

Universal Import/Export Compano Online Software

Version L4.4

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1 Introduction

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Up until version L02, several import and export functions were used in COS. These functions have now been unified into a *universal import function* and *multi-functional export function*.

Also, the *Excel Update function* -which made use of Microsoft's Office Add-In and Internet Explorer 11 for exporting, editing and importing data *was replaced*, as both the browser and the add-in were phased-out by Microsoft.

This manual describes the new universal data import and export method developed for Compano Online Software.

1.1 Concepts

COS Compano Online Software.

Entity

Data object in COS, for instance Product, Item, Assortment, Attachment, Price, etc.

Record

One instance of a data object in COS, for instance Product 23452-3.

Import

Import of data into data fields in COS. The data source is often an Excel or text-formatted file. Another way of importing data is accomplished by use of a (international) data 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-formatted file. Another way of exporting data is accomplished by use of a (international) data 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, et. cetera. These Data Exchange Standards facilitate the sharing of structured data across different information systems.

Excel Update

Method for updating data in COS, using the Internet Explorer 11 browser and the MS Office Add-In. This method is no longer in use as of COS version L03.

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.

Export layout

Layout for exporting data out of COS. Export layouts can be customized by the user, or are generated on-the-fly.

Delta import

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

Full import

A Full Import compares data in the source file with data in COS. On import any records in COS which are not offered in the import file, will be Archived. All data in COS is overwritten with data from the import file.

Multi-pass import

Consecutive import of multiple entities from one data file. Up to 5 consecutive imports can be handled.

1.2 Automated imports

Besides the universal import and export method, import and exports can also be *automated*. For instance, a data file for import can be transferred to the Compano server via FTPS to a standard import folder, from where it is automatically processed.

Options for automated import and export are:

- Automated import of industry standard formats: See the *manual COS Basics*.
- Automated import or export non-standard (custom) formats: See the *manual Periodic Tasks*.

<u>Note</u>: For automated imports and exports, an extra FTPS user account needs to be added. Please contact <u>sales@compano.com</u> for information on options and pricing.

2 Export

To tackle all export scenario's, a *universal export* method was developed. This new method will handle:

- Custom exports: used for Excel, CSV, Unicode and fixed width exports
- Update exports: used for updating data in COS

For exporting of Assortments and Items in a *standard exchange format*, an *standard item export* is available:

• Standard export: used for exporting item information using standard exchange formats, such as INSBOU, BMEcat, FAB-DIS, etc. or other custom formats (Pricat, Galvano, etc.).

2.1 Industry standard export

The *Item export* function can be used for exporting Items or Assortments¹ in the following *industry* standard data exchange formats.

With a standard Compano license:

¹ Depending on the export format, these exports can be set to also include product, attachment, accessory, and other information.

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- PAB2.0: ASCII* Product Data & Article (PAB)
- PAB2.03: ASCII* Product Data & Article (PAB)
- SalesBouw: Older format for Building sector only
- DICO/INSBOU003: UTF-8 XML-based compressed format
- DICO/INSBOU004: UTF-8 XML-based compressed format, with language selection
- DICO/SALES005: UTF-8 XML-based compressed format, with language selection and including certificates

In addition, the following export formats are available with a Compano International licence:

- BMEcat 4.2: BMEcat 2005 ETIM Guideline Version 4.0.2
- BMEcat 5.0: BMEcat 2005 ETIM Guideline Version 5.0
- Datanorm 4.0: Open standard for plumbing, heating, electrical and painting and varnishing industries
- IGH: Data exchange format used in Switzerland
- OpenData/DQR (7/8/9²): Data export format according to the Datenqualitätsrichtlinie (DQR) for ARGE, BVBS, DG Haustechnik and ZVSHK
- FAB-DIS 2.3: Data exchange format based on the BMEcat®-Standard and managed by ETIM International, which is used in France

Furthermore, items or assortments can be exported in formats compatible with the following software packages:

- Compano: GA-Software
- Compano: InstallCalc
- Building Infosys: Install Office (t/m K40.14.008)
- Building Infosys: Install Office (from K40.14.009)
- Acto: Easy Project/MyProject
- InstalLogic: Handsoft
- Syntess: Atrium/Prisma
- ENK Software: ENK ERP-software

2.2 Custom export

For other export scenario's, custom export layouts are used:

- Custom screen layouts
 - o Layouts for exporting an Excel file based on the screen layout
- Custom export layouts
 - o Layouts for exporting an Excel file
 - o Layouts for exporting a text-based file (CSV, Unicode)

<u>Note</u>: Custom export layouts can be created in advance, or generated on the fly.

2.2.1 Export with custom screen layout

On any Overview the screen layout can be used to export data. All data which is visible in the Overview will be exported as an Excel file.

² Import of OpenData/DQR 9.0 is under development as of 24-4-2023

To export data using the screen layout:

- 1. Through the Menu, navigate to the relevant Overview, for instance *Products*.
- 2. Go to the *View* tab and select the screen layout which contains the data fields that you need to export, for instance:



<u>Note</u>: Detailed information on how to create screen layouts can be found in the *Basic Manual Compano Online Software*.

- 3. Optionally, use Filter and Search to find a set of records.
- 4. Use select *All* (CRTL-A) or manually select records that you need to export.
- 5. Next, go to the Import/Export tab and click on Export [ENTITY]:

Products Menu View Edit	t Functions Print	Import / Export					
Filter	Search Export products	🦂 🕜 🗸					
Navigation 🛞 🔶	Manufacturer Code	Manufacturer Description	S	GTIN	Code	F	Short description P
Product parts			None		<u>17020</u>	4	SideFlow Clean 5L
Is part of Product certificates		lana il	None	-	<u>17031</u>		SideFlow Clean Zakfilter 10 micron
Manufacturer:Flamco S							SidaElaw Class Zabfiltar

6. In the *Export [ENTITY]* dialog:

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Export products		46.734	
Export products			
			A
Use screen layout	🔍 Yes 🔾 No		
Prepare for import	🔾 Yes 🔘 No		
Summary			
Export overzicht: Products Filter: Selectie: all 10 products Velden: • Manufacturer code (gln) • Manufacturer description • Modificationcode • Available • GTIN • Code			•
Image Short description Description Brand Series Type Start date Net weight			
 Weight unit code Height Length Width 			•
	Conversions	Export	Close

- a. Use screen layout: Set to Yes.
- b. Prepare for import (optional): Set to *Yes*, when you need to use the resulting export for later importing of (updated) data.

<u>Note</u>: This option replaces the Excel Update function of COS-versions L02 and older. Also see paragraph <u>2.3 Update export (ExcelForImport)</u>.

- c. Summary: Lists the records and data fields to be exported.
- 7. Click on *Export* and save the file at a location of your choice.

2.2.2 Export with custom layout (Excel)

Custom export layouts offer *more options for data exports* than screen layouts. Some options are:

- Conversion of data: for instance, conversion of units (PCE to STUK).
- Insert header (*Yes/No*): Insert a header row containing data labels.
- Export type³ (product exports only): Choose an export layout type:

³ <u>Note</u>: Other dedicated export types can be added on request, for instance for memos, attachments, et cetera. Please contact <u>sales@compano.com</u> for more information.

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	110111.2,4111-1/4KF	d	
	📄 Add - New layout		
<u>1C</u>	Layout Properties Fields Memo		
	Insert header	● Yes ○ No	
1C	Export type	Standard 🗸	
		Standard	
		Include product classes	
10		Include model classes	

- o Standard: Standard export layout, also suitable for updating data.
- Include product classes: Export layout suitable for *updating (ETIM) product data*; will export the product class(es) and their features.
- Include model classes: Export layout suitable for *updating (ETIM MC) model data*; will export the model class(es) and their features.

<u>Note</u>: Also see paragraphs <u>2.3 UPDATE EXPORT (EXCELFORIMPORT)</u> and <u>3.3 UPDATE IMPORT</u> (<u>EXCELFORIMPORT</u>) for a complete description of the update procedure.

To export data using an Export layout:

- 1. Through the Menu, go to the Overview where you want to Export data.
- 2. Use Filter and Search to find a data set.
- 3. Use select A//(CRTL-A) or manually select records that you need to export.
- 4. Next, go to the *Import/Export* tab and click on *Export [ENTITY]*.

🔦 Items 🛛 Menu 🔍 View	Edit Fun	ctions Pri	nt Import / Export	> Assortm	ents:	a januar a
⋟.	- 🤇	٤	🌛 🗟	2.		
Filter	Search	Export items	Import Item exports	Help		
Navigation 🛞	- Sup	olier GL	N code	Item no.	Price Date	Price per PU and PQ
Bring Lafermanting				23980	16/07/2018	
Price Information				24066	16/07/2018	
Surcharges				<u>33403</u>	08/05/2019	Selected records
Own alternatives				<u>37641</u>	27/05/2016	
- own alternatives				37906	27/05/2016	
Accessories			-	55568	16/07/2018	
Attachments			all states and states	<u>55586</u>	27/05/2016	
				<u>55801</u>	16/07/2018	
Assortments:				56701	16/07/2018	

5. In the *Export [ENTITY]* dialog:

Export products		10 0 C (4) 11	
Export products			
Use screen layout	0	Yes 🖲 No	_
Export layout			- 🖌
Prepare for import	<u></u>	Yes 🔍 No	
Summary Ct	eate Export lay	/out	
Export overzicht: Products Filter: Selectie: alle 2452261 produc	ts		
		Export	Close
06711401069434	VI:1	•• глака	

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- a. Use screen layout: Set to No.
- Export layout: Use the +-icon to create a new layout⁴. Alternatively, choose an Export layout from the drop-down menu⁵. <u>Note</u>: Export layouts can also be prepared at *System > Layouts*; see chapter <u>4. Layout management</u>.
- c. Prepare for import: Set to *Yes*, when you need to use the resulting export for later importing of (updated) data. <u>Note</u>: This option replaces the Excel Update function of COS-versions L02 and older. Also see <u>paragraph</u> 3.3 Update import (ExcelForImport).

Add New Layout (skip if you selected a premade layout)
In the Add – New layout dialog:
Layout tab
Add - New layout
Layout Properties Fields Memo Name Standard item export layout Item export layout
Application O III Within the company S S For me
Save record Cancel
 b. Application: Set to <i>For me</i> if the layout is for your own use only, or to <i>Within the company</i> if all users within your company need to have access to this layout. Properties tab
Add - New layout
Layout Properties Fields Memo
Save record Cancel
a. Insert header: Set to <i>Yes</i> to include a header row containing data field labels in the export file.

⁴ This method only allows for creation of Excel export layouts. If you need to export in a text-based format (CSV, Unicode), the export layout will have to be created through *System > Layouts*, see: <u>4.1.1 Add custom text-based export</u> layout.

⁵ Export layouts created for any Entity, either on-the-fly or at *System > Layouts* will show up in the dropdown menu of the Entity.

Layout Projectus Heids Memo Available fields Selected fields Field Header Pos Product Supplier code Supplier 1 Purchase item Supplier brief description Supplier 2 Retailprice Retailprice information Item no. 3 Size unit Standard Short description/Dutch Short Supplier Appointments Short description Abbreviation 6 Gross price per calculation unit Gross/CU 7		Pos 1 2	Header Po Supplier 1	elected fields	s Memo	Available fields
Field Header Pos Product Supplier code Supplier 1 Purchase item Supplier brief description Supplier 2 Retailprice Item no. 3 2 Size unit Size unit Item no. 3 Standard Standard Short description/Dutch Item description Appointments Barcode prefix Calculation unit abbreviation Abbreviation		Pos 1 2	Header Po Supplier 1	Field		
Image: Price unit Image: Product Image: Product Supplier code Supplier Image: Product Supplier code Supplier Image: Product Supplier code Supplier Image: Retailprice Item Number Item no. 3 Image: Retailprice information Item Number Item no. 3 Image: Standard Image: Standard Item Number Item Number 4 Image: Supplier Short description/Dutch Short description / 4 4 Image: Supplier Appointments Calculation unit abbreviation Abbreviation 6 Image: Barcode prefix Gross price per calculation unit Gross/CU 7		Pos 1 2	Header Po Supplier 1	Field	-	
Image: Product Supplier bird description Supplier 2 Image: Retailprice Supplier bird description Supplier 2 Image: Retailprice Item Number Item no. 3 Image: Retailprice Standard Item Number Item no. 3 Image: Standard Item Standard Item Number Item no. 3 Image: Supplier Short description/Dutch Short description 5 5 Image: Appointments Barcode prefix Calculation unit abbreviation and the organization of a standard and the organization of a standard and the organization and the organization of a standard and the organization and the		2		Supplier code		H" Price unit
Portrase term Item Number Item no. 3 Retailprice Item Number Item no. 3 Retailprice information Item Number Item no. 3 Size unit Item Number Item no. 3 Standard Item Number Item no. 3 Short description/Dutch Short description 5 (nl) 5 Appointments Barcode prefix Gross price per calculation unit Gross/CU 7		_	Supplier 2	Supplier brief description		Product
Image: Retailprice information Image: Retailprice information Image: Size unit Image: Size unit <t< td=""><td></td><td>3</td><td>Item no. 3</td><td>Item Number</td><td></td><td>Betailprice</td></t<>		3	Item no. 3	Item Number		Betailprice
a) Size unit (m) a) Standard Short description/Dutch Short description 5 (m) b) Supplier Calculation unit abbreviation Abbreviation 6 b) Barcode prefix Gross price per calculation unit Gross/price per calculation unit		4	Item description 4	Description/Dutch		Retailprice information
Supplier Appointments Barcode prefix Gross price per calculation unit Gross/CU 7	1	5	Short description 5	Short description/Dutch		tandard
Appointments Barcode prefix Gross price per calculation unit Gross/CU 7		6	(ni) Abbreviation 6	Calculation unit abbreviation		∃ Supplier
Barcode prefix		7	Gross/CU 7	Gross price per calculation unit	· · · ·	Appointments
Conversion table		*+	- *			Properties
Header Supplier 🗹	1	~			Su	leader
Automatic Tooltip Supplier code				de	Aut	ooltip
		0		0.000		
Save record Can	icei	Cance	cora C	Save re		

6. Click on the *Export* button to start the export process:

⁶ <u>Important</u>: export layouts are created for *one* specific Data Entity only, for instance when creating an export layout from the Product overview the layout will be limited to exporting records of the entity Product only.

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Depending upon your browser download settings:

a. The resulting Excel file will be exported to the Download folder of your browser:

Print	10.000 CT0000	interim terms
Product class	1107/101	have been
https:// compano.com/pages/grid.a	spx?vk=PRD.Item.ItemEdit.Mair	1#
🗟 Excel-Items-20210xlsx 🔨	Excel t downle	file is exported to oad folder of browser

b. Or you can download the Excel file to a folder of your choosing:

				>
→ · · ↑ ↓ > Deze pc > Downloads			ٽ ~	
Organiseren 🔻 Nieuwe map				::: - ?
🐚 Deze pc	^	Naam	Gewijzigd op	Туре
3D-objecten		Vandaag (1)		
📰 Afbeeldingen		Excel-Items-20210329-113331.xlsx	29-3-2021 11:33	Microsoft Excel-werkblad
🔜 Bureaublad		Vorige week (4)		
🗎 Documenten		ExcelForImport-Products-and-Items-20210322-145322	23-3-2021 09:27	Microsoft Excel-werkblad
🐥 Downloads		ExcelForImport-Products-20210322-145322.xlsx	22-3-2021 14:54	Microsoft Excel-werkblad
👌 Muziek		ExcelForImport-Products-20210322-144754.xlsx	22-3-2021 14:47	Microsoft Excel-werkblad
📕 Video's		Excel-Items-20210322-124938.xlsx	22-3-2021 12:49	Microsoft Excel-werkblad
🤩 Lokale schijf (C:)		V Eerder deze maand (16)		
The second second	~	<		>
Bestandsnaam: Excel-Items-20210329-1135	38.xlsx			
Opslaan als: Microsoft Excel Worksheet (*.xlsx)			``````````````````````````````````````
Mappen verbergen				Opslaan Annuleren

The resulting Excel file, named **COS-Excel-[ENTITY]-[DATE]-[TIME]⁷.xlsx**, will contain all data fields which were specified in the Export layout:

⁷ [DATE] en [TIME] reflect the data and time of the export.

1	А	В	С	D	E	F
3	Supplier 🔪	Α .	Item no. 📑 💌	Abbreviation 🔭	Item description	Delivery time 🛛 🔽
4		Valid	HU122201BE60	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-118kPa G1 1x230V P	2,00
5		Valid	HU122201BR10	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-118kPa G1 3x400V+N	3,00
6	a second a second	Valid	HU122202BV5N	st	DP drukverh. 1pmp v/tapw RVS m/toerreg nom.2,4m³/h-174kPa 1x230V+N	4,00
7		Valid	HU122301BE60	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-177kPa G1 1x230V P	5,00
8		Valid	HU122301BR10	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-177kPa G1 3x400V+N	6,00
9		Valid	HU122302BV5N	st	DP drukverh. 1pmp v/tapw RVS m/toerreg nom.2,4m³/h-261kPa 1x230V+N	7,00
10	Contraction (section)	Valid	HU122401BE60	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-236kPa G1 1x230V P	8,00
11	Contraction Contraction Contraction	Valid	HU122401BR10	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-236kPa G1 3x400V+N	9,00
12						I

2.2.3 Export with custom layout (text-based)

<u>Important</u>: A custom text-based layout *cannot* be created on the fly. Prepare your text-based layout at *System > Layouts*, also see paragraph <u>4.1.1 ADD custom TEXT-BASED EXPORT LAYOUT</u>.

To export data with a custom text-based layout:

- 1. Through the Menu, go to the Overview where you want to Export data.
- 2. Use Filter and Search to find a data set.
- 3. Use select A//(CRTL-A) or manually select records that you need to export.
- 4. Next, go to the Import/Export tab and click on Export [ENTITY].



5. In the Export [ENTITY] dialog:



- a. Use screen layout: Set to No.
- b. Export layout: Choose the text-based layout from the drop-down menu.
- c. Compress (optional): Set to *Yes*, should you need to lower the file size of your export. The file will be export in the **ZIP** compression format.

2.3 Update export [ExcelForImport]

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

HU1222018E60	DP drukverb 1pmp v/tapw RVS z/toerreg nom 2m3/b-118kPa G1 1v230V P		
Export products			×
Export products			
Use screen layout	⊖ Yes ● No		
Export layout	Excel export lay-out 'test' on Screen products	- *+/	
Prepare for import	● Yes ○ No		
Summary			
Export overzicht: Products Filter: Selectie: de 21 geselecteerde products			

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

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

To update data, edit this ExcelForImport-file with Microsoft Excel. Subsequently, use the *Import function* in COS to import the updated data, see paragraph <u>3.3 UPDATE IMPORT</u> (EXCELFORIMPORT).

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

<u>Note</u>: The ExcelForImport-option replaces the *Excel Update* function of COS-versions L02 and older.

2.3.1 Removing Excel protection

Removing the protection of *ExcelForImport* worksheets is *not recommended*. However, should you wish to do so, a few rules apply:

- Hiding columns/rows: Data in hidden columns and/or rows will be imported.
- Removing/Adding columns/rows: *Not allowed*; you can no longer import the ExcelForImport file.
- Filtering/Sorting data: Using filters or sorting in Excel is allowed. <u>Note</u>: When importing an ExcelForImport file with active filters, *all data* in the file will be imported, including any data that has been filtered out (!)
- Editing greyed-out data: *Not allowed*; by importing grey-out data you will mess up your data in COS.
- Using formulas: Formulas in existing columns are allowed, however you *cannot refer* to data in added columns, worksheets or other (Excel) files.
- Changing cell formats: *Not allowed*; you can no longer import the ExcelForImport file.

2.3.2 Non-editable fields

Data fields in Compano that cannot be updated directly are marked-out in *grey* in both the COS field selector and any exported Excel files:

📄 Add - New layout Memo Layout Properties Fields Available fields Main product - Manufacturer Product **Reference fields** - Codes Dates and time > < - Names and descriptions Assortment assigned of Attachment description per product Brand (product) Code and description Commercial description (product) Description (product)

Figure 1. Non-editable fields in the field selector

	А	В	С	D	E
3	Manufacturer Description 🔽	Code 🔽	GTIN 🔻	Short description (product)	Short description (product) (nl)
4		26136		Contraflex expansievat 12/0,5 [3bar]	Contraflex expansievat 12/0,5 [3bar]
5		26171		Contraflex expansievat 18/0,5 [3bar]	Contraflex expansievat 18/0,5 [3bar]
6		26241	and the second second	Contraflex expansievat 25/0,5 [3bar]	Contraflex expansievat 25/0,5 [3bar]
7		26341		Contraflex expansievat 35/0,5 [3bar]	Contraflex expansievat 35/0,5 [3bar]
8		26493		Contraflex expansievat 50/1,5 [6bar]	Contraflex expansievat 50/1,5 [6bar]
9		26793	And the second second	Contraflex expansievat 80/1,5 [6bar]	Contraflex expansievat 80/1,5 [6bar]
10		17020		Reference field	Source
11		17031		SideFlow Clean Zakfilter 10 micron	SideFlow Clean Zakfilter 10 micron
12		17032	And the second second	SideFlow Clean Zakfilter 25 micron	SideFlow Clean Zakfilter 25 micron
13		17033		SideFlow Clean Zakfilter 50 micron	SideFlow Clean Zakfilter 50 micron
14		17035		SideFlow Clean C-sleutel	SideFlow Clean C-sleutel
15		17021	and the second second	SideFlow Clean 3.5L	SideFlow Clean 3.5L

Figure 2. Non-editable fields in the exported Excel file

Non-editable fields include:

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- Reference(data) fields: These fields cannot be updated directly, because their value comes from another data field in Compano. For instance, *Translatable fields* where the value of the field refers to one or more corresponding language-specific fields: Short Description can refer to Short Description (n1), but also to Short Description (en)
- Calculated fields: The value of the field is calculated from one or more other data fields in the application. For example: the **Net price** is calculated from **Gross price** minus **Discount**.
- Read-only fields: Some fields in COS are read-only and never be updated. Examples are: Import date, Author, etc.

2.3.2.1 Updating calculated fields

For calculated fields, the value of the field is calculated from one or more other data fields in the **application**. Therefore, to update the value of a calculated field, these 'source' fields need to present in your Excel export layout.

Example

The value of **Net price** is calculated from **Gross price** minus **Discount**. To edit the Net price, either the Gross price or the Discount, or both need to be present in your layout:

2.3.2.2 Updating translatable fields (multi-language license only)

In COS-applications with a multi-language license, translatable fields refer to their languagespecific counterpart(s), based on the language that is set for your user-interface, for example:

	User-interfa	ce language
Translatable field	English (en)	German (de)
Series \rightarrow refers to:	Series (en)	Series (de)
<i>Type</i> \rightarrow refers to:	Type (en)	Type (de)

Thus, to update the value of a translatable field, you should really update the corresponding language-specific field.

Example

Suppose you need to translate the fields *Series* and *Type* on the entity Product and the language of your user interface is *English (en)*. In this case the fields *Series* and *Type* refer to *Series (en)* and *Type (en)*. Only the latter two fields can be edited using the Universal Import/Export method:

- 1. Through the Menu, go to *Products > Products*.
- 2. On the Products overview, go to the View tab and click on Manage screen layouts.



3. Under Edit, click on +Add to create a new screen layout:

Per view and type Menu V	iew <mark>E</mark>	dit 🚺	Functions Print
Filter	Search	Add	Modify Delete record(s)
Navigation	^ A	Т	Name
	•	0	Datapool
Conversion tables	m	0	images
Memo (0/0)			

4. On the *Layout* tab, name your layout:

Layout F	ields \	Sorting	Quick Fil	ter Memo			
Туре				Screen		\sim	
Name				Update series	s and type		e
Application				🔿 🖬 Within th	ne company	🔘 🗟 For I	me

5. Next, on the Fields tab, add the Translation fields.

<u>Note</u>: Translation fields can be found under *Available fields > By category > Product > Translations > Translations English*.

Layout Fields Sorting Quick F	Filter	Memo		
Available fields	7 [Selected fields		
Product		Field	Header	
Codes		х	х	
+ Dates and time		Manufacturer description	Manufacturer Description	
Names and descriptions		Code	Code	
• Numbers		GTIN	GTIN	
• Other		Image	F	
Percentages		Drawing	т	
References (illustration)		Description	Product	
Source information			description	- -
Translations	1 1	Series	Series	
Translations Dutch		Туре	Турс	
Translations English		Series/	Series (en)	
Brand/		Туре/	Type (en)	
Commercial description/				
Description/				
Group (masterdata) Comm				

<u>Reminder</u>: The default fields *Series* and *Type* (crossed-out) cannot be updated as they take their content from the language-specific fields of your user interface, in this example their English *(en)* counterparts.

6. Apply the screen layout.

After exporting the product data, the resultant ExcelForImport-file will clearly show the difference between the non-editable default data fields (greyed-out) and the editable language-specific data fields (black):

🍠 🌮 💭

Н	I	J	К
Series	Туре	Series (en)	Type (en)
contraflex [3bar 2-80ltr]	TEST	Contraflex [3bar 2-80ltr]	TEST
Controflex [3bar 2- Non-ed	litable default	Contraflex [3bar 2- Editabl	e language-
Contrafic [3bar 2- data fi	elds	Contraflex [3bar 2- specific	c data fields
Contraflex [35ar 2-80ltr]	TEST	Contraflex [3bar 2-80ltr]	TEST
Contraflex [3bar 2-80ltr]	TEST	Contraflex [3bar 2-80ltr]	TEST
Contraflex [6bar 2-80tr]	TEST	Contraflex [6bar 2-80ltr]	TEST
Contraflex [6bar 2-80ltr]	TEST	Contraflex [6bar 2-80ltr]	TEST
Separation	SideFloy Clean 5L	Separation	SideFlow Clean 5L
Separation	SNerlow Clean 5L Filterbag	Separation	SideFlow Clean 5L Filterbag
Separation	SideProw Clean 5L Filterbag	Separation	SideFlow Clean 5L Filterbag
Separation	SideFlow Slean 5L Filterbag	Separation	SideFlow Clean 5L Filterbag
Separation	SideFlow Clean 5L C-Spanner	Separation	SideFlow Clean 5L C-Spanner
Separation	SideFlow Clean 3,51	Separation	SideFlow Clean 3,5L
Separation	SideFlow Clean 3.5L Fitterbag	Separation	SideFlow Clean 3.5L Filterbag
Separation	SideFlow Clean 3.5L Filtering	Separation	SideFlow Clean 3.5L Filterbag
Separation	SideFlow Clean 3.5L Filterbag	Separation	SideFlow Clean 3.5L Filterbag
Separation	SideFlow Clean 3.5L C-Spanner	Separation	SideFlow Clean 3.5L C-Spanner

2.3.3 Mandatory key fields

Specific *key data fields* are required to import each entity. These fields are included when using *the Prepare for Import* option, however on custom imports these fields will need to be present in your import layout *and* import data file.

Mandatory fields are marked in red in the *New layout* dialog:

Available fields		- Selected fields			
· · · · · · · · · · · · · · · · · · ·		Field	Header	Poe	
····· Important field yes/no		Code	Code	1	1
····· Last modification		Manufastures and (ala)	New feetures Code	-	
Length		Manufacturer code (gin)	Manufacturer Code	2	
Main product code					
Main product GTIN					
Main product manufacturer code (gln)					
Manufacturer code (gln)					
····· Multiple choice					
Net weight					
On Internet		Mandatory ke	ey field		
PAB Status					
Predecessor code					
Desident Classification and the	-				
- Properties					ī

<u>Important</u>: When migrating to COS version L03, existing import (and export) layouts should be checked for missing mandatory fields. For an overview of the mandatory key fields per data entity, see chapter <u>5 APPENDIX A:</u>.

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2.3.4 Export classification fields

Updating of *product classification data* (ETIM or BIM) can be accomplished using two dedicated Export types:

- Include product classes: used for updating ETIM product classification data
- Include model classes: used for updating *BIM-model classification* data



For a further explanation, see paragraph 3.3.1 UPDATING CLASSIFICATION DATA

2.3.5 Exporting fields containing HTML

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.

3 Import

To tackle *all import scenario's*, a universal import method has been developed. This new method will handle:

- Standard imports: used for importing data by means of industry standards, such as DICO (INSBOU/SALES), BMEcat, FAB-DIS, etc. and custom formats, such as Pricat, Galvano, et cetera.
- Custom imports: used for importing character-separated and fixed-width data files, such as Excel, CSV, and TXT (Unicode). <u>Note</u>: can also be used to import Excel files with multiple worksheets or compressed files (ZIP, BZIP) containing multiple data files.
- Update imports: used for updating data. This option replaces the *Excel Update* function.

Some general notes on importing data:

• A data import can be started on *any Overview* using the *Import* button. The application will autodetect which kind of data you wish the import. If this is unclear, the import dialog will ask for the import Entities and any import layouts for your data.

<u>*Tip</u></u>: For ease of use, when importing data of a single Entity, Compano recommends using the Import button on the corresponding Overview of the Entity; for instance product data at Products, surcharges at Surcharges, et cetera.*</u>

- Column headers in the import file need *not* reflect corresponding header labels in COS; therefore you are allowed to change the labels of any column headers in your import files or ExportForImport files. <u>Note</u>: The Pos(ition) number of the data field *must* correspond with the correct Excel data column!
- To prevent overwriting data, a custom import layout can be defined where overwriting data can be disabled per data field:

Layout Properties Fields M	lemo		
- Available fields	Selected fields		1
+ All fields	Field Header	Pos	
+ Alphabetically by letter	Item item number Item	1	
± by category	Item supplier code Supplier	2	
* Standard fields	Туре Туре	3	
	Start date Start date	e 4	
	Amount per PU+PQ Amount p	er PU+PQ 5]
	Sequence Sequence	6	
	Lower limit Lower limit	it 7	14
	Lower limit unit SE	8	14
	Do not overwrite (maintain) data value in constain		
	Do not overwrite (maintain) data value in COS		
- Properties	Do not overwrite (maintain) data value in COS		
Properties	Do not overwrite (maintain) data value in COS	Automatic	
- Properties	Do not overwrite (maintain) data value in COS	Automatic ^	
- Properties	Do not overwrite (maintain) data value in COS Start data 4 4 Automatic	Automatic	
- Properties	Do not overwrite (maintain) data value in COS Start date 4 Automatic	Automatic	
Properties— teader field position fixed value eintain Continue on error	Do not overwrite (maintain) data value in COS Start date 4 4 9 Yes No O Yes © No	Automatic	
Properties	Do not overwrite (maintain) data value in COS Start date @ Yes O No O Yes @ No Start date	Automatic	

3.1 Industry standard import

An industry standard import can be used with the following data exchange formats:

- IXF (classification XML)
- ICC (conditions XML)
- PAB105
- PAB20
- PAB203
- PRICAT (Price / Sales catalog)
- SALESBOUWV3
- INSBOU003
- INSBOU004
- DICO/SALES005
- DICO/SALES0051
- EZBASE

• BMEcat31

- BMEcat42
- BMEcat50
- DataNorm
- DataNormV12Xml
- DQR8 (OpenData, ARGE)
- DQR9 (OpenData, ARGE)⁸

Note: The Import function will *autodetect* which industry standard exchange format is offered.

<u>Warning</u>: For industry standard imports, such as SALES005, DQR, BMEcat5, if the import is recognized (especially for the items) as a full import and there are no errors, then any previously imported and untouched articles will be archived. Thus, if items were added manually, they will not have an import date and therefore they will not be archived.

To import data using a industry standard exchange format (DICO/SALES005 example):

1. To start the import of data, through the Menu, go to *Items > Assortments*.



2. Next, go to the *Import/Export* tab and click on *Import:*

Assortment Menu V	iew Ed	it F	unctions	Impor	t / Expor	t		
⋟.	•	9	4	i.				2.
Filter	S	Search	Export asso	rtments	Import	Item exports	Export images	Help
Navigation	_ ا	<u> </u>	Logo	Code		Description		
Automs (2481/0)				100				
(101/0)								
Logs (6/0)				22200	0007410	Compano		

3. In the Import dialog, first select your data file and click on *Next:*

⁸ DQR 9.0 is under development as of 24-4-2023



<u>Important</u>: The data file will be analysed upon import; depending upon the size of the data file, this can take some time. Please be patient.

4. In the Import dialog :

		Sales
🚍 Import		
Import		inc
Summary		ing
Test Import with format SALES0051 of file SALE with impact eport: All except the product class	S005_DirectProfile_van(SA_MF)_20230904_143118_bzip	2.zip
war impact oper an except the product dass		ing
Delta import of manufacturers from file product Delta import of products from file productdata.x	data.xml ml	ing
Delta import of etim product features from file p	productdata.xml	inc
Delta import of product certificates from file productdate	ductdata.xml	
Delta import of attachments from file productda Delta import of manufacturers from file pricecat	ta.xml alogue xml	ing
full import of items from file pricecatalogue.xml	, .	
Delta import of attachments from file pricecatal Delta import of item - item relations from file pr	ogue.xml icecatalogue.xml	
Delta import of item - item relations from file ite	emrelations.xml	
Denta import of product - product relations from	nie item elations.xim	ing
Settings	All sussess the residual slave features	
Reporting level		
Is checkrun	<mark>● Yes ○ No</mark>	
Selected Files	Delta import of manufacturers (product)	
	Delta import of products	
	Delta import of etim product reatures Delta import of certificates	
	Delta import of product certificates	
	Delta import of attachments (product)	
	Delta import of manufacturers (item)	
	Full import of items Pelta import of attachments (item) Item	
	Delta import of item encloseitem relations	
	Delta import of item relations	
	Delta import of Product - Product relations	
	Previous	Close
	Пейбиз	

- a. 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. All except the product class features: Generate an import report, but exclude any checks on (ETIM) Product Features. This is the *default setting* for all imports and will result in a faster import.
 - iii. Full: Generate a full import report, including all changes in all fields. This will result in the slowest import as all data fields will be checked.
 - iv. Only warnings: Generate an import report only listing warnings. This import is generally faster than with a Full report.

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- b. Is testrun: Set to Yes to simulate an import; this will only generate an import report listing any potential errors and/or warnings. No data is actually imported!
- c. Selected files⁹: Several entities can be selected for *delta* or *full* import, for instance: a delta import of products, a full import of items, a delta import of product attachments, etc. Use the checkboxes to (de-)select which data is to be imported, in this example:
 - i. Delta import of products: Check this box if you need to import only changes in the product data (new or changed products). When set to No, the data will not be imported.
 - ii. Delta import of etim product features: Check this box if you need to import only changes in the ETIM product data (new or changed ETIM classes and/or features). When set to *No*, the changed ETIM data will *not* be imported.
 - iii. Delta import of attachments (products): Check this box if you need to import only changes in the attachment data (new or changed attachments). When set to No, the data will not be imported.
 - iv. Full import of items: Check box if you need to import all (new) item information. When set to No, the data will not be imported.
 - v. Delta import of attachments (items): Check box if you need to import only changes in the attachment data (new or changed attachments). When set to No, the data will not be imported.
- 5. Click on *Next* to start the import; you will receive the following pop-up message:

Res	ults Import Artikelen				×	С
	The import has bee	n started as <u>back</u>	g <u>round task</u> . You will	receive an email a	as soon as the job is	<u></u>
2	finished. Then the i	mport report will	also be availanble in	the <u>logs</u> .		<u>C1</u>
2						<u>C1</u>
2						<u>C1</u>
2						<u>C1</u>
2						<u>C1</u>
2						
2	OK					
2	OK	PEF	1 111			

You will receive an *import report* via e-mail¹⁰, or you can find the import report under System > Logs. See also paragraph <u>3.5 IMPACT ANALYSIS</u>.

3.1.1 Automatic import

For Industry standard data files, an import can be set up:

- Compano customer sets up an automated upload of an industry standard data file to a Compano FTPS-server location.
- COS software automatically imports the data file as a nightly job.

⁹ Which *Selected files* will show, depends on the type of import file offered.

¹⁰ For automated import tasks (periodic tasks), the import report is sent to the *admin* user.

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For more information, see chapter <u>7 APPENDIX C: AUTOIMPORT/AUTOCHECK</u> and contact Compano consultant.

3.1.2 DQR import

For DQR imports, the following applies:

- Supported DQR import formats: DQR 8.0 and DQR 9.0
- ETIM version: Should a DQR file contain multiple ETIM versions, on import only the most recent ETIM version will be imported.

3.1.3 FAB-DIS import

FAB-DIS is an Excel format and can thus be imported using a custom Excel import, with the exception of ETIM-classification data which cannot be imported this way.

3.2 Custom import

Custom import files, such as Excel, CSV or (Unicode-) Text files, need to be imported using *custom import layouts.*

Custom import layouts can be created:

- On-the-fly: In the Import dialog, see the numbered list below.
- At System > Layouts: See paragraph <u>4.2 ADD IMPORT LAYOUT</u>.

To import a custom data file:

1. Through the menu, go to the Entity¹¹ that you need to import, for instance *Items > Surcharges*.



2. Next, go to the tab Import/Export and click on Import.

¹¹ Or, use any Import button in COS.

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3. In the Import dialog, first select your import file and click on Next.

🗐 Import				
Import File	Excel-import-surch	arges.xis) Select		
-				
	Previous	Next	Close	

4. In the next screen:

summary Importof file Excel import-surchar	TAR VEV				-
with impactreport: Full	gesixisx				
Import van Surcharges met layout	t Import surcharges en velden:				
Item item number					
Туре					
 Start date Amount per PU+PO 					
Sequence					
 Lower limit Lower limit unit 					
Layout1					
Title	Blad1				
	Surcharge		•	*	
Import entity			· · -		P
Import entity Import layout	Excel import lay-o	ut 'Import surcharges' d	in Screen surchargi 🔨		
import entity import layout	Excel import lay-o	ut 'Import surcharges' o	n Screen surchargi *		
Import entity Import layout	Excel import lay-c	ut 'Import surcharges' c	n Screen surcharg 🔻		

Layout112

- a. Summary: The Summary lists all fields which are to be imported, based on the selected Import layout.
- b. Title: Name of the import source; for instance, the name of the Excel worksheet.
- c. Import entity: Autodetected import entity; if this is not correct, select a different entity from the drop-down menu.

¹² In case of multiple data sources, for instance an Excel file with multiple worksheets, the dialog will list a layout for each data source (*Layout1, Layout2, Layout3*, etc.).



d. Import layout: Either select a premade Import layout from the drop-down menu, or click on the +-icon to create an Import layout on-the-fly.

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	(skip if yo	Add New Layout u selected a pre-made layout)	
e Ac	<i>dd – New layout</i> dialog:		
out t	ab		
ſ	🗐 Add - New layout		
	Layout Properties Fields	Memo	
	Name	New import layout	

- a. Name: Enter a Name for the Import layout.
- b. Application: Set to *For me* if the layout is for your own use only, or to *Within the company* if all users within your company need to have access to this layout.

○ I Within the company ● S For me

Save record

Cancel

Properties tab

Application

In th

Layc

😥 Item	Items	5	
📄 Add - New layout			
Layout Propert	ies Fields Memo		
Number of header rows	5	1	
Continue import on err	ors	O Yes 🖲 No	_
	Add next record	Save record	Cancel

- a. Number of header rows: Enter the number of header rows in your Excel file that should be skipped on import.
- b. Continue import on errors: Set to *Yes*, if the import should continue when encountering a faulty record.

Fields tab

Layout Properties Fields	Memo			
- Available fields		Selected fields		
Price unit	^	Field	Header	Pos
Product		Supplier code	Supplier	1
Purchase item		Supplier brief description	Supplier	2
H- Retailprice		Item Number	Item no.	3
Retailprice information		Description/Dutch	Item description (nl)	4
Standard		Short description/Dutch	Short description (nl)	5
Lei" Supplier		Calculation unit abbreviation	Abbreviation	6
Appointments		Gross price per calculation unit	Gross/CU	7
Code Code and description	-			
Conversion table			-	201
Header	Supp	ler		
	Autom	iatic ier code		
looitip	Subbi			

a. Available fields: Fields which can be added to your layout.

b. Selected fields: Selected fields which will exported.
 > and <: Use these buttons to either add to or remove fields from the *Selected fields*.
 Next, click on *Save record* to save your layout¹³. After saving the export layout, you will return to

- the *Import* dialog.
- 5. Click on *Next* to go to the Import settings:

Import			
Summary			
Importof file Excel-import-surcharges.xls with impactreport: Full Import van Surcharges met layout Impo Item number Item supplier code Type Start date Amount per PU+PQ Sequence Lower limit	sx rt surcharges en velden:		
Settings			
Reporting level	Full		~
Is testrun	O Yes 🖲 No		
Fill conversion list	O Yes 🖲 No		
	Desuisus	Maut	Class

- a. 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. All except the product class features: Generate an import report, but exclude any checks on (ETIM) Product Features. This is the *default setting* for all imports and will result in a faster import.
 - iii. Full: Generate a full import report, including all changes in all fields. This will result in the slowest import as all data fields will be checked.
 - iv. Only warnings: Generate an import report only listing warnings. This import is generally faster than with a Full report.
- b. Only warnings: Generate an import report only listing warnings. This import is generally faster than with a Full report.
- c. Is testrun: Set to *Yes* to simulate an import; this will only generate an import report listing any potential errors and/or warnings. No data is actually imported!
- d. Fill conversion list: Set this option to *Yes*, if you need to fill any Conversion lists that you have created; see also paragraph <u>3.2.3 ARCHIVE /</u> Restore records
- e. 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):

¹³ <u>Important</u>: Import layouts are created for *one* specific Data Entity only, for instance when creating an import layout for the Product overview the layout will be limited to importing records of the entity Product only.

		Α	F		
3		Archived	ltem no. 🔽		
4	No		140043898	https:// .compano.com/Data/Enviro	on
5	No		140043899	https:// .compano.com/Data/Enviro	on
6	Yes		140043900	https:// .compano.com/Data/Enviro	on
7	Yes		140043901	https:// .compano.com/Data/Enviro	on
8	Yes		140043902	https:// .compano.com/Data/Enviro	on
9	Yes		140043903	https:// .compano.com/Data/Enviro	on
10	No		140043904	https:// .compano.com/Data/Enviro	on
11	No		140043967	https:// .compano.com/Data/Enviro	on
10					

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 then be archived.

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

Note: Not imported records will only be archived when the import report contains no errors (!)

Test Importof file Template_New_Pro with impactreport: All except the pro	ducts_Items_PIM_Basic_r2-3_L03.xlsx duct class features	
Import van Products met layout Prod Product code Manufacturer code (GLN) Brand (product)/Nederlands (Neder Series (product)/Nederlands (Neder Type (product)/Nederlands (Neder Long description (product)/Nederl Short description (product)/Nederl	luct import L04 en velden: erland) erland) ands (Nederland) lands (Nederland)	
Layout1		
	Products and Items (v2.3)	
Title		
Title Import entity	Product -	*
Title Import entity Import layout	Product	¥ ¥+∕

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

f. Conversion table

6. Click on *Next* to start the import; you will receive the following pop-up message:

Res	ults Import Artikelen	1			×
	The import has be	en started as <u>backg</u>	<u>round task</u> . You wil	I receive an email	as soon as the job is
	finished. Then the	import report will a	lso be availanble ir	n the <u>logs</u> .	
	OK				

3.2.1 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 file (ZIP, BZIP): Compressed format containing multiple *text* data files. <u>Important</u>: The compressed file can only contain data files in text-format (CSV or Unicode).

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

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

	Import done	0	U
🗐 Import			
Import			
Summary			
Importof file Multiple-unicode-dataset.zip with impactment. Full			<u>^</u>
Import van Items met layout Standaard e Supplier code Assortment code Assortment code Item Number GTIN Short description Gross price info (with new startdate) p Gross price info (with new startdate) p Number OU per OU Calculation unit code Number of PU per OU Order unit code Minimum purchase in OU Increment decrease Packing Form code Condition group code	artikel import Unicode TAB-gescheiden.txt e price/pu + pq price quantity price unit (pu) code	n velden:	
Layout1			
Title	Unicode-items.txt		
Import entity	ltem		- ×
Import layout	Text import lay-out 'Standaard artik	el import Unicode TAB-gesc	iheide 🕶 🗱 🗭 🖊
Layout2 Title	unicode-product.txt		
Import entity	Product		•
Import layout	Text import lay-out 'Standaard prov	Juct import Unicode TAB-ge:	scheit 🕶 🗶 🖶 🖊

Compano Online Software To im 1.

To import multiple data sheets or files:

1. Through the Menu go to any data entity, for instance Products:



2. Go to the Import/Export tab and click on *Import*.

Products Menu V	iew 🔪 Edit	Fund	tions Print	Impo	rt / Export
⋟	•				2.
Filter		Search	Export products	Import	Help
Navigation		A Man	ufacturer Code	Mar	ufacturer De
Product parts		•			

3. In the pop-up window, select your multiple data file, and click on Next.

🗐 Import			
Import			
Import File	Multiple-da	ta-set.zip Sel	ect
	Previous	Next	Close

4. In the next window, you will be presented with one or more data Layouts. If your import file contains multiple text data files or Excel worksheets, these are automatically detected and named Layout1, Layout2, etc.:

🗐 Import								×
Import								
Summary								
Nothing selected to import!								
Layout1								
Title	E	xcel-Items	.CSV					
Import entity	1	ltem				•	≍_	
Import layout						-	洪宁	
							_	
Layout2								
Title	E	xcel-Produ	cts.csv					
Import entity	F	Product				•	×	
Import layout						•	きょう	
	_			_		_		_
					Next	C	lose	

For each Layout:

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

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

5. Click on Next for the Import settings.

							_
Import							
Summary							
Importof file Multiple-data-set.zip with impactreport: Full Import van Products met layout Standaard Country of origin code GTIN Manufacturer code Brand Series Series Short description Description Product group code Product Class code (ETIM Dynamic) Import van Products met layout Standaard Country of origin code GTIN Manufacturer code Brand Series	d product import Uni	code TAB-gescho code TAB-gescho	eiden.txt en velden: eiden.txt en velden:			Î	
Settings							
Reporting level	Full			~			
Is testrun	🔿 Yes 🔍 N	lo					
Fill conversion list	🔾 Yes 🔘 N	lo				_	
Selected Files	Excel-Ite	ms.csv (Standa	ard product	Excel-Produc	ts.csv (Standaard produ		

- a. 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.
- b. 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!
- c. Selected files: (De-)select the files from your multiple data set which you need to import.
- 6. Click on *Next* to start the import. You will receive an e-mail with an Import report.

3.2.2 Multi-pass import

A multi-pass import allows for multiple, consecutive imports of data with different import layouts. This method can be used for:

- Import of interdependent data sources, such as:
 - o Product and Item
 - o Item and multiple Attachments
 - o Item with Current and Future Price
- Import of column-based data sources, such as Items with different Packaging data, ordered in consecutive Excel columns.
- One Periodic Task instead of multiple, interdependent periodic tasks, for example, for importing product and item data.

Important: A maximum of 5 consecutive imports can be handled this way.

<u>Note</u>: Multi-pass imports can make use of Excel or CSV data files, provided the correct type of import layout is selected.

For detailed instructions, see the *Manual Periodic Tasks*, which is available on the <u>Compano Help</u> <u>website</u>.

Multi-pass imports need to be prepared and tested:

- First, set up and test the import of the main entity; for instance Product data.
- Next, set up and test the import of the subsequent data/entity; for instance Item data.
 - Optionally, repeat this step for the remainder of the subsequent data/entity imports.
- Create the multi-pass import by linking the main and subsequent import(s).

Example

To set-up a multi-pass import, for example to import Product and related Item information:

1. First, prepare the import layout for the *main entity*, which is Product data in this example.

<u>Note</u>: Detailed information on how to add an import layout, can be found in paragraph <u>4.2</u> <u>ADD IMPORT LAYOUT</u>.

- 2. Use the import layout and your data file to test the import; see <u>PARAGRAPH 3.2 CUSTOM</u> <u>IMPORT</u> for detailed instructions.
- 3. Next, prepare the import layout for the *subsequent data/entity*, which is Item data in this example.

- Compano Online Software 4. 2.
 - 4. Use the import layout and your data file to test the import; see <u>PARAGRAPH 3.2 CUSTOM</u> <u>IMPORT</u> for detailed instructions.
 - 5. Now, go to *System > Layouts*.

Layouts Menu View	Edit	T	unctions			
🧏 🗐 . A.	0.		7			💽 🧞 . 📀 . 🖡
Contacts Products Items	DAM	Put	lications	Classificati	ion	System My details Help Logou
Navigation	\otimes		Standa	rd A	Na	Analyses
Conversion tables				m		Analyses
				m		Background tasks
Memo (0)				m		
Maria and a construction				m		Configuration
Attachments (0)				89		A
Edit	\otimes			m	ļ	Layouts
				m		Logs
Feed layout				69		
Impact analysis layout				m		User-defined fields (main)
<u> </u>				0	lur	
Free form				-	Jun	users Users

6. Select the import layout of your *main entity* and, under Edit, click on *Modify*.

Layouts Menu View E	dit Functions						
≫.	- 🔍 🔤	. 🧷 🗙	1.0.				
Filter	Search Feed layout	Modify Delete record(s)	Copy Help				
Navigation 🔅	🔺 Standard A	Name	T So	ource	Dverview	Report	Name
Conversion tables			Q Pro	oduct F	Products		Afbeeldingen
			Q Pro	oduct F	Products		Compano
Memo (0)			Q Pro	oduct F	Products		Datapool
Attachments (0)			Pro Pro	oduct F	Product search		Duco product
9			Pro Pro	oduct F	Product search		ID_OPPLE_PRD
idit 🖉			💥 Pro	oduct F	Products		Import productgroepen
Feed layout	N 🗆 🖬		💥 Pro	oduct F	Products		Import products
			🎾 Pro	oduct F	Products		happen.
Impact analysis layout			9, Pro	oduct F	Products		Large 1
Free form	8	langer bendels	R Pro	oduct F	Product elessifications		The second s
			Pro Pro	oduct F	Product search		No.
Add export layout			IS Pro	oduct F	Products		The second
Add import layout			Pro Pro	oduct F	Product search		PRD
		The particular in the	A Pro	oduct		Product sheet	Productblad
Add report template	8	in the second second	🔊 Pri	oduct		Product sheet	Productblad - Joule
Modify			Pro Pro	oduct F	Product search		with the second s
							Standaard product impor

7. In the pop-up window, on the Properties tab:

Edit - Excel import lay-	out 'Import products'	on Screen products		
Layout Properties	Fields Memo			
Number of header rows		1		
Continue import on errors	(🗓 🔾 Yes 🔍 No		
Next import layout		Excel import lay-out	'Import items' on Screen	items 🔻 🗙
	Edit previous	Edit next	Save record	Cancel
ra -		in Hodace	r rouace sear	GIT

a. Next import layout: Select the import lay-out for the subsequent data/entity import.

8. Save the record.

3.2.3 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):

1	А		F				
3	Archived	Ŧ	Item no.	Ŧ			
4	No		140043898		https://	.compano.c	om/Data/Enviror
5	No		140043899		https://	.compano.c	om/Data/Enviror
6	Yes		140043900		https://	.compano.c	om/Data/Enviror
7	Yes		140043901		https://	.compano.c	om/Data/Enviror
8	Yes		140043902		https://	.compano.c	om/Data/Enviror
9	Yes		140043903		https://	.compano.c	om/Data/Enviror
10	No		140043904		https://	.compano.c	om/Data/Enviror
11	No		140043967		https://	.compano.c	om/Data/Enviror
40						-	

3.2.3.1 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 then be archived.

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

Note: Not imported records will only be archived when the import report contains no errors (!)

🗐 Import			
Import			
Summary			
Test Importof file Template_New_Pr with impactreport: All except the pr Import van Products met layout Pro Product code Manufacturer code (GLN) Brand (product)/Nederlands (Ne Series (product)/Nederlands (Ned Long description (product)/Nederlands Short description (product)/Nederlands	oducts_Items_PIM_Basic_r2-3_L03.xlsx oduct class features duct import L04 en velden: lerland) derland) rlands (Nederland) rlands (Nederland)		
Title	Products and Items (v2.3)		
Import entity	Product		- 🗶
Import layout	Excel import lay-out 'Product ir	mport L04' on Screen p	roducts 👻 🗱
Archive not imported records	● Yes ○ No		

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

3.2.4 Conversion table

For some data fields, you can define a *conversion table*. This is useful if your import file contains non-standard values for the data field in question. For instance, for the field *Packing Form* a conversion table can, on import, convert the value **PALLET** to code **09** for *Returnable pallet*.

Note: Not all data fields have the conversion list option.

To add a conversion table:

1. At the field with the *Conversion table* option, click on the +-icon:



2. In the pop-up window:

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💕 🌮 🛄

Add - New conversion table		(×
Conversion Table		
Code	PACKING	
Description	Packing conversions	
Conversion object	Packing Form code values	
Use	Import 🗸	
Missing conversion line	NO CONVERSION	
When empty input	MISSING PACKING VALUE	
	Save record	Cancel

- a. Code: Enter a code for the Conversion table
- b. Description: Enter a description for the Conversion table
- c. Conversion object: Name of the object (auto-filled)
- d. Use: Table is used for either *imports* or *exports*.
- e. Missing conversion line: If the value is missing in the conversion table, write the value of this field into COS. If left empty, the original value from the (import) file is written.
- f. When empty input: If there is no value for this field in the (import) file, write the value of this field into COS. If left empty, no value is written.
- 3. Save the conversion table.

Once the Conversion Table has been created, you have to option to either:

- Manually fill the conversion table at *Configuration > Conversion* tables, or
- Automatically fill the conversion table, by setting the Fill conversion list option at import.

3.2.4.1 Manually fill conversion table

To manually fill the conversion table:

1. Through the Menu, go to Configuration > Conversion tables.



2. In the Conversion Table overview, select the conversion table you need to fill and click on *Lines*.

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3. In the next screen, under Edit, click on +Add to add conversion lines:



4. In the pop-up windows:

Add - New conversion value	e to conversion table PACKIN	G Packing conversions	There a
Conversion Value			
Conversion object	Packing F	orm code values	^
Value in	PALLET		
Value out	09		
Value out	09 Return	able pallet	- ×+
			-
	Add next record	Save record	Cancel

- a. Conversion object: Name of the conversion object (auto-filled)
- b. Value in: Enter the value, such as encountered in your (import) file, which is to be converted.
- c. Value out: Enter the converted value, or choose a standard value from the dropdown list.
- 5. Save the record.

<u>Note</u>: Add as many conversion lines as are need to convert all different values in your (import) file. Alternatively, you have to option to automatically add a conversion line for all different values in your (import) file; see the next paragraph.

3.2.4.2 Automatically fill conversion table

To automatically fill the conversion table:

- 1. Through the menu, go to the overview where you need to import data.
- 2. Go to the tab Import/Export and click on Import.

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- 3. In the pop-up window, select an import file and click on *Next*.
- 4. In the next dialog window, select an Import entity and Import layout, and click on Next.
- 5. In the next dialog window, set the option Fill conversion list to Yes.

Import				×
Import				
Summary				
Nothing selected to import!				
Settings				
Reporting level	Full			∽∥
Is testrun	🔾 Yes 🖲 No			
Fill conversion list	● Yes ○ No			
	Previous	Next	Close	

6. Click on Next to start the import. <u>Note</u>: No actual import will take place; only the Conversion list (table) will be filled. You will receive two e-mails, one analysis report concerning the added conversion values, and one import report stating that the import has finished without any changes:

Conversion Voluce:	
Conversion values:	_
Number of records processed	2
Number of new records	2
Number of archived records	0
Number of changed records	0
Number of unchanged records	5 0
incerely,	
omnano BV	

ne import of importrepor	-Layout-20211203-	163445 nas finis	ned without any change	S.
Sincerely,				
Compano BV				

 Conversion lines have been added to your conversion table, however you will need to *Modify* each line to enter the Out values (see also <u>3.2.4.1 MANUALLY FILL CONVERSION</u> <u>TABLE</u>):

Conversion Values	Menu View	Edit Functions Import / Exp	ort * Conversion Table: PACKING Packing
▶.	- 🤍 🛛		2.
Filter	Search	All Details Manage screen layouts	Help
Navigation	🛞 🔺 Value i	n Value	out
Conversion Tables DACK	PALLET	09	
	Box		
Edit	TRAY		
Add			
Modify			

3.2.5 Date fields

Special care should be taken when importing dates. Date fields in Compano expect a true dateformatted value; when using an Excel file as your import file, make sure that Excel cells containing date values are of the correct cell format: *Date*.

Number	Alignment	Font	Border	Fill	Protection			
Category:								
General Number Currency	4	Sample Thurse	t day, Februar	y 02, 201	2			
Accounts	ng	Type:						
Date	1	*3/14/2	012					
Percenta Fraction Scientific Text Special Custom	Thursday, February 02, 2012 Thursday, February 02, 2012 Type: *3/14/2012 * * * * * * * * * * * * * * * * * * *							
Custom		3/14 3/14/12 03/14/12 14-Mar 14-Mar-12 Locale (location): Nederlands (standaard)						
		Nederlands (standaard)						
	÷							
Date form an asteris operating	ats display da k (") respond t system. Form	te and tim o change ats withou	ie serial nun s in regiona ut an asteris	ibers as o I date an k are not	date values. Date formats th d time settings that are spec affected by operating system	at begin with ified for the n settings.		

To avoid formatting when copying/pasting data from another source, make sure to paste your data in Excel using the *Paste special* option **Paste value only**:

	Α	В	C	D		Α	_			F	G	Н	
1	No.	Name	Date	Data	1		X	Cut					
2	00001	ana varela	7/30/2016	20930	2		00	Cur (
3	00002	Patricia King	7/30/2016	5410	3			Copy	_				
1	00003	Charles Monaghan	7/30/2016	11350	4		B	Paste Options:					
5	00004	Fred Schuler	7/30/2016	17950	5			🔓 🔓 👘 👘	<u></u>				
6	00005	John Botts	7/30/2016	25390	6			Paste Special	~				
7	00006	Frank Vickers	7/30/2016	4940	7			- aste <u>opecialiti</u>	÷.				
В	00007	Martha Sargent	7/30/2016	6250	8		Ø	Smart <u>L</u> ookup					
9	00008	Matthew Martin	7/30/2016	29520	9			Insert Copied Cells					
0	00009	JP VAN BEUZEKOM	7/30/2016	31290	10			Delete					
1	00010	Christian Faust	7/30/2016	23060	11			Clear Contents					
2	00011	Ricky Kwon	7/30/2016	20060	12								
3	00012	Alfonso Gonzalez Pedregal	7/30/2016	28070	13		74	Quick Analysis					
4	00013	Simone Williams	21800	20710	14			Filt <u>e</u> r					
-		er sorth	0000	05000	15			Sort					

3.2.6 Multi-select fields

Values for multi-select data fields—such as **Publication**—where multiple options can be selected, can be imported using a comma as a separator between values:

Publication (product)	I On internet	□In catalog
	Cn webshop	ERP
	Datapool	Calculation

To import values for this data field, values should be separated with a comma:



3.2.7 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:

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-
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Edit - Text import lay-out 'Standaard	artikel import Unicode	TAB-gescheiden.txt - kopie' on Screen	items		-
Layout Properties Fields	Memo				
- Available fields		Selected fields			1
All fields		Field	Header	Pos	
Alphabetically by letter		Supplier code	Supplier	1	
≝ by category		Supplier GLN code	GLN code	2	
		Item Number	Item no.	3	
		Price Date	Price date	4	
		Gross price info (with new startdate) price/pu + pq	Gross/PU + PQ	5	
		Gross price info (with new startdate) price quantity	PQ	6	
		Gross price info (with new startdate) price unit (pr) code	PU	7	'
		Calculation unit code	CU	8	
		Order unit code	OU	9	
		Packing Form ode	Pack.	10	
- Properties					
Field position	4	Automatic		<u> </u>	
Fixed value	3-12-2021				
Date format	31-01-2010	(dd-mm-yyyy)	~		
Maintain	🔿 Yes 🖲 No)			
Continue on error	🔾 Yes 🔍 No)			
The slates	Price Date				

To add a value for a (mandatory) data field which is not present in your import file and which for all records should have the same value.

For example, if in your import file the column *Price Unit* is not present and for *all* items the value of *Price Unit* should be **1**, then you can add this as a *fixed value*:

Per view and type Properties Field	ds Memo					
Available fields		1	-Selected fields			٦
Condition Group	^		Field	Header	Pos	4
Country of origin			GLN manufacturer code	GLN Code	1	-
terrency			Product GTIN	GTIN	2	-
🖈 Deliverytime unit			Item Number	Item no.	4	
Gross price info (with new startdate)			Description	Item description	5	
End date			Gross price info (with new startdate) price / pu + pg	Gross / PU + PQ	6	
Increment quantity		>	Product code	Product	7	
Price / pu + pq		<	Condition group code	Condition	8	
Price date			Gross price info (with new	PU	0	1
Price quantity			startdate) price unit (pu) code	/	-	٩.
Price unit (pu) code						
Time unit code				x		
in Item				Set position	n to	
ter Codes			×	🛹 'zero'		
Dates and time	•					_
Field position	0	-	Automatic Uncheck	c i i i i i i i i i i i i i i i i i i i	^	ł.
Fixed value	Piece			- 2	٤	
Conversion table				- 2	\$ \$	
Maintain	O Yes @	No				
Continue on error	O Yes @	🖲 No				
					_	

1. In the Add/Edit layout dialog, on the Fields tab, add the field *Price unit (pu) code*.

- 2. Under *Selected fields*, select the field you just added and, at Properties, uncheck the checkbox *Automatic*.
- 3. Now, type the value **0** for *Field position*. Select a fixed value from the drop-down menu; in this case the value **Piece (PCE)**.
- 4. Save the layout.

When importing item information, using this layout, all items will have the value **PCE** assigned to the value for their **Price Unit**.

Important: With this method, the *position* of data in the import file can be set to Θ , as no actual data will be read from the data file.

3.2.8 Maintain values (do not overwrite)

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



3.2.9 Continue on error

By default, any imports are terminated when the import process encounters an error. Should the import continue on errors for a certain data field, then set the *Continue on error* option to *Yes*.

Edit - Taxt import law out 'Standard artikel in	port Unicode TAP	narchaidan tyt - konia' on Sereen	Product H	enriette	-
j Edit - Text Import lay-out Standaard artikel in	iport Unicode TAB-	gescheiden.txt - kopie on Screen	items		
Layout Properties Fields Memo		Calastad Falds			
Available fields		-Selected fields]
± All fields		Field	Header	Pos	1
Alphabetically by letter		Supplier code	Supplier	1	
± by category		Supplier GLN code	GLN code	2	
tim Standard fields		Item Number	Item no.	3	
		Price Date	Price date	4	
		Gross price info (with new startdate) price/pu + pq	Gross/PU + PQ	5	
	>	Gross price info (with new startdate) price quantity	PQ	6	lr
	<	Gross price info (with new startdate) price unit (pu) code	PU	7	
		Calculation unit cride	CU	8	
		Order unit code	OU	9	
		Packing Form code	Pack.	10	
Properties		/			
ield position	3	Automatic		*	
ext format	None		~		
ixed value					
Conversion table			-	* +	
faintain	• Yes No				
Continue on error	<mark>○Yes ● No</mark>				

3.2.10 Concatenate (merge) descriptions

Multiple data columns in an import file can be merged, on import, to yield a concatenated text value which will be entered into the *Description* or *Short Description* data field in COS.

<u>Note</u>: This feature is available for text-based import formats, such as CSV and UNICODE and applies to the following data fields:

- Product Description
- Product Short Description
- Item Description
- Item Short Description

```
Example CSV

Item number;Assortment code;Text 1;Text 2

2345;VX_NL;This is the first part;and this the second part of the description

2346;VX_NL;This is the first part;and this the second part of the description

2347;VX_NL;This is the first part;and this the second part of the description
```

To concatenate Texts 1 and 2 on import, the following import lay-out can be made:

wijzigen					_
Layout Properties Fields Memo Available fields		— Selected fields —————			7
		Field	Header	Pos	1
References (illustration)		Item Number	Item no.	1	1
- Texte		Supplier code	Supplier	2	
Text constant		Description/Engels	Item description (en)	3	
Translations	1	Description/Engels	Item description (en)	4	
- Translations English					
- Brief description 1/Engels	>				
- Brief description 2/Engels	Add the field the	eld 'Description'			
Commercial description/Epgels	murupie u	incs			
Description/Engels					
Short description/Engels					
Technical description/Engels					

In the layout above, the data field *Description* has been added twice, such that data from column 3 and 4 of the CSV import file will be merged.

<u>Tip</u>: By adding the data field *Description* a third time and setting a fixed value, a space character can be added between texts 1 and 2:



3.3 Update import (ExcelForImport)

The data in an ExcelForImport-file can be edited using Microsoft Excel:

1. Open the exported Excel-file:

1	\rightarrow	

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	А		в	С		DE		F		
3	Supplier	•	А	 Item no. 	*	Abbreviation	Υ.	Item description	Delivery time	~
4		Valid		HU122201BE60	st			DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-118kPa G1 1x230V P		2,00
5		Valid		HU122201BR10	st			DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-118kPa G1 3x400V+N		3,00
6		Valid		HU122202BV5N	st			DP drukverh. 1pmp v/tapw RVS m/toerreg nom.2,4m³/h-174kPa 1x230V+N		4,00
7		Valid		HU122301BE60	st			DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-177kPa G1 1x230V P		5,00
8		Valid		HU122301BR10	st			DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-177kPa G1 3x400V+N		6,00
9		Valid		HU122302BV5N	st			DP drukverh. 1pmp v/tapw RVS m/toerreg nom.2,4m³/h-261kPa 1x230V+N		7,00
10		Valid		HU122401BE60	st			DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-236kPa G1 1x230V P		8,00
11		Valid		HU122401BR10	st			DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-236kPa G1 3x400V+N		9,00
12										

- 2. When editing data in any cell, please note:
 - a. Black font: Data field is editable and can also be empty
 - b. Grey font The data cell is protected against editing. You *cannot* edit greyed-out data fields
 - c. Red font: This data field is required; the cell cannot be empty (!)
- 3. After editing, save the Excel-file.

Important: The new Excel update import can *no longer* be used to add new records.

Updated data from a saved Excel-file¹⁴, named **COS-ExcelForImport-Items-[DATE]-**[**TIME].xlsx**, can be imported back into the Compano application:

- 1. Through the Menu go to the data that you need to import, for instance Product data.
- 2. Go to the Import/Export tab and click on Import.



3. In the pop-up window, select the Excel-file for import and click on Next.



4. On the next screen:

¹⁴ <u>Important</u>: When renaming the *ExcelForImport* file, always make sure the filename starts with: **COS-ExcelForImport**.

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~	DP ODKVPDL ZDDD					_
ž	🚍 Import					×
	Import					
ż	Summary					- 11
.EI E.	Importof file ExcelForImport-Products-20210308- With impactreport: Full Import van Products met layout en velden: • Code • GTIN • Description • Brand • Series • Type	150746.xlsx				
ž	Settings					- 11
	Reporting level	Full		~		- 11
	Is testrun	O Yes O No				- 11
ž						
			Previous	Next	Close	

- a. Summary: Check which data fields will be imported.
- b. Reporting level: Select the reporting level for the import report:
 - i. None: Do <u>not</u> generate an import report. This will result in the fastest import.
 - ii. Full: Generate a full import report, including all changes in all fields. This will result in the slowest import as all fields will be checked.
 - iii. Only warnings: Generate an import report only listing warnings. This import is generally faster than with a Full report.
- c. 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!
- 5. Click on *Next* to start the import and check your browser or default Download folder for the Import report¹⁵:



3.3.1 Updating classification data

Updating of product classification data can be done through dedicated export layouts for product and model classes. These layouts are available on the Product and Product Classification overviews and allow for:

- Updating data for one or multiple product classes of a set of products
- Drop-down selection of alphanumeric ETIM-feature values in the exported Excel-file

<u>Note</u>: Only (ETIM) classification feature values can be updated this way. (ETIM) classes need to be assigned to products by Editing or Manipulation.

More information on updating classification data can be found in the *Manual Classification* (L03).

¹⁵ <u>Note</u>: The import report is also available under *Menu > System > Logs*.

3.3.2 Updating archived records

The update import can also be used to archive or unarchive records.

The following applies to all archived records:

<i>Archived</i> status before import	Update <i>Archived</i> status to	Value updated on import?	Archived status changed to
Yes (archived)	No update	No	-
No (not archived)	No update	Yes	-
No (not archived)	Yes	Yes	Yes
Yes (archived)	No	Yes	No

The Archived status can be updated by adding the Archived data field to screen or export layout:



3.4 Non-standard imports

3.4.1 Attachments

For the import of Attachments a premade import template is available at the <u>Compano Help</u> <u>website</u>: *Template Import Attachments (CSV)*.

<u>Note</u>: Attachments can be imported using *any* Import button. Also, this template will be imported without the need for an import layout.

3.4.2 Conditions

Purchasing conditions can be imported using either an ICC- or XML-file. Conditions can be imported using *any* Import button.

For ICC-files, COS will check whether there is a purchase contract for the Supplier, that is still pending. If there is no pending contract, a new purchase contract will be created for that Supplier.

For XML-files the *Purchase contract number* must be present as a field in the XML-file.

3.5 Impact analysis

All imports will generate a Log entry and an Import report.

3.5.1 Import log entry

A successful import will generate an import log record stating that the import is *Finished*.

Time created	Name	Description	Туре	DetailLink
		Basis Product en Artikelbestand (Standaard product import in Excel) => Finished		https://pima03t.compano.
09-11-2021 12:41		Finished on 11/9/2021 12:41:26 PM in 46,9ms	Import	Layout-20211109- 124126.xlsx

If the import terminated due to errors, you would see this listed in the logs as: cancelled.

Time created	Name	Description	Туре	DetailLink
		Basis Product en Artikelbestand (Standaard product import in Excel) => cancelled	Terrard	https://pima03t.compano
09-11-2021 12:41		Finished on 11/9/2021 12:41:26 PM in 46,9ms	Import	124126.xlsx

3.5.2 Import report

This report will be sent via e-mail to the admin user of the Compano application.

Dear Mr	
Your file has been processed.	You can download the impact analysis report <u>here</u> . The report is compressed and will be visible if you double-click
Manufacturers:	
Number of records processed	1
Number of new records	1
Number of archived records	0
Number of unarchived records	0
Number of changed records	0
Number of unchanged records	0
Items:	
Number of records processed	12
Number of new records	12

Other users can download the import report at System > Logs.

Log	s Menu View Edit Functions	Import / Export			
2	•] 🚺 🛛	2.		
Filte	er Search A	Il Details Manage screen layouts	Help		
^	X ParentRecordDescriTime created	Name	Description	Туре	DetailLink
	07-09-2021 15:04		=> Finished Finished on 07/09/2021 15:04:23 in 46,9ms	Import	https://compano Layout-20210907- 150423.xlsx
	07-09-2021 15:03		Export of 5 Products	Export	https:// 1.compano ExcelForImport-Products-

The *import report* consists of two or more worksheets; a *Summary* and one or more worksheets listing *Changed Records, Errors* and/or *Warnings*.

	Α	В	С		D	E	F	G	
1		User	MDM Beheerder						
2		File	ExcelForImport-Products-20210308-	150746.xlsx					
3		Action							
4		Date	3/8/2021 3:12 PM						
5									
6				C.	mmary				
7		Introduc	tion	51					
8									
9		This repo	ort describes the impact of the above r	nentioned acti	on. This re	port contain	s different p	parts:	
10									
11		1. Below	the totals of the changes per subject.						
12		2. Overv	iew of the 10 changed products						
13									
14			Totals						
15					Offered	Processed	Modified	Total mutations	
16			Products		10	10	10	10	
17			Series				10		
10									

									-
	A	В	С	D		E	F	G	н
1	Manufacturer Description	Code	GTIN	 Product description 	<u> </u>	Brand 💌	Туре 👻	Product class code	Series
2	Duijvelaar pompen	HU212201C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.2,4m³/h-174kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
3	Duijvelaar pompen	HU212201C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.2,4m³/h-174kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
4	Duijvelaar pompen	HU212301C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.2,4m³/h-261kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
5	Duijvelaar pompen	HU212301C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.2,4m³/h-261kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
6	Duijvelaar pompen	HU212401C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg	Changed records	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
7	Duijvelaar pompen	HU212401C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg	changed records	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
8	Duijvelaar pompen	HU212501C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.2,4m³/h-435kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
9	Duijvelaar pompen	HU212501C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.2,4m³/h-435kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
10	Duijvelaar pompen	HU212601C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.2,4m³/h-522kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
11	Duijvelaar pompen	HU212601C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.2,4m³/h-522kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
12	Duijvelaar pompen	HU214201D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.4,8m³/h-210kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
13	Duijvelaar pompen	HU214201D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.4,8m³/h-210kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
14	Duijvelaar pompen	HU214301D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.4,8m³/h-315kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
15	Duijvelaar pompen	HU214301D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.4,8m³/h-315kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
16	Duijvelaar pompen	HU214401D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.4,8m³/h-420kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
17	Duijvelaar pompen	HU214401D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.4,8m³/h-420kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
18	Duijvelaar pompen	HU216201D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.7,2m³/h-660kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
19	Duijvelaar pompen	HU216201D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.7,2m³/h-660kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
20	Duijvelaar pompen	HU216301D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.7,2m³/h-330kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
21	Duijvelaar pompen	HU216301D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg non	n.7,2m³/h-330kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube

3.5.2.1 Testrun

Setting the *Is testrun* option to Yes on any import, will result in a simulated import; no changes are saved to the database, however you will receive an import analysis report listing any errors or warnings:

	А	В	С	D	E	F	G	н	
1		User	to the second						
2		File	COS-ExcelForImport-Products-20220815-150917.xlsx						
3		Action	EC000025						
4		Action	EC002557						
5		Action	EC002892						
6		Action	EC001744						
7		Date	18/08/2022 15:22						
8			THIS WAS A TESTRUN; no actual data was imported						
9									
10		Introduct	ion						
11									
12		This repor	t describes the impact of the above mentioned action. This	report cont	ains differen	t parts:			
13									
14		1. Below t	he totals of the changes per subject.						
15		2. Overvie	w of the 1 errors						
16		3. Overvie	w of the 3 changed products						
17									
18			Totals						
19				Offered	Processed	Unchanged	Modified	Total mutations	
20			Products	10	10	7	3		3
21									

3.5.2.2 No changes on import

When the import has finished without changing any data in COS, you will receive the following email message:

i ne import of im	portreport-Layout-20211203-163445 has finished without a	ny cnanges.
Sincerely,		
Compano BV		

3.6 Import anywhere

The import function automatically determines for which Entity the data is intended. This means that *any Import button* can be used to import any kind of data. If the system cannot determine the likely entity, the Import dialog will offer to select an Entity and Import lay-out for a correct import of the data file.

<u>Note</u>: Depending upon the overview you selected for importing data, changes might not be **immediately apparent. Either navigate to the 'correct' overview, or refresh the browser window** (F5).

3.7 Country-specific character sets

When importing text files, the character encoding of the provided import file is used. The encoding is determined via a *Byte order mark*: <u>https://en.wikipedia.org/wiki/Byte_order_mark</u>. If this Byte order mark is missing in the import file, the default encoding will be used. This default encoding can be set at *Company Settings*.

To change the fallback of encoding:

1. Through the Menu go to My Details > Company settings.



2. In the pop-up window, go to the tab International.

> 💭									
	DP drukvarb	10mp v/taow PV	S m/toerres som 3 4m3/b-17/				2082.00 0.00%	£ 2082 00 1 1	Duijuslans Dasaas
u 🗉	Dr drukvern.	Thub Areby KA	5 m/toerreg non.274m-71-174	4KF8 1X250V TN			. 2005.00 0.0076	e 2003.00	
Project administratio	n Quotation	Purchasing	Financial administration	Artikelbeheer	Contact management	System settings	Number patern	Default Reports layout	International
<u>u</u>									
International									
Country		I Netherlan	ds						
Country Language code		Netherlan Inl Dutch	ds						
International Country Language code Fallback translations		Netherlan Netherlan Inl Dutch Yes C	lds						
International Country Language code Fallback translations Encoding fallback for imp	ort	Netherlar Netherlar Inl Dutch Yes C Default	ds No						
International Country Language code Fallback translations Encoding fallback for imp	ort	 Netherlan nl Dutch Yes C Default Default 	lds No v						
International Country Language code Fallback translations Encoding fallback for imp	ort	 Netherlar nl Dutch Yes C Default Default Ansi-Wir BMPC-I 	ds No vdows-1252 JOS-437						
International Country Language code Pallback translations Encoding fallback for imp	iort	 Netherlar Inl Dutch Yes C Default Default Ansi-Wir IBMPC-I 	ds No vdows-1252 JOS-437						

- 3. Set the encoding to a different character set.
- 4. Save the Company settings.

The character encoding can thus be adjusted for companies in Germany (**1252**) or in the south of Europe (**437**). The *Default* encoding setting is: **UTF - 8**.

4 Layout management

Layouts for import and export can be managed at *System > Layouts*. While the Export dialog allows for on-the-fly generation of export layouts, these are limited to exports in Excel. However, the management option under the System menu allows for definition of *export layouts in different formats*.

To manage a layout:

Compano Online Software

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



2. Next, under Edit, select either Add Export or Add Import layout:



Edit (*) Feed layout Add OData layout Free form Add export layout Add import layout Add report template

Important: A detailed explanation on creating export and/or import layouts is available in the *Basic Manual Compano Online Software L03*.

4.1 Add export layout

To add an export layout:

1. Click on Add export layout.

Layouts Menu View	Edit	Func	tions			
▶.	•			1		?.
Filter		Search	All	Details	Manage screen layouts	Help
Navigation	۲	^ St	tandard	A	Name	
rda		<u>۲</u>				
Lait	\odot					
Feed layout				m		
Add OData layout				89		
				EN .		
Free form				111		
Add export layout			~	89		
	_		~			
Add import layout			~	51		
Add report template			_	_		

2. In the pop-up window, select the *Entity*¹⁶ for which you want to define the layout, for instance Item:

¹⁶ An Entity is a data object in COS, for instance Product, Item, Assortment, Attachment, Price, etc.

ttem	Items	artikei-impor	t-CSV	
Add export layout				×
Add export layout				
Export entity	Item		- *	
	Accessories item			
	Choice item			
	Item			
	Item group			
	Item surveillance			
	Item variant template			
	Point of Sale per item			
	✓ There are 7 Entit	ties found		
		Add export layout	Close	

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

Layout tab:

📰 item items			
Layout Properties Fields Memo			
Туре	Text export	~	
Name	Item export in U	nicode	
Application	◯ 🛱 Within the ● [©] For me	company 이쵸 For	all members
	Add next record	Save record	Cancel

- a. Type: Choose the Export type:
 - i. Excel export: Exports data in Microsoft XSLX-format.
 - ii. Text export: Exports data in a Text format, such as **CSV** or **Unicode**.
- b. Name: Type a name for the Export 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*)

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Properties tab:

Wijzigen			
Layout Properties Fields	Memo		
insert header	● Yes ○ No		
Format	Character separated		~
Separation character	;		
Decimal separator character	-		
Decimal group character	,		
Date separator character	/		
Fime separator character	:		
Fext enclosure character			
	Add next record	Save record	Cancel

- a. Insert header: Set to Yes if the export should contain a header line with data field labels
- b. Format: Selected either a Fixed width or Character separated format
- c. Separation character: Set the data field separation character. For **CSV** this is a semi-colon ; and for **Unicode** use the code: **TAB**.
- d. Decimal separator character: Set the decimal separator character. The default setting for European CSV is a *comma*.
- e. Decimal group character: Set the date separator character. The default setting for European CSV is a *point*.
- f. Date separator character: Set the date separator character. The default setting for European CSV is a *hyphen*.
- g. Time separator character: Set the time separator character. The default setting for European CSV is *colon*.
- h. Text enclosure character: Set the decimal separator character. The default setting for European CSV are *double quotes*.

Fields tab:



- a. Available fields: Add data fields to be exported from the list of available fields
- b. Selected fields: Remove unwanted fields from the list of available fields. <u>Note</u>: The position number (**Pos**) indicates at 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.

4.1.1 Add custom text-based export layout

To create a custom text-based (CSV, Unicode) export layout:

1. Through the Menu go to System > Layouts.

Layouts Menu View	Edit	Functions		
🥂 🤜 , 🗞 ,	0.	1	₿.	💽. 🚸 🤹 (🤅
Contacts Products Items	DAM	Publications	ETIM	System ArtSelect My details He
Navigation	۲	▲ Standa	rd A	Analyses
Conversion tables			LTI .	- 23
			8	Background tasks
Memo (0/0)			3	
Attachments (0/0)			64	Configuration
			m	Environments
Edit	\otimes		3	
Feed Lavout			m	A Layouts
			EN .	
Impact analysis layout			EN .	Logs
C Free form			03	User def fields (main)
			8	MN
Add Export Layout			0	User groups
Add			3	1 Users
			3	

2. Next, under Edit, click on Add export layout:



3. In the pop-up window:

Add Export Layout		
Export entity	Pro	- 🗙
	ETIM Product class feature	
	ETIM Productmodel	
	Optional product	
	Product	
	Product accessories	
	Product component	
	Product standard	
	Productgroup	
	✓ There are 8 Entities found	

- a. Export entity: Select the Entity for which the export layout needs to be created. Type the first few letters to searching for the correct entity. <u>Note</u>: If the language of your COS database is set to English, you will need to search for English entity names; for instance, **Item** instead of **Artikel**.
- 4. Click on *Add Export Layout* to go to the next dialog window:

Wijzigen				
Layout Properties Field	Memo			
Туре	Text export 🗸 🗸			
Name	Export of products in Unicode			
Application	○ ♥ Within the company ④ S For me	0.5	For all members	
		Add next record	Save record	Cancel

Layout tab

- a. Type: Select the Text export type.
- b. Name: Type a name for the layout.
- c. Application: Decide whether the layout is for your own use only or for all users within your company which have access to your application.

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Properties tab

	S. 1. 1. 17 17 17			1. J.
📰 Wijzigen				
Layout Properties Fields N	1emo			
Insert header	● Yes ○ No			
Format	Character separated	1	~	
Separation character	TAB			
Decimal separator character]		
Decimal group character	,]		
Date separator character	1]		
Time separator character	1]		
Text enclosure character]		
		Add next record	Save record	Cancel

- a. Insert header: Set to *Yes* to add a header line containing data field labels to your export.
- b. Format: Select *Character-separated* for CSV or Unicode files, or *Fixed Width* for a fixed-width format.
- c. Separation character: Use a semi-colon for CSV or the code TAB for Unicode.
- d. Optionally, set the Decimal, Date, Time, and Text enclosure characters.

Fields tab

a. Select data fields from the Available fields and add them to the Selected fields.

Layout Properties Fields Memo				alacted fields		
Available fields			-31	elected fields		
All fields				Field	Header	Pos
Alphabetically by letter			_	x	X	1
by category				Manufacturer description	Manufacturer Description	2
			۶.	Code	Code	3
				GTIN	GTIN	4
		>		Availability	А	5
		<		Image	F	6
		_		Drawing	т	7
				Description	Product description	8
				Brand	Brand	9
				Туре	Туре	10
Properties						
Header	Code				Automatic	
Text format	None				~	
Conversion table					- 💥	÷
Tooltip	The manu a GTIN (G	facturer lobal Tra	's pi ade	roduct code and the code that th Item Number).	e manufacturer uses for a prod	luct, not
				Add next record	Save record	Cancel

b. Properties (optional): Optionally, edit any properties for the data field, such as Header label, Text format, etc.

Note: Properties may differ depending upon the type of data field.

c. Conversion table (optional): Optionally, add a conversion table to convert the values of a field. See also paragraph <u>3.2.2 MULTI-PASS</u> import

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A multi-pass import allows for multiple, consecutive imports of data with different import layouts. This method can be used for:

- Import of interdependent data sources, such as:
 - o Product and Item
 - o Item and multiple Attachments
 - o Item with Current and Future Price
- Import of column-based data sources, such as Items with different Packaging data, ordered in consecutive Excel columns.

One Periodic Task instead of multiple, interdependent periodic tasks, for example, for importing product and item data.

Important: A maximum of 5 consecutive imports can be handled this way.

Note: Multi-pass imports can *make use* of Excel or CSV data files, provided the correct type of import layout is selected.

<u>For</u> detailed instructions, see the Manual Periodic Tasks, which is available on the Compano Help website.

Multi-pass imports need to be prepared and tested:

First, set up and test the import of the main entity; for instance Product data. Next, set up and test the import of the subsequent data/entity; for instance Item data. Optionally, repeat this step for the remainder of the subsequent data/entity imports. Create the multi-pass import by linking the main and subsequent import(s).

Example

To set-up a multi-pass import, for example to import Product and related Item information:

First, prepare the import layout for the main entity, which is Product data in this example.

Note: Detailed information on how *to add* an import layout, can be found in paragraph <u>4.2 ADD</u> <u>IMPORT LAYOUT</u>.

Use the import layout and your data file to test the import; see <u>PARAGRAPH 3.2 CUSTOM IMPORT</u> for detailed instructions.

Next, prepare the import layout for the *subsequent data/entity*, which is Item data in this example. Use the import layout and your data file to test the import; see <u>PARAGRAPH 3.2 CUSTOM IMPORT</u> for detailed instructions.

Now, go to System > Layouts:

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ayouts Menu View	Edit	$\langle $	Functions						
🚨 🤜 . 🗞 .	0.		7			- 69	l 🥹 .	0.	
Contacts Products Items	DAM	Pul	olications (Classifica	tion	System	My details	Help	Logou
lavigation	\otimes		Standar	A b	Na		nalvses		
Conversion tables				8		WU			
Conversion tables				89		В В	ackground tas	sks	
Memo (0)						-00 (***			
A and the second second				m		0	onfiguration		
Attachments (0)				m		A=	weute		
dit	\otimes						iyouts		
154				H		L	ogs		
Feed layout				m					
Impact analysis layout						V 📎	ser-defined fi	elds (main)
				-		1			-
Free form				2	Jun	U:	sers		

Select the import layout of your main *entity* and, under Edit, click on *Modify*.

Layouts Menu View E	Edit Functions			
⋟.	- 🔍 🛤 . 🧷 🗙	. 0.		
Filter	Search Feed layout Modify Delete rec	ord(s) Copy Help		
Navigation (2	Standard A Name	I Source	Overview Report	Name
Conversion tables		Esg Product	Products	Albeeldingen
		HQ Product	Products	Compano
Memo (0)	m	R Product	Products	Datapool
Attachments (0)		Product	Product search	Duco product
2	m	Product	Product search	ID_OPPLE_PRD
lit 🤅	The second seco	Product	Products	Import productgroepen
Feed layout	× 🗆 🖬	Product	Products	Import products
		Product	Products	har parts
Impact analysis layout		Product	Products	happen.
Free form	S Inserting	Product	Product elessifications	The second se
	E B	Product	Product search	Tornall.
Add export layout		S Product	Products	The second
Add import layout		Product	Product search	PRD
Add report tomplate	to perform the second	A Product	Product sheet	Productblad
Aud report template		A Product	Product sheet	Productblad - Joule
Modify	- m	Product	Product search	sets.
A	<u> </u>			Standaard product impo

• In the pop-up window, on the Properties tab:



- ٠
- Next import layout: Select the import lay-out for the subsequent data/entity import.
- Save the record.
 - d. Archive / Restore records

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

	А	F		
3	Archived 💌	ltem no. 🔽		
4	No	140043898	https://	.compano.com/Data/Enviror
5	No	140043899	https://	.compano.com/Data/Enviror
6	Yes	140043900	https://	.compano.com/Data/Enviror
7	Yes	140043901	https://	.compano.com/Data/Environ
8	Yes	140043902	https://	.compano.com/Data/Environ
9	Yes	140043903	https://	.compano.com/Data/Environ
10	No	140043904	https://	.compano.com/Data/Enviror
11	No	140043967	https://	.compano.com/Data/Enviror
40				

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 then be archived.

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

Note: Not imported records will only be archived when the import report contains no errors (!)

Summary					
Test Importof file Template_New_Produ with impactreport: All except the produ	cts_Items_PIM_Basic_r ct class features	2-3_L03.xlsx			
Import van Products met layout Produc Product code Manufacturer code (GLN) Brand (product)/Nederlands (Nederla Series (product)/Nederlands (Nederla Type (product)/Nederlands (Nederlan Long description (product)/Nederlan Short description (product)/Nederlar	t import L04 en velden: and) ad) ds (Nederland) ids (Nederland)				
Layout1	Products an	d Items (v2 2)			
litie	Froducts an	d Items (v2.5)			2
Import entity	Product			*	\$ • • • •
Import layout	Excel impor	lay-out 'Product i	mport L04' on Screen	products 🔻 🗸	

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

- f. Conversion.
- 5. Click on *Save record* to save the layout.

4.2 Add import layout

To add an import layout:

1. Click on + Import layout.



2. In the pop-up window, select the *Entity*¹⁷ for which you want to define the layout, for instance Item:

IN INCHI	ricins		artikeini
📄 Import layout			
Import layout			
#ImportEntity	Item		• *
-	Choice item		
-	Item		
-	Item group		
-	Item surveillance		
-	Point of Sale per i	tem	
	Selection item line	2	
		 There are 6 Entities found 	
		Add import layout	Close
(<u> </u>			

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

Layout tab:

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¹⁷ An Entity is a data object in COS, for instance Product, Item, Assortment, Attachment, Price, etc.

item Items					
📄 Add - New layout					
Layout Properties Fields Memo					
Туре	Excel import	~			l
Name	Item import from Excel				l
Application	O margareta				
Application	Ser me	O and For al	members		
					l
	Add next record Sa	ave record	Cancel		
			Suncer	_	1

- a. Type: Choose the Import type:
 - i. Excel import: Imports data from Microsoft **XLS**-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*). <u>Note</u>: this last option is only available for applications with multiple environments.

Properties tab:

TNR ICCTI	rema			And cordin
📄 Add - New layout				
Layout Properties	Fields Memo			
Number of header rows	1			
Continue import on errors	🚺 🔾 Yes	● No		
Next import layout	Excel in	port lay-out 'Import prod	lucts' on Screen product	s 🗙 🚽
				-
				-
				-
				L
		Add next record	Save record	Cancel
Har User	USEIS			uebruikerŝ

- a. Number of header rows: Set the number of *header rows* contained in your import file. <u>Note</u>: These rows will be skipped on import.
- b. Continue on errors: Set to *Yes* if the import should continue on errors in your data file. Errors will *not* be imported. <u>Note</u>: In combination with a test run import, this option will report *all* errors in a data file.
- c. Next import layout (optional): When opting for a multi-pass import, select the next import layout to be used with the import file. For more information, please see paragraph <u>3.2.2 MULTI-PASS IMPORT</u>.

Fields tab:

Item Item sea	cn	asora:
Layout Properties Fields Memo		_
Available fields	Selected fields Field Field Item number It Supplier code Key data fields for entity 'Item'	eader Pos em no. 1 upplier 2
Header	Item no.	ld
Field position Fixed value	1 Automatic	
Conversion table		- ** -
	Add next record Save record	Cancel

a. Available fields: This column lists all data fields which are available in your

application. Use the button to add data fields for import to the *Selected fields* column.

b. Selected fields: This column lists all data fields which will be used for import.

Field position (**Pos**): This number indicates from which Excel data column the value of the field will be imported. Position numbers can be changed under Properties, by removing the check mark next to Automatic and typing a new number. <u>Note</u>: Position 1 corresponds to column A, position 2 to column B, and so on.

Key data fields: When adding a new import layout, the key data fields for the selected entity will already be present in the *Selected fields* column. As these fields are *mandatory*, they should not be removed! Also see <u>APPENDIX A: KEY DATA</u> <u>FIELDS PER ENTITY</u>.

- c. Properties: Optionally, set import options per selected data field.
- 5. Click on *Save record* to save the layout.

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4.2.1 Adding translatable fields (multi-language license only)

In a multilingual environment, (translatable) text fields in the field selector can *only* be added from the *Product >Translations* category¹⁸. From this category, you can select any of the languages available in your application and select the language-specific text fields that you need for your import layout:

	Layout Properties Fields Memo
-	Available fields
	 Product Codes Country specific fields Dates and time Names and descriptions Attachment description per product Classification information Numbers Other
	'∎'' Other
	Translations
	Translations Dutch (Netherlands)
	Brand (product)/Dutch (Netherlands)
	Commercial description (product)/Dutch
	Description (product)/Dutch (Netherland
	Series (product)/Dutch (Netherlands)
	Short description (product)/Dutch (Neth
	Size description/Dutch (Netherlands)
	Technical description (product)/Dutch (N

4.3 Finding layouts

The Layouts overview lists all kinds of layouts, such as import, export, feed, import analysis, screen, report, etc. Use the Filter to easily single out a list of of only one type(s) of layout.

For instance, to view all available *Excel export layouts*, set the Filter to:

¹⁸ <u>Note</u>: In the field selector, these fields have been removed from the category *Names and Descriptions*.

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Layout			-		
Application	= value	~	Within the company	SFor me	
Туре	= value	~	Sreport	□ ⊠ Impactanalysis □ ♪OData OData	
			Excel export	Filter setting	
			Image: Second Seco	Free form Free form Report template	
Source	= value	~			
Name	start	~			
Last Used	= value	~			
Languages	= value	~	□en-GB English (United Kingdom) □nl Dutch □de German	☐fr French ☐en English	

4.4 Modifying layouts

Existing layouts can be modified, using the *Modify* function:

- Select the layout to be modified in the Layout overview
 Under Edit, click on *Modify:*

Layouts Menu View	Edit	Func	tions					
≫.	•	Q		(1)		5		
Filter		Search	All	Details	Manage screen layouts	Ticket		
Navigation	\otimes	≜ S	tandard	A	Name	т	Source	Overview
						26	Item	Items
				8	Admin	56	Item	Item search
Attachments (0/0)		× .		8	Admin	<u>50</u>	Item	Items
				-		9	#ProductCertificate	ProductCertificates
Edit	۲					8	Product	Product classifications
Add export layout				-		58	Product	Product search
Import layout				F		25	Assortments	Assortments
		-		*		56	Item	Item search
/ Modify	1			-		9	Certificate	Certificates
W			1	8	Admin	0	Product accessories	Accessory products

3. Adapt the layout and click on *Save record*.

Appendix A: Key data fields per Entity 5

This appendix list the key data fields for the most commonly used Entities, as well as any standard Excel import templates and corresponding import layouts which were premade by Compano.

Note: Standard Excel import templates are available on the Compano Help website.

When creating layouts, any mandatory key data field are marked in red font in the field selector. Also, these field are added to the Selected fields by default:



When migrating from a previous version of Compano software, any existing import layouts might need adjusting, as mandatory key data fields could be missing.

5.1 Product

Mandatory fields	Field selector category	Remark
Manufacturer code (gln)	Manufacturer	-
Code	Product > Codes	-

For the import of (new) Products a premade import template is available: *Template for importing* new products and items (XLSX).

This Excel file can be imported using the standard import layout:

Standaard product import in Excel - L03

For more information, see the Manual New Products, Items and Price Updates, available from the Compano Help website.

5.2 **Item**

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Mandatory fields	Field selector category	Remark
Supplier code	Supplier	-
Item number	Item > Codes	-

For the import of (new) Items a premade import template is available: *Template for importing new products and items (XLSX).*

This Excel file can be imported using the standard import layout:

• Standaard artikel import in Excel - L03

For more information, see the *Manual New Products, Items and Price Updates*, available from the <u>Compano Help website</u>.

5.3 Price (update) information

Mandatory fields	Field selector category	Remark
Item supplier code	Item	-
Item number	Item	-
Sequence	Price information > Numbers	Value can be empty
Price date	Price information > Dates and	-
	time	

For the import of Accessories a premade import template is available at the <u>Compano Help</u> <u>website</u>: *Template Price Updates (XLSX)*.

This Excel file can be imported using the standard import layout:

• Standaard prijsupdates in Excel - L03

For more information, see the *Manual New Products, Items and Price Updates*, available from the <u>Compano Help website</u>.

5.4 Certificate

Mandatory fields	Field selector category	Remark
Туре	Certificate > Other	Value cannot be empty
Number	Certificate > Codes	Value can be empty
Sub number	Certificate > Codes	Value can be empty
Issuer	Certificate > Names and	Value cannot be empty
	descriptions	
Start date	Certificates > Dates and time	In the Excel import file, the cells
		containing the <i>Start dates</i> need
		to be of cell type <i>Date</i> .

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5.5 Product –Product relations

Mandatory fields	Field selector category	Remark
Manufacturer 1 (parent)	Product relations > References	
Manufacturer 2 (child)	Product relations > References	
Product code 1 (parent)	Product relations > Codes	
Product code 2 (child)	Product relations > Codes	
Sequence number	Product relations > Numbers	
Туре	Product relations > Other	
Valid from	Product relations > Time of day	

For the import of Accessories a premade import template with two matching import layouts is available at the <u>Compano Help website</u>:

Standaard product relaties import - L04

Note: This template is not suitable for importing Optional products or Optional Items.

5.6 Item –Item relations

Mandatory fields	Field selector category	Remark
Supplier 1 (parent)	Item relations > References	
Supplier 2 (child)	Item relations > References	
Item code 1 (parent)	Item relations > Codes	
Item code 2 (child)	Item relations > Codes	
Sequence number	Item relations > Numbers	
Туре	Item relations > Other	
Valid from	Item relations > Time of day	

For the import of Accessories a premade import template with two matching import layouts is available at the <u>Compano Help website</u>:

Standaard item relaties import - L04

Note: This template is not suitable for importing Optional products or Optional Items.

5.7 Surcharges

Mandatory fields	Field selector category	Remark
Item supplier code	Item	-
Item item number	Item	-
Start date	Surcharge > Dates and time	-
Туре	Surcharge > Other	Not mandatory, but strongly
		recommended
Optional fields	Field selector category	Remark
Lower limit*		Need to be added to import
		layout as a '0' field*
Increment unit code*		Need to be added to import
		layout as a '0' field*

*) These fields need not be present in your import file, however, they *do* need to be present in your import layout (possibly as an '0' field).

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5.8 User-defined fields

Mandatory fields	Field selector category	Remark
Name	Standard fields	-
Туре	Standard fields	-
Entity	User-defined fields > Names and	-
	descriptions	

6 Appendix B: ETIM classification version import

By default, Compano PIM license offers classification of products using the *ETIM Dynamic standard*. Should you so desire, multi-classification of products—using different version of the ETIM standard—is available as an add-on license. Please contact <u>sales@compano.com</u> for more information and prices.



To be able to classify in a *different version ETIM*, you will need to perform a one-off import of the classification system:

- 1. Go to https://www.etim-international.com/downloads/
- 2. Choose the version you need in the left-hand menu, for example ETIM7
- 3. Download the corresponding *IXF-file*¹⁹, or example ETIM-7.0-ELECTRICALHVACS-IXF-METRIC-EIDENL-NO-CHANGE-CODES-2017-09-01.zip (ETIM International DE/NL)



¹⁹ From the ETIM International versions list, choose the METRIC system that corresponds best with your needs. In case need to fill-out both metric and imperial values, you will need to combine an ETIM-metric IXF-file with user-defined fields and a proper set up of mapping UDF's to features. For more information, please check your Compano consultant.

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4. In the Compano PIM environment, go to Menu > ETIM > Product Classes:



5. Go to the *Import/Export* tab and click on *ETIM classification import*.

Product Classes	Menu Vie	w	Edit Functions	Import / E	xport				
	- Q Search	Imp	ort Manage layouts	Excel Import	Excel Update	▼ ETIM	classification import	Help	•
Navigation	۲	^	Classification syste	em Code	Name	(zh-CN)	Name (cs-C	Z)	Na
Productmodels (2/	(1)	•	ETIM Dynamic	<u>EC000</u>	0001				
			ETIM 7	5000	001				

6. In the pop-up window:

ETIM classification import			
ETIM classification import			
Classification file	ET114-7.	0-ELECTRICALHVAC	ielect
EDvnamic	ETIM7	ETIM8	Close

- a. Select: Select the ETIM IXF that you downloaded.
- b. ETIM-##: Click on the corresponding ETIM-button to import the IXF-file. In this example: **ETIM7**.


7 Appendix C: AutoImport/AutoCheck

For industry standard data files, a different import method can be used: *AutoImport/Autocheck*. In combination with FTPS:

Important: The data must be offered in one of the following industry formats: *PAB, INSBOU, DICO/SALES, BMEcat* or *DQR (8 en 9).*

To setup AutoImport/AutoCheck:

- 1. Upload your data file to the Compano FTPS server and place it in either the *AutoCheck* or *AutoImport* folder:
 - i. AutoCheck: Data file is compared with current dataset on Artikelbeheer.nl; a report is drawn up and sent. <u>Note</u>: After approval, the file must ALWAYS be manually placed in the *AutoImport* folder for actual processing, unless the parameters.xml of the data file indicate the following:

<PublishMethod>AutoAcceptStagingData</PublishMethod>

This is only possible for the PAB, INSBOU and DICO/SALES data file types. A parameters.xml can be added 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>
```

- ii. AutoImport: Data file is read and processed. A report is sent to the e-mail address indicated in the parameters.xml of the data file.
- 2. The data processing via FTPS is automated as a nightly job.