



## Manual Transfer Schemes

### COS MDM

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# 1 Introduction

Transfer Schemes can be used to **transfer** (copy) existing records from a **source** to a **destination**. More commonly transfer schemes are known as ETL-schemes. **ETL** is short for **Extract, Transform, Load**; three database functions that are combined into one tool to pull data out of one database and place it into another database.

- **Extract** is the process of reading data from a database. In this stage, the data is collected, often from multiple and different types of sources.
- **Transform** is the process of converting the extracted data from its previous form into the form it needs to be in so that it can be placed into another database. Transformation occurs by using rules or lookup tables or by combining the data with other data.
- **Load** is the process of writing the data into the target database.

The purpose of Transfer Schemes within Compano is to create and update a selection of Sales Items or Products automatically from a *source* of existing records to a *destination* such as a sales assortment or a central data environment.

## Examples

- Items are copied from an import buffer to a central purchase assortment.
- Products are copied from one environment to another, for instance from a *Centrally Maintained Assortment* to a *Locally Maintained Assortment*.
- Recipes to a recipe system (not implemented, yet)

Within a Transfer Scheme **filters** and **conversion rules** can be configured. These filters and rules define which records and fields are copied. During copying, values in the source data can be transformed resulting in data that is amended, expanded or otherwise different than the source data. The transformations are applied to the 'destination' data, the original source data is kept intact.



## 1.1 MDM-concept Compano

Within the MDM-concept of Compano, four types of transfer schemes can be distinguished:

- Buffer (Import)to Central (cross-database)
- Purchase to Sales (limited to one database)
- CIP to COA (cross-database)
- Artikelbeheer.nl (Compano data pool) to Central

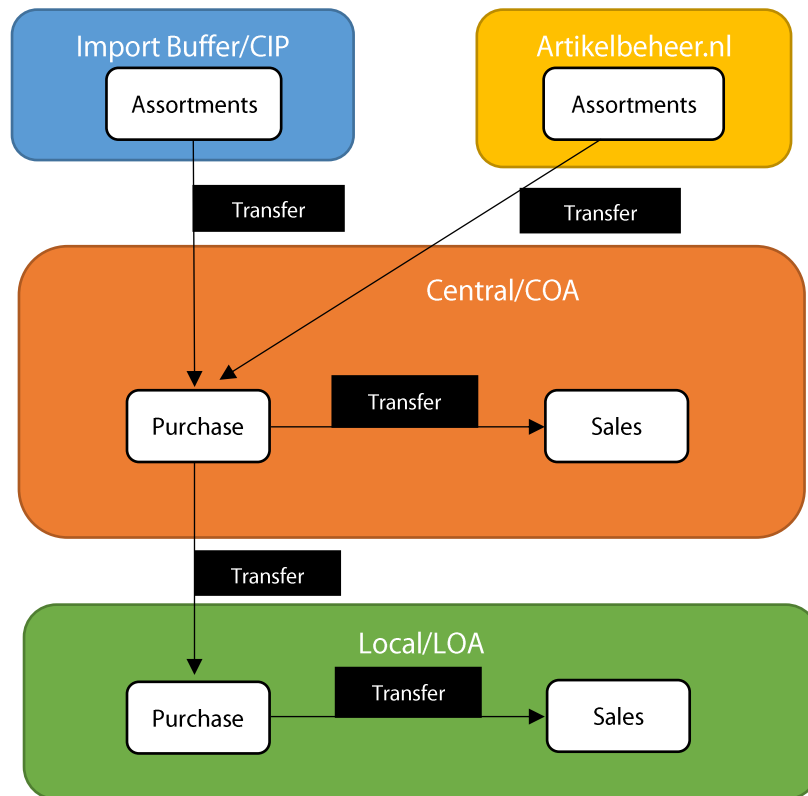


Figure 1. Layered environment

These different types of schemes each represent a specific scenario. Which type of scheme should be used depends mainly on the source and destination for the transfers.

For instance, when using a single environment, the Purchase to Sales scheme can be used to transfer supplier data to meet your specific needs. The other three options imply the use of a **layered environment**, as depicted in *Figure 1. Layered environment*.

## 1.2 Concepts

Each transfer is configured in a **Transfer Scheme**. Multiple schemes can be configured and applied separately, for instance to different suppliers or assortments.

A scheme contains:

- Filters: Extract source main selection and extract source sub selection
- Fields: Extract fields
- Transformation rules: Data conversions

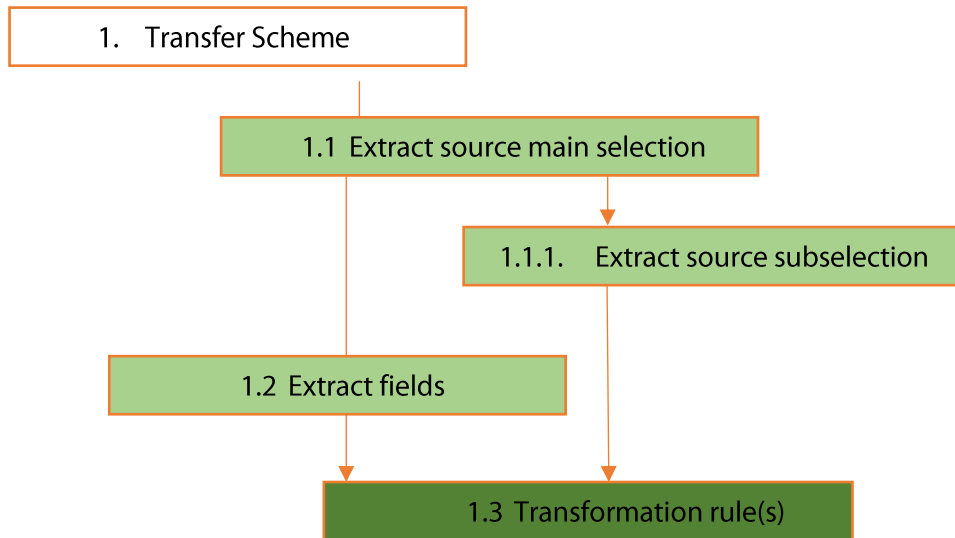


Figure 2. Structure of a Transfer Scheme

### 1.2.1 Filters

Filters, or selections, are used to determine the source data to which transformations will be applied.

There are two types of filters:

- **Extract source (sub)selections:** Filters to **select** records to be copied
- **Extract fields:** Filters to **define** which fields should undergo a *value transformation*

### 1.2.2 Rule groups

A *Rule Group* is a **set of filters**. Within a scheme a Rule Group can be created to prevent having to define a filter for each transformation rule. Rule groups can be considered a **subselection** of the main selection and will be addressed as such in the remainder of this document.

### 1.2.3 Transfer

A data **transfer** consists of four steps:

1. **Determine** which **records** are selected to be copied
2. **Determine** which **fields** are selected to be copied
3. **Determine** which fields should undergo a **value transformation**
4. **Execute** the **value transformation(s)**

## 1.3 Entities

Transfer schemes have been implemented for the following **Entities**:

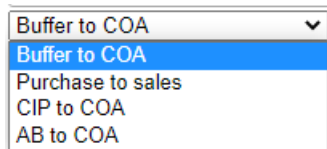
- **Product:** only one (1) Transfer Scheme can be set for Products, which will be applied to all products of all manufacturers.
- **Item:** per Assortment, one (1) scheme can be set, which will be applied to all the items in the assortment.



These transfer schemes can be created and configured **for each environment** within your MDM-application, be it Buffer, Central or Local.

Transfer schemes can be set to one of four **Types<sup>1</sup>**:

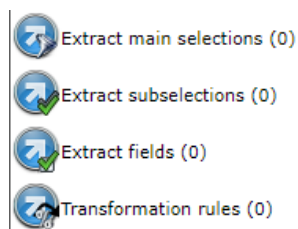
- Buffer to COA
- Purchase to Sales
- CIP to COA
- Artikelbeheer.nl (AB) to COA



## 1.4 Components

A Transfer scheme consists of four parts:

- Extract Main Selections
- Extract Subselections
- Extract Fields
- Transformation Rules



### 1.4.1 Extract main selection

The function *Extract Main Selection* deals with a first selection of Items, based on common features, such as Item Group, Condition Group, Product Class, etc.).

Depending on the type of scheme, several different Filter options will be available for further filtering, for example:

<sup>1</sup> Also see [1.1 MDM-concept Compano](#)



The dialog box is titled "Add - New extract main selection to transfer scheme Copy product to central environment". It has a tab labeled "Main selection". The fields are as follows:

Transfer scheme	Copy product to central environment
Assortment code	NEFIT
Main selection type	Condition Group
Main selection code	C002
Include in selection	<input checked="" type="radio"/> Yes <input type="radio"/> No

At the bottom right, there are "Save" and "Cancel" buttons. The "Save" button is highlighted with a red border.

**Note:** *Multiple Main Selections* can be defined in a transfer scheme. However, please be mindful that extraction rules defined in the main selections can affect each other. Positive filters (Include in selection = Yes) are applied first to extract a set of records, after which Negative filters (Include in selection = No) can exclude certain records from the set.

#### 1.4.1.1 Inclusive - Exclusive

Main Extraction filters can be set to either *Include* or *Exclude* the filtered records:

Selection (A,B,C,D) with filter 'B', *Include in selection* = Yes: the result will be 'B'

Selection (A,B,C,D) with filter 'B', *Include in selection* = No: the result will be 'ACD'

#### 1.4.2 Extract subselection

The function *Extract Subselection* is an additional option to extract a subselection of records and group Transformation Rules for this subset. For instance, when using a subselection, all transformation rules for brand, series and type can be grouped, or all transformation rules that deal with dimensions can be grouped. Subselections are configured through a Filter.

To select, for example, all items with a datafield value above a certain threshold, a subselection can be created as follows:

The dialog box is titled "Add - New extract subselection to transfer scheme Copy product to central environment". It has two tabs: "Subselection" (active) and "Filter". The fields are as follows:

Transfer scheme	Copy product to central environment
Description	All product with at least 1 attachment

At the bottom right, there are "Save" and "Cancel" buttons.



### 1.4.3 Extract fields

The function *Extract Fields* is used to select data fields and determine how they are manipulated. Manipulation options are:

- **Overwrite target value:** Write the new value into the target data field
- **Keep non-empty target value:** Do *not* write an empty value into the target data field
- **Keep any target value:** If the target data field already contains a value, do not overwrite it
- **Only overwrite if new record:** Only overwrite the data field if the target record was newly created; i.e. do not update data fields of existing target records.

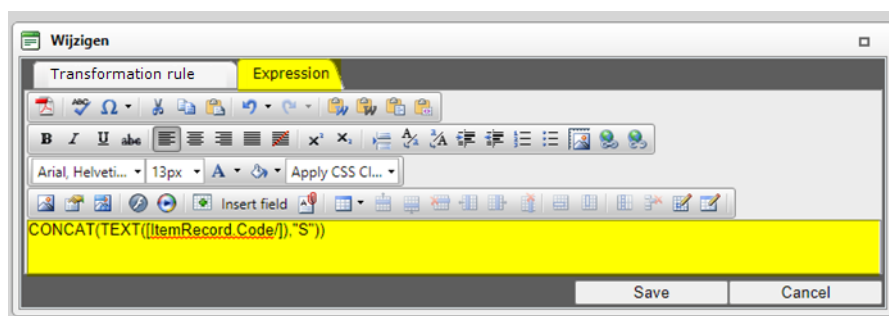
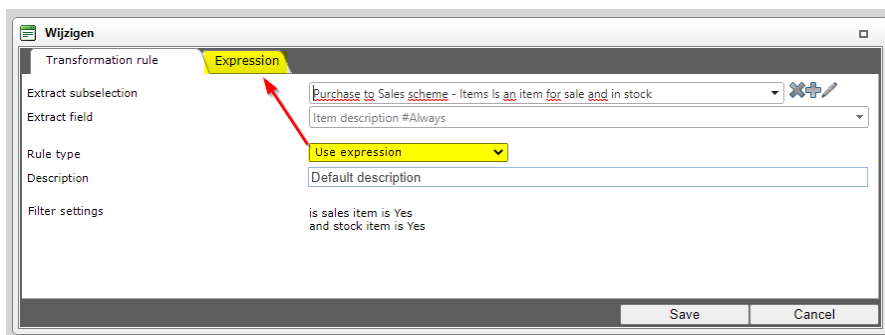
For example:

Extract the field **Commercial description** and **overwrite** its value:

### 1.4.4 Transformation rule

The function *Transformation rules* is used to define the transformation to the value of a selected Field. Transformation options include:

- **Generate a number:** Generate of a (new) number according to a number template.
- **Set a fixed (new) value:** Enter a (new) value.
- **Use an Expression:** Values can be calculated or manipulated using (mathematical) operators, functions and/or other data fields.



## 1.5 Setting a Transfer scheme

Transfer schemes can be set for Products or Assortments (Items). **Note:** The assortment for which a scheme is set, is the **target** assortment; any extractions and transformation are applied to the items of the **source** assortment which are then copied (including any transformations) to the target assortment.

### 1.5.1 Transfer scheme on Products

At the moment, only one (1) Transfer scheme can be set for Products, which will be applied to all targeted products of all targeted manufacturers.

**Note:** If you want the product scheme to be applied, there must be a reference (via the Product field) to products in the item scheme.

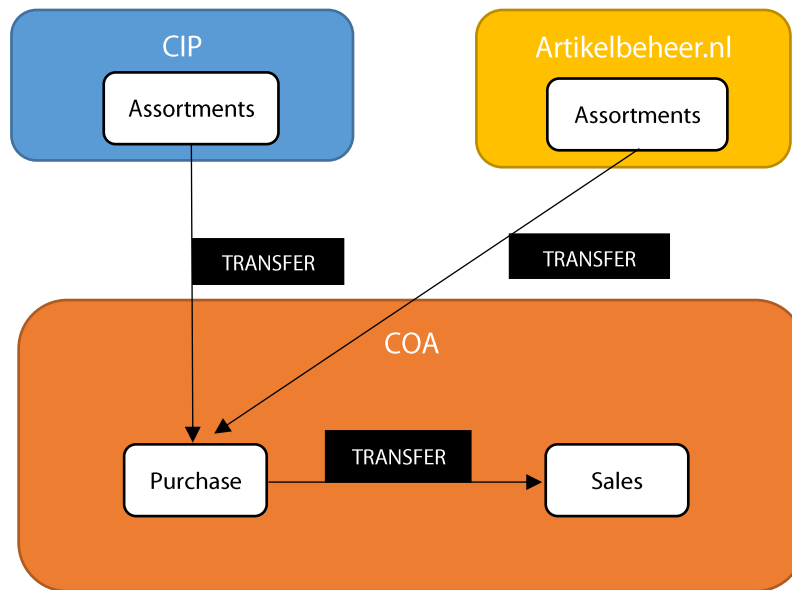
Minimum afname in BE	MinOrderQuantity	Doelwaarde overschrijven	Artikel algemeen	PRD.Item
Omschrijving	Description	Doelwaarde overschrijven	Artikel algemeen	PRD.Item
Omschrijving kort	ShortDescription	Doelwaarde overschrijven	Artikel algemeen	PRD.Item
Product	Product	Doelwaarde overschrijven <input type="checkbox"/>	Artikel algemeen	PRD.Item
Stapgrootte afname	StepQuantity	Doelwaarde overschrijven	Artikel algemeen	PRD.Item
Tekening	Drawing	Doelwaarde overschrijven	Artikel algemeen	PRD.Item

### 1.5.2 Transfer scheme on Assortment [Items]

Per Assortment, one (1) scheme can be set, which will be applied to all the items in the assortment. This allows for setting a different scheme for each assortment.

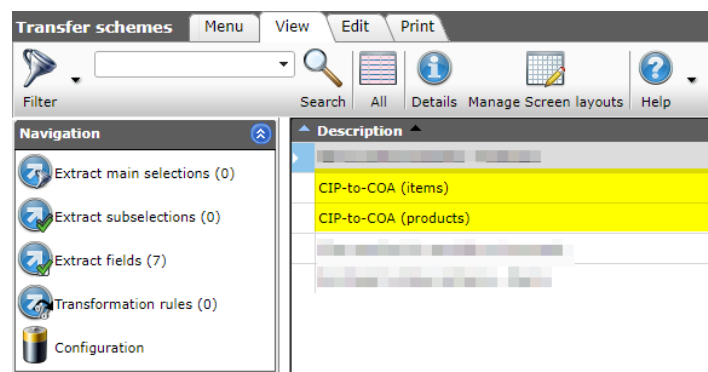
## 1.6 Example configuration

A purchasing association is working with the following setup of a Master Data Management system:



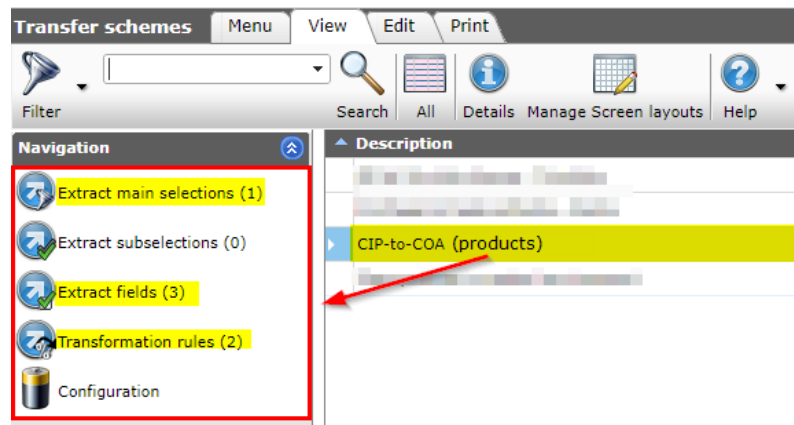
- **CIP:** Central import portal
- **COA:** Centrally maintained assortment
- **Artikelbeheer.nl:** Data pool

The CIP is used for import of 'raw' data from suppliers. Both the CIP and Artikelbeheer.nl data pool provide data to the COA. Data is then transferred from the CIP to the COA using two Transfer schemes, one for Item data and one for Product data. These schemes will be discussed in the paragraph below.



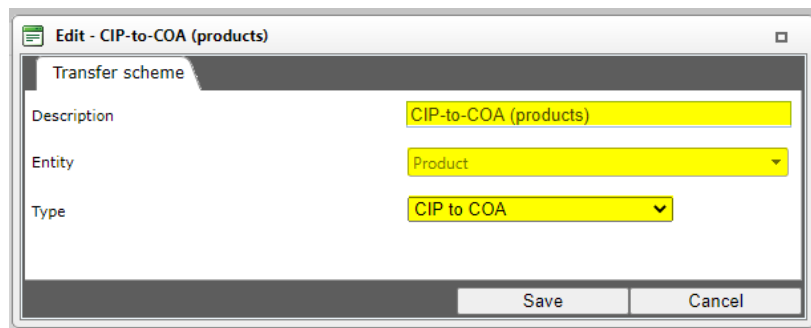
Within the COA a further Transfer scheme is active for transfer of Items from the Purchase assortment to the Sales assortment. This scheme will **not** be discussed in this example section.

The CIP-to-COA scheme for Product data, consists of one main selection, three field extractions and two transformation rules.



### 1.6.1 CIP-COA (Product) scheme

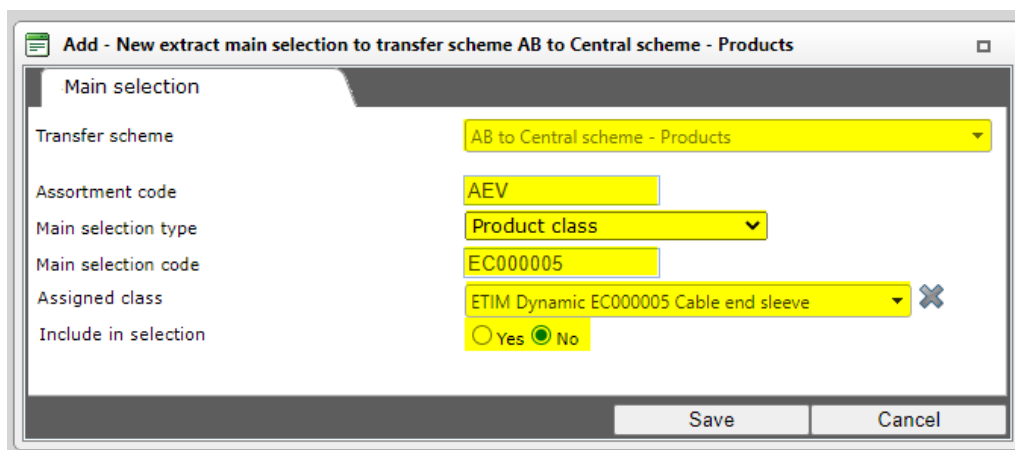
The transfer scheme for product data:



- **Description:** Description of the transfer scheme
- **Entity:** Entity on which the transfer scheme is active
- **Type** Type of transfer scheme

### 1.6.2 Extract Main Selection

Within the CIP-to-COA scheme, one **main selection** is active:

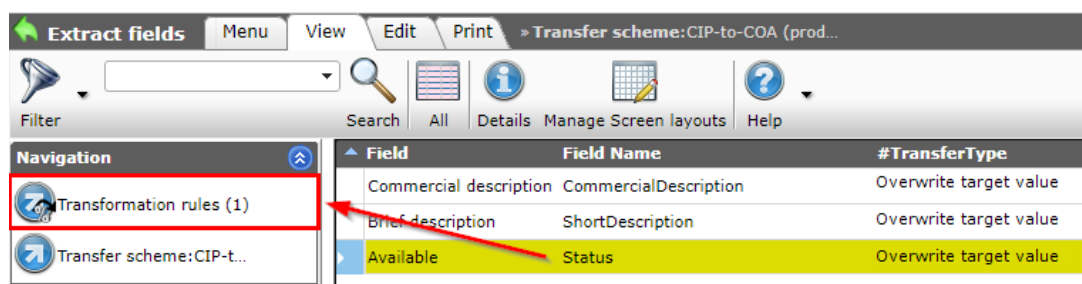


- **Transfer scheme:** Name of parent transfer scheme
- **Assortment code:** Code of the assortment from which records are to be selected
- **Main selection type:** Type of records to be selected. Options are:
  - Item number

- Item group
- Condition group
- Product class
- Manufacturer
- **Main selection code:** Code of the selection type, can be either an item number, item group code, condition group code, product class EC-code, or manufacturer code.
- **Assigned class:** Selects all records with the selected ETIM product class. Note: Only available for the main selection type *Product Class*.
- **Include in selection:** Set to Yes/No to either **include** or **exclude** the specified records.

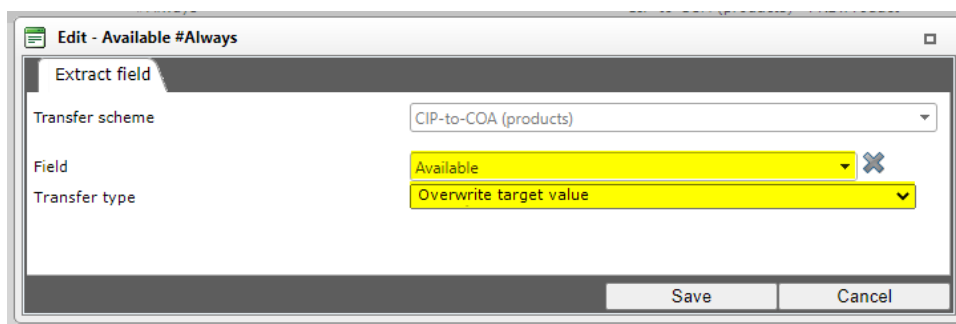
### 1.6.3 Extract Fields

Within the CIP-to-COA scheme, three **field extractions** are active:



Field	Field Name	#TransferType
Commercial description	CommercialDescription	Overwrite target value
Brief description	ShortDescription	Overwrite target value
Available	Status	Overwrite target value

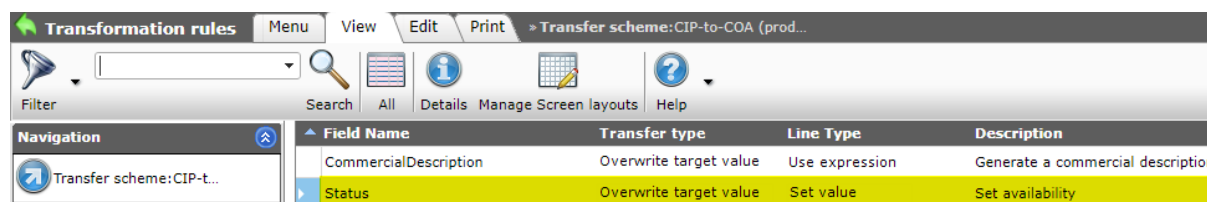
The third rule extracts the field *Available* and overwrites its value. This transformation action is described in the next paragraph.



Edit - Available #Always  
 Extract field  
 Transfer scheme: CIP-to-COA (products)  
 Field: Available  
 Transfer type: Overwrite target value  
 Save Cancel

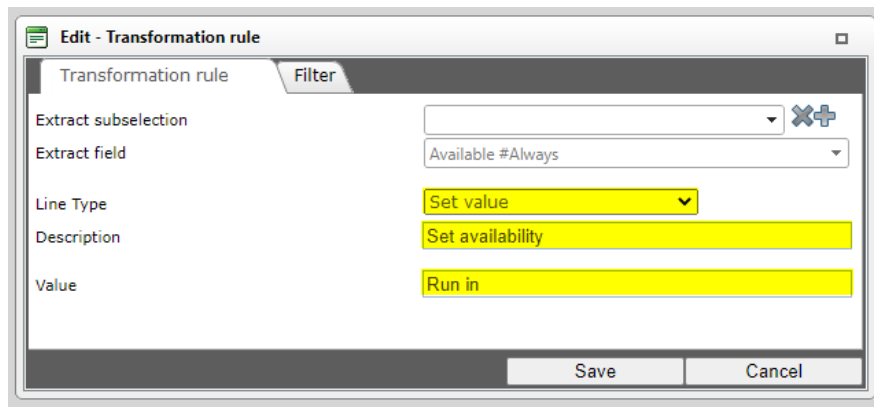
### 1.6.4 Transformation Rules

Within the CIP-to-COA scheme, two transformation rules are active:



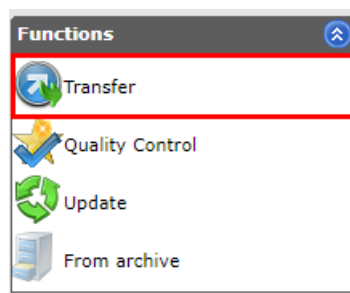
Field Name	Transfer type	Line Type	Description
CommercialDescription	Overwrite target value	Use expression	Generate a commercial description
Status	Overwrite target value	Set value	Set availability

The second transformation rule sets the availability of a product to *Run in*:



## 1.7 Applying a Transfer scheme

Transfer schemes for **Items** are applied at the level of Assortments. A transfer should always be started manually, using the *Transfer* function:



For now, the transfer scheme for **Products** need not be applied manually. If present, the scheme will automatically transfer requested product information if this is called for by another transfer scheme. Note: The product scheme **must** be set at *My company settings*.

## 1.8 Communicating Transfer schemes

While any user with full access to the Compano system is allowed to create Transfer schemes, most often a Compano consultant will implement these schemes.

To facilitate implementation, communicating desired schemes should be according to the following format:

*As [user-type], I need [action] to be performed with this [result].*

Example:

*As **data manager**, I need **items with a price in pounds** to have a **VAT of 20% added**.*

This kind of format allows the Compano consultant to implement the correct Transfer scheme.

Guidelines for notation of ETL rules:

- Transfer schemes are supported for Products or Items. This basic, first selection will determine which data fields are available for further selection and processing.



- Fields can be processed in four distinct ways:
  - Overwrite target value → Write the new value into the target data field
  - Keep non-empty target value → Do **not** write an empty value into the target data field
  - Keep any target value → If the target data field already contains a value, do not overwrite it
  - Only add if new record → Do **not update** existing records, but add new ones.
  - nieuwe records aanmaken – geen records updaten, maar toevoegen

### 1.8.1 Example 1

As **data manager**, I need the **Packaging Form** for an **Item** to change from **NE** to **BX** as this is our standard packaging form.

Resulting Transfer scheme:

- **Entity:** Item
- **Extract main selection:** none
- **Extract subselection:** none
- **Extract fields:** *Packaging Form*, overwrite target value
- **Transformation rule:** "If Packaging Form is NE, then change Packing Form to BX" (Expression)

### 1.8.2 Example 2

As **purchasing manager**, for **Items** of **Manufacturer X**, I need to **increase the Gross Price by 10% if the original gross price is less than €5,-**.

Resulting Transfer scheme:

- **Entity:** Item
- **Extract main selection:** Items of *Manufacturer X*
- **Extract subselection:** filter on *Price per PU and PQ* < 5.00
- **Extract fields:** *Gross Price*, overwrite target value
- **Transformation rule:** "Add 10% to Gross Price" (Expression)

### 1.8.3 Example 3

As **data manager**, I need to **add a default text** to **Products** in **ETIM class EC000815**. The default text should be a description of the class in question.

Resulting Transfer scheme:

- **Entity:** Product
- **Extract main selection:** Products in ETIM class *EC000815*
- **Extract subselection:** none
- **Extract fields:** *Technical Description*, overwrite target value
- **Transformation rule:** "Add the following default text: *Auto-antenne*".

### 1.8.4 Example 4

As **data manager**, I need to make sure that all **Products** have valid **GTIN code**.

Resulting Transfer scheme:

- **Entity:** Product
- **Extract main selection:** none
- **Extract subselection:** none
- **Extract fields:** GTIN, keep non-empty target value
- **Transform rule:** none

### 1.8.5 Example 5

As **marketeer**, I need to **supplement each Product Description** with a **link to our website**.

Resulting Transfer scheme:

- **Entity:** Productf
- **Extract main selection:** none
- **Extract subselection:** none
- **Extract fields:** Description, overwrite target value
- **Transform rule:** "Add a link at the end of the description to the website:  
*http://www.compano.com.*"

## 2 Implementing a Transfer Scheme

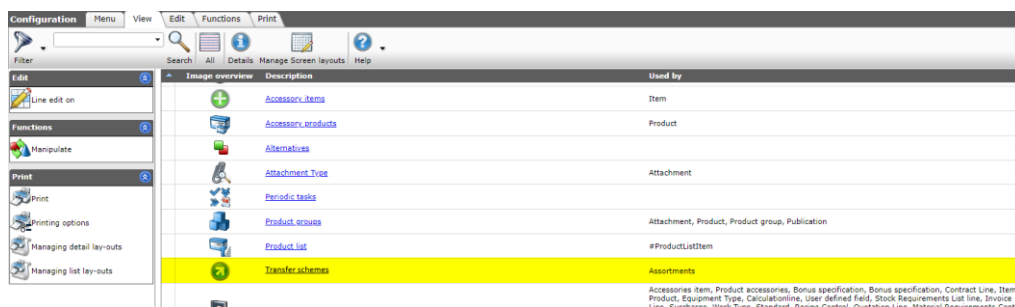
### 2.1 Creating schemes

Detailed *Transfer Schemes*, including Filters, Rules and Transformations can be created through the Configuration screen of your Compano application.

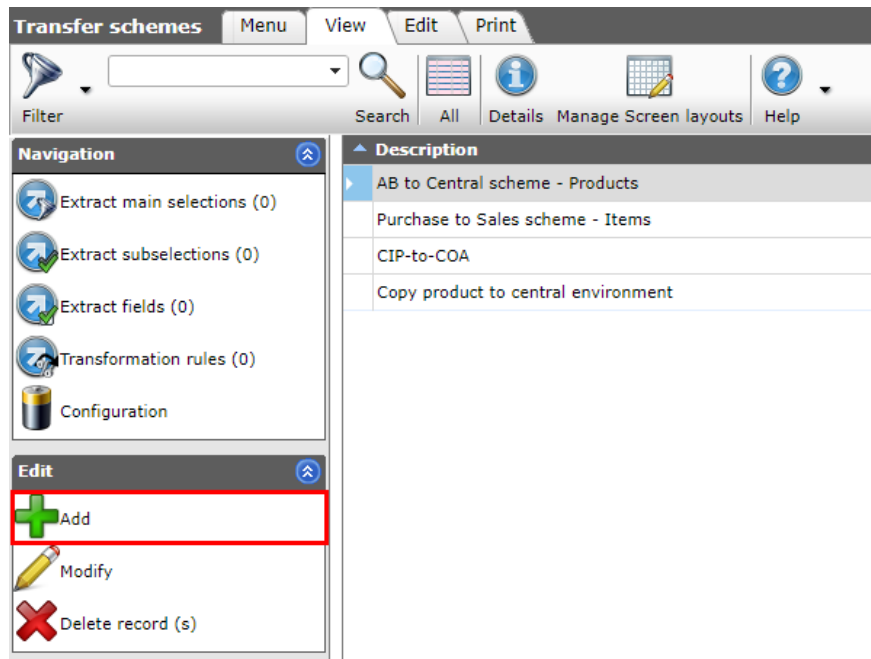
#### 2.1.1 Add new scheme

To add a new schema

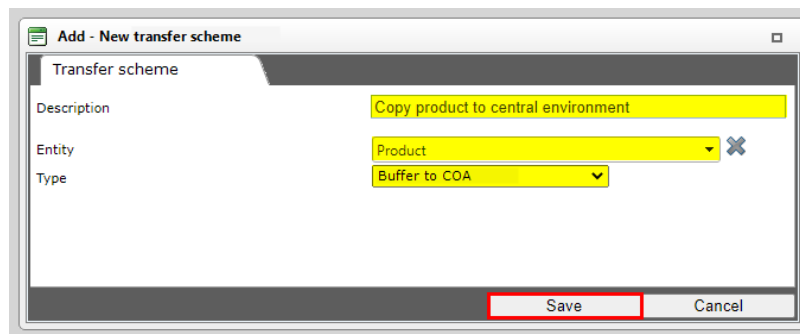
1. Through the Menu go to *System > Configuration* and click on *Transfer Schemes*:



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



3. In the pop-up window:



- Description:** Type a description for the transfer scheme
- Entity:** Select the entity (Product or Item) to which the scheme applies
- Type:** Select the type of transfer scheme:
  - Buffer to COA
  - Purchase to Sales
  - CIP to COA
  - AB to COA

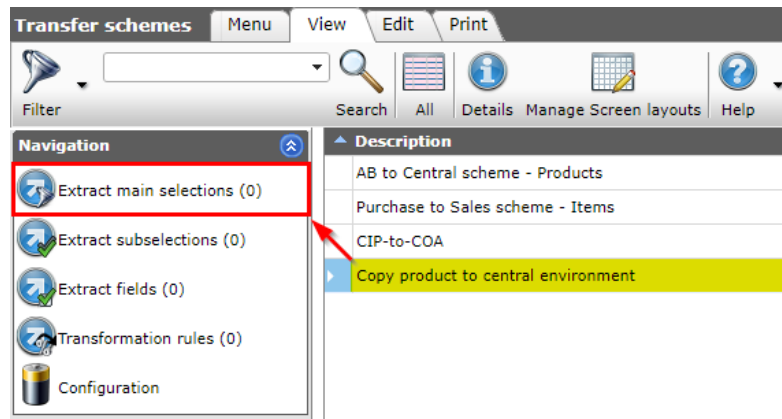
Once the new scheme is created you can extract selections, fields and add transformation rules.

Important: If you want the product schedule to be applied, there must be a reference (via the Product field) to products in the article schedule

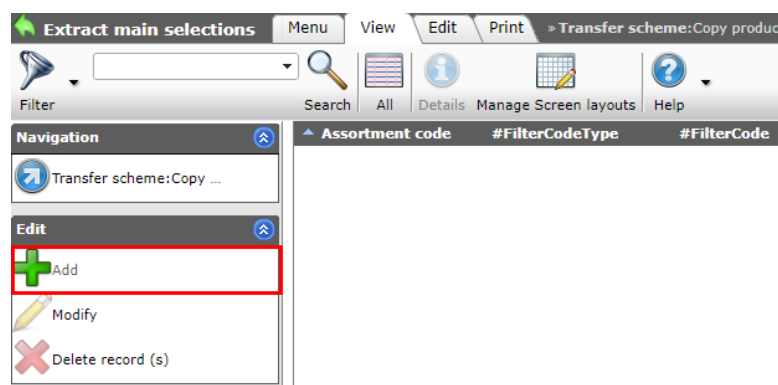
### 2.1.2 Extract main selection

To extract a main selection for the scheme:

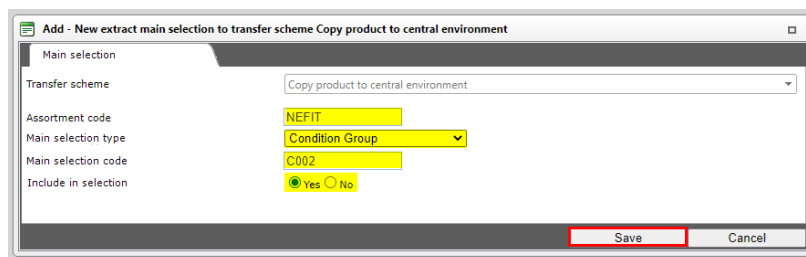
- Through the Menu go to *System > Configuration > Transfer schemes* and select the scheme you need to edit:



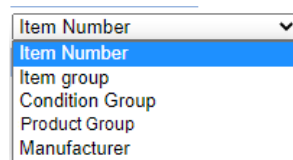
2. Under Navigation, click on *Extract main selections*, and in the next window click on *+Add*:



3. In the pop-up window:



- a. **Transfer schema:** Transfer scheme to which the selection is applied (automatically selected).
- b. **Assortment code:** Code of the assortment from which the selection is made.
- c. **Main selection type:** Type of entity to which the selection is to be applied:



- i. **Item Number<sup>2</sup>:** Selection concern one item.
- ii. **Item group<sup>2</sup>:** Selection concerns items in a group.
- iii. **Condition Group<sup>2</sup>:** Selection concerns items in a condition group.

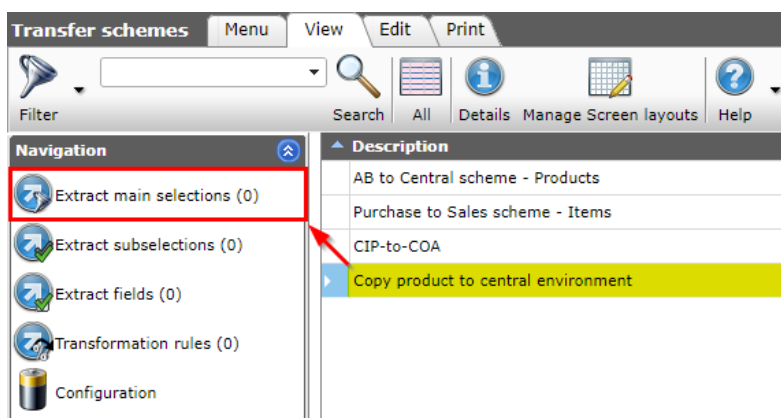
<sup>2</sup> This filter option is **not** available for Product entity schemes.

- iv. **Product class:** Selection concerns products of a product class.
  - v. **Manufacturer:** Selection concerns products of a manufacturer.
  - d. **Main selection code:** Dependent on the *Main selection type*, this can be an item number, item group code, condition group code, product class code or manufacturer code.
  - e. **Include in selection:** When set to Yes, records that conform to the *Main selection* criteria will be included in the selection, when set to No these records will be excluded.
4. Click on Save, to save the Main selection.

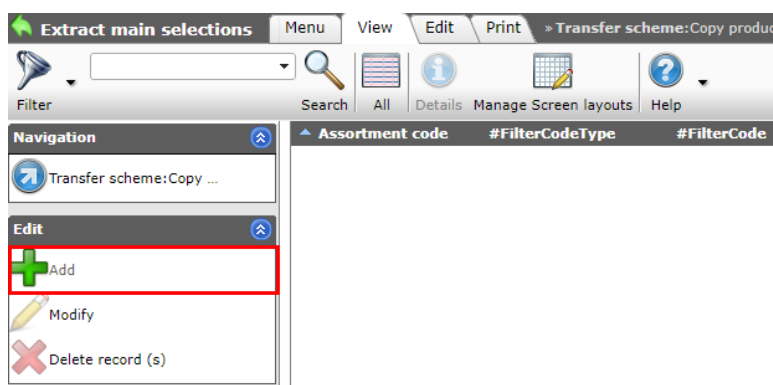
#### 2.1.2.1 Purchase-to-Sales: Extract main selection (item)

In a Purchase-to-Sales scheme, item selection offers additional filtering option:

1. Through the Menu go to *System > Configuration > Transfer schemes* and select *Purchase to Sales* scheme:



2. Under Navigation, click on *Extract main selections*, and in the next window click on *+Add*:



3. In the pop-up window, set *Include in selection* to Yes/No, and go to the Filter tab:



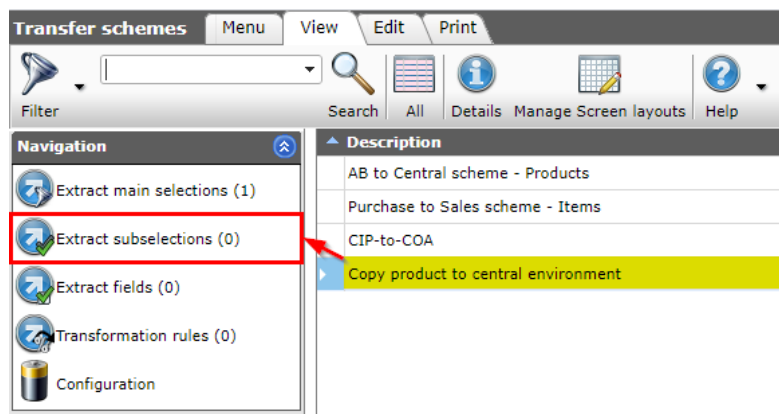
4. On the Filter tab, use the filter options to select a set Items to be selected:

- a. **Assortment:** Select an assortment from the drop-down menu
  - b. **Assortment code:** Select an assortment, based on the assortment code
  - c. **Item Number:** Select specific Items based on (a range of) item numbers
  - d. **Item description:** Select specific Items based on the item description
  - e. **Group code:** Select specific Items based on the item group code
  - f. **Condition group code:** Select specific Items based on the condition group code
  - g. **Code:** Select specific Items based on the code of the manufacturer of the related product
5. Click on Save to save the main selection.

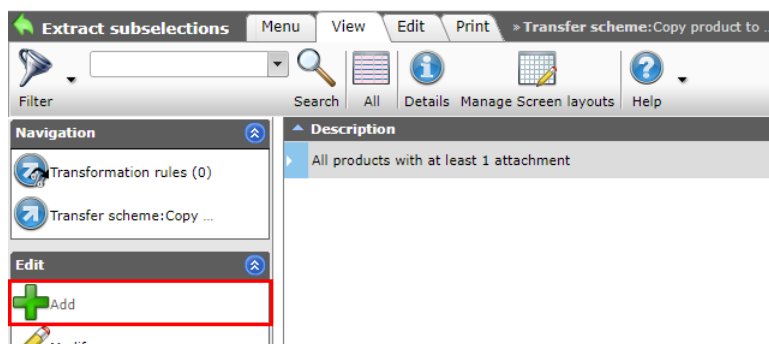
### 2.1.3 Extract subselection

To extract a subselection for the scheme:

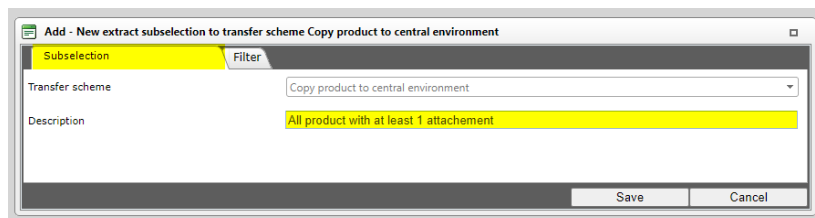
1. Through the Menu go to *System > Configuration > Transfer schemes* and select the scheme you need to edit:



2. Under Navigation, click on *Extract subsections*, and in the next window click on *+Add*:

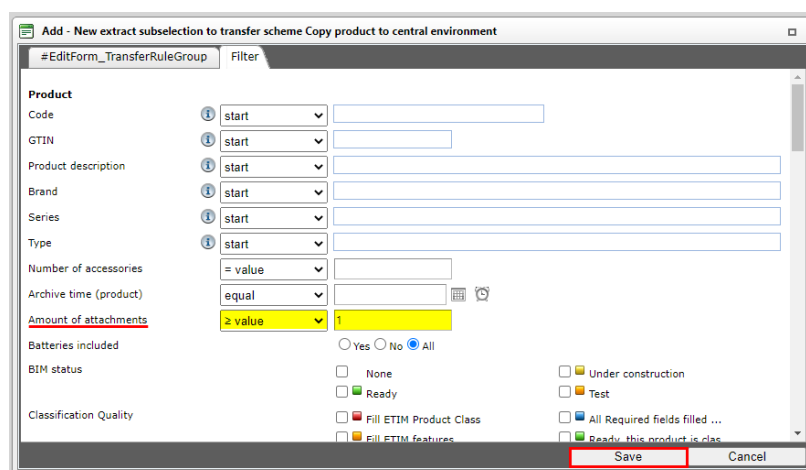


3. In the pop-up window:



a. **Tab Subselection:**

- Transfer scheme:** Transfer scheme to which the selection is applied (automatically selected).
- Description:** Type a description for the subselection.

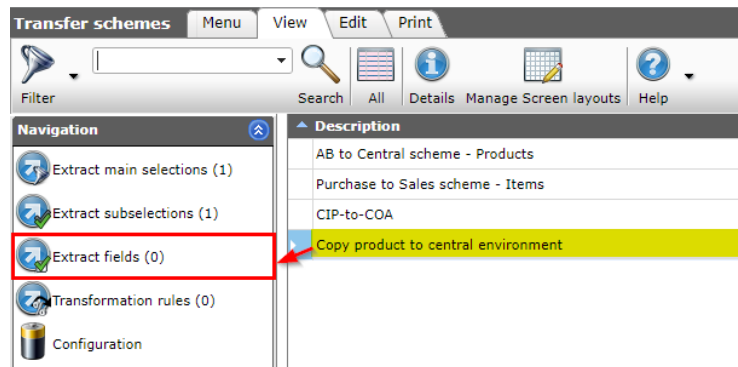


- b. **Tab Filter:** Use any (combination of) filter criteria to define the subselection. For instance, Amount of attachments  $\geq 1$
4. Click on Save, to save the subselection.

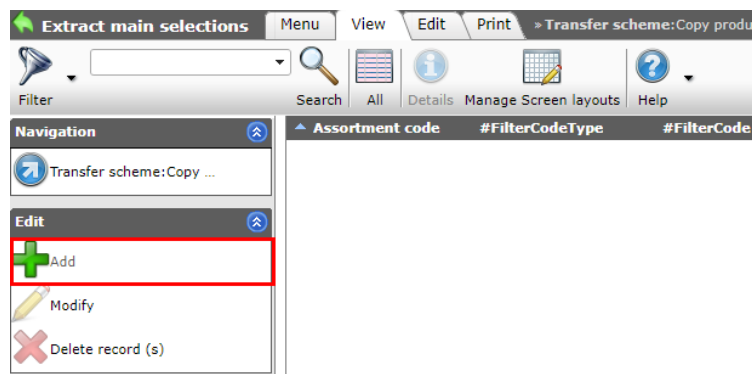
#### 2.1.4 Extract fields

To extract fields for the scheme:

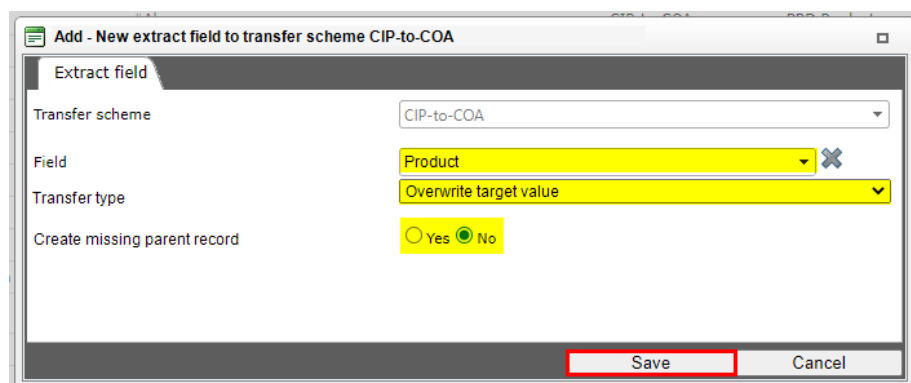
1. Through the Menu go to *System > Configuration > Transfer schemes* and select the scheme you need to edit:



2. Under Navigation, click on *Extract fields*, and in the next window click on *+Add*:



3. In the pop-up window:



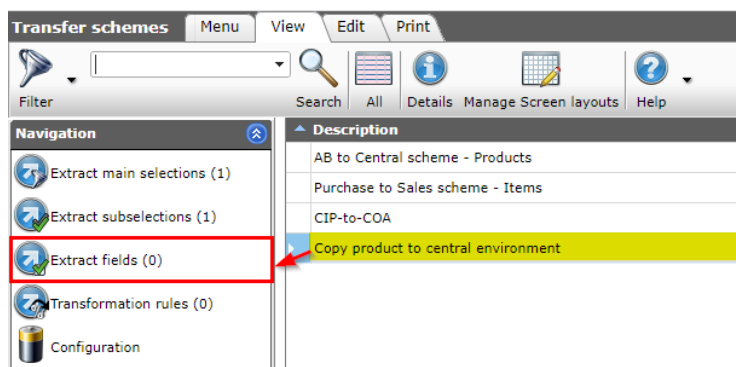
- a. **Transfer scheme:** Transfer scheme to which the selection is applied (automatically selected).

- b. **Field:** Select the Field to be extracted. Note: You can type (part of) the field named.
  - c. **Transfer type:** Select how the Field is to be modified upon transfer
    - i. **Overwrite target value:** Always overwrite the value in the target field.
    - ii. **Keep non-empty target value:** Only overwrite target field if it is currently empty.
    - iii. **Keep any target value:** Do **not** overwrite the target field.
    - iv. **Only overwrite if new record:** Only overwrite the data field if the target record was newly created; i.e. do not update data fields of existing target records.
  - d. **Create missing parent record<sup>3</sup>:** Set to Yes to create a copy of the missing parent record in the target environment. Set to No to omit creating a copy of the missing parent record in the target environment. Example: If an item is transferred, but the coupled product is missing in the target environment, then create a copy of the missing product in the target environment.
4. Click on Save, to save the Field extraction.

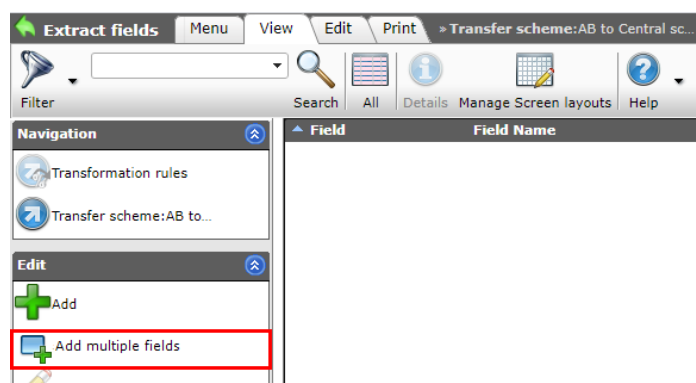
#### 2.1.4.1 Add multiple fields

To quickly add multiple fields, use the *+Add multiple fields option*:

1. Through the Menu go to *System > Configuration > Transfer schemes* and select the scheme you need to edit:

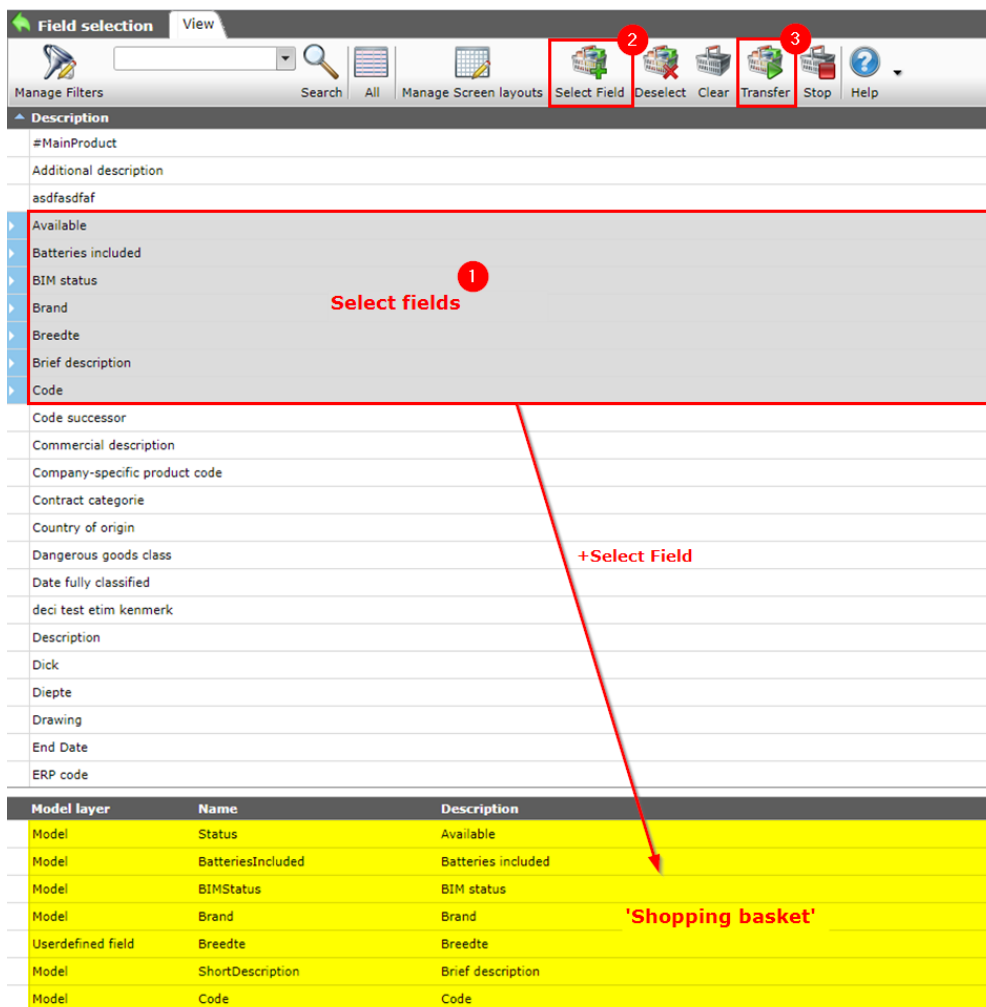


2. Under Navigation, click on *Extract fields*, and in the next window click on *+Add multiple fields*:



3. You will be presented with an overview of all available fields, which you can select (1), move to the 'shopping basket' (2) and finally transfer (3) to the scheme.

<sup>3</sup> This setting is only available for parent fields which have a coupled field, such as Product, Assortment, Unit, etc.

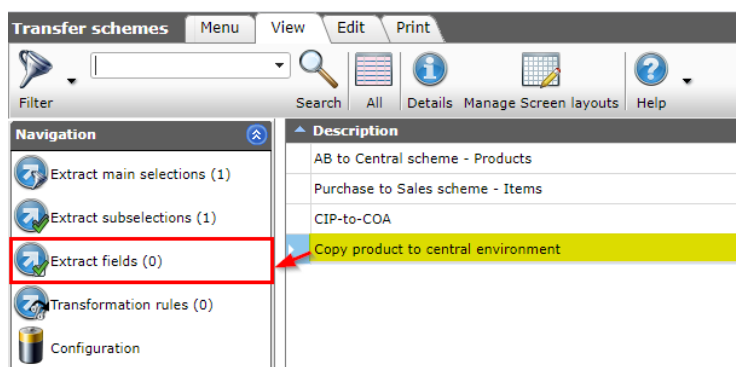


4. Important: The default Transfer Type for all fields selected this way will be: *Overwrite target value*. Please make changes as needed.

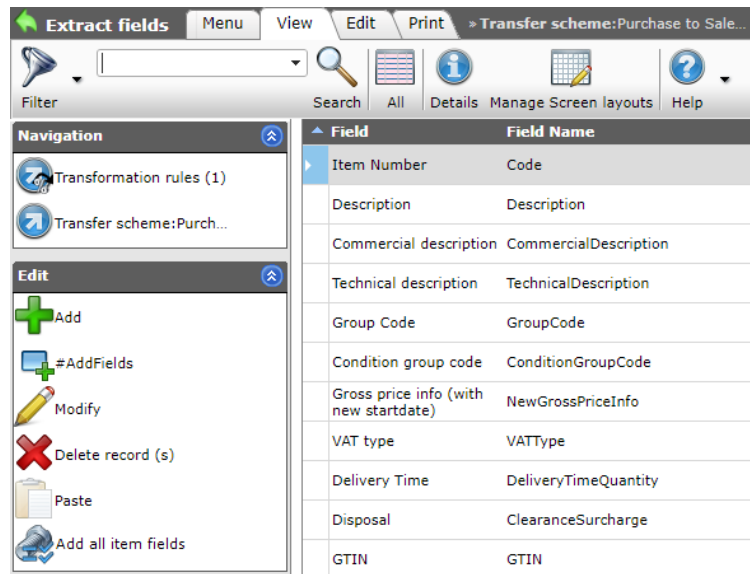
#### 2.1.4.2 Auto-add transferable fields

For **Items schemes only**, all transferable item fields can be added automatically:

1. Through the Menu go to *System > Configuration > Transfer schemes* and select the scheme you need to edit:



2. Under Navigation, click on *Extract fields*, and in the next window click on *+Add item fields*.

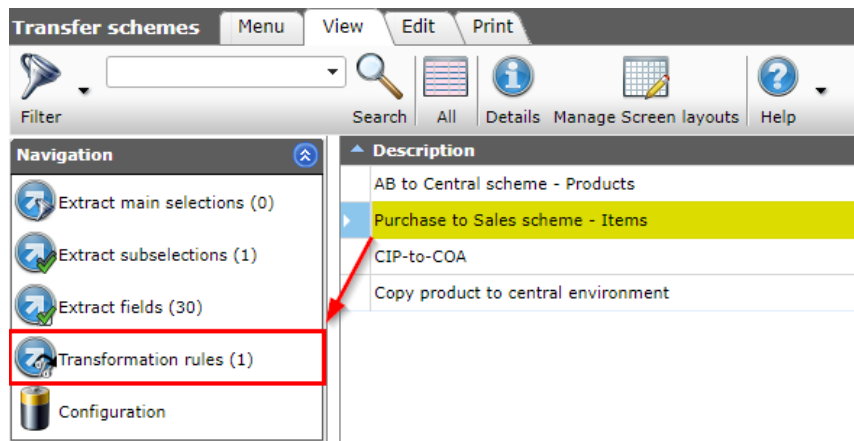


3. Important: The default Transfer Type for all fields selected this way will be: *Overwrite target value*. Please make changes as needed.

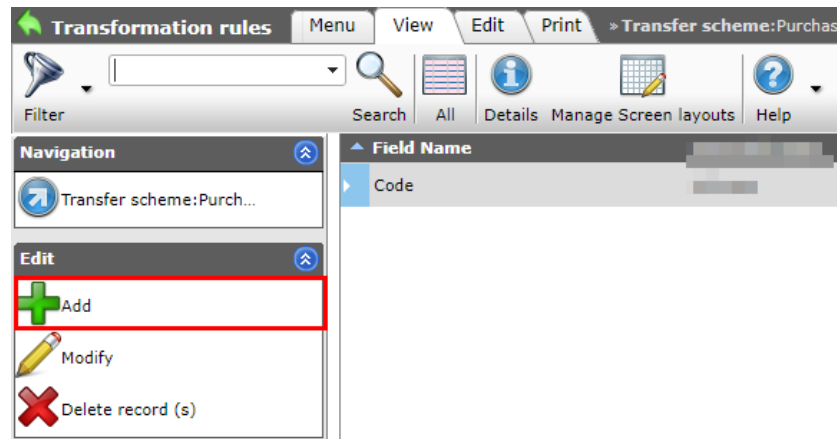
## 2.1.5 Transformation rules

To add transformation rules to a scheme:

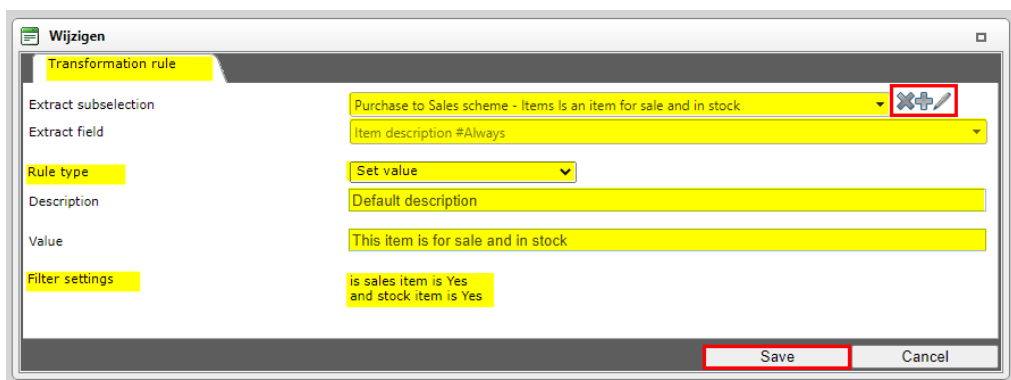
1. Through the Menu go to *System > Configuration > Transfer schemes* and select the scheme you need to edit:



2. Under Navigation, click on *Transformation rules*, and in the next window click on *+Add*:



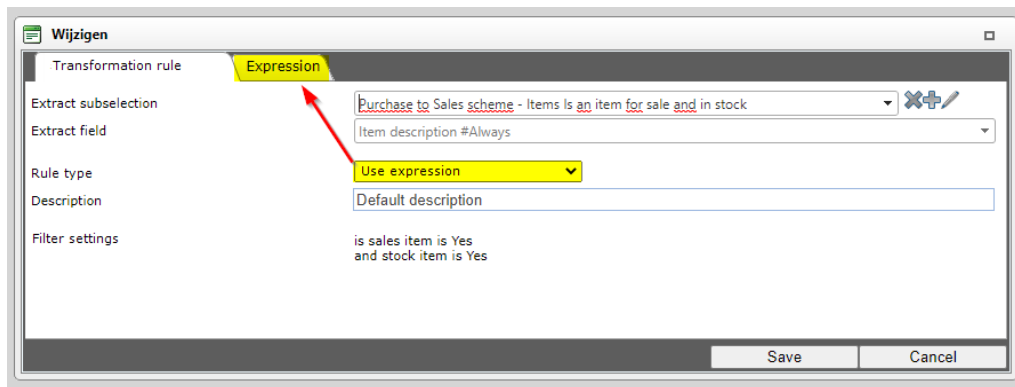
3. In the pop-up window:



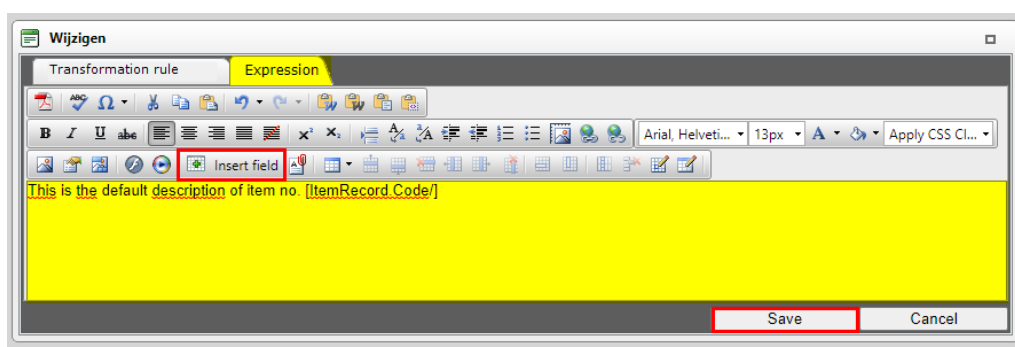
- Extract subselection** (optional): Select a subselection to which this transformation rule should be applied. Using the buttons next to this field, a new subselection can be created (+), or selected subselections can be edited (pencil) or unselected (X).
  - Extract field** (mandatory): Select the extracted field to which this transformation rule should be applied.
  - Rule type**: Select the type of rule to be applied:
    - Generate number**: Generate a (new) number for the extracted field.
    - Set value**: Set a (new) value for the extracted field.
    - Use expression**: Use an expression to calculate the value that will be set for the extracted field. See: [2.1.5.1 Use expression](#).
  - Description**: Enter a description for this transformation rule.
  - Value**: Enter the value that should be set for the extracted field. This option is only available when the Rule type *Set value* has been selected.
  - Filter settings**: Overview of the filter options that have been set for the selected subselection.
4. Click on **Save**, to save the transformation rule.

#### 2.1.5.1 Use expression

An expression can be used to calculate the value for an extracted field. Once the Rule type *Use expression* is selected (see [2.1.5 Transformation rules](#)), an additional tab appears for entering the expression:



1. **Rule type:** Select the option Use expression.
2. Next, go to the *Expression* tab:



3. Enter an Expression into the text field. Either of the following options can be used:
  - a. Type a text, for instance for a description, brand, series, type or other text field
  - b. Use a (mathematical) expression, such as:

$12 - (360/60)$

- c. Use an expression in combination with standard data fields:

$(32 + (1.8 * [ProductRecord.MaxMediumTemp]))$

- d. Use an expression in combination with user-defined fields.
4. Click on Save, to save the Transformation rule.

For more information on the use of Expressions, see the *Manual Expressions*.

## 2.2 Navigating schemes

Schemes can be navigated through the Navigation menu in the left side panel. The navigation structure is as follows:

- Transfer scheme
  - Main selection
  - Subselection
    - Transformation rules active per subselection
  - Extract fields
    - Transformation rules active per field
  - Transformation Rules: all transformation rules active under this transfer scheme



## 2.3 Set Product scheme

Only **one** Transfer scheme can be set for Products. After creating the scheme, go to *Menu > My Company Settings > Item Manager tab* to select it:

The screenshot shows the 'My Company settings' window with the 'Item Manager' tab selected. The window contains several sections with settings:

- #PABExportAllItems**: ☐ Yes ☒ No
- Future Prices**: ☒ Yes ☐ No
- Products (product.txt hproduct +)**: ☒ Yes ☐ No
- Manufacturersinfo in export**: ☒ Yes ☐ No
- Product (prodspec.txt)**: ☒ Yes ☐ No
- Including product attachments**: ☐ Yes ☒ No
- Omit Incomplete products in export**: ☐ Yes ☒ No
- Fall back product description**: ☐ Yes ☒ No
- Import Items**:
  - Remove items that are not supplied**: ☐ Yes ☒ No
- Adding new items**:
  - Transfer product description**: ☒ Yes ☐ No
  - Transfer productgroup**: ☒ Yes ☐ No
- Automatic Import**:
  - Automatic transfer**: ☒ Yes ☐ No
  - Email Item File**:
  - GLN for ICC import**:
- Item overview**:
  - Preferred Supplier**:
- Product overview**:
  - Transfer scheme products**: **AB to Central scheme - Products** (highlighted in yellow)

A 'Close' button is located at the bottom right of the window.

### Important:

- The product field **must be included** in the item scheme; if you want the product scheme to be applied, there must be a reference (via the Product field) to products in the item scheme.
- There **must be cross-environment transfer**, otherwise it is simply a matter of assigning the same product from the source item to the target item. Note that an assignment of product to an item is an item change, not a product change. In most case, this will be true for a *CIP to COA scheme*.
- A (new) **product must be created**. This means, the Product field in the item scheme must be set to *Create missing parent record*. Or the previously allocated local product must deviate from the source product. But that must be a field that is included in the product schedule. Otherwise that field will not be included. See also first bullet.
- Note: For now, the filter **Include in selection** (Yes/No) on the Product scheme is not active; Extract Fields and Transformation Rules of the scheme are always applied.

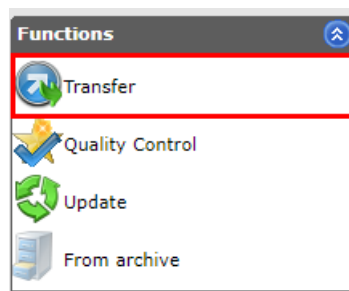
## 2.4 Set Assortment schemes

Per Assortment, **one** scheme can be set, which will be applied to all the items in the assortment. After creating the scheme, go to *Menu > Assortment > Item Manager tab* to select it:



## 2.5 Applying a transfer scheme

Transfer schemes for **Items** are applied at the level of Assortments. A transfer should always be started manually, using the *Transfer* function:



The transfer scheme for **Products** need not be applied manually. If present, the scheme will automatically transfer requested product information if this is called for by another transfer scheme.

Note: The product scheme **must** be set at *My company settings*, and while it is possible to define multiple product schemes, only one (1) can be active at any given time.

### 2.5.1 Transfer report

Manually applying a transfer scheme will generate a report, which will be sent via e-mail to the main user of the application.

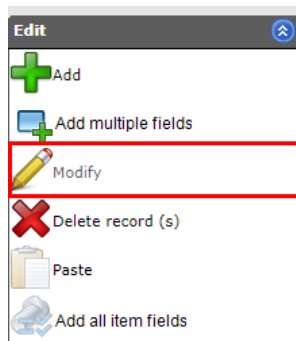
The report will list:

- All new Items
- Alle new Products
- All mutations on Items
- All mutation on Products

	A	B	C	D	E	F	G	H	I	J	K
1		Bron									
2		Gebruiker	Boris Jansen								
3		Datum	11-2-2021 16:54								
4											
5		Inleiding									
6											
7		In dit rapport staat de impact van de hierboven genoemde actie in detail uitgewerkt. Dit rapport bestaat uit verschillende onderdelen:									
8											
9		1. Hieronder de totalen van de mutaties per bestand.									
10		2. Overzicht van de 224 nieuwe artikelen									
11		3. Overzicht van de 1082 gewijzigde artikelen									
12		4. Overzicht van de 401 gewijzigde producten									
13											
14		Totalen									
15			Aangeboden	Verwerkt	Ongewijzigd	Toegevoegd	Gewijzigd	Totaal mutaties	Gevuld	Geleegd	
16		Artikelen	1321	1321	15	224	1082	1306			
17		Bruto gewicht					1082		96		
18		Product					2			2	
19		Producten	401	401	0	0	401	401			
20		Archiveringstijdstip product					38				
21		Commerciële omschrijving					201				
22		Merk					396				
23		Product omschrijving					401				
24		Serie					388				
25		Type					4				
26											
27											
28											
29											
30											
31											
32											
33											
34											
35											
36											
37											
38											

## 2.6 Modifying schemes

Schemes, selections, and rules can be modified using the Modify function:



## 2.7 Deleting schemes

Schemes, selections, and rules can be deleted using the Delete record(s):

