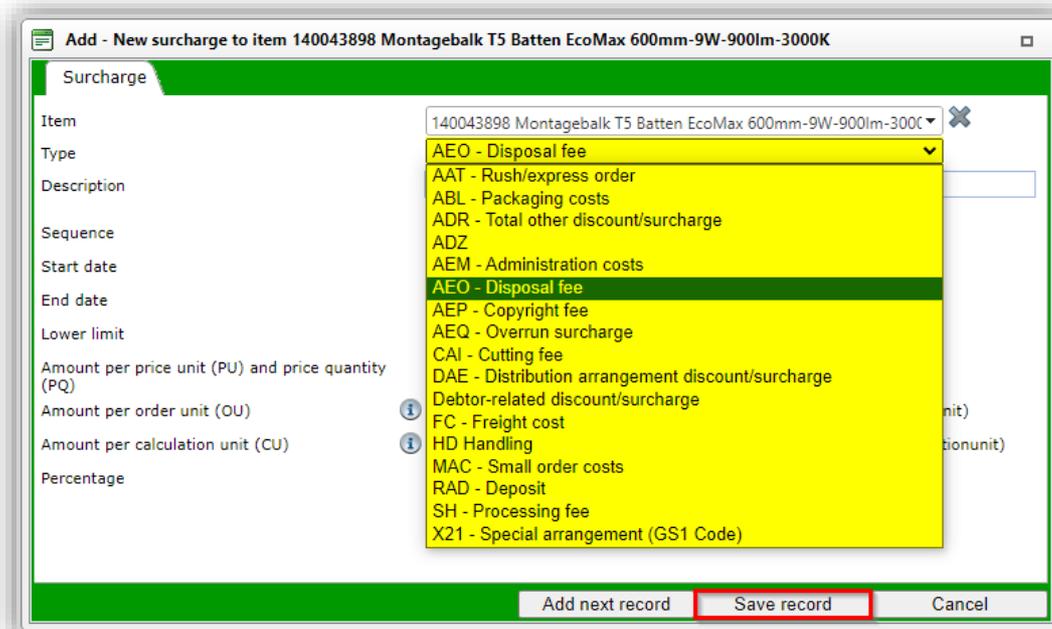
1. Through the Menu, go to Items > Items.
2. Select an Item and, under Navigation, click on *Surcharges*.



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



4. On the pop-up screen:

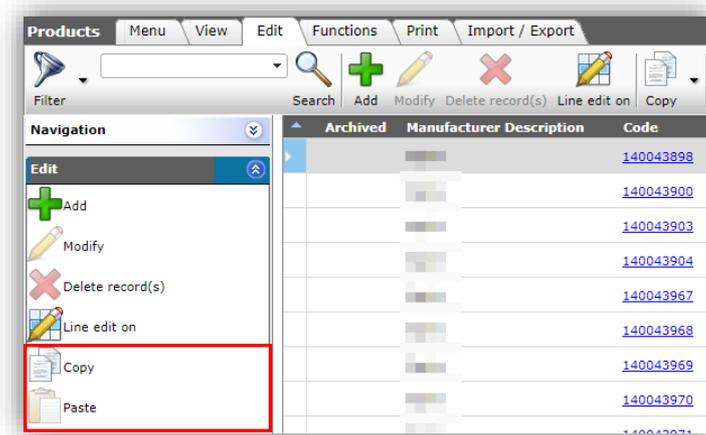


- a. Item: Is automatically filled-out.
- b. Type: Select a type of surcharge, for example: **AEO - Disposal fee**.
- c. Description: Type a description for the surcharge.
- d. Sequence\*: Set the sequence in which this surcharge appears on the overview.
- e. Start date\*: Set a start date for the surcharge.
- 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:



Note: 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 [12.1 Add manufacturer](#).

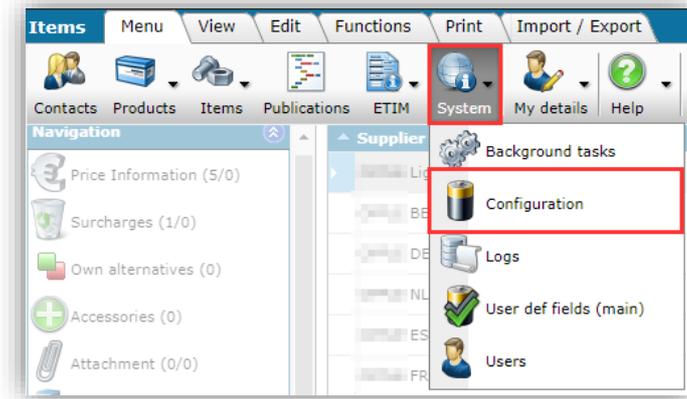
### 12.7.2 Copying items

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.

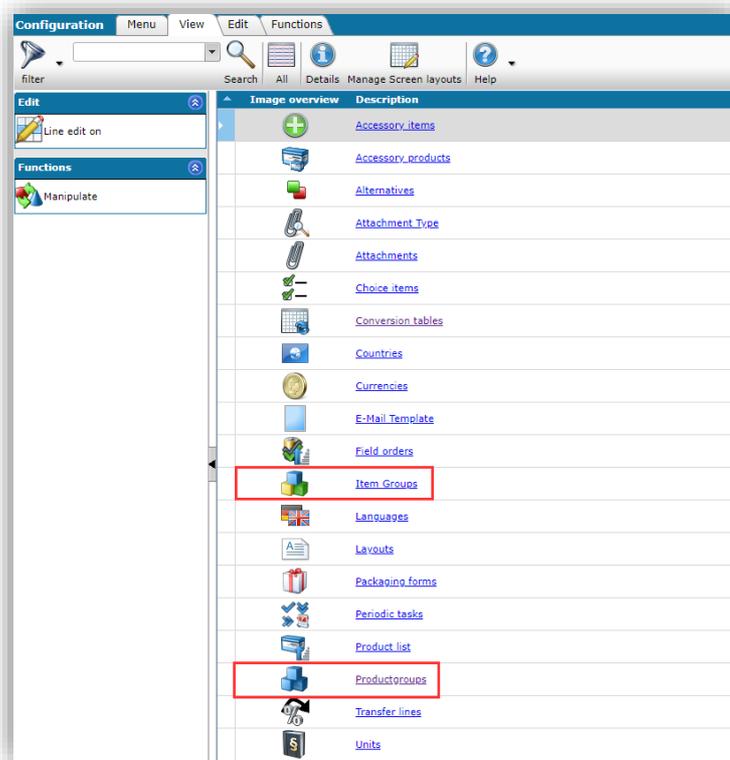
## 12.8 Adding product / item groups

Product and item groups are managed through the Configuration menu:

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



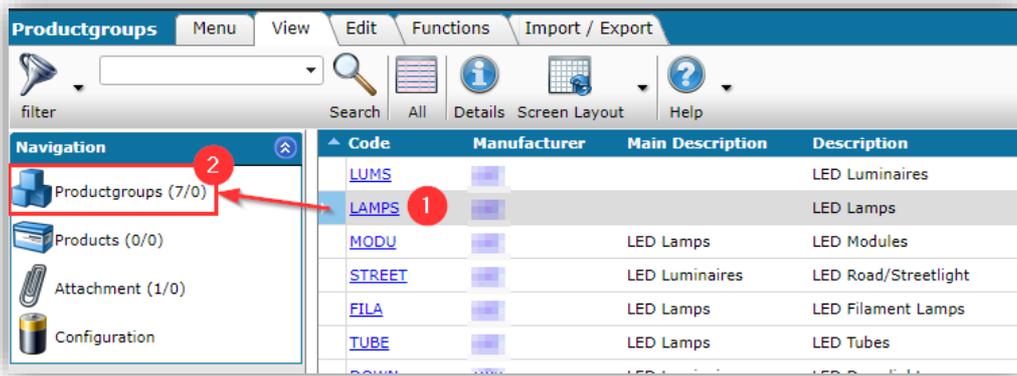
2. In the next window, click on either *Item Groups* or *Product Groups*.



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

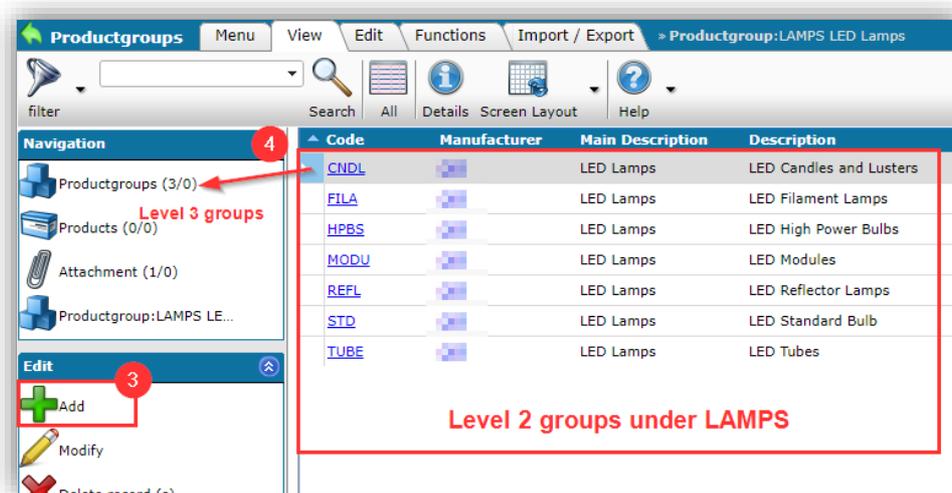


Product groups have an hierarchical structure. First, add all level 1 groups, next select one of the level 1 groups and add the level 2 groups. For instance, the level 1 group LAMPS has 7 underlying level 2 groups:



To add lower level groups:

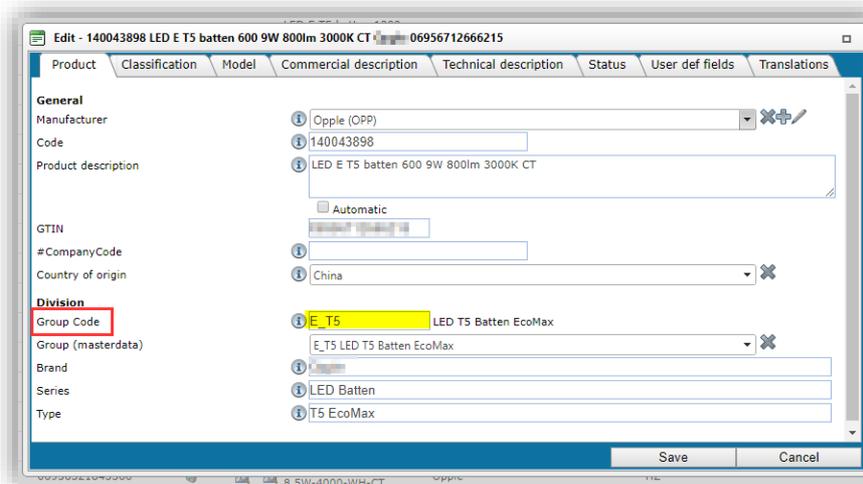
1. Select (1) the group to which you want to add lower level groups
2. Under *Navigation*, click on *Productgroups* (2)
3. On the next screen, add any level 2 product groups using *Add* (3):



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:



### 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.

Note: 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:
  - *Download*
  - *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 [sales@compano.com](mailto:sales@compano.com) for options and pricing. Upload FTPS users have access to the folder:
  - *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](mailto:sales@compano.com) for options and pricing. Upload FTPS users have access to the folder:
  - *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 [sales@compano.com](mailto:sales@compano.com) for more information on options and pricing.

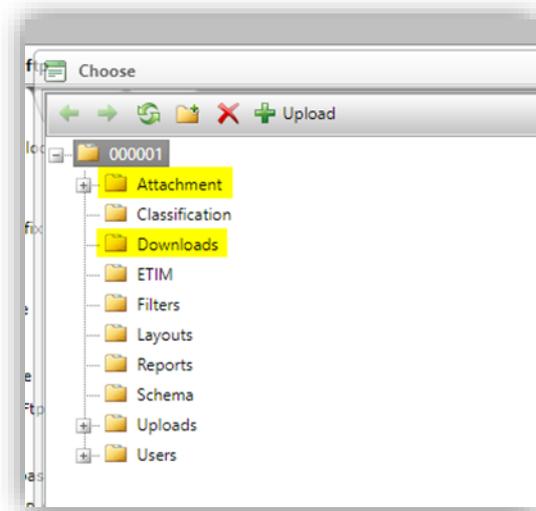
Note: It is recommended to have FTPS accounts added by a Compano consultant.

### 13.2 FTPS-folder access

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

#### 13.2.1 Standard FTPS-user

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



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

### 13.2.2 Extra FTPS-user

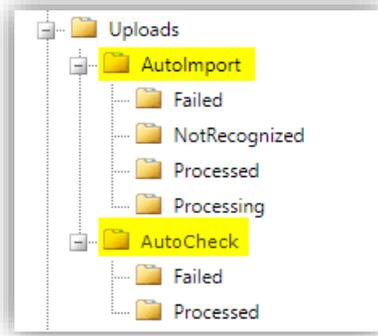
For extra FTPS-user accounts access to additional folder(s) can be set, such as:

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

For automated imports, two additional subfolders can be added:

- AutoCheck: An Industry Standard data file (PAB, INSBOU, SALES or BMEcat) placed in this folder will be compared *within the hour* with the current dataset, based on Global Location Number (GLN)<sup>14</sup>. A report will be send to the e-mail address indicated in the `parameters.xml` of the data file. Note: 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.

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



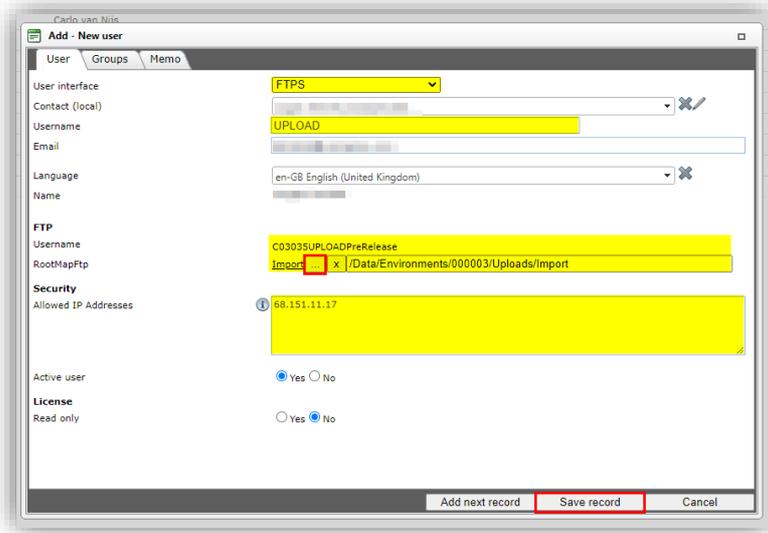
Note: *Failed*, *Processed* and *NotRecognized* folders will be generated automatically after a failed/successful import.

### 13.3 Add FTPS folders

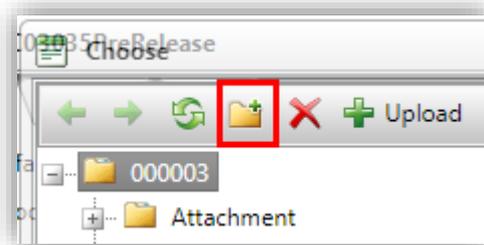
Additional folders need to be added by the Compano consultant. Note: This includes the Uploads (root) folder!

To add a folder:

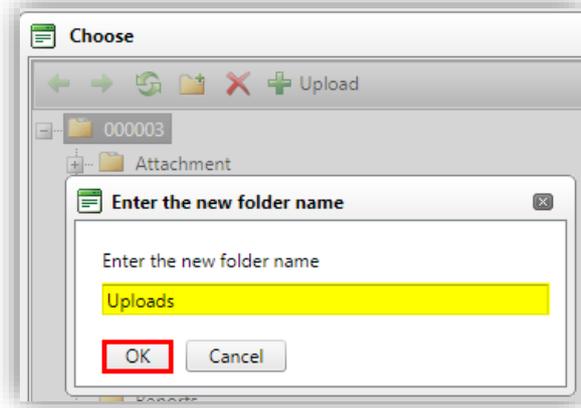
1. When adding the FTPS user, in the *Add new user* window, next to *Rootmapftp*, click on the  -button:



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



3. Enter a folder name, for instance Uploads:



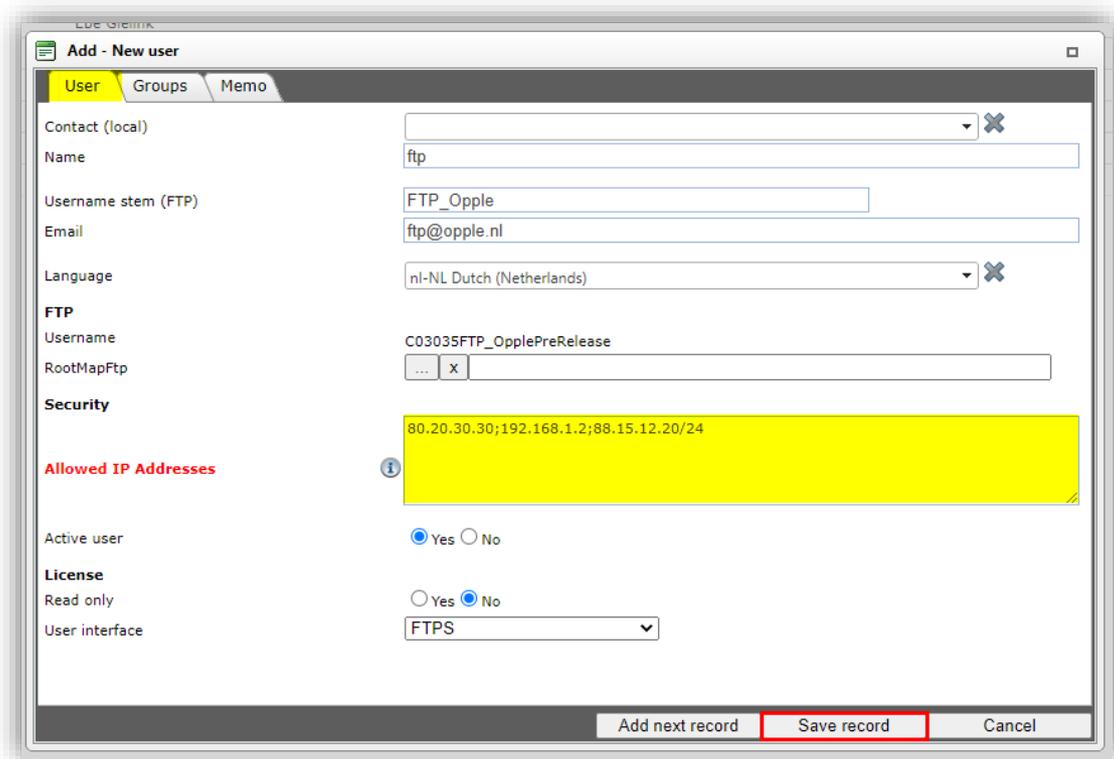
4. Click on OK to add the new folder.

Note: 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:



Notes:

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

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

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

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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: <https://whatismyip.com/>

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### 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

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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, [+31882667202](tel:+31882667202) or [support@compano.com](mailto:support@compano.com).

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### 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 [support@compano.com](mailto:support@compano.com).

### 13.7 FTPS URLs per application type

Application type	FTP URL
Production	<a href="https://Ftps.compano.com">Ftps.compano.com</a>
PreRelease	<a href="https://FtpsPreRelease.compano.com">FtpsPreRelease.compano.com</a>
Test	<a href="https://FtpsTest.compano.com">FtpsTest.compano.com</a>

### 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.

Note: This combination makes use of an extra FTPS user account for uploads and needs to be setup by a Compano consultant. Please contact [sales@compano.com](mailto:sales@compano.com) for options and pricing.

### 13.8.1 Submit data to Artikelbeheer.nl

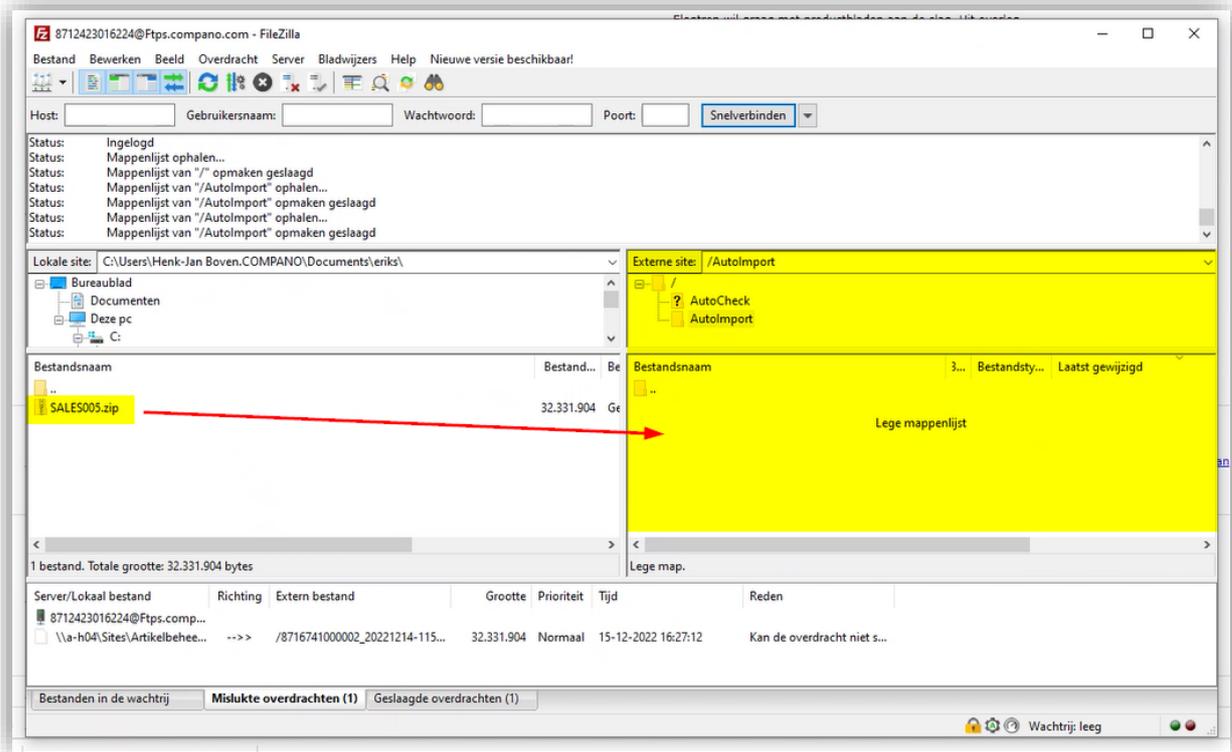
For use of FTPS to submit data to Artikelbeheer.nl, please see the manual *Aanleveren aan Artikelbeheer.nl* (Dutch only) which is available from the [Compano Help website](#).

### 13.8.2 Submit data to own assortment

Important: 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:



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

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

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

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

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

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

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



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

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

Order unit (OU): Unit in which the item is ordered. This can be **piece, m2, m**, etc.

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

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

### 14.2 Ratios

Furthermore, a number of *ratios* are important:

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

Example

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