

Universal Import/Export Compano Online Software

Version L6.1

| File | Universal_Import_Export.docx |
|-------------|------------------------------|
| COS-version | L06 |
| Date | 10-12-2024 |

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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

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

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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.

Note: For detailed information on Industry standard exports, please see the manual COS Basics.

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
- DQR: Data export format according to the Datenqualitätsrichtlinie (DQR) for ARGE, BVBS, DG Haustechnik and ZVSHK. Data can be exported according to the following guidelines:
 - o DQR 9.0 (OpenData/ITEK)
 - o DQR 9.0 (ARGE)
 - o DQR 8.0 (OpenData)
- FAB-DIS 2.3: Data exchange format based on the BMEcat®-Standard and managed by ETIM International, which is used in France
- FAB-DIS 3.0: Data exchange format based on the BMEcat®-Standard and managed by ETIM International, which is used in France
- ETIMxChange: Exchange format for ETIM data in JSON format; successor to the BMEcat standard.

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

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

<u>Note</u>: For a correct export in the x format, some additional steps need to be performed; these are described in the <u>manuals for these export formats</u>.

Warning: Please pay close attention to your settings when switching between export formats!

Settings in the export dialog below are *stored per user*, however common settings are *retained* when selecting a different export format. Thus, for instance, when exporting in the FAB-DIS format with the ETIM 8 setting, this setting is retained when switching back to the DQR export format.

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)

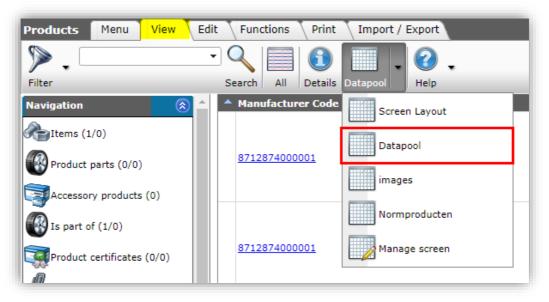
Note: Custom export layouts can be created in advance, or generated on the fly.

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.

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 A//(CRTL-A) or manually select records that you need to export.
- 5. Next, go to the Import/Export tab and click on Export [ENTITY].

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| Products Menu View E Sideflow | Edit Functions Print | 🕹 🕜 . | _ | | _ | _ | |
|--------------------------------------|----------------------|--------------------------|------|------|--------------|---|--------------------------------------|
| Navigation 🛞 | A Manufacturer Code | Manufacturer Description | s | GTIN | Code | F | Short description |
| Product parts | | | None | | <u>17020</u> | 1 | SideFlow Clean 5L |
| Is part of Product certificates | | lane it | None | | <u>17031</u> | I | SideFlow Clean Zakfilte 10 micron |
| Attachments Manufacturer:Flamco S | | | | | | | CidaElow Claza Zabilta |

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

| | | 96.36 | | _ | |
|---|-------------|--------|-------|---|----|
| Export products | | | | × | |
| Export products | | | | | |
| Use screen layout | ● Yes ○ No | | | 1 | Zā |
| Prepare for import | 🔾 Yes 🔘 No | | | | |
| Summary | | | | | |
| Export overzicht: Products Filter: Selectie: all 10 products Velden: • Manufacturer code (gln) • Manufacturer description • Modificationcode • Available • GTIN | | | * | | Zā |
| Code Image Short description Description Brand Series Type Start date | | | | | Zā |
| Net weight Weight unit code Height Length Width | | | • | • | c- |
| | 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.

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

- 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:

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- Conversion of data: for instance, conversion of units (PCE to STUK).
- Insert header (*Yes/No*): Insert a header row containing data labels.
- Export type² (product exports only): Choose an export layout type:

| | 1101117274112/11-174KK | | |
|-----------|-------------------------------|-------------------------|--|
| | 🚍 Add - New layout | | |
| <u>1C</u> | Layout Properties Fields Memo | | |
| | Insert header | ● Yes ○ No | |
| <u>1C</u> | 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: | |
|-----------------------|---------------|--------------|---|--------------|------------|---------------------|
| Filter | - Q Search | Export items | Import Item exports | 🕜 🗸 | | |
| Navigation 🛞 | ▲ Sup | | N code | Item no. | Price Date | Price per PU and PQ |
| Price Information | | | - | <u>23980</u> | 16/07/2018 | |
| | | | | 24066 | 16/07/2018 | |
| Surcharges | | | | <u>33403</u> | 08/05/2019 | Selected records |
| Own alternatives | | | | <u>37641</u> | 27/05/2016 | |
| _ | | | - | <u>37906</u> | 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:

² <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.

| Export products | | | |
|---------------------------------------|-----------------|------------|-------|
| Export products | | | |
| Use screen layout | | 🔾 Yes 🖲 No | _ |
| Export layout | [| | - X- |
| Prepare for import | | 🔾 Yes 🖲 No | |
| Summary | Create Export I | ayout | |
| Export overzicht: Products Filter: | | | |
| Selectie: alle 2452261 pro | ducts | | |
| | | | |
| | | | |
| | | | 01 |
| | Conversions | Export | Close |

- a. Use screen layout: Set to No.
- b. Export layout: Use the +-icon to create a new layout³. Alternatively, choose an Export layout from the drop-down menu⁴. <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 A | <i>dd – New layout</i> dialog: |
| Layout | tab |
| Na | Add - New layout Image: Fields Memo Layout Properties Fields Memo me Standard item export layout Image: For me Image: Save record Cancel plication Image: Enter a Name for the Export layout. 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. |
| Propert | ties tab |

⁴ Export layouts created for any Entity, either on-the-fly or at *System > Layouts* will show up in the dropdown menu of the Entity.

³ 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.

|] Add - New layout | | nomen ja zono oz | |
|-------------------------------|--|------------------|--------|
| Layout Properties Fields Memo | | | |
| nsert header | | | |
| | | | |
| | | | |
| | | | |
| | | Save record | Cancel |

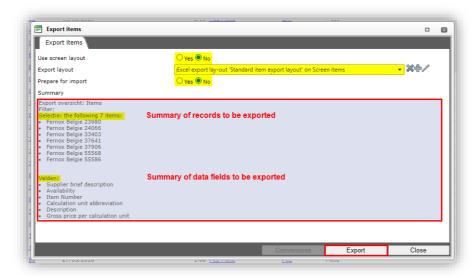
a. Insert header: Set to *Yes* to include a header row containing data field labels in the export file.

| | _ | | | _ |
|---|-----------------------|----------------------|------------------------------|--------|
| Layout Properties Fields Me | Selected fields | s | | |
| | ▲ Field | | Header | Pos |
| m Product | Supplier co | de | Supplier | 1 |
| ■ Purchase item | Supplier br | ief description | Supplier | 2 |
| HTTT Retailprice | Item Numb | er | Item no. | 3 |
| | Description | /Dutch | Item description (nl) | 4 |
| Standard | Short descr | ription/Dutch | Short description (nl) | 5 |
| Appointments | Calculation | unit abbreviation | Abbreviation | 6 |
| Barcode prefix | Gross price | per calculation unit | Gross/CU | 7 |
| Conversion table | | | • | *+ |
| Header | Supplier Automatic | | | |
| Tooltip | Supplier code | | | |
| | | | | |
| | | Save re | cord | Cancel |
| | | | | |
| | | | | |
| | | | | |
| a. Available fields: Fiel | ds which can be | added to you | ur layout. | |
| a. Available fields: Fiel 5. Selected fields: Sele | | 2 | 5 | |
| | | 2 | 5 | |

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

⁵ <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:

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|-----------------------------------|-------------------------------|--|
| Product class | 1107/101 | here the |
| https:// compano.com/pages/grid.a | spx?vk=PRD.Item.ItemEdit.Mair | h# |
| 🗟 Excel-Items-20210xlsx 🔨 | Excel f downle | file is exported to bad folder of browser |

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

| | ads | | ٽ ~ | Ø Zoeken in Downloads |
|-------------------------------------|--------------|---|-----------------|--------------------------|
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| 📰 Afbeeldingen | | Excel-Items-20210329-113331.xlsx | 29-3-2021 11:33 | Microsoft Excel-werkblad |
| E Bureaublad | | ✓ Vorige week (4) | | |
| 🖹 Documenten | - 1 | 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:) | | ✓ Eerder deze maand (16) | | |
| The second second | ~ | < | | > |
| Bestandsnaam: Excel-Items-20210329- | 113538.xlsx | | | × |
| Opslaan als: Microsoft Excel Worksh | eet (*.xlsx) | | | Ň |

The resulting Excel file, named **COS-Excel-[ENTITY]-[DATE]-[TIME]⁶.xlsx**, will contain all data fields which were specified in the Export layout:

⁶ [DATE] en [TIME] reflect the data and time of the export.

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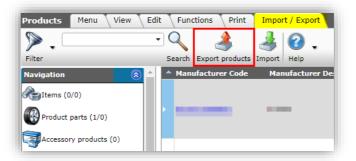
| 1 | А | B | С | | D | E | | F |
|----|--|-------|--------------|----------|--------------|---|---|---------------|
| 3 | Supplier | - A | Item no. | • | Abbreviation | Item description | - | Delivery time |
| 4 | and the second second | Valid | HU122201BE60 | st | | DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-118kPa G1 1x230V P | | 2,00 |
| 5 | a second a second s | Valid | HU122201BR10 | st | | DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-118kPa G1 3x400V+N | | 3,00 |
| 6 | COMPANY AND DO | Valid | HU122202BV5N | st | | DP drukverh. 1pmp v/tapw RVS m/toerreg nom.2,4m³/h-174kPa 1x230V+N | | 4,00 |
| 7 | COMPANY AND COM | 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 | the second second | Valid | HU122401BE60 | st | | DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-236kPa G1 1x230V P | | 8,00 |
| 11 | Contraction in contraction of the | Valid | HU122401BR10 | st | | DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-236kPa G1 3x400V+N | | 9,00 |
| 12 | | | | | | | | |

2.2.3 Export with custom layout (text-based)

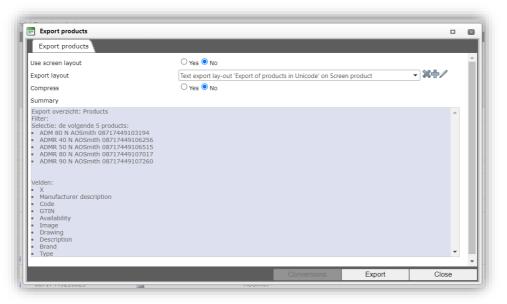
<u>Important</u>: A custom text-based layout *cannot* be created on the fly. Prepare your text-based layout at *System > Layouts*, also see paragraph <u>4.1.1 ADD custom TEXT-BASED EXPORT LAYOUT</u>.

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:*

| 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: | | | |

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 | | Contraflex expansievat 25/0,5 [3bar] | Contraflex expansievat 25/0,5 [3bar] |
| 7 | | 26341 | and a second | 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 | Contraflex expansievat 80/1,5 [6bar] | Contraflex expansievat 80/1,5 [6bar] |
| 10 | | 17020 | and the second second | Reference field | Source |
| 11 | | 17031 | | SideFlow Clean Zakfilter 10 micron | SideFlow Clean Zakfilter 10 micron |
| 12 | | 17032 | | SideFlow Clean Zakfilter 25 micron | SideFlow Clean Zakfilter 25 micron |
| 13 | | 17033 | and the second second | SideFlow Clean Zakfilter 50 micron | SideFlow Clean Zakfilter 50 micron |
| 14 | | 17035 | | SideFlow Clean C-sleutel | SideFlow Clean C-sleutel |
| 15 | | 17021 | | 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:

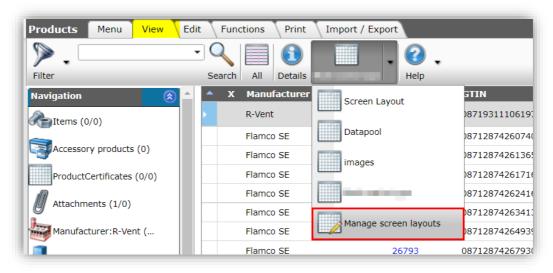
| | User-interfa | ice language |
|--------------------------------------|--------------|--------------|
| Translatable field | English (en) | German (de) |
| Series \rightarrow refers to: | Series (en) | Series (de) |
| <i>Type</i> \rightarrow refers to: | Type (en) | Type (de) |

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 | Vi | iew E | dit | Functions Print |
|------------------------|----|--------|-----|-------------------------|
| Filter | • | Search | Add | Modify Delete record(s) |
| Navigation | | ^ A | т | Name |
| Conversion tables | | | 9 | Datapool |
| Memo (0/0) | | m | Q | images |

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

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| Layout Fields Sort | ing Quick Filter Memo | | |
|--------------------|-----------------------|--------------|--------|
| Туре | Screen | | ~ |
| Name | Update ser | ies and type | e |
| Application | 🔿 🖼 Withir | the company | For 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 | Filter | Memo | | |
|-----------------------------|--------|--------------------------|-----------------------------|-------|
| Available fields | | 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 | | 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):

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| н | I I | J | K |
|-----------------------------|-------------------------------|------------------------------|-------------------------------|
| Series | 🔽 Туре | Series (en) | Type (en) |
| ontraflex [3bar 2-80ltr] | TEST | Contraflex [3bar 2-80ltr] | TEST |
| Controllex [3bar 2-Non-e | litable default 🛛 🖌 | Contraflex [3bar 2- Editabl | e language- |
| Contraflex [3bar 2- data fi | elds | Contraflex [3bar 2- specific | c data fields |
| Contraflex [38ar 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 | Sterlow Clean 5L Filterbag | Separation | SideFlow Clean 5L Filterbag |
| Separation | siderhow 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:

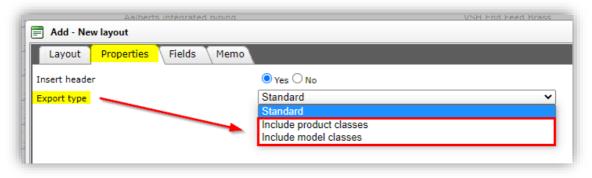
| Available fields | | - Selected fields | | | |
|--------------------------------------|-----|-------------------------|-------------------|-----|---|
| | | Field | Header | Pos | |
| ····· Important field yes/no | | Code | Code | 1 | 1 |
| ····· Last modification | | Manufacturer code (gln) | Manufacturer Code | 2 | |
| 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 | | | | | |
| Deadload Classic allocation and an | - | | | | |
| - 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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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.

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<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 lim | it 7 | 14 |
| | Lower limit unit SE | 8 | ļΨ |
| | Do not overwrite (maintain) data value in constain | | |
| | | | |
| - Properties | (maintain) data value in | | |
| Properties | (maintain) data value in COS | Automatic | |
| | (maintain) data value in COS | | |
| Header | (maintain) data value in COS | | |
| Header Field position | (maintain) data value in COS | | |
| teader ield position fixed value | (maintain) data value in COS Start date 4 (Matter Cos (Matter Cos) (Matter Cos) (Ma | | |
| teader field position ixed value faintain | (maintain) data value in COS Start date 4 4 @ Yes O No | | |

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

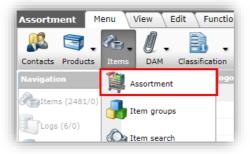
- BMEcat42
- BMEcat50
- DataNorm
- DataNormV12Xml
- DQR8 (OpenData, ARGE)
- DQR9 (OpenData, ARGE)⁷

<u>Note</u>: 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*.



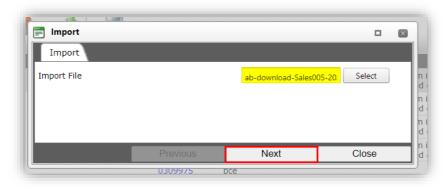
2. Next, go to the *Import/Export* tab and click on *Import:*

| Assortment Menu | View | Edit I | Functions | Import | t / Expor | t | | | |
|-----------------|------|----------|-------------|----------|-----------|--------------|---------------|------|---|
| ⋟ | | - 🤇 | | | 4 | | | 2 | • |
| Filter | | Search | Export asso | ortments | Import | Item exports | Export images | Help | |
| Navigation | ۲ | ^ | Logo | Code | | Description | | | |
| August (2481/0) | | • | | | | | | | |
| | | | | | | | | | |
| Logs (6/0) | | | | 22200 | 0007410 | Compano | | | |

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

⁷ DQR 9.0 is under development as of 24-4-2023

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<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 :

| Summary Irest Import with format SALES0051 of file SALES005_DirectProfile_van(SA_MF)_20230904_143118_bzip2.zip Irest Import with format SALES0051 of file SALES005_DirectProfile_van(SA_MF)_20230904_143118_bzip2.zip Delta import of manufacturers from file product class features Irest Import of manufacturers from file product class.xml Delta import of file product features from file product features Irest Import of product features from file product class.xml Delta import of certificates from file product data.xml Irest Import of product certificates from file product class.xml Delta import of product certificates from file product data.xml Irest Import of attachments from file product data.xml Delta import of attachments from file product data.xml Irest Import of attachments from file product data.xml Delta import of attachments from file product data.xml Irest Import of attachments from file product data.xml Delta import of items from file product data.xml Irest Import of items from file product data.xml Delta import of items from file proceatalogue.xml Irest Import of items from file pricecatalogue.xml Delta import of item - item relations from file itemrelations.xml Irest Import of item - item relations from file itemrelations.xml Delta import of item - item relations from file itemrelations.xml Irest Import of item - item relations from file itemrelations.xml | | | Sales |
|--|--|---------------------------------------|-------|
| Summary Test Import with format SALES0051 of file SALES005_DirectProfile_van(SA_MF)_20230904_143118_bzip2.zip In Test Import of manufacturers from file productdata.xml Delta import of remutoduct features In Delta import of etim product features Delta import of etim product features In Delta import of etim product features In In Delta import of etim product features In In Delta import of etim product features In In Delta import of product entificates from file productdata.xml In In Delta import of product restricts In productdata.xml In Delta import of time rise from file productdata.xml In In Delta import of time rise In productdata.xml In Delta import of attachments from file productdata.xml In In Delta import of time - item relations from file proceatalogue.xml In In Delta import of time - item relations from file product class features In In Settings Reporting level In In In Is checkrun Is checkrun Im prot of product settimport of products In Delta import of product. Delta import of product | 🗐 Import | | |
| Summary If Test Import with format SALES0051 of file SALES005_DirectProfile_van(SA_MF)_20230904_143118_bzip2.zip If With impactreport: All except the product class features Delta import of manufacturers from file productdata.xml Delta import of product set from file productdata.xml Delta import of certificates from file productdata.xml Delta import of attachments from file productdata.xml Delta import of attachments from file productdata.xml Delta import of attachments from file productdata.xml Delta import of attachments from file productdata.xml Delta import of them - item relations from file proceatalogue.xml Delta import of attachments from file proceatalogue.xml Delta import of them - item relations from file proceatalogue.xml Delta import of product - product relations.xml Delta import of product - product relations.xml Estings Reporting level All except the product class features ✓ Is checkrun © Delta import of product set import of erdificates © Delta import of product set import of attach | Import | | in |
| Test Import with format SALES0051 of file SALES005_DirectProfile_van(SA_MF)_20230904_143118_bzip2.zip III Test Import with format SALES0051 of file SALES005_DirectProfile_van(SA_MF)_20230904_143118_bzip2.zip IIII Delta import of manufacturers from file productdata.xml Delta import of moduct features from file productdata.xml IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII | | | |
| with impactreport: All except the product class features iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii | | | |
| Delta import of manufacturers from file productdata.xml Delta import of products from file productdata.xml Delta import of certificates from file productdata.xml Delta import of attachments from file pricecatalogue.xml Delta import of tem - item relations from file pricecatalogue.xml Delta import of tem - item relations from file itemelations.xml Delta import of product - product relations from file itemelations.xml Delta import of product - product relations from file itemelations.xml Delta import of product - product relations from file itemelations.xml Delta import of product - product relations from file itemelations.xml Settings Reporting level Is checkrun Selected Files Delta import of product Delta import of product features Delta import of product features Delta import of product features Delta import of product Selected Files Delta import of tem relations Delta import of tatachments (product) Delta import of item relations Delta import of item r | | | ing |
| Delta import of etim product features from file productdata.xml iii Delta import of certificates from file productdata.xml iiii Delta import of attachments from file productdata.xml iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii | Delta import of manufacturers from file pro | ductdata.xml | |
| Delta import of certificates from file productdata.xml Image: Setting and the set of | | | ing |
| Delta import of attachments from file productdata.xml If Delta import of manufacturers from file pricecatalogue.xml Delta import of attachments from file pricecatalogue.xml Delta import of item - item relations from file pricecatalogue.xml Delta import of item - item relations from file pricecatalogue.xml Delta import of product - product relations from file itemrelations.xml If Settings All except the product class features ▼ Reporting level All except the product features (product) If Is checkrun Import of features ✓ Selected Files Delta import of products ✓ Delta import of product of entiprode features ✓ Delta import of product features Delta import of product of product features ✓ Delta import of product features Delta import of product features ✓ Delta import of features ✓ Delta import of features ✓ Delta import of groduct features ✓ Delta import of features ✓ Delta import of features ✓ Delta import of features ✓ Delta import of features ✓ Delta import of features ✓ Delta import of features ✓ Delta import of features ✓ Delta i | Delta import of certificates from file product | :data.xml | ing |
| Delta import of manufacturers from file pricecatalogue.xml full import of items from file pricecatalogue.xml Delta import of item - item relations from file pricecatalogue.xml Delta import of item - item relations from file pricecatalogue.xml Delta import of product - product relations.xml Delta import of product - product relations.xml Settings Reporting level Is checkrun Selected Files O Delta import of etim product features O Delta import of product O Delta import of etim product features O Delta import of product ertificates O Delta import of product certificates O Delta import of manufacturers (item) O Delta import of tems product features O Delta import of product O Delta import of product of times O Delta import of tems O Delta import of tem encloseitem relations | | | ing |
| Delta import of attachments from file pricecatalogue.xml Delta import of item - item relations from file increatalogue.xml Delta import of product - product relations.xml Delta import of product - product relations.xml Settings Reporting level Is checkrun Selected Files I Delta import of etim product of product Delta import of product Delta import of product Delta import of product Reporting level Is checkrun Selected Files Delta import of etim product features Delta import of product Delta import of product Delta import of product Delta import of product Selected Files Delta import of etim product features Delta import of product certificates Delta import of attachments (product) Delta import of attachments (product) Delta import of items Delta import of item melations Delta import of item melations Delta import of item relations | Delta import of manufacturers from file price | ecatalogue.xml | |
| Delta import of item - item relations from file pricecatalogue.xml Delta import of item - item relations from file itemrelations.xml Delta import of product - product relations from file itemrelations.xml Settings Reporting level Is checkrun Selected Files Ø Delta import of product Ø Delta import of product features Ø Delta import of product certificates Ø Delta import of product certificates Ø Delta import of attachments (product) Ø Delta import of items Ø Delta import of item Ø Delta import of attachments (item) Ø Delta import of item relations | | | |
| Delta import of product - product relations from file itemrelations.xml Settings Reporting level All except the product class features Is checkrun • Yes ○ No Selected Files • Delta import of product of products • Delta import of product features • Delta import of certificates • Delta import of product certificates • Delta import of product certificates • Delta import of attachments (product) • Delta import of attachments (product) • Delta import of items • Delta import of items • Delta import of item encloseitem relations • Delta import of item relatimport • Delta import of item relatimport • Delta | Delta import of item - item relations from fi | le pricecatalogue.xml | |
| Settings Reporting level All except the product class features Setected Files Delta import of manufacturers (product) Delta import of etim product features Delta import of product certificates Delta import of product certificates Delta import of attachments (product) Delta import of item sendoscitem relations Delta import of item relations Delta import of item relations Delta import of item relations Delta import of item relations | | | |
| Reporting level All except the product class features Selected Files Delta import of manufacturers (product) Delta import of certificates Delta import of attachments (product) Delta import of attachments (product) Delta import of items Delta import of item relations Delta import of item relations Delta import of item relations Delta import of item relations Delta import of item relations Delta import of item relations Delta import of item relations Delta import of item relations Delta import of item relations Delta import of item relations Delta import of item relations | Sattings | | ing |
| Is checkrun Selected Files Delta import of manufacturers (product) Delta import of certificates Delta import of product certificates Delta import of attachments (product) Delta import of items Delta import of items Delta import of item nelations Delta import of item relations Delta import of item relations Delta import of item relations | | All except the product class features | |
| Selected Files | | | |
| Delta import of products Delta import of etim product features Delta import of certificates Delta import of product certificates Delta import of attachments (product) Delta import of manufacturers (item) full import of items Delta import of attachments (item) Delta import of attachments (item) Delta import of item encloseitem relations Delta import of item relations | | | |
| Delta import of etim product features Delta import of certificates Delta import of product certificates Delta import of attachments (product) Delta import of manufacturers (item) full import of items Delta import of attachments (item) Delta import of attachments (item) Delta import of item encloseitem relations Delta import of item relations | Selected Files | | |
| Delta import of certificates Delta import of product certificates Delta import of attachments (product) Delta import of manufacturers (item) full import of items Delta import of attachments (item) Delta import of attachments (item) Delta import of item encloseitem relations Delta import of item relations | | | |
| Delta import of product certificates Delta import of attachments (product) Delta import of manufacturers (item) full import of items Delta import of attachments (item) Delta import of item relations Delta import of item relations | | | |
| ✓ Delta import of manufacturers (item) ✓ full import of items ✓ Delta import of attachments (item) ✓ Delta import of item encloseitem relations ✓ Delta import of item relations | | | |
| ✓ full import of items ✓ Delta import of attachments (item) ✓ Delta import of item encloseitem relations ✓ Delta import of item relations | | | |
| ✓ Delta import of attachments (item) ✓ Delta import of item encloseitem relations ✓ Delta import of item relations | | | |
| ☑ Delta import of item encloseitem relations ☑ Delta import of item relations | | | |
| ☑ Delta import of item relations | | | |
| | | | |
| | | | |
| | | | |
| Previous Next Close | | Previous Next | Close |
| | | | |

- 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 files⁸: 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> | <u>ground task</u> . You wil | l receive an email | as soon as the job is | |
| 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 | | | | | | |
| | OK | | | | | |
|)44075 | | PCE | 1.00 | 1.00 PCE | CLU | |

You will receive an *import report* via e-mail⁹, 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.

⁸ Which *Selected files* will show, depends on the type of import file offered.

⁹ 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:

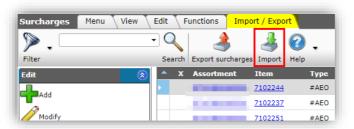
1. Through the menu, go to the Entity¹⁰ that you need to import, for instance *Items > Surcharges*.



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

¹⁰ 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.

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

4. In the next screen:

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

Layout111

- 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.

¹¹ 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.

🍠 🌮 💭

| | | Add New Layout (skip if you selected a pre-made l | ayout) |
|--------|-----------------------------|--|---------------|
| ne Ad | <i>'d – New layout</i> dial | log: | |
| out ta | ab | | |
| ſ | Add - New layout | | |
| | Layout Properties | Fields Memo | |
| | Name | New import layout | |
| | Application | 🔿 🎞 Within the compar | ny 🔍 🕄 For me |

- 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.

Save record

Cancel

Properties tab

In th

Lay

| 🛂 Item | Items | 3 | |
|-------------------------|-----------------|-------------|--------|
| 📄 Add - New layout | | | |
| Layout Propertie | es Fields Memo | | |
| Number of header rows | | 1 | |
| Continue import on erro | rs | 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 | Sele | cted fields | | |
| + Price unit | - F | ield | Header | Pos |
| • Product | ► S | upplier code | Supplier | 1 |
| + Purchase item | 🖌 🖌 s | upplier brief description | Supplier | 2 |
| · Retailprice | | em Number | Item no. | 3 |
| Retailprice information | | escription/Dutch | Item description (nl) | 4 |
| In Standard | | hort description/Dutch | Short description (nl) | 5 |
| Supplier | c | alculation unit abbreviation | Abbreviation | 6 |
| Appointments Barcode prefix | G | ross price per calculation unit | Gross/CU | 7 |
| Code Code and description | data field | | | |
| - Properties | | | | |
| Conversion table | | | • | * |
| Header | Supplier Automatic | | | ~ |
| Tooltip | Supplier code | | | |
| | | | | |
| | | Save re | | Cancel |

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 layout¹². 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.xk with impactreport: Full Import van Surcharges met layout Impo Item supplier code Type Start date Amount per PU+PQ Sequence Lower limit | | | |
| Lower limit unit Settings | | | |
| Reporting level | Full | | ~ |
| Is testrun | Ves 🖲 No | | |
| Fill conversion list | 🔾 Yes 🔘 No | | |
| | | | |
| | | | |
| | Previous | Next | Close |

- 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):

¹² <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.

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

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 | | | |
| Import van Products met layout Produc Product code Manufacturer code (GLN) Brand (product)/Nederlands (Nederl Series (product)/Nederlands (Nederla Type (product)/Nederlands (Nederla Long description (product)/Nederlan Short description (product)/Nederlan | nd) nd) [) (Nederland) | | |
| Layout1 | Products and Items (v2.3) | | |
| Title | Products and Items (V2.5) | | |
| Import entity | Product | | - 🛪 |
| Import layout | Excel import lay-out 'Product | import L04' on Screen p | roducts 🔻 🗱 🗭 |
| | | | |

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:

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| 📄 Res | sults Import Artikelen | X |
|-------|--|------|
| | The import has been started as <u>background task</u> . You will receive an email as soon as the jo finished. Then the import report will also be availanble in the <u>logs</u> . | b is |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | OK | |
| | UK . | |
| 4075 | THUR A REPORT OF THE TRUE TO THE CLU | |

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*.

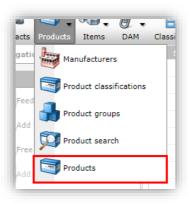
On import, an *Entity* and *Layout* need to be assigned to each data source, as demonstrated below:

| | import done | b | U |
|---|--------------------------------------|-----------------------------|----------------|
| 🗐 Import | | | |
| Import | | | |
| | | | |
| Summary | | | |
| Importof file Multiple-unicode-dataset.zip with impactreport: Full | | | <u>^</u> |
| | price quantity | 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: | scheic |
| | | | |

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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 View | Edit | : Fun | tions Print | Impo | rt / Export |
|--------------------|------|--------|-----------------|--------|-------------|
| ⋟. | • | | | | ?. |
| Filter | | Search | Export products | Import | Help |
| Navigation (| | 🔺 Man | ufacturer Code | Mar | ufacturer D |
| Items | | | | | |
| 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.:

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| 🗐 Import | | | | | × |
|-----------------------------|------|-----------------|------|------------|---|
| Import | | | | | |
| Summary | | | | | |
| Nothing selected to import! | | | | | |
| Layout1 | | | | | |
| Title | Exce | el-Items.csv | | | |
| Import entity | Iten | n | | - × - × | |
| Import layout | | | | + ₩ | |
| | | | | | |
| Layout2 | | | | | |
| Title | Exce | el-Products.csv | | | |
| Import entity | Pro | duct | | - × - × | |
| Import layout | | | | - X- | |
| | | | | | |
| | | | | | |
| | | | | | _ |
| | | Previous | Next | Close | |

For each Layout:

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

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

5. Click on Next for the Import settings.

| Import | | | | | | |
|---|-------------------------------|-------|--------------|-------------------------|-------|-----|
| Import | | | | | | |
| Summary | | | | | | - F |
| Importof file Multiple-data-set.zip with impactreport: Full Import van Products met layout Standaard Country of origin code GTIN Manufacturer code Brand Series Type Code Short description Description Product group code Product group code Product Gass code (ETIM Dynamic) Import van Products met layout Standaard Country of origin code GTIN Manufacturer code | | | | | | |
| Brand Series | | | | | * | |
| Settings | | | | | | |
| Reporting level | Full | | ~ | | | |
| Is testrun | 🔾 Yes 🖲 No | | | | | |
| Fill conversion list | O Yes 🖲 No | | | | | |
| Selected Files | Excel-Items.csv (Standaard pr | oduct | Excel-Produc | ts.csv (Standaard produ | | |
| | | | Previous | Next | Close | _ |

- 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.

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- 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.

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 - 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*.

| 🧸 🗐 . A. | 0. | , | | | Ţ | 💽 🦆 . 📀 . 🖡 |
|-------------------------|---------|----|------------|-------------|------|------------------------------|
| Contacts Products Items | DAM | Pu | blications | Classificat | tion | System My details Help Logou |
| Navigation | ٢ | | Standar | A b | Na | |
| Conversion tables | | | | m | | |
| | | | | m | | Background tasks |
| Memo (0) | | | | 64 | | |
| Attachments (0) | | | | m | | Configuration |
| G Attachments (0) | | | | m | | A Layouts |
| Edit | \odot | | | m | | |
| Feed layout | | | | m | | Logs |
| | | | | 64 | | |
| Impact analysis layout | | | | m | | User-defined fields (main) |
| Q. Free form | | | | 3 | Jun | |
| and the form | | | | m | | |

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

| youts Menu View | Edit | Functions | | | | | | |
|------------------------|------|------------------|-------------------------|---------------|---------|-------------------------|---------------|--|
| » . | - | 2 | . 🧷 🗙 | 1 🗊 . 🕜 . | | | | |
| lter | S | earch Feed layou | t Modify Delete record | (s) Copy Help | | | | |
| avigation (| ۵ 🔺 | Standard / | Name | т | Source | Overview | Report | Name |
| Conversion tables | | | 1 | 9 | Product | Products | | Afbeeldingen |
| | | | 1 | 9 | Product | Products | | Compano |
| Memo (0) | | | 1 | 9 | Product | Products | | Datapool |
| Attachments (0) | | | 1 | 100 A | Product | Product search | | Duco product |
| / | | | 1 | 100 A | Product | Product search | | ID_OPPLE_PRD |
| it (| 2 | E 1 | 1 | 25 | Product | Products | | Import productgroepen |
| Feed layout | | - E | 1 | 2 | Product | Products | | Import products |
| . . | | | 1 | ۶ | Product | Products | | Large C |
| Impact analysis layout | | | 1 | | Product | Products | | Large L |
| Free form | | | International Accession | | Product | Product alessifications | | The second s |
| ar 10 | | | 1 | | Product | Product search | | No. of Concession, No. of Conces |
| Add export layout | | | 1 | 191 | Product | Products | | The second |
| Add import layout | | | 1 | 88. s | Product | Product search | | PRD |
| | | | La production de | Ä | Product | | Product sheet | Productblad |
| Add report template | - 1 | | harpen her ander | Ä | Product | | Product sheet | Productblad - Joule |
| Modify | | - E | 1 | 20 C | Product | Product search | | 10 |

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 |
| | | in roduce | riodace scan | un - |

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):

| | 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/Enviror |
| 8 | Yes | | 140043902 | https:// | .compano.com/Data/Enviror |
| 9 | Yes | | 140043903 | https:// | .compano.com/Data/Enviror |
| 10 | No | | 140043904 | https:// | .compano.com/Data/Enviror |
| 11 | No | | 140043967 | https:// | .compano.com/Data/Enviror |
| 10 | | | | | |

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_Pri with impactreport: All except the pri Import van Products met layout Pro- Product code Manufacturer code (GLN) Brand (product)/Nederlands (Ned Series (product)/Nederlands (Ned Long description (product)/Neder Short description (product)/Neder | luct import L04 en velden: erland) erland) fand) ands (Nederland) | | |
| Layout1 | | | |
| Title | Products and Items (v2.3) | | |
| Import entity | Product | | - 🗙 |
| Import layout | Excel import lay-out 'Product | import L04' on Screen pr | |
| Archive not imported records | e Yes O No | | |
| | Previous | Next | Close |

<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.

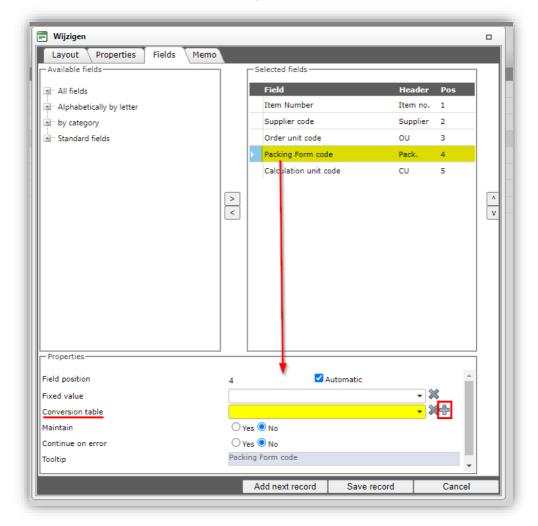
3.2.4 Conversion table

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.

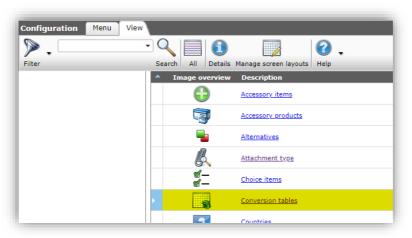
Once the Conversion Table has been created, you have to option to either:

- 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

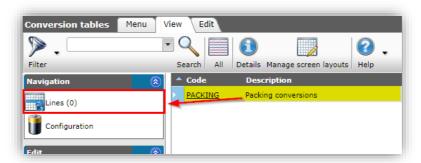
To manually fill the conversion table:

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

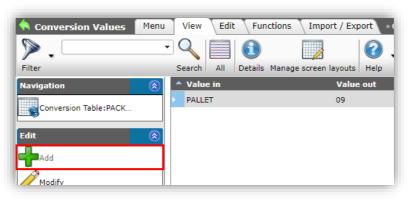


2. In the Conversion Table overview, select the conversion table you need to fill and click on *Lines*.

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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 to conversion table PACKING Packing conversions Conversion Value Conversion object Packing Form code values Value in Value out 09 Value out 09 Returnable pallet | |
|--|----------|
| Value out 09 09 | _ |
| Value in Value out 09 | A |
| | |
| Value out 09 Returnable pallet 🔻 | |
| | ð |
| - | - |
| Add next record Save record Cance | I |

- 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 | | | | \mathbf{X} |
|-----------------------------|------------|------|-------|--------------|
| 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 Values: | |
|-----------------------------|------|
| Number of records processed | 12 |
| Number of new records | 2 |
| Number of archived records | 0 |
| Number of changed records | 0 |
| Number of unchanged record | ls 0 |
| | |
| | |
| Sincerely, | |
| Compano BV | |

| The import of | 'Importreport-L | ayout-202112 | 03-163445' <mark>h</mark> a | as finished wit | hout any chang |
|---------------|-----------------|--------------|-----------------------------|-----------------|----------------|
| | | | | | |
| | | | | | |
| Sincerely, | | | | | |
| Compano BV | | | | | |

Figure 4. Import report

 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 📄 | 1enu View Ed | it Functions Import / Export > Conversion Table: PACKING Packing |
|-----------------------|----------------|--|
| ▶ . | - 🤍 🔲 | 10 🛛 🖉 . |
| Filter | Search All | Details Manage screen layouts Help |
| Navigation | \land Value in | Value out |
| Conversion Table:PACK | 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 | • | Sample Thurse | t Jay, Februar | y 02, 201 | 2 | |
| Accounts | ng | Type: | | | | |
| Date | 1 | *3/14/2 | | | | |
| Percenta Fraction Scientific | | 3/14 3/14/12 03/14/12 | | h 14, 201 | 2 | |
| Text Special Custom | | 14-Mar 14-Mar | | | | |
| | | Locale (| ocation): | | | |
| | | Nede | rlands (sta | ndaard) | 8 | |
| | ÷ | | | | | |
| an asteris | k (*) respond t | o change | s in regiona | I date an | date values. Date formats th d time settings that are spec affected by operating system | ified for the |

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**:

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| | Α | В | C | D | | A | _ | 5 | | - | F | G | н | 1 I |
|----|-------|---------------------------|-----------|-------|----|---|-----|---------------------|-----|---|---|---|---|-----|
| 1 | No. | Name | Date | Data | 1 | | * | Cut | | | | | | |
| 2 | 00001 | ana varela | 7/30/2016 | 20930 | 2 | | _ | - / | | | | | | |
| 3 | 00002 | Patricia King | 7/30/2016 | 5410 | 3 | | 1 | <u>С</u> ору | _ | | | | | |
| 4 | 00003 | Charles Monaghan | 7/30/2016 | 11350 | 4 | | Ĝ | Paste Options: | | | | | | |
| 5 | 00004 | Fred Schuler | 7/30/2016 | 17950 | 5 | | | 🛱 🔒 🕼 🕼 🕼 | Ê. | | | | | |
| 6 | 00005 | John Botts | 7/30/2016 | 25390 | 6 | | | Paste Special | 7 | | | | | |
| 7 | 00006 | Frank Vickers | 7/30/2016 | 4940 | 7 | | | | _ | | | | | |
| 8 | 00007 | Martha Sargent | 7/30/2016 | 6250 | 8 | | Ø | Smart Lookup | _ | | | | | |
| 9 | 00008 | Matthew Martin | 7/30/2016 | 29520 | 9 | | | Insert Copied Cells | | | | | | |
| 10 | 00009 | JP VAN BEUZEKOM | 7/30/2016 | 31290 | 10 | | | Delete | | | | | | |
| 11 | 00010 | Christian Faust | 7/30/2016 | 23060 | 11 | | | Clear Contents | - Į | | | | | |
| 12 | 00011 | Ricky Kwon | 7/30/2016 | 20060 | 12 | | 100 | | _ | | | | | |
| 13 | 00012 | Alfonso Gonzalez Pedregal | 7/30/2016 | 28070 | 13 | | 須 | Quick Analysis | | | | | | |
| 14 | 00013 | Simone Williams | 21800 | 20710 | 14 | | | Filt <u>e</u> r | | | | | | |
| | | | 0000 | 25020 | 15 | | 1 | Sort | - F | | | | | |

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) | 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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| <u> </u> |
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| Layout Properties Fields Memo -Available fields Selected fields Supplier code Supplier 1 Alphabetically by letter Supplier code Supplier code 2 1 by category Standard fields Price Date Price Date Price date 4 Cross price info (with new startdate) price/pu + pq Gross price info (with new startdate) price/pu + pq 6 6 Gross price info (with new startdate) price duantity PQ 6 6 6 Gross price info (with new startdate) price (until (p) code PU 7 7 7 Calculation unit code OU 9 9 9 9 9 Properties | Edit - Text import lay-out 'Standaard | artikel import Unicode | TAB-gescheiden.txt - kopie' on Screen | n items | | 5 |
|---|---------------------------------------|------------------------|---------------------------------------|---------------|-----|---|
| All fields Alphabetically by letter by category Standard fields Standard fields Standards) price field (with new startdate) price quantity Standards) f | Layout Properties Fields | Memo | | | | |
| Alphabetically by letter Alphabetically by letter by category Standard fields Price Date Price Dat | - Available fields | | Selected fields | | | 1 |
| Impose the optimized of the optized of the optimized of the optimized of the | ≝ All fields | | Field | Header | Pos | |
| Standard fields Item Number Item no. 3 Price Date Price Date Price date 4 Gross price info (with new startdate) price (pu + pq) 6 6 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price unit (p) code PU 7 Calculation unit code CU 8 Order unit code OU 9 Packing Form ode Pack. 10 Properties 312-2021 | Alphabetically by letter | | Supplier code | Supplier | 1 | |
| Price Date Price date 4 Gross price info (with new startdate) price date 4 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price unit (p) code PU 7 Calculation unit code CU 8 Order unit code OU 9 Packing Form code Pack. 10 Properties Field position 4 Fixed value 3:12:2021 Date format 31-01:2010 (dd-mm-yyyy) ✓ Maintain ✓ Yes © No | ■ by category | | Supplier GLN code | GLN code | 2 | |
| Gross price info (with new startdate) price (up + pq) 5 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price quantity PQ 6 Gross price info (with new startdate) price quantity PQ 6 Order unit code OU 9 Packing Form code Pack. 10 | | | Item Number | Item no. | 3 | |
| startdåte) price/pu + pq Gross/PU + PQ 5 Gross price info (with new PQ 6 Gross price info (with new startdåte) price quantity PQ 6 Gross price info (with new startdåte) price quantity CU 7 Calculation unit code CU 8 Order unit code OU 9 Packing Form obde Pack. 10 | | | Price Date | Price date | 4 | |
| startdate) price quarity PQ 6 Gross price info (with new startdate) price quarity PU 7 Gross price info (with new startdate) price quarity PU 7 Calculation unit code CU 8 Order unit code OU 9 Packing Form ode Pack. 10 | | | | Gross/PU + PQ | 5 | |
| Properties Field position 4 Fixed value Date format 31-01-2010 (dd-mm-yyyy) Maintain Calculation unit code PU 7 Calculation unit code PU 7 Calculation unit code CU 8 Order unit code OU 9 Packing Form code Pack. 10 7 7 Calculation unit code OU 9 Pack. 10 7 7 7 7 7 7 7 7 7 7 7 7 7 | | | (atautabata) puine aupatitu | PQ | 6 | |
| Properties Field position 4 2001 Properties Field position 4 2001 Automatic 2001 Fixed value Date format 31-01-2010 (dd-mm-yyyy) ✓ Maintain ○ Yes ® No | | | Gross price info (with new | le PU | 7 | 1 |
| Properties Field position 4 2 Automatic Fixed value 3-12-2021 Date format 31-01-2010 (dd-mm-yyyy) V Maintain O Yes © No | | | Calculation unit code | CU | 8 | |
| Properties Field position 4 ✓ Automatic Fixed value 3-12-2021 Date format 31-01-2010 (dd-mm-yyyy) ✓ Maintain ○ Yes © No | | | Order unit code | OU | 9 | |
| Field position 4 Automatic Fixed value 3-12-2021 Date format 31-01-2010 (dd-mm-yyyy) ✓ Maintain ○ Yes ® No | | | Packing Form ode | Pack. | 10 | |
| Fixed value 3-12-2021 Date format 31-01-2010 (dd-mm-yyyy) Maintain O Yes | – Properties – | | | | | |
| Fixed value 3-12-2021 Date format 31-01-2010 (dd-mm-yyyy) Maintain O Yes | Field position | 4 | Automatic | | | |
| Date format 31-01-2010 (dd-mm-yyyy) ✓ Maintain ○Yes ® No | | | | | | |
| | | 31-01-2010 | (dd-mm-yyyy) | ~ | | |
| Continue on error O Yes No | Maintain | 🔿 Yes 🖲 No |) | | | |
| | Continue on error | 🔾 Yes 🖲 No | | | | |
| Tooltip Price Date - | Tooltip | 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 | s 🔪 Memo | | | | |
|---|----------|-------|--|------------------|----------------|
| Available fields | | 1 | Selected fields | | |
| n Condition Group | ^ | | Field | Header | Pos |
| Country of origin | | | GLN manufacturer code | GLN Code | 1 |
| + Currency | | | Product GTIN | GTIN | 2 |
| | | | Item Number | Item no. | 4 |
| Gross price info (with new startdate) | | | Description | Item description | 5 |
| - End date | - 1 | | Gross price info (with new startdate) price / pu + pq | Gross / PU + PQ | 6 |
| Increment quantity | | > < | Product code | Product | 7 |
| Price / pu + pq | | < | Condition group code | Condition | 8 |
| Price date Price quantity | | | Gross price info (with new startdate) price unit (pu) code | PU | 0 |
| Price unit (pu) code Time unit code Time unit code Time Codes | | | | Set positio | n to |
| Dates and time Properties | * | | | | |
| Field position | 0 | | Automatic Uncheck | | <u>^</u> |
| Fixed value | Piece | | | | × |
| Conversion table | | | | - 1 | * * |
| Maintain | O Yes | No | | | |
| Continue on error | O Yes (| No No | | | |
| | | | | Save | Cancel |

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

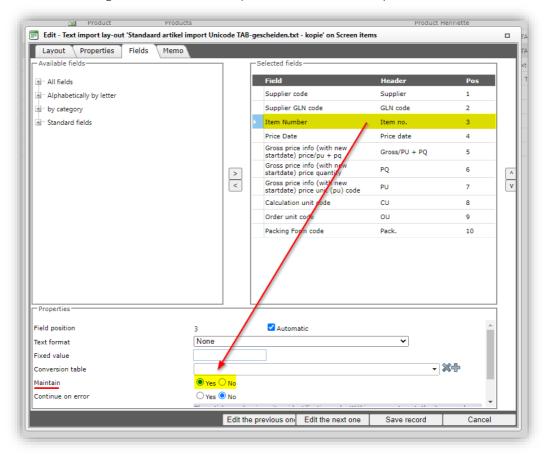
- 2. Under *Selected fields*, select the field you just added and, at Properties, uncheck the checkbox *Automatic*.
- 3. Now, type the value **0** for *Field position*. Select a fixed value from the drop-down menu; in this case the value **Piece (PCE)**.
- 4. Save the layout.

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*.

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| Edit - Text import lay-out 'Standaard artik | lucts al import Unicoda T/ | AP-gercheiden tyt - konie' on Screen | Product H | enriette | |
|---|-------------------------------|---|---------------|------------|---|
| | | RB-gescheiden.txt - kopie on Screen | items | | |
| Layout Properties Fields Men | | - Selected fields | | | _ |
| Available fields | | | | | |
| + All fields | | Field | Header | Pos | 4 |
| Alphabetically by letter | | Supplier code | Supplier | 1 | |
| by category | | Supplier GLN code | GLN code | 2 | |
| ± 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 | |
| | < | Gross price info (with new startdate) price unit (pu) code | PU | 7 | |
| | | Calculation unit crde | CU | 8 | |
| | | Order unit code | ou | 9 | |
| | | Packing Form code | Pack. | 10 | |
| Properties | | | | | |
| ield position | 3 | Automatic | | * | |
| Text format | None | | ~ | | |
| Fixed value | | | | | |
| Conversion table | | | - | * + | |
| Maintain | 🔍 Yes 📂 No | | | | |
| Continue on error | <mark>○Yes ● No</mark> | n a su an ann an an ann | | | |
| | | | | | 1 |

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
```

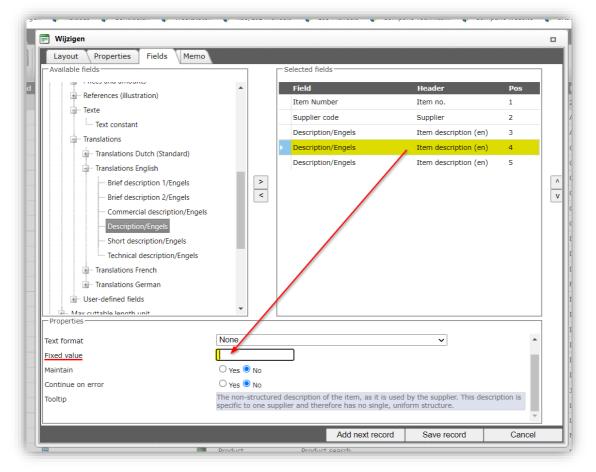
To concatenate Texts 1 and 2 on import, the following import lay-out can be made:

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| 9 Wijzigen | | | | | |
|--|-------------|----------------------|-----------------------|-----|---|
| Layout Properties Fields Memo | | —Selected fields———— | | | |
| | | Field | Header | Pos | |
| References (illustration) | | Item Number | Item no. | 1 | |
| Texte | | Supplier code | Supplier | 2 | |
| Text constant | | Description/Engels | Item description (en) | 3 | |
| Translations Translations Dutch (Standard) | | Description/Engels | Item description (en) | 4 | |
| Translations English | | | | | |
| - Brief description 1/Engels | | | | | ^ |
| - Brief description 2/Engels | Add the fie | eld 'Description' | | | V |
| Commercial description/Epgels | multiple ti | mes | | | |
| 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:



3.2.11 Country-specific fields

For country-specific fields of Item and Product, the Size Unit Code for Weight and Volume can added to the import layout thus enabling import of these values, including Imperial values.



3.3 Update import (ExcelForImport)

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

1. Open the exported Excel-file:

| | A | В | С | | D | | E | F | |
|----|----------|-------|--------------|----------|--------------|---|---|---------------|------|
| 3 | Supplier | A 🔽 | 💽 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 | | 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-file¹³, 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.

| 📰 Import | DP drukverh. 2nmn | | | | |
|-------------|---|----------|--------------------------|---------------------|---|
| Import | | | | | |
| Import File | Selec | | | | |
| | 8 | Previous | Next | Close | |
| t. | V/tapw KVS m/toerred | PL C.L. | | 50 hours and 1 | |
| | Openen | | | | × |
| : | \leftrightarrow \rightarrow \checkmark \bigstar \blacklozenge Deze pc \Rightarrow Downloads \Rightarrow | | ~ ບັ ,> | Zoeken in Downloads | |
| | Organiseren 👻 Nieuwe map | | | | • |
| : | 🤜 Deze pc | ^ Naem | | | |
| | 3D-objecten | √ Var | aag (1) | | |
| | See Afbeeldingen | | celForImport-Products-20 | 210308-150746.xlsx | |
| | E Bureaublad | | ge week (5) | | |

¹³ <u>Important</u>: When renaming the *ExcelForImport* file, always make sure the filename starts with: **COS-ExcelForImport**.

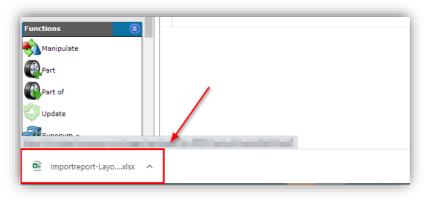
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4. On the next screen:

| Import . | KVEIII. ZDIDD | | | | E |
|--|---------------------------|----------|------|-------|---|
| Import | | | | | |
| Summary | | | | | |
| Importof file ExcelForImport-Prod With impactreport: Full | ucts-20210308-150746.xlsx | | | | ٦ |
| Import van Products met layout e Code GTIN Description Brand Series Type | n velden: | | | | |
| Settings | | | | | |
| Reporting level | Full | | ~ | | |
| Is testrun | O Yes 🖲 No | | | | |
| | | | | | |
| | | 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 report¹⁴:



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.

¹⁴ <u>Note</u>: The import report is also available under *Menu > System > Logs*.

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

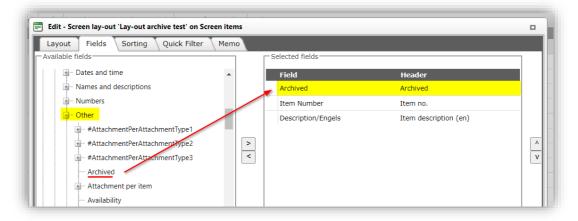
3.3.2 Updating archived records

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? | <i>Archived</i> 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) => Finisher | | https://pima03t.compano. |
| 09-11-2021 12:41 | Finished on 11/9/2021 12:41:26 PM in 46,9ms | Import | <u>124126.xlsx</u> |

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

| Time created | Name | Description | Туре | DetailLink |
|------------------|------|---|--------|-----------------------|
| 09-11-2021 12:41 | - | Basis Product en Artikelbestand (Standaard product import in Excel) => <mark>cancelled</mark> | Import | https://pima03t.compa |
| 55 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.

| Logs Menu View | Edit Functions Import / Export | | |
|----------------|---------------------------------|---|--|
| ⋟. | | ∂ . | |
| Filter | Search All Details Manage scree | n layouts Help | |
| X ParentRecord | DescriTime created Name | Description Type | DetailLink |
| • | 07-09-2021 15:04 | => Finished Finished on Import 07/09/2021 15:04:23 in 46,9ms | https://company Layout-20210907- 150423.xlsx |
| | 07-09-2021 15:03 | Export of 5 Products Export | https://compan 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. | ummary | , | | |
| 7 | | Introduc | tion | 31 | ininar y | | | |
| 8 | | | | | | | | |
| 9 | | This rep | ort describes the impact of the above r | nentioned acti | on. This re | port contain | s different | 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 | | | | | | | | |

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

| | A | В | С | D | E | F | G | н |
|----|---|-----------|---|-------------|---------------|-----------|----------|-----------------|
| 1 | | User | Informational States. | | | | | |
| 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 | | Introduc | tion | | | | | |
| 11 | | | | | | | | |
| 12 | | This repo | rt describes the impact of the above mentioned action. This | report cont | ains differen | t parts: | | |
| 13 | | | | | | | | |
| 14 | | 1. Below | the totals of the changes per subject. | | | | | |
| 15 | | 2. Overvi | ew of the 1 errors | | | | | |
| 16 | | 3. Overvi | ew 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 | роптероп-Layout-20211203- | 163445' has finished without ar | y 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.

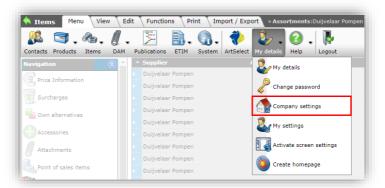
<u>Note</u>: Depending upon the overview you selected for importing data, changes might not be **immediately apparent. Either navigate to the 'correct' overview, or refresh the browser window** (F5).

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.

| > 💭 | | | | | | | | | |
|---|----------------|--------------------------------|-----------------------------|---------------|--------------------|-----------------|----------------|------------------------|------------------|
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| U122202BV5N st | DP drukvarb 1 | pmp v/tapw PV | S m/toerreg nom.2,4m³/h-174 | | | | 2083.00 0.00% | £ 2092 00 1 1 | Duijvelaar Pompe |
| U 🗉 | DF didkvein. 1 | рпр укари ку | 5 m/toeneg nom.2/4m-/n-1/4 | 4KF8 12250VTN | | | 2003.00 0.0076 | 6 2003.00 | |
| Project administration | Quotation | Purchasing | Financial administration | Artikelbeheer | Contact management | System settings | Number patern | Default Reports layout | International |
| International | | | | | | | | | |
| Country | | I Netherlan | ıds | | | | | | |
| Language code | | 🚺 nl Dutch | | | | | | | |
| | | ⊙ Yes ◯ | No | | | | | | |
| Fallback translations | | | 110 | | | | | | |
| Fallback translations Encoding fallback for import | | Default | × | | | | | | |
| | - | Default Default | ~ | | | | | | |
| | - | Default Default Ansi-Win | ✓ Idows-1252 | | | | | | |
| | - | Default Default | ✓ Idows-1252 | | | | | | |

- 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**.

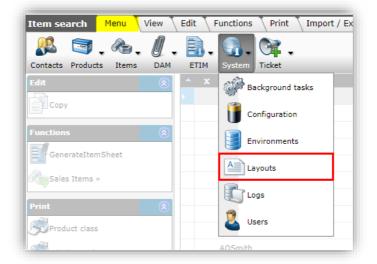
4 Layout management

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 Ed | dit Functions |
|----------------------|---|
| ⋟. | ⊇♀ ■ ❹ |
| Filter | Search All Details Manage screen layouts Help |
| Navigation 😵 | 🔺 Standard A Name |
| Edit 🛞 | |
| | 2 🔲 🏛 |
| Feed layout | |
| Add OData layout | - - |
| | |
| Free form | □ ₩ |
| Add export layout | S |
| | |
| Add import layout | N |
| Add report template | |

2. In the pop-up window, select the *Entity*¹⁵ for which you want to define the layout, for instance Item:

¹⁵ An Entity is a data object in COS, for instance Product, Item, Assortment, Attachment, Price, etc.

| item | Items | artikei-impoi | rt-csv | |
|-------------------|------------------------|-------------------|------------|---|
| Add export layout | | | | × |
| Add export layout | | | | |
| Export entity | Item | | - X | |
| | Accessories item | | | |
| | Choice item | | | |
| | Item | | | |
| | Item group | | | |
| | Item surveillance | | | |
| | Item variant template | | | |
| | Point of Sale per item | | | |
| | | | | |
| | | | | |
| | | | | |
| | ✓ There are 7 | 7 Entities 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:

| 📰 nem nems | | | |
|-------------------------------|---|-----------------|-------------|
| Layout Properties Fields Memo | | | |
| Туре | Text export | ~ | |
| Name | Item export in U | nicode | |
| Application | ◯ 🛱 Within the ● [©] For me | company 🛛 🖧 For | all members |
| | | | |
| | | | |
| | Add next record | Save record | Cancel |
| | 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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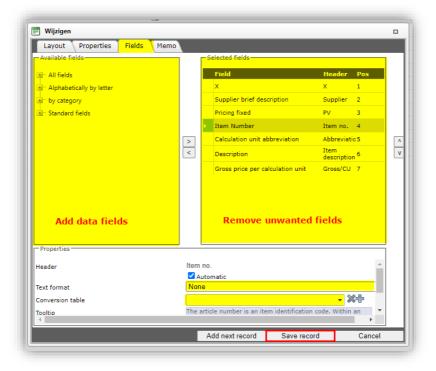
Compano Online Software

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 | : | | |
| Text 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:



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- 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.

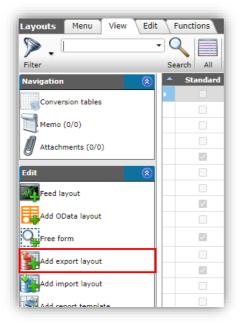
4.1.1 Add custom text-based export layout

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 | | Analyses |
| Conversion tables | | | m | |
| | | | 3 | Background tasks |
| Memo (0/0) | | | 8 | |
| Attachments (0/0) | | | 1 | Configuration |
| | | | m | Environments |
| Edit | | | 8 | |
| Feed Layout | | | m | A Layouts |
| | | | 111 | P . |
| Impact analysis layout | | | m | Logs |
| QFree form | | | 09 | User def fields (main) |
| | | | 8 | M |
| Add Export Layout | | | 8 | User groups |
| Add | | | 8 | 🙎 Users |
| | | | 2 | |

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.

| | emo | | _ | | | |
|--------------------------|---------------------|-----------------------|---------------|---|--------------------------------|-----------|
| - Available fields | |] | | elected fields | | |
| H- All fields | | | | Field | Header | Pos |
| Alphabetically by letter | | | | х | Х | 1 |
| 💷 by category | | | | Manufacturer description | Manufacturer Description | 2 |
| | | | | 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 man a GTIN (| ufacture Global Tr | r's pi ade | roduct code and the code that th Item Number). | e manufacturer uses for a prod | duct, 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:

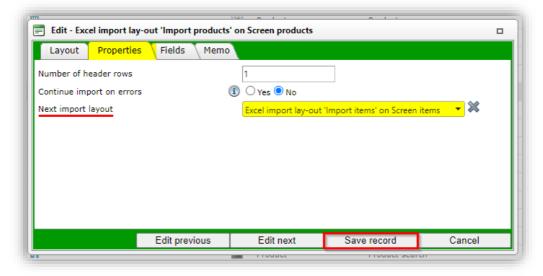
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| Layouts Menu View | Edit | | unctions | | - | |
|-------------------------|-------|-----|-----------|-------------|------|---------------------------------------|
| Contacts Products Items | DAM - | Put | lications | Classificat | tion | System My details Help Logou |
| Navigation | ۲ | | Standa | nrd A | Na | Analyses |
| Conversion tables | | | | 54 | | Background tasks |
| Memo (0) | | | | m | | Configuration |
| Attachments (0) | | | | 89 | | |
| Edit | ۲ | | | m | | Layouts |
| Feed layout | | | | | | Logs |
| Impact analysis layout | | | | 8 | | User-defined fields (main) |
| | | | | Q | Jun | 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 |
| | | | | | | |

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

| ▶. | - 🔍 📑 . | . 🧷 💥 📔 | 1.0. | | | | |
|------------------------|--------------------|----------------------------|-----------|---------|-------------------------|---------------|--|
| lter | Search Feed layout | Modify Delete record(s) Co | ppy Help | | | | |
| avigation (| Standard A | Name | | Source | Overview | Report | Name |
| Conversion tables | | | | Product | Products | | Afbeeldingen |
| | | | LLI | Product | Products | | Compano |
| Memo (0) | - - | | 0 | Product | Products | | Datapool |
| Attachments (0) | | | 100 L | Product | Product search | | Duco product |
| y | | | 1997. | Product | Product search | | ID_OPPLE_PRD |
| lit (| 8 | | 26 | Product | Products | | Import productgroepen |
| Feed layout | | | 2 | Product | Products | | Import products |
| - | | | ۶ | Product | Products | | happen - |
| Impact analysis layout | | | 9 | Product | Products | | Larger . |
| Free form | 2 | inequal transition | 9 | Product | Product elassifications | | Terraria de la companya de |
| | | | 194 - C | Product | Product search | | Sec. 2 |
| Add export layout | | | 19 | Product | Products | | Print Report |
| Add import layout | | | 20 M | Product | Product search | | PRD |
| | | The part of the last | <i>\$</i> | Product | | Product sheet | Productblad |
| Add report template | 8 | Longer Schelering | <i>\$</i> | Product | | Product sheet | Productblad - Joule |
| Modify | | | 100 A | Product | Product search | | sets. |

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



- •
- 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/Enviro |
| 8 | Yes | | 140043902 | https:// | .compano.com/Data/Enviro |
| 9 | Yes | | 140043903 | https:// | .compano.com/Data/Enviro |
| 10 | No | | 140043904 | https:// | .compano.com/Data/Enviro |
| 11 | No | | 140043967 | https:// | .compano.com/Data/Enviro |
| 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 (!)

| Summary | | | | | |
|---|-------------------------------|--------------------|----------------------|--------------|---------------|
| Test Importof file Template_New_Produ with impactreport: All except the produ | | 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 | and) ad) ds (Nederland) | | | | |
| Layout1 | Products an | d Items (v2.3) | | | |
| Title | | d Items (v2.5) | | | 2 |
| Import entity | Product | | | | \$ • • • • |
| Import layout | Excel impor | lay-out 'Product i | mport L04' on Screen | products 🔻 🗸 | ••/ |
| | 🔘 Yes 🔿 N | | | | |

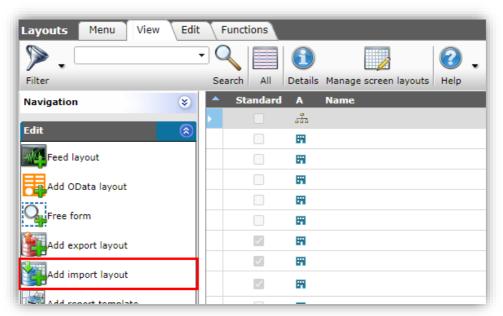
Note: Archiving of products/items using the Archive not imported records will also function when the layout is used for a Periodic Import Task.

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

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| 😒 Ite | m Ite | ms | | | |
|-----------------|----------------------|-----------------------|---------------|------------|----|
| Add - New layou | ıt | | | • | _ |
| Layout Prop | erties 🔪 Fields 🔪 Me | mo | | | L |
| Туре | | Excel import | ~ | | |
| Name | | Item import from Exc | cel | | |
| Application | | ◯ III Within the comp | pany 이급 For a | ll members | |
| | | | | | |
| | | Add next record | Save record | Cancel | ٦. |

- 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 | | | Ane coren |
|---------------------------|-------------|---------------------------|--------------------------|------------|
| 📄 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:

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| Item Item se | searcn | asora: |
|---------------------------------|---|--------|
| Layout Properties Fields Memo | | |
| Available fields | Selected fields Field Header Pos Item number Item no. 1 Supplier code Supplier 2 Key data fields for entity 'Item' | |
| Header | Item no. Automatic | ^ |
| Field position | 1 Automatic | |
| Fixed value Conversion table | - X+ | - |
| | Add next record Save record Car | ncel |

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* category¹⁷. 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:

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:

¹⁷ <u>Note</u>: In the field selector, these fields have been removed from the category *Names and Descriptions*.

| 2 | ftware | |
|---|--------|---|
| | S | |
| 3 | Online | |
| | ompano | |
| | 5 | |
| 2 | 3 | ~ |

| Layout | | | - | | |
|-------------|---------|---|--|--------------------------------------|--|
| Application | = value | ~ | □ III Within the company □ III members | 🗌 🗳 For me | |
| Туре | = value | ~ | Sreport | □ ⊠ Impactanalysis □ ♪OData OData | |
| | | | Excel export | Filter setting | |
| | | | Ivit export Ivit Text import | 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:

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

| Layouts Menu View | v Edit | \ Fu | nctions | | | | | |
|-------------------|-----------|----------|----------|----------|--------------------------------|-----|---------------------|------------------------|
| ▶ | • | - Q | | 6 | | | | |
| Filter | | Sear | ch All | Detail | s Manage screen layouts Ticket | | | |
| Navigation | \otimes | • | Standard | A | Name | т | Source | Overview |
| Conversion tables | | | | m | | 26 | Item | Items |
| | | | | 8 | Admin | 56 | Item | Item search |
| Attachments (0/0) | | <u>۲</u> | | 3 | Admin | 122 | Item | Items |
| - | | | | | | 9 | #ProductCertificate | ProductCertificates |
| Edit | ۲ | | | | | | Product | Product classification |
| Add export layout | | | | - | | 56 | Product | Product search |
| Import layout | | | | B | | 26 | Assortments | Assortments |
| | _ | - | | ÷. | | 50 | Item | Item search |
| Modify | | | | . | | 9 | Certificate | Certificates |
| | | | 1 | 8 | Admin | 0 | Product accessories | Accessory products |

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

4.5 Copying layouts

It is possible to copy shared layout with the *Copy/Paste* functions and then edit this local copy:

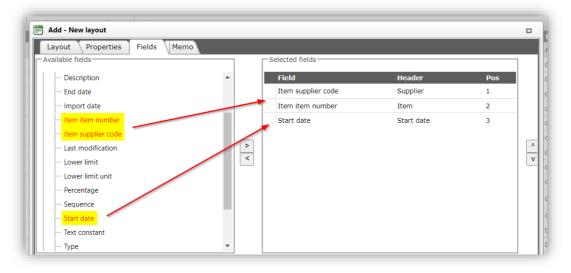
| ⋟ | - 9 | | 6 |) 🚺 🔞 . | | | | | |
|--------------------------|--------|--------|------------|---------------------------------|----|---------------------------|----------------------------|-----------------|---|
| Filteren | Zoeker | Alles | Detai | ils Schermlay-outs beheren Help | | | | | |
| Navigatie 🛛 😵 | Star | ndaard | T | Naam | т | Bron | Overzicht | Rapport | Naam |
| Bewerken | | | | | 9 | Artikel | Artikelen | | Compano L05 |
| bewerken e | 2 | | - | | 0 | Assortimenten | Assortiment | | Compano L05 |
| Feed lay-out | | 1 | m | | 0 | Log | Logs | | Compano L05 |
| Impact analyse lay-out | | | 8 | Henriëtte Stam | | Artikel | Artikelen | | Import artikelen |
| | | | 8 | Henriëtte Stam | 22 | Product | Producten | | Import producten |
| QuVrij formulier | | | a. | | | Rapportsjabloon | | Rapportsjabloon | PIM BASIS Artikelblad |
| Voeg export lay-out toe | | | a. | | 5 | Artikel | | Productklasse | PIM BASIS Artikelblad |
| | | | đ. | | 3 | Product | | Productblad | PIM BASIS Productblad |
| Voeg import lay-out toe | | | æ. | | | Rapportsjabloon | | Rapportsjabloon | PIM BASIS Productblad |
| Voeg rapportsjabloon toe | | | æ | | 26 | Artikel | Artikelen | | Standaard artikel import in Excel - L03 (v2.3) |
| | | | m | | 26 | Artikel | Artikelen | KOPIE | Standaard artikel import in Excel - L03 (v2.3) - kopi |
| Wijzigen | | | <i>.</i> # | | 22 | Artikel - Artikel relatie | Artikel - Artikel relaties | | Standaard artikel relaties import - L04 (v1.1) |
| Verwijderen record(s) | | | # | | | Certificaat | Certificaten | | Standaard certificaat import - L03 (v1.0) |
| Kopiëren | 1 | | 4 | | | Product certificaat | Product certificaten | | Standaard import link certificaten aan producten |
| - Kopieren | | | | | | Toebehoren product | Toebehoren producten | | Standaard import toebehoren product - L03 (v2.2) |
| Plakken | | | <u>.</u> | | 26 | Toebehoren product | Toebehoren producten | | Standaard import toebehoren product met GTIN - LI |

5 Appendix A: Key data fields per Entity

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 | - |

A ready-to-use template is available for importing (new) Products: *Template New Products And Items (DICO/SALES005) - (XLSX)*. This template is available in 2 variants:

- International: Template_New_Products_Items_PIM_International_r1-1_L04.xlsx
- Dutch: Template_Nieuwe_Producten_Artikelen_PIM_Basis_r2-3_L03.xlsx

These Excel files can be imported using the corresponding standard import layouts:

- Standard product import in Excel INT NL L04 (v1.1)
- Standaard product import in Excel L03 (v2.3)

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

5.2 Item

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

A ready-to-use template is available for importing (new) Items: *Template New Products And Items (DICO/SALES005) - (XLSX)*. This template is available in 2 variants:

- International: Template_New_Products_Items_PIM_International_r1-1_L04.xlsx
- Dutch: Template_Nieuwe_Producten_Artikelen_PIM_Basis_r2-3_L03.xlsx

These Excel files can be imported using the corresponding standard import layouts:

- Standard artikel import in Excel INT NL L04 (v1.1)
- Standaard artikel import in Excel L03 (v2.3)

For more information, see the *Manual New Products, Items, and Price Updates*, available on 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 importing accessories, a ready-to-use template is available on the Compano Help website:

• Template_Prijsupdates_PIM_Basis_r2-2_L03.xlsx

Both Excel files can be imported using the standard import layout:

• Standaard prijsupdates in Excel - L03 (v2.2)

For more information, see the *New Products, Articles, and Price Updates Guide*, available on 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 |
| Subnumber | Certificate > Codes | Value can be empty |
| Issuer | Certificate > Names and descriptions | Value cannot be empty |
| 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> . |

Two templates are available for the import of Certificates:

Adding new certificates: Template_Import_Certificaten_r1-0_L04.xlsx Linking certificates to products: Template_Link_Certificaten_aan_Producten_r1-0_L04.xlsx

These templates can be imported with:

- Standaard certificaat import L03 (v1.0)
- Standaard import product certificaat link L04 (v1.0)

For more information, see the *Attachments and Certificates Manual*, available on the <u>Compano</u> <u>Help website</u>.

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 | |

A ready-to-use template is available for importing product relationships:

• Template_import_product_relaties_PIM_Basis_r1-1_L04.xlsx

This template can be imported with:

• Standaard product relaties import - L04 (v1.1)

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 | |

A ready-to-use template is available for importing product relationships:

• Template_import_artikel_relaties_PIM_Basis_r1-1_L04.xlsx

This template can be imported with:

• Standaard artikel relaties import - L04 (v1.1)

<u>Note</u>: 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* |

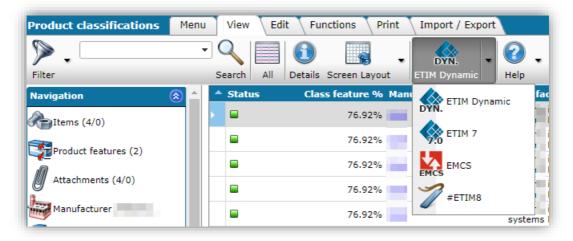
*) These fields need not be present in your import file, however, they *do* need to be present in your import layout (possibly as an '0' field).

5.8 User-defined fields

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

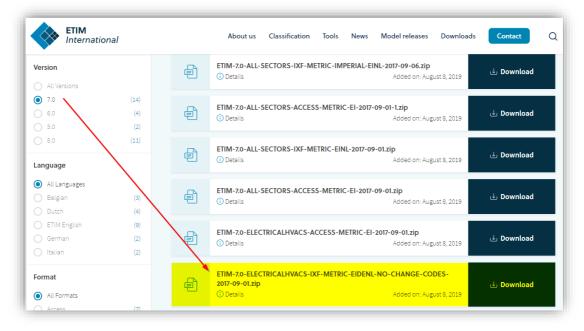
6 Appendix B: ETIM classification version import

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*¹⁸, or example ETIM-7.0-ELECTRICALHVACS-IXF-METRIC-EIDENL-NO-CHANGE-CODES-2017-09-01.zip (ETIM International DE/NL)



¹⁸ 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 | Export | | | | | |
|-------------------|---------------|-----|----------------------|--------------|-----------|----------|-----------------|--------------|------|----|
| | - Q Search | Imp | ort Manage layouts | Excel Import | Excel Upd | • ate | ETIM classifica | ation import | Help | • |
| Navigation | ۲ | | Classification syste | em Code | Na | me (zl | h-CN) I | Name (cs-C | Z) | Na |
| Productmodels (2/ | (1) | • | ETIM Dynamic | <u>EC000</u> | 0001 | | | | | |
| | - | | ETIM 7 | ECON | 0001 | | | | | |

6. In the pop-up window:

| | | | Appaluitklopp |
|----------------------------|----------|---------------------|---------------|
| ETIM classification import | | | |
| ETIM classification import | | | |
| Classification file | ETIM-7.0 | -ELECTRICALHVAC Sei | lect |
| | | | |
| EDynamic | 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.