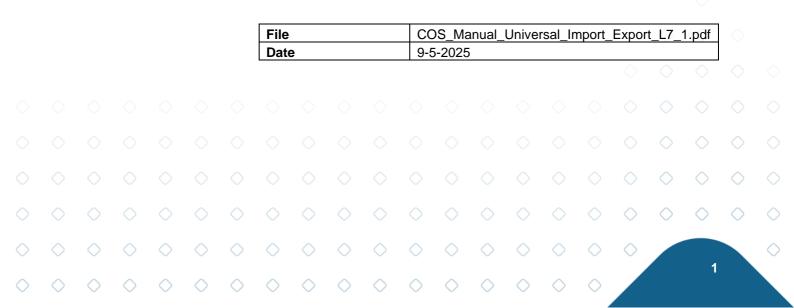




Universal Import / Export Compano Online Software

Version L7.1





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1 Introduction

This manual describes the 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 onthe-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

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.

With a standard Compano license:

- 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:

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



- 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:
 - DQR 9.0 (OpenData/ITEK)
 - DQR 9.0 (ARGE)
 - 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>.

<u>Warning</u>: Please pay close attention to your settings when switching between export formats! Settings in the export dialog below are *stored per user*, however common settings are *retained* when selecting a different export format. Thus, for instance, when exporting in the FAB-DIS format with the ETIM 8 setting, this setting is retained when switching back to the DQR export format.

2.2 Custom export

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

- Custom screen layouts
 - Layouts for exporting an Excel file based on the screen layout
- Custom export layouts
 - Layouts for exporting an Excel file
 - 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:

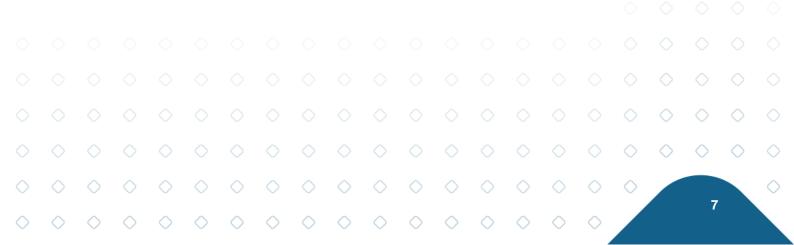
Products Menu View E	dit Functions Print	Import / Export
Filter	Search All Details	Datapool Help
Navigation 🛞	Manufacturer Code	Screen Layout
Ttems (1/0)	0712074000001	Datapool
Product parts (0/0)	<u>8712874000001</u>	images
Accessory products (0)		Normproducten
Is part of (1/0)	8712874000001	Manage screen
Product certificates (0/0)		

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

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

sideflow sideflow	Search Export product	s Import Help					
avigation	🔊 🔶 🔺 Manufacturer Code	Manufacturer Description	s	GTIN	Code	F	Short description
Product parts	-	1000	None	100000	<u>17020</u>		SideFlow Clean 5L
Is part of Product certificates Attachments		land it	None		<u>17031</u>		SideFlow Clean Zakfilt 10 micron

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





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

- Conversion of data: for instance, conversion of units (PCE to STUK).
- Insert header (Yes/No): Insert a header row containing data labels.
- **Export type**² (product exports only): Choose an export layout type:

		E	Add - Nev	v layout	nom	2,411-/11-1/	4KMd	-		-	-	-	-	-	-	-				
			Layout	Propertie	es Fiel	ds Mer		es O No												
			xport type				Star Star Incl	ndard ndard ude produc ude model					~							
			\bigcirc	\bigcirc	\bigcirc	\bigcirc				\bigcirc	\diamond	\diamond	\diamond	\diamond	\bigcirc	\bigcirc				
	² Note	: Othe	r dedica	ated ex	kport t	ypes ca	an be a	dded	on requ	Jest, fo	or insta	nce fo	r mem	os, atta	achme	nts, et	cetera.	\diamond	\diamond	
	Please	conta	ict <u>sales</u>	s@com	pano.	com fo	r more	inforn	nation.							\diamond	\diamond	\diamond	\diamond	<
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- **Standard**: Standard export layout, also suitable for updating data.
- Include product classes: Export layout suitable for updating (ETIM) product data; will 0 export the product class(es) and their features.
- Include model classes: Export layout suitable for updating (ETIM MC) model data; will 0 export the model class(es) and their features.

Note: Also see paragraphs 2.3 UPDATE EXPORT (EXCELFORIMPORT) and 3.3 UPDATE IMPORT (EXCELFORIMPORT) 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.
- Use Filter and Search to find a data set.
 Use select *All* (CRTL-A) or manually select records that you need to export.
 Next, go to the *Import/Export* tab and click on *Export* [ENTITY]:

🔦 Items 🛛 Menu 🔍 View	Edit Fun	ctions Pri	nt Import / Export	× Assortn	nents:	i i i i i i i i i i i i i i i i i i i
Filter	- Q Search	export items	Import Item exports	🕜 🗸 Help		
Navigation 🤇	🕥 🔶 📥 Supp	olier GL	N code	Item no.	Price Date	Price per PU and PQ
Price Information				23980	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	55586	27/05/2016	
				<u>55801</u>	16/07/2018	
Assortments:				56701	16/07/2018	

5. In the Export [ENTITY] dialog:

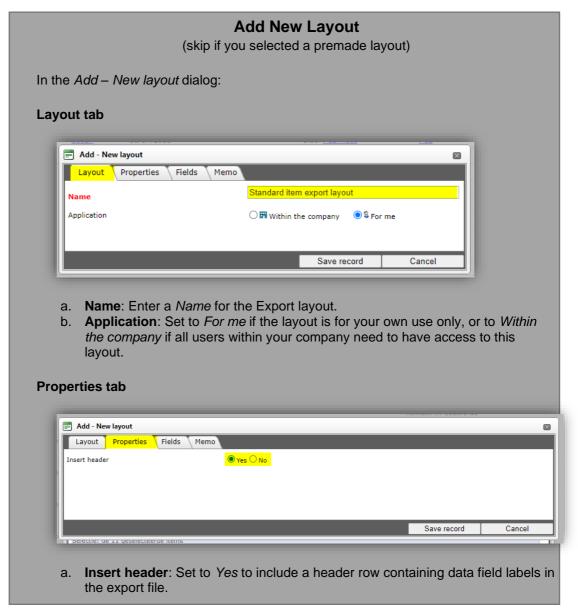
Export products	VIII TAPLEY		
Export products			
Use screen layout		es 🖲 No	_
Export layout			- 🗶
Prepare for import	<mark>О</mark> ү	es 🖲 No	
Summary	Create Export lay	out	
Export overzicht: Products Filter: Selectie: alle 2452261 prod	lucts		
Science, and 2452201 prot	14003		
			Close
00711401009434		D/IdKd	

- 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. Note: Export layouts can also be prepared at System > Layouts; see chapter 4. Layout management.

		³ This r Unicoc <u>export</u> ⁴ Expor	de), the	expor	t layou	ut will I	have to	be cr	eated t	hroug	h <i>Syste</i>	em > L	ayouts	; see: <u>4</u>	.1.1 Ac	dd cust	om tex	<u>t-base</u>	ed
		of the	Entity.														\diamond	\diamond	\diamond
>	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond		
5	\sim	\wedge	\sim	\sim	\sim	\bigcirc	\sim	\sim	\sim	\sim	\sim	\bigcirc	\sim	\sim	\sim	\bigcirc			9



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).







Available fields	Selected	fields			
Deine unit		, neido			1
	▲ Field		Header	Pos	
Product	Supp	lier code	Supplier	1	
■ Purchase item	Supp	lier brief description	Supplier	2	
netailprice	Item	Number	Item no.	3	
	Desc	ription/Dutch	Item description (nl)	4	
	Short	t description/Dutch	Short description (nl)	5	V
- Supplier Appointments	Calcu	lation unit abbreviation	Abbreviation	6	
Barcode prefix	Gross	s price per calculation unit	Gross/CU	7	
Properties	•				
Conversion table			•	⋧₽	s
Header	Supplier Automatic				
Tooltip	Supplier code				
		Save red	cord	Cancel	_
				ouncer	
Available fields: E	iolde which o	n ha addad ta	vourlov	out	
a. Available fields : F b. Selected fields : Se				out.	

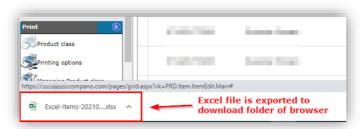
6. Click on the *Export* button to start the export process:

				Expor	t items				<u> </u>		<u></u>									
				Use scree Export lay Prepare fr	yout or import			O Yes ● M Excel expor	t lay-out 'Stan	dard item exp	ort layout' on	Screen items		<mark>→</mark> X4	/					
				Filter: Selectie: Fernon Fernon Fernon Fernon Fernon Fernon Fernon	/ verzicht: Item	7 items:	Summ	ary of reco	ords to be	exported										
				Velden: Suppli Availa Item M	ier brief descri bility Number	ption	Summ	ary of dat	a fields to	be export	ed									
				 Descri 	ation unit abb iption price per calc															
				- 1 8 <u>-</u>	27703/2010			1.00	<u>- ree nece</u>		Conversions	Hete	Export	Clo	se					
			export the Pro																\diamond	
																\diamond	\diamond	\diamond	\diamond	<
\sim	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond				<
\sim			Ŭ															11		



Depending upon your browser download settings:

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



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

			v/tanw RVS m/toerreg
Dpslaan als			>
← → · · ↑ 🖡 > Deze pc > Downloads		5 v	
Organiseren 👻 Nieuwe map			III ▼ (?)
🍠 Deze pc	^ Naam	Gewijzigd op	Туре
🧊 3D-objecten	✓ Vandaag (1)		
📰 Afbeeldingen	Excel-Items-20210329-113331.xlsx	29-3-2021 11:33	Microsoft Excel-werkblad
Bureaublad	✓ Vorige week (4)		
🗎 Documenten	ExcelForImport-Products-and-Items-20210322-145322	23-3-2021 09:27	Microsoft Excel-werkblad
🕹 Downloads	ExcelForImport-Products-20210322-145322.xlsx	22-3-2021 14:54	Microsoft Excel-werkblad
👌 Muziek	ExcelForImport-Products-20210322-144754.xlsx	22-3-2021 14:47	Microsoft Excel-werkblad
📕 Video's	Excel-Items-20210322-124938.xlsx	22-3-2021 12:49	Microsoft Excel-werkblad
🗐 Lokale schijf (C:)	✓ Eerder deze maand (16)		
The second second	v < 🗋		>
Bestandsnaam: Excel-Items-20210329-113538.x	SX		· · · · · · · · · · · · · · · · · · ·
Opslaan als: Microsoft Excel Worksheet (*.xl	x)		\ \
N Mappen verbergen			Opslaan Annuleren
			1x230V P

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

	A		В		С		D		E		F
3	Supplier	1	Α	ا ا	em no. 💦	*	Abbreviation	-	Item description	-	🔹 Delivery time 🛛 🔽
4		Valia		HU1222	1BE60	st			DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-118kPa G1 1x230V P		2,00
5		Valia		HU1222	1BR10	st			DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-118kPa G1 3x400V+N		3,00
6		Valia		HU1222	2BV5N	st			DP drukverh. 1pmp v/tapw RVS m/toerreg nom.2,4m³/h-174kPa 1x230V+N		4,0
7		Valia		HU1223	1BE60	st			DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-177kPa G1 1x230V P		5,0
8		Valia		HU1223	1BR10	st			DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-177kPa G1 3x400V+N		6,0
9		Valia		HU1223	2BV5N	st			DP drukverh. 1pmp v/tapw RVS m/toerreg nom.2,4m³/h-261kPa 1x230V+N		7,0
10	and the second second	Valia		HU1224	1BE60	st			DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-236kPa G1 1x230V P		8,0
11	and the second	Valia		HU1224	1BR10	st			DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-236kPa G1 3x400V+N		9,0
12											

2.2.3 Export with custom layout (text-based)

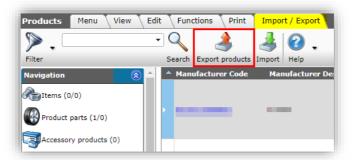
<u>Important</u>: A custom text-based layout *cannot* be created on the fly. Prepare your text-based layout at *System > Layouts*, also see paragraph **4.1.1** ADD CUSTOM TEXT-BASED EXPORT LAYOUT.

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

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





5. In the Export [ENTITY] dialog:

Export products Use screen layout O Yes INO Export layout Text export lay-out 'Export of products in Unicode' on Screen product Compress O Yes INO Summary Export overzicht: Products Filter: Selectie: de volgende 5 products: > ADM 80 N AOSmith 08717449103194 > ADMR 40 N AOSmith 08717449106515 > ADMR 90 N AOSmith 08717449106515 > ADMR 90 N AOSmith 08717449107070 > Veiden: * X Manufacturer description • Code Dimang Dimang • Trype	Export products		
Export lay-out 'Export of products in Unicode' on Screen product Compress Ores Summary Export overzicht: Products Filter: Selectie: de volgende 5 products: ADM 80 N AOSmith 08717449103194 ADMR 40 N AOSmith 08717449106256 ADMR 90 N AOSmith 0871744910717 ADMR 90 N AOSmith 08717449107260 Velden: X Manufacturer description Code GTIN Availability Image Description Brand Exponential Exponentia	Export products		
Compress Yes ® No Summary Export overzicht: Products Filter: Selectie: de volgende 5 products: Selectie: de volgende 5 products: ADMR 40 N AOSmith 08717449103194 ADMR 40 N AOSmith 08717449106515 ADMR 40 N AOSmith 08717449107260 Velden: • X Manufacturer description Code GTIN Availability Image Description Brand Type	se screen layout	○ Yes ● No	
Summary Export overzicht: Products Filter: Export overzicht: Products Filter: ADM 80 N AOSmith 08717449103194 ADM 80 N AOSmith 08717449106256 ADM 80 N AOSmith 08717449106515 ADM 80 N AOSmith 0871744910717 ADM 80 N AOSmith 08717449107260 Velden: X Manufacturer description Code GTIN Amanufacturer description Code Brand Frand Frand Frand Frand Frand	xport layout	Text export lay-out 'Export of products in Unicode' on Screen product	- *+/
Export overzicht: Products Filter: • ADM 80 N AOSmith 08717449106256 • ADMR 50 N AOSmith 08717449106515 • ADMR 90 N AOSmith 0871744910717 • ADMR 90 N AOSmith 08717449107260 Velden: • X • X • Manufacturer description • Code • GTIN • Availability • Image • Drawing • Description • Brand • Type	ompress	○ Yes ● No	
Filter: Filter: Selectie: de volgende 5 products: ADMR 80 N AOSmith 08717449103194 ADMR 50 N AOSmith 08717449106256 ADMR 80 N AOSmith 08717449107017 ADMR 80 N AOSmith 08717449107017 ADMR 90 N AOSmith 08717449107260 Velden: X Manufacturer description Code GTTN Availability Image Drawing Description Brand Type	ummary		
Conversions Export Class	Ilter: ADM 80 N AOSmith 08717449103194 ADMR 40 N AOSmith 08717449106256 ADMR 40 N AOSmith 08717449106515 ADMR 80 N AOSmith 0871744910717 ADMR 80 N AOSmith 0871744910717 ADMR 90 N AOSmith 08717449107260 (elden: X Manufacturer description Code GTIN Availability Image Drawing Description Brand		
Conversions Export Close		Conversions Export	Close

- 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:

		xport proc															
	115.1	screen lay	1			Ov	es 🔍 No									Di	
		ort layout	Juc				l export lay	-out 'test' d	on Screen p	products				•	X+ /	Þi	
	Prep	are for im	oort			Ογ	es 🔿 No									Þi	
	Exp	r:	ht: Produc	ts erde_produ	inte											þi Di	
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é r	esultin	g Exce	el file v	vill be			Exce	LForIr	nport	-[ENT	ITY]-				<lsx< td=""><td><u> </u></td><td></td></lsx<>	<u> </u>	
ér	<u></u>	nportar	<u>nt</u> : Whe	\diamond	aming	an Exc	celForli	mport	file, al	ways r	make s	ure the	e filena	\diamond	tarts wi	◇ ith _◇	\diamond
é r > >	<u></u>	nportar	<u>nt</u> : Whe	en rena	aming	an Exc	celForli	mport	file, al	ways r	make s	ure the	e filena	\diamond	\diamond	(<i>ith</i>)	\diamond
é r > > >	<u></u>	nportar	<u>nt</u> : Whe	en rena	aming	an Exc	celForli	mport	file, al	ways r	make s	ure the	e filena	\diamond	\diamond		 13



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 (ExcelForImport)</u>.

<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.

Note: 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:

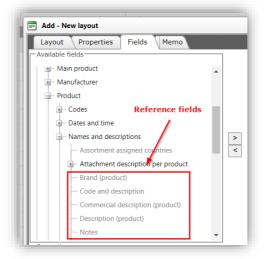


Figure 1. Non-editable fields in the field selector





	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		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		Contraflex expansievat 80/1,5 [6bar]	Contraflex expansievat 80/1,5 [6bar]
10		17020		Reference field	Source
11		17031		SideFlow Clean Zakfilter 10 micron	SideFlow Clean Zakfilter 10 micron
12		17032		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:

- **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 language-specific counterpart(s), based on the language that is set for your user-interface, for example:

	User-interface 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 languagespecific 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:



Products Menu View Ed	lit Functions Print	Import / Export	
Filter	Search All Details		
Navigation 🛞 📤	🔺 X Manufacturer	Screen Layout	GTIN
Ttems (0/0)	R-Vent)871931110619
	Flamco SE	Datapool	871287426074
Accessory products (0)	Flamco SE	images	871287426136
ProductCertificates (0/0)	Flamco SE		871287426171
Attachments (1/0)	Flamco SE		871287426241
	Flamco SE	Manage screen layouts	871287426341
Manufacturer:R-Vent (Flamco SE		871287426493
	Flamco SE	26793	08712874267930

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

Per view and type Menu	/iew E	dit I	Functions Print
Filter	Search	Add	Modify Delete record(s)
Navigation 🛞	^ A	т	Name
Comunica tables	•	9	Datapool
Conversion tables	54	0	images
Memo (0/0)			

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

Layout	Fields	Sorting	Quick Filte	er Memo			
Гуре				Screen		\sim	
Name				Update series	and type		9
Application				🔿 🖬 Within the	company	🔘 🗟 For m	e

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

						n field							s > By	categ	ory > I	Produc	ct > Tr	anslat			
			Trai	nslatio	ns En	glish:															
																		\diamond	\diamond	\diamond	
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>	\diamond		16		<																
2	\diamond			01																	



Layout Fields Sorting Quick	Filter	Memo		
Available fields		-Selected fields		7
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	1
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):

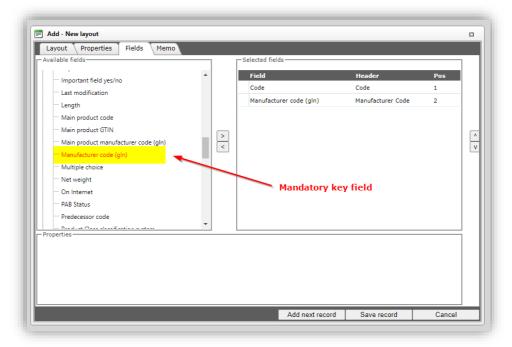
F		H Serie	25			Тур	e		-	Series	(en)			Туре	(en)		-	
	Contrafi			TE				/	Contraf	lex [3bar	2-80ltr]		TEST					
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E	Separati		2 00101			ean 5L			Separat	-	2 00101		SideFlow Clean 5L					
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	Separati	on		510	sider ow Clean 5L Filterbag					ion			SideFlow (lean 5L	Filterbag			
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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.





<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>.

2.3.4 Export classification fields

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

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

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				Add - N	ew layo	ut															
				Layout	Pro	perties	Field	ls 🔪 M	emo												
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			ц							Include	model c	lasses						- 1			
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2.3.5 Exporting fields containing HTML

Certain data fields in COS can contain HTML formatting code, for instance the *Commercial Description* field. When exporting these data fields, please note:

- Custom export: The HTML-code is stripped on export; the export file will contain *no* HTML-codes.
- **Export for import**: The HTML-code is exported; the ExportForImport-file will contain HTML-codes, which can be updated and imported back into COS.

3 Import

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

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

Some general notes on importing data:

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

<u>Tip</u>: 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.

- 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:





Available fields Selected fields All fields Field Alphabetically by letter Item number by category Item supplier code Standard fields Start date Amount per PU+PQ Amount per PU+PQ Lower limit Cover limit Lower limit SE	
Alphabetically by letter Item item number Item item 1 by category Item supplier code Supplier 2 Type Type Type 3 Standard fields Start date 4 Amount per PU+PQ Amount per PU+PQ 5 Sequence Sequence 6 Lower limit Lower limit 7	
by category Item supplier code Supplier 2 Type Type 3 Standard fields Start date 4 Amount per PU+PQ Amount per PU+PQ 5 Sequence Sequence 6 Lower limit Lower limit 7	
Standard fields Type 3 Standard fields Start date 4 Amount per PU+PQ Amount per PU+PQ 5 Sequence Sequence 6 Lower limit Lower limit 7	
Start date Start date 4 Amount per PU+PQ Amount per PU+PQ 5 Sequence Sequence 6 Lower limit Lower limit 7	
Amount per PU+PQ Amount per PU+PQ 5 Sequence Sequence 6 Lower limit Lower limit 7	
Sequence Sequence 6 Lower limit Lower limit 7	
Lower limit Lower limit T	
Lower limit Lower limit 7	
cos	
Properties	
Header Start date ZAutomatic	^
ield position 4 Automatic	
Fixed value	
faintain 💿 Yes 🔿 No	
Continue on error O Yes 🖲 No	
oolfin Start date	

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

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

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

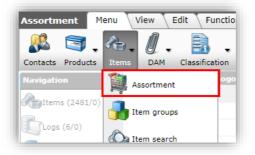
20	
ZU	



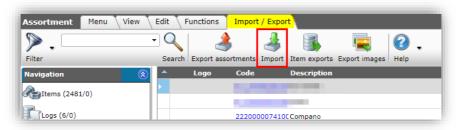
<u>Warning</u>: For industry standard imports, such as SALES005, DQR, BMEcat5, if the import is recognized (especially for the items) as a full import and there are no errors, then any previously imported and untouched articles will be archived. Thus, if items were added manually, they will not have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



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



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

4. In the Import dialog :





		Sales
🗐 Import		
Import		
Summary		
	of file SALES005_DirectProfile_van(SA_MF)_20230904_143118_bzip2.zip	
with impactreport: All except the pro-	iduct class features	
elta import of manufacturers from		
elta import of products from file pro elta import of etim product feature		
elta import of certificates from file	productdata.xml	
Pelta import of product certificates f Pelta import of attachments from file		
elta import of manufacturers from		
ull import of items from file pricecat Delta import of attachments from file		
Delta import of item - item relations		
Delta import of item - item relations Delta import of product - product rel		
ettings		
eporting level	All except the product class features	
s checkrun	● Yes ○ No	
elected Files	Delta import of manufacturers (product)	
	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 attachments (product)	
	✓ full import of items	
	Delta import of attachments (item)	
	Delta import of item encloseitem relations	
	Delta import of item relations	
	Delta import of Product - Product relations	
	Previous	Close
	I TEVIOUS INEXT	01036

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. **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 files**⁸: 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.

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

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- 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				×	<u>C</u> 1
2			<u>jround task</u> . You will also be availanble in	receive an email as	soon as the job is	<u>C1</u>
2						<u>C1</u>
2						<u>C1</u>
2						<u>C</u> 1
2						<u>C1</u>
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2						<u>C</u> 1
2						<u>C1</u>
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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.

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*.

⁹ For automated import tasks (periodic tasks), the import report is sent to the *admin* user.



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:

Surcharges	Menu View	Edit	F	unctions	Impo	rt / Expo	rt	
Filter		- C	arch	Export surch	arges	Jmport	Help	•
Edit	8		х	Assortmen	t	Item		Туре
Add		•				7102244		#AEO
Add				1.000		7102237		#AEO

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

					Impor Impor	t				Excel	import-sur	charges.xls	Selec	t							
				-													-				
										Previ	ous		Next		Clos	e					
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		¹⁰ Or, u	ise any	Impor	rt butto	on in C	OS.										\diamond	\diamond	\diamond	\diamond	\diamond
\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond				\diamond
\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond			24		



Import			_	×
Import				
Summary				
Item item number Item supplier code Type Start date Amount per PU+PQ Sequence Lower limit	arges.xlsx ut Import surcharges en velden:			
Lower limit unit Layout1				
Title	Blad1			
Import entity	Surcharge		- 💥	
Import layout	Excel import lay-out 'Imp	oort surcharges' on Scree	n surcharg 🔻 🗮 🚼	
	Previous	Next	Close	

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.
- 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.

		¹¹ In ca	ise of n	nultipl	e data	source	es, for i	nstance	e an Ex	cel file	e with r	nultipl	e work	ksheets	s, the d	lialog v	will list	a layoi	ut for	\diamond	
		each d							a + a									\diamond		\diamond	\diamond
\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond		05		\diamond
\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond			25		



	(skip if you s		
In the A	A <i>dd – New layout</i> dialog:		
Layout	tab		
	Add - New layout		
	Layout Properties Fields Mer	no	
	Name	New import layout	
	Application	◯ III Within the company ● 🕯 F	or me
		Save record	Cancel
a. b.	Name : Enter a <i>Name</i> for the Imp Application : Set to <i>For me</i> if the <i>company</i> if all users within your c	layout is for your own use	only, or to <i>Within the</i> ess to this layout.
Proper	ties tab		
	Item	Items	
	Layout Properties Fields	Memo	
	Number of header rows	1	
	Continue import on errors	O Yes No	
	Add next	record Save record	Cancel
a.	Number of header rows: Enter t	he number of header rows	in your Excel file that
b.	be skipped on import. Continue import on errors: Set	to Yes, if the import should	continue when
	encountering a faulty record.		
	tab		
Fields			



	Available fields		- Selected fields	Header	Pos		
	Product		Supplier code		1		
	Purchase item		Supplier brief description	Supplier	2		
	Retailprice		Item Number	Item no.	3		
	Retailprice information		Description/Dutch	Item description (nl)	4		
	 ■·· Size unit ■·· Standard 		Short description/Dutch	Short description (nl)	5	v	
	. Supplier		Calculation unit abbreviation	Abbreviation	6		
	Appointments Barcode prefix		Gross price per calculation unit	Gross/CU			
	- Properties Conversion table Header Tooltip	Supplie Automa Supplier	tic	• 3	×+ 2	S	
a. Available	fields: Fields which	ch can be	added to your		Cancel		
	ields: Selected fie						
			•				
> and	<: Use these butto	ons to eith	ner add to or rei	move fi	elds	from th	ne Sele

5. Click on Next to go to the Import settings:

the Import dialog.

= Import			
Import			
Summary			
Importof file Excel-import-surcharges.xl: with impactreport: Full Import van Surcharges met layout Impo Item item number Item supplier code Type Start date Amount per PU+PQ Sequence Lower limit Lower limit			
Settings	-		
Reporting level	Full		~
Is testrun	O Yes 🔍 No		
Fill conversion list	O Yes No		
	Previous	s 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.

¹² Important: 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.

elected fields



- 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):

	А		F			
3	Archived	-	Item no.	-		
4	No		140043898		https://	.compano.com/Data/Enviro
5	No		140043899		https://	.compano.com/Data/Enviro
6	Yes		140043900		https://	.compano.com/Data/Enviro
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 (!)

= Import	•	×							
Import									
Summary									
Test Importof file Template_New_Prod with impactreport: All except the prod Import van Products met layout Produ • Product code • Manufacturer code (GLN) • Brand (product)/Nederlands (Neder • Series (product)/Nederlands (Nederla • Type (product)/Nederlands (Nederla • Long description (product)/Nederla • Short description (product)/Nederla	uct import L04 en velden: rland) erland) land) ands (Nederland) ands (Nederland)								
	Products and Items (v2.3)								
Title		_							
	Product 👻								
Import entity		P							
Title Import entity Import layout Archive not imported records	Product V	P							
Import entity Import layout	Product Excel import lay-out 'Product import L04' on Screen products	P							

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:



2 🚍 Res	sults Import Artikelen	×	
2	The import has been started as background task. You will receive an email as so	on as the job is	<u>с</u> 1
2	finished. Then the import report will also be availanble in the logs.		<u>C1</u>
2			<u>C</u> 1
2			<u>C1</u>
2			<u>C1</u>
2	ОК		<u>C1</u>
)44075	PLE I.UU I.UU PLE	CLU	ВМ

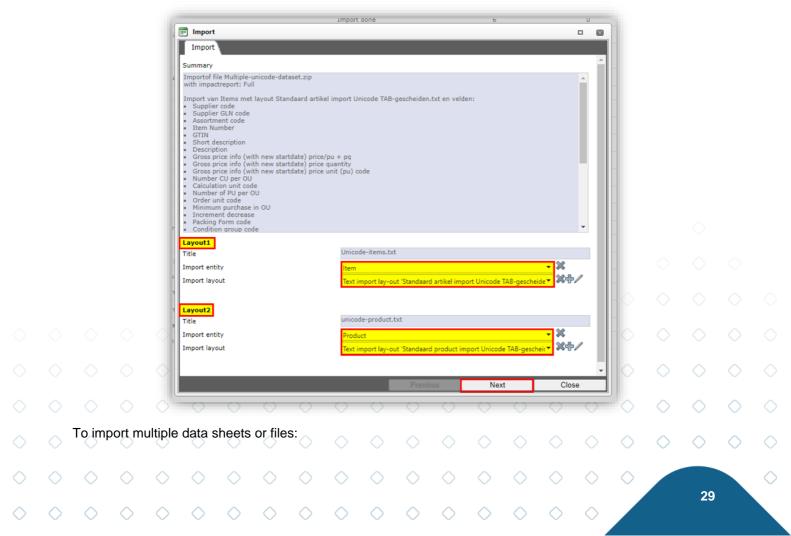
3.2.1 Multiple data sources

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).

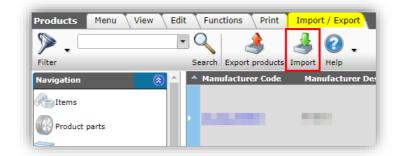
Note: Each data source needs to be linked to an *Entity* and imported with a *separate import layout*.

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





- 1. Through the Menu go to any data entity, for instance Products:
 - acts Products Items DAM Classi gatic Manufacturers Feed Product classifications Feed Product groups Add Free Product search Free Product search
- 2. Go to the Import/Export tab and click on Import:



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

📄 Import			
Import			
Import File	Multiple-dat	a-set.zip Se	elect

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





🗐 Import				
Import				
Summary				
Nothing selected to import!				
Layout1				
Title	Excel-Iten	ns.csv		
Import entity	Item			- × - ×
Import layout				- 🗶
Layout2				
Title	Excel-Pro	ducts.csv		
Import entity	Product			- × - ×
Import layout				- X-
		Previous	Next	Close
0001 0200617 04/00/20	54	FX03 100	DCE Diaso	nce

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								<u>^</u>
Importof file Multiple-data-set.zip with impactreport: Full							^	
Import van Products met layout Sta • Country of origin code • GTIN	ndaard product import	Unicode TAB-gescheid	en.txt en velden:					
 Manufacturer code Brand 								
 Series Type 								
Code Short description								
 Description Product group code Product Class code (ETIM Dynam) 	ic)							
Import van Products met layout Sta • Country of origin code	ndaard product import	Unicode TAB-gescheid	en.txt en velden:					
GTIN								
 Manufacturer code Brand Series 							-	
Settings								
Reporting level	Full			<u> </u>				
Is testrun Fill conversion list								
Selected Files		I-Items.csv (Standaard	product	Excel-Prod	ucts.csv (Standaard	produ		
		Tremblest (Standadia	product m	- Exter Free		produiti		.
				Previous	Next		Close	
0001 <u>0310219</u> 04/0	9/2021	€ 65.10 1	.00 PCE Piece	PCE	Piece			
	evel: Select	the reportin	a level for t	he import	report:			
a. Reporting I						ne faste	est imr	oort.
a. Reporting l	ie: Do <i>not</i> a							
i. Nor	ne: Do <i>not</i> g : Generate a							



- 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:
 - Product and Item
 - 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 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:

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 ADD</u> <u>IMPORT LAYOUT</u>.

- 2. Use the import layout and your data file to test the import; see <u>PARAGRAPH 3.2 CUSTOM IMPORT</u> for detailed instructions.
- 3. 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.
- 5. Now, go to *System > Layouts*:





ayouts Menu View	v Edit	Functions		
🚨 🤜 . 🙈 .	. 0 .			💽 🤱 . 📀 . 隊
Contacts Products Items	DAM	Publications O	Classification	System My details Help Logou
Navigation	\otimes	 Standar 	d A Na	
Conversion tables			89	
Conversion tables			EH .	Background tasks
Memo (0)			EH .	
Attachments (0)			EN .	Configuration
			EN .	A Layouts
dit	\otimes		EH.	
Tel send la sent			m	Logs
Feed layout			m	
Impact analysis layout			m	User-defined fields (main)
			S Jui	
Free form				Ser S

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

	dit Functions					
▶.	<u> </u>	. 🦉 💥 👘 . 🕝).			
ilter	Search Feed layout	Modify Delete record(s) Copy Help	, ,			
avigation (8	Standard A	Name	T Source	Overview	Report	Name
Conversion tables			Reduct	Products		Afbeeldingen
			Reduct	Products		Compano
Memo (0)			Reduct	Products		Datapool
Attachments (0)			Product	Product search		Duco product
9			Product	Product search		ID_OPPLE_PRD
dit 🤅			Product	Products		Import productgroepen
Feed layout	> m		Product	Products		Import products
			Product	Products		here a
Impact analysis layout			Reduct	Products		here a
Free form	2	Logar Densish	Reduct	Product elessifications		10.00
Add export layout			Product	Product search		Sec. 4
Add export layout			Product	Products		The system
Add import layout			Product	Product search		PRD
Add report template		The part of the last	🔊 Product		Product sheet	Productblad
Augureport template		happen in the set	🔊 Product		Product sheet	Productblad - Joule
Modify			Product	Product search		setti -

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

		mporti	ay-out 1	mport pr	oducts' d	n Screen	produce	s									
La	iyout <mark>f</mark>	Properti	es 🛛 Fi	ields 🔪	Memo												
Num	ber of head	der rows				1											
Conti	nue impor	t on erro	ors		i) O Yes	🔍 No										
Next	import lay	out				Excel im	nport lay-	out 'Impo	rt items' o	on Screen	items	- ×	-				
													-				
													-				
													_				
			_					_					_				
			Ed	it previou	ls	Edit	t next		Save rec	ord		Cancel					
	ext imp	oort la	ayout	: Selec	ct the i	import	lay-ou	ut for th	ne sub	seque	ent dat	a/entit	y impo	ort.			
	ext imp record.	oort la	ayout	: Selec	t the i	import	lay-ou	ut for ti	ne sut	seque	ent dat	a/entit	y impo	ort.			
		oort la	ayout	: Selec	ct the i		lay-ou	ut for ti	ne sub	seque	ent dat	a/entit	y impo	ort.	0	\diamond	
		oort la	ayout	: Selec	ct the i	import	lay-ou	ut for ti	ne suk	oseque	ent dat	a/entit	y impo	ort.	○○	\diamond	
		oort la	ayout	: Selec	t the i	import	lay-ou	ut for ti	ne sut	oseque	ent dat	a/entit	ey impo	ort.	○○○○	 <td><</td>	<
		oort la	ayout	Selec	t the i		lay-ou	ut for ti	ne sub		ent dat	a/entit		ort.	○○○	 <	
		oort la	ayout	Selec	ct the i	import	lay-ou	ut for the second secon		oseque	ent dat	ca/entit	cy impo	ort.	 ○ ○ ○ 33 		<



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	-	Item no.	-		
4	No			140043898		https://	.compano.com/Data/Enviro
5	No			140043899		https://	.compano.com/Data/Enviro
6	Yes			140043900		https://	.compano.com/Data/Enviro
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							

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_Pro with impactreport: All except the pro Import van Products met layout Prod • Product code • Manufacturer code (GLN) • Brand (product)/Nederlands (Nede • Series (product)/Nederlands (Neder • Type (product)/Nederlands (Neder • Long description (product)/Nederl • Short description (product)/Nederl	uct import LO4 en velden: erland) erland) land) ands (Nederland)								
L ayout1 Title	Products and Items (v2.3)								
import entity Import lavout	Product								
Archive not imported records	· · · · · · · · · · · · · · · · · · ·								
	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

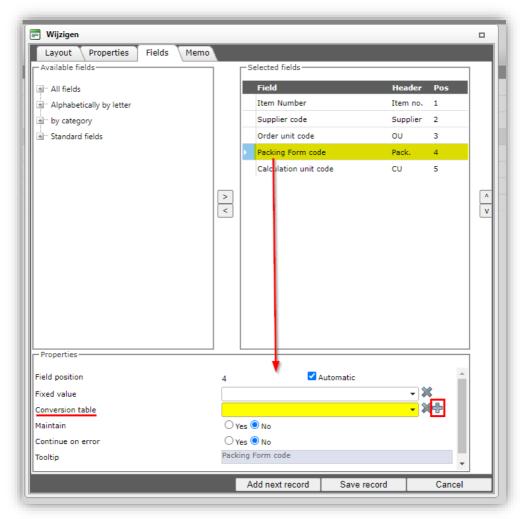
For some data fields, you can define a *conversion table*. This is useful if your import file contains nonstandard values for the data field in question. For instance, for the field *Packing Form* a conversion table can, on import, convert the value PALLET to code 09 for *Returnable pallet*.



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:

			ſ	🗐 Add -		Product	ahla	Ч	oduct cia:	ssification	S				×					
					ersion Tal		abie													
				Code Descriptio	on					CKING cking cor	versions	3								
				Conversio	on object					king Form	code va	lues								
				Use Missing conversion line					Import NO CONVERSION											
			<	When em	pty input				MI	SSING P/	ACKING	VALUE								
											Save	record		Cance	el	Jþ				
				Code: E													\diamond	\diamond	\diamond	
			b.	Descrip	otion	Enter	a desc	riptior	n for th	ie Con	versio	n tabl	e 🔿			\diamond	\diamond	\diamond	\diamond	\langle
\rangle	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond				\langle
>	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond			35		



- 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.

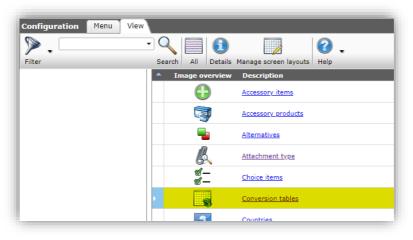
Once the Conversion Table has been created, you have to option to either:

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

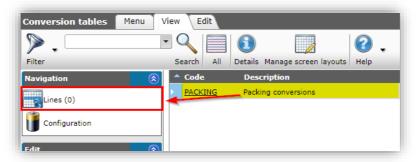
3.2.4.1 Manually fill conversion table

To manually fill the conversion table:

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



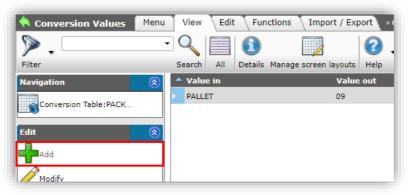
2. In the Conversion Table overview, select the conversion table you need to fill and click on Lines:



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 co	nversion table PACKIN	G Packing conversions	There ar
Conversion Value			
Conversion object	-	orm code values	Â
Value in	PALLET		
Value out	09		
Value out	09 Return	able pallet	- * +
	Add next record	Save record	Cancel
	Add next record	Save record	Cancel

- a. Conversion object: Name of the conversion object (auto-filled)
- b. Value in: Enter the value, such as encountered in your (import) file, which is to be converted.
- c. Value out: Enter the converted value, or choose a standard value from the drop-down 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.
- 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	Contract India Renting			×
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:

		You can download	no impuor analysis re	.port <u>noro</u> . The rep		o n you double on	or the me.
Conversion V	alues:						
Number of rea	cords processed	1 2					
Number of ne	w records	2					
Number of arc	chived records	0					
lumber of ch	anged records	0					
Number of un	changed record	s 0					
incerely,							
ompano BV							

Figure 3. Conversion analysis report

The import of	'Importreport-Layout-20211	1203-163445' <mark>has finished without a</mark>	ny changes.
Sincerely,			
Compano BV			

Figure 4. Import report

7. 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 TABLE</u>):





Conversion Values	Menu View	Edit Functions Import / Exp	ort * Conversion Table: PACKING Packing
▶	- 🤍 🛛		2.
Filter	Search	All Details Manage screen layouts	Help
Navigation	🔿 🔺 Value i	n Value	out
Conversion Table: PACK	PALLET	09	
	BOX		
Edit	TRAY		
Add			
Modify			
Poloto record(a)			

3.2.5 Date fields

Special care should be taken when importing dates. Date fields in Compano expect a true date-formatted 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	e day, Februa	ry 02, 201	2					
Account	ng	Iype:								
Date		*3/14/2		and the						
Percentage Fraction Scientific Text Special		*Wednesday, March 14, 2012 3/14 3/14/12 03/14/12 14-Mar								
Custom		14-Mar	-12							
Corton		Locale (location):							
		Nede	rlands (sta	indaard)	1	-				
	+									
an asteris	k (*) respond t	o change	s in regiona	al date an	date values. Date formats that d time settings that are specifi affected by operating system	ed 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:





	Α	В	С	D		A				-	F	G	н	1
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			<u>C</u> opy						
4	00003	Charles Monaghan	7/30/2016	11350	4		r 🖻							
5	00004	Fred Schuler	7/30/2016	17950	5			Ê 🔒 Ĝ 🕼 🕼						
6	00005	John Botts	7/30/2016	25390	6			Paste Special						
7	00006	Frank Vickers	7/30/2016	4940	7				_					
8	00007	Martha Sargent	7/30/2016	6250	8		ø	Smart <u>L</u> ookup						
9	00008	Matthew Martin	7/30/2016	29520	9			Insert Copied Cells						
10	00009	JP VAN BEUZEKOM	7/30/2016	31290	10			Delete						
11	00010	Christian Faust	7/30/2016	23060	11			Clear Contents						
12	00011	Ricky Kwon	7/30/2016	20060	12				_					
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 +						
		er vertte	0000	25020	15			Sort 🕨						

3.2.6 Multi-select fields

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

Publication (product)	I On internet	□In catalog
	On webshop	
	Matapool 🖌	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:





	lucts		ict Henriette
Edit - Text import lay-out 'Standaard artik	el import Unicode TAB-gescheiden.txt -	kopie' on Screen items	
Layout Properties Fields Mem	0		
- Available fields	Selected fields-		
± All fields	Field	Header	Pos
Alphabetically by letter	Supplier code	e Supplier	1
■ by category	Supplier GLN	I code GLN code	2
	Item Number	r Item no.	3
	Price Date	Price date	4
	Gross price in startdate) pr	nfo (with new rice/pu + pq Gross/PU + PQ	5
	startdate) pr		6 ^
	Gross price ii	nfo (with new rice unit (pr) code PU	7
	Calculation u	init code CU	8
	Order unit co	ode OU	9
	Packing Form	n ode Pack.	10
- Properties		r	
Field position	4 🖌 🖌 Automati	c	A.
Fixed value	3-12-2021		
Date format	31-01-2010 (dd-mm-yyyy)	~	
Maintain	🔿 Yes 🔘 No		
Continue on error	🔿 Yes 🔘 No		
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**:

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

					🗍 Edit - Text	Import lay-o	out 'Item imp	ort from SA	P' on View ite	ms											
					Per view a	and type 🔪	Properties	Fields	Memo												
					- Available fie	lds					ed fields —										
					• Condi	tion Group			^	Fiel			Head		Pos						
					E Count	try of origin					I manufactur	er code	GLN (1	_					
						ncy					duct GTIN		GTIN		2						
						erytime unit					n Number		Item		4						
					Gross	price info (wi	th new startda	ate)			cription		Item	description	5						
					Er	nd date				Gro	ss price info tdate) price /	(with new (pu + pq	Gross	/ PU + PQ	6						
					In	crement quar	ntity		>	Pro	duct code		Produ	ct	7	^ V					
					Pr	ice / pu + pq			<	Con	dition group	code	Condi	tion	8	V					
					Pr	ice date				Gro	ss price info	(with new unit (pu) code	PU		0						
						ice quantity	_			star	tdate) price (unit (pu) code	/		_	- 1					
					Pr	ice unit (pu) o	ode						/								
						me unit code															
					⊡ Item								Set	t <mark>positi</mark>	on to						
									-				-	'zero'							
					Properties -	ates and time			•							=					
					Field position				0 .		Automatic	Unchec	k			<u>^</u>					
					Fixed value				Piece						×						
					Conversion ta	ble			FIECE						**						
					Maintain				O Yes No												
					Continue on e	rror			○ Yes ● No												
									- 100 - 110							Ŧ					
														Save	Can	cel					
						~	~	~	~	~			~	~	~	~		\sim	\sim	\sim	
					\bigcirc	\sim	\sim	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\sim	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	
																	\sim	\sim	\sim	\sim	\sim
																	\sim	\sim	\sim	\sim	\sim
\sim	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\circ	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc				\bigcirc
\checkmark	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim				\sim
																			41		
\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc					
\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim					



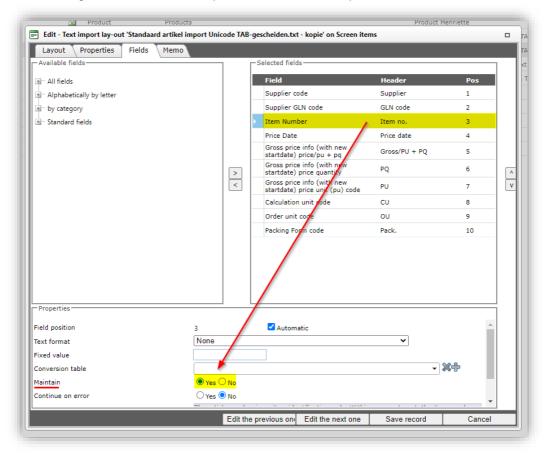
- 2. Under Selected fields, select the field you just added and, at Properties, uncheck the checkbox *Automatic*.
- 3. Now, type the value **0** for *Field position*. Select a fixed value from the drop-down menu; in this case the value **Piece** (PCE).
- 4. Save the layout.

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

<u>Important</u>: 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 error option to Yes:





Product	Products			Product H	enriette	
Edit - Text import lay-out	Standaard artikel imp	oort Unicode TA	3-gescheiden.txt - kopie' on Screen i	tems		
Layout Properties	Fields Memo					
Available fields			Selected fields			1
··· All fields			Field	Header	Pos	l I
Alphabetically by letter			Supplier code	Supplier	1	1
by category			Supplier GLN code	GLN code	2	
Standard fields			Item Number	Item no.	3	
			Price Date	Price date	4	1
			Gross price info (with new startdate) price/pu + pg	Gross/PU + PQ	5	-
		>	Gross price info (with new startdate) price quantity	PQ	6	1
		<	Gross price info (with new startdate) price unit (pu) code	PU	7	
			Calculation unit code	CU	8	
			Order unit code	OU	9	
			Packing Form code	Pack.	10	
Properties						
eld position		3	Automatic			
ext format		None	Accinate	~		
xed value]		
onversion table	Ĺ]		×4	
aintain	l	• Yes No				
ontinue on error		<mark>○Yes ● No</mark>	the second second second	in a state for		
			e previous on Edit the next one		Cancel	-

3.2.10 Concatenate (merge) descriptions

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

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

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

Example CSV

Item number;Assortment code;Text 1;Text 2

2345;VX_NL;This is the first part;and this the second part of the description 2346;VX_NL;This is the first part;and this the second part of the description 2347;VX_NL;This is the first part;and this the second part of the description

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

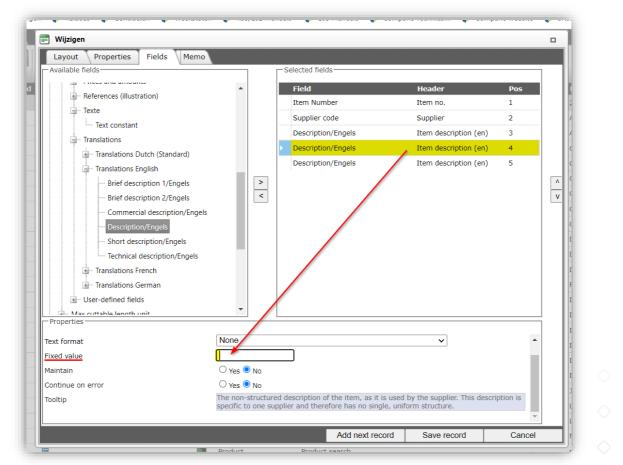




= Wijzigen					
Layout Properties Fields Memo					
Available fields		Selected fields			
These and amounts		Field	Header	Pos	
 References (illustration) 		Item Number	Item no.	1	
Texte		Supplier code	Supplier	2	
Text constant		Description/Engels	Item description (en)	3	
Translations		Description/Engels	Item description (en)	4	
Translations Dutch (Standard)					-
- Translations English					
Brief description 1/Engels					
- Brief description 2/Engels	Add the fi multiple t	eld 'Description'			
Commercial description/Epgels	indicipie e				
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:

	А	В	С		D	E		F
3	Supplier	× A	Tem 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:

		6 F Impo 6 Import f 6 6	rt		Seect													
		<u>64T</u>		•	aow KVS m/t Openen - → × 1		zepc > Do	wnloads >		revious		Next ت	C Zoeken in	lose Downloads	×			
		<u>64T</u>		ľ	Organiseren 🔻 🔊 Deze pc 🧊 3D-obje	cten	e map				aag (1)				• • • • • • • • • • • • • • • • • • •			
		<u>641</u> 641	E Afbeeld	-					ige week		<mark>-20210308-15</mark>	0746.xlsx						
4.	On	the nex	t scre	en:														
		: Wher nport.	renar	ning	the Ex	celFor	Impor	t file, a	always	make	sure t	he file	ename	starts	with:	cos-	\diamond	



DP DUKVED, ZI	mn				_
📰 Import					\mathbf{x}
Import					
Summary					
Importof file ExcelForImport-Products-202: With impactreport: Full Import van Products met layout en velden: Code GTIN Description Brand Series Type					
Settings					
Reporting level	Full		~		
Is testrun	O Yes 🖲 No				
		Previous	Next	Close	
1	Dunveiaar Pomoen	PECIDE		FR TOPPENOPPE	menn

- a. Summary: Check which data fields will be imported.
- b. **Reporting level**: Select the reporting level for the import report:
 - i. None: Do not generate an import report. This will result in the fastest import.
 - ii. Full: Generate a full import report, including all changes in all fields. This will result in the slowest import as all fields will be checked.
 - iii. Only warnings: Generate an import report only listing warnings. This import is generally faster than with a Full report.
- 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:

Functions	
Manipulate	
Part	
Part of	
🖏 Update	
Suponum *	and a meril and a second second
₫ importreport-Layoxlsx へ	

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 •

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

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

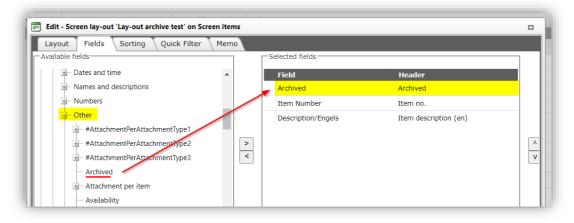
	3.3.2	Upd	lating	archi	ved r	ecord	s 🔿												
	The up	date	import	t can a	lso be	used	to arc	hive o	r unar	chive I	record	s.					\diamond	\diamond	\diamond
	¹⁴ Note:	The i	mport	report	is also	availa	bleun	der Me	enu > S	System	> Log	^{S.} 🔿				\diamond	\diamond	\diamond	\diamond
\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond		46	



The following applies to all archived records:

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

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



3.4 Non-standard imports

3.4.1 Attachments

For the import of Attachments a premade import template is available at the <u>Compano Help 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:

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

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

Time created Name	Description	Туре	DetailLink
09-11-2021 12:41	Basis Product en Artikelbestand (Standaard product import in Excel) => cancelled		https://pima03t.compar
	Finished on 11/9/2021 12:41:26 PM in 46.9ms	Import	Layout-20211109- 124126 view

3.5.2 Import report

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

Dear Mr	
our 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				
۶.				2.		
Filter	Search A	II Details Manage	e screen layouts H	lelp		
<u>^</u> x	ParentRecordDescriTime created	Name		Description	Туре	DetailLink
				=> Finished		https://
► I	07-09-2021 15:04			Finished on 07/09/2021 15:04:23 in 46,9ms	Import	<u>Layout-20210907-</u> 150423.xlsx
	07-09-2021 15:03			Export of 5 Products	Export	<u>https:// l.compano</u> 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				51	ummary			
7		Introduc	tion	50				
8								
9		This repo	ort describes the impact of the above r	mentioned acti	on. This re	port contain	s different p	parts:
10								
11		1. Below	the totals of the changes per subject.					
12		2. Overv	iew of the 10 changed products					
13								
14			Totals					
15					Offered	Processed	Modified	Total mutations
16			Products		10	10	10	10
17			Series				10	
10								

1	А	В	С	D		E	F	G	н
1	Manufacturer Description	Code	✓ GTIN	Product description		Brand 💌	Туре 🔻	Product class code	 Series
2	Duijvelaar pompen	HU212201C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.2,4m³/h-174kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
3	Duijvelaar pompen	HU212201C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.2,4m³/h-174kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
4	Duijvelaar pompen	HU212301C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.2,4m³/h-261kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
5	Duijvelaar pompen	HU212301C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.2,4m³/h-261kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
6	Duijvelaar pompen	HU212401C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg	Changed records	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
7	Duijvelaar pompen	HU212401C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg	changed records	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
8	Duijvelaar pompen	HU212501C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.2,4m³/h-435kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
9	Duijvelaar pompen	HU212501C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.2,4m³/h-435kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
10	Duijvelaar pompen	HU212601C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.2,4m³/h-522kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
11	Duijvelaar pompen	HU212601C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.2,4m³/h-522kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
12	Duijvelaar pompen	HU214201D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.4,8m³/h-210kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
13	Duijvelaar pompen	HU214201D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.4,8m³/h-210kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
14	Duijvelaar pompen	HU214301D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.4,8m³/h-315kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
15	Duijvelaar pompen	HU214301D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.4,8m³/h-315kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
16	Duijvelaar pompen	HU214401D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.4,8m³/h-420kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
17	Duijvelaar pompen	HU214401D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.4,8m³/h-420kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
18	Duijvelaar pompen	HU216201D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.7,2m³/h-660kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
19	Duijvelaar pompen	HU216201D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.7,2m³/h-660kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
20	Duijvelaar pompen	HU216301D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.7,2m³/h-330kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
21	Duijvelaar pompen	HU216301D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg no	om.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	la familia															
		2		File	COS-Exc	elForImpor	t-Products	-20220815	-150917.xls	sx										
		3	_	Action	EC00002												_			
		4		Action	EC00255															
		5	_	Action	EC00289												-			
		6	_	Action	EC00174															
		7	-	Date		022 15:22											-			
		8	-		THIS WA	AS A TESTR	UN; no act	ual data w	as importe	d										
		10		Introduc	rtion												-			
		10		maoaaa																
		12		This repo	ort describe	s the impa	ct of the ab	ove menti	oned actior	n. This re	eport con	tains differe	nt parts:							
		13											· ·				~			
		14		1. Below	the totals	of the char	iges per sul	oject.												
		15		2. Overv	iew of the :	L errors														
		16		3. Overv	iew of the 3	3 changed p	oroducts										\sim			
		17																		
		18			Totals															
		19			Product	_					Offered 10		Unchanged				\sim			
		20 21			Product	5					10	1	0	7	3	3				
																	0	\bigcirc	\circ	
																	\sim	\sim	\sim	
																\sim	~	\sim	\sim	
																\bigcirc	\bigcirc	\bigcirc	\bigcirc	<
\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\bigcirc	\circ	0	\rangle	\circ	\bigcirc	\bigcirc	\bigcirc				<
Ŭ	Ŭ	Ŭ	Ŭ	Ŭ	Ŭ	Ŭ	Ŭ		Ŭ	Ŭ		Ŭ	Ŭ	Ŭ	Ŭ	, in the second s		49		
\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	\sim	_		\sim	\sim	\sim					
\bigcirc	\sim	\sim	\sim	\sim	\sim	\sim	\bigcirc	\sim	\sim	\bigcirc			\sim	\sim	\bigcirc					



3.5.2.2 No changes on import

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

The import of Importre	port-Layout-20211203-1634	145' has finished without any cl	nanges
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.

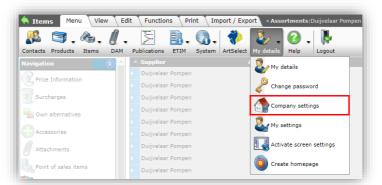
<u>Note</u>: Depending upon the overview you selected for importing data, changes might not be immediately apparent. Either navigate to the 'correct' overview, or refresh the browser window (F5).

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:





<u>U12220</u>	2BV5N st	DP drukverh.	1pmp v/tapw RV:	S m/toerreg nom.2,4m³/h-174	kPa 1x230V+N		E	2083.00 0.00%	€ 2083.00	Duijvelaar Pompe	en (871423
										•	23
U F	Project administration	Quotation	Purchasing	Financial administration	Artikelbeheer	Contact management	System settings	Number patern	Default Reports layout	International	
Int	ternational										400
Cou	untry		Netherlan	ds							-
Lan	nguage code		🔳 nl Dutch								-
Fall	back translations		💿 Yes 🔾	No							
Enc	coding fallback for import		Default	~							
			Default Ansi-Win IBMPC-E	dows-1252 IOS-437							

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

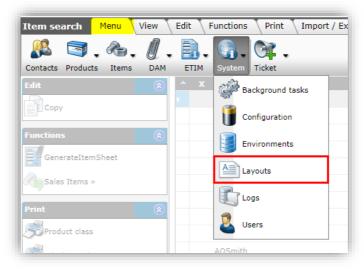
The character encoding can thus be adjusted for companies in Germany (1252) or in the south of Europe (437). The *Default* encoding setting is: UTF-8.

4 Layout management

Layouts for import and export can be managed at *System > Layouts*. While the Export dialog allows for onthe-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:

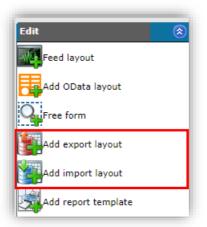
1. Through the Menu, go to System > Layouts:



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







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

4.1 Add export layout

To add an export layout:

1. Click on Add export layout:

Layouts Menu View	Edit	F	unctions			
▶.	•			1		2.
Filter		Sea	rch All	Details	Manage screen layouts	Help
Navigation	۲	•	Standard	A	Name	
Edit				-		
	۲			57		
Feed layout				57		
Add OData layout				89		
				89		
Generation Free form				57		
Add export layout			V	m		
			~	57		
Add import layout			~	67		
Add report tomplate						

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

		\diamond	\diamond	\diamond	\diamond	\diamond	\diamond											\diamond	\diamond	\diamond	
		¹⁵ An E	Entity is	s a data	a objec	t in CC)S, for i	instand	e Proc	duct, Ite	em, As	sortme	ent, Att	achme	ent, Pri	ce, etc.	\diamond	\diamond	\diamond	\diamond	\diamond
\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond		50		\diamond
\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond			52		



item items	artikei-import-		
Add export layout		•	×
Add export layout			
Export entity	Item 💌	×	
	Accessories item		
	Choice item		
	Item		
	Item group		
	Item surveillance		
	Item variant template		
	Point of Sale per item		
	 There are 7 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:

ijzigen			
yout Properties Fields Me	emo		
	Text export	~	
2	Item export in Unicode		
ation	◯ 閉 Within the compan ◎ [©] For me	y O端For	all members
			0
_	Add next record Sa	ave 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*)

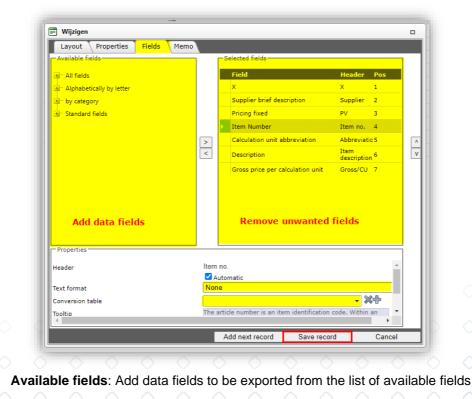




Properties tab:

Layout Properties Fields	Memo	
Insert header	● Yes ○ No	4
Format	Character separated	~
Separation character	;	
Decimal separator character		
Decimal group character	,	
Date separator character	/	
Time separator character	:	
Text enclosure character	"	
		•

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



Fields tab:

a.



- 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.

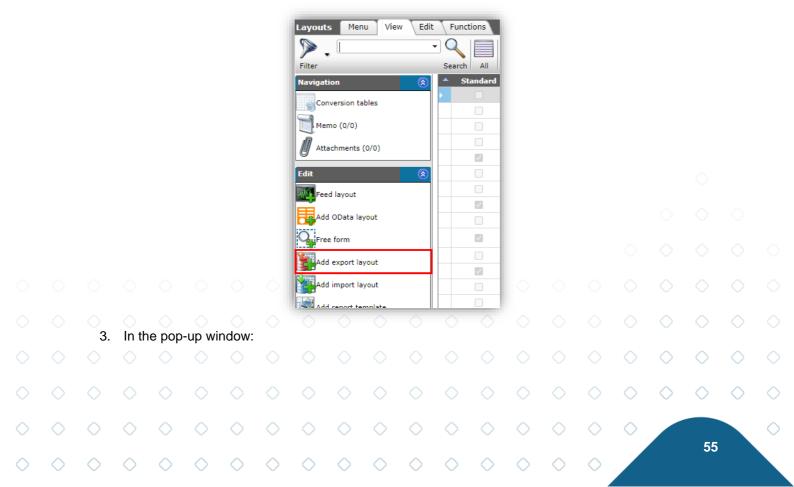
4.1.1 Add custom text-based export layout

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

1. Through the Menu go to System > Layouts:

Layouts Menu View	Edit	Functions		
🚨 🤜 . 🗞 .	9.	5	.	💽. 🚸 🕹. 🤅
Contacts Products Items	DAM	Publications	ETIM	System ArtSelect My details He
Navigation	۲	▲ Standa		Analyses
Conversion tables			8	Background tasks
Memo (0/0)			9	
Attachments (0/0)			m	Configuration
Attachments (0/0)			m	Environments
	\otimes		3	
Feed Layout			m	Layouts
			m	Logs
Impact analysis layout			64	
G Free form			9	User def fields (main)
			9	
Add Export Layout			9	User groups
Add			3	2 Users
			9	

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





Add Export Layout			
Export entity	Prd		- 🗙
	ETIM Product class feature		
	ETIM Productmodel		
	Optional product		
	Product		
	Product accessories		
	Product component		
	Product standard		
	Productgroup		
	▼ There are 8 Entities found		
	_	Add Export Layout	Close

- 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 Fields Type Name	Memo Text export			
Application	○ 꽤 Within the company ම \$ For me	0	3 For all members	
	A	dd 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.





Properties tab

i Wijzigen				
Layout Properties Fields I	Memo			
insert header	● Yes ○ No			
Format	Character separated		~	
Separation character	TAB			
Decimal separator character				
ecimal group character	1			
ate separator character	1			
ime separator character	:			
ext 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:

] Wijzigen	_	-			
Layout Properties Fields Me	mo	_			
- Available fields-			Selected fields		
All fields			Field	Header	Pos
Alphabetically by letter			х	х	1
🗐 by category			Manufacturer description	Manufacturer Description	2
Standard fields			Code	Code	3
			GTIN	GTIN	4
	I	>	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 manufa	acturer's	product code and the code that the Item Number).	e manufacturer uses for a prod	uct, not
			e ttem Number).		
			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

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.

For 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.

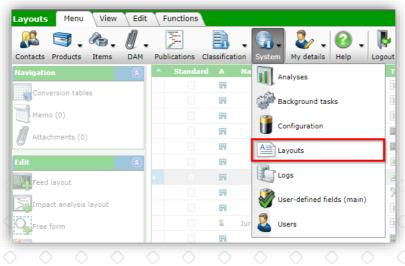
Note: Detailed information on how *to add* an import layout, can be found in paragraph <u>4.2 ADD IMPORT</u> <u>LAYOUT</u>.

Use the import layout and your data file to test the import; see **PARAGRAPH 3.2 CUSTOM IMPORT** 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:



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



▶.	- 🔍 🛛 🔤	. 🧷 🗶 📔	1.0.				
filter	Search Feed layout	Modify Delete record(s) C					
avigation	Standard A	Name		Source	Overview	Report	Name
Conversion tables			11.18	Product	Products		Afbeeldingen
				Product	Products		Compano
Memo (0)			9	Product	Products		Datapool
Attachments (0)			188 V.	Product	Product search		Duco product
2			(A)	Product	Product search		ID_OPPLE_PRD
dit (8 8		25	Product	Products		Import productgroepen
Feed layout			26	Product	Products		Import products
	- H		۶	Product	Products		harpen.
Impact analysis layout			9	Product	Products		terms.
Free form	8	in spectrum in the	9	Product	Product elessifications		10 million (1997)
			38A.C	Product	Product search		No.
Add export layout			19,	Product	Products		The second
Add import layout			20 V.	Product	Product search		PRD
		Targe Shows	Ē	Product		Product sheet	Productblad
Add report template	8	harpentition in	Ē	Product		Product sheet	Productblad - Joule
Modify			94 T	Product	Product search		sets.

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

Edit - Excel import lay-o	ut '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 Hodace	riodace scan	511

- •
- Next import layout: Select the import lay-out for the subsequent data/entity import.
- Save the record.
 - d. Archive / 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):

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

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_Prod with impactreport: All except the prod		ic_r2-3_L03.xlsx		
Import van Products met layout Produ Product code Manufacturer code (GLN) Brand (product)/Nederlands (Neder Series (product)/Nederlands (Neder Type (product)/Nederlands (Nederl Long description (product)/Nederla Short description (product)/Nederla	'land) rland) and) nds (Nederland)	fen:		
Layout1				
Title	Product	s and Items (v2.3)		
Import entity	Product			- 💥
Import layout	Excel in	port 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 .

5. Click on Save record to save the layout.

4.2 Add import layout

To add an import layout:

1. Click on + Import layout.

Layouts	Menu View Edit	: Functions							
▶ .		- 🤍 🔲	1		?				
Filter		Search All	Details Manag	e screen layouts	-				
Navigation	*	 Standard 							
Edit	8		÷						
			EM .						
Feed lay	vout		F			- 0			
Add ODa	ata layout		89			_			
Q. Free for	m		8			\rightarrow \diamond			
Add exp	oort layout		88			\rightarrow \diamond			
Add imp			m			\rightarrow \diamond			
	ort tomplato		\diamond \diamond	\diamond \diamond	\bigcirc	0 0	\bigcirc	\diamond	
						\sim \sim	\sim	\sim	
						\diamond \diamond	\diamond	\diamond	\bigcirc
$\diamond \diamond \diamond \diamond \diamond \diamond$	\circ \circ \diamond	\rangle \diamond \diamond	\diamond \diamond	\diamond \diamond	\diamond	\diamond			\diamond
							60		



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

I Item	nems	aı	сколт
📄 Import layout			×
Import layout			
#ImportEntity	Item	- 🗙	
	Choice item		
-	Item		
-	Item group		
	Item surveillance		
	Point of Sale per item		
	Selection item line		
	✓ There are 6 Entities found		
	Add import layout	Close	

3. Click on Add import layout.

Layout tab:

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

1tem Items				a
📄 Add - New layout				_ 0
Layout Properties Fields Memo				E
Туре	Excel import	~		
Name	Item import from Exc	el		r
Application	◯ 聞 Within the comp ● [©] For me	any 이라 For al	Imembers	
				T
	Add next record	Save record	Cancel	
				2

- 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:

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

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THE TOOL	rema			And can
Add - New layout				
Layout Properties	Fields Memo			
Number of header rows	1			
Continue import on errors	🕄 🔾 Yes			
Next import layout	Excel in	mport lay-out 'Import prod	lucts' on Screen products	- 🗙
		Add next record	Save record	Cancel
Hull USEI	USEIS			uebruik

- 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</u> <u>MULTI-PASS IMPORT</u>.





Fields tab:

Item Item sea	searcn a	asoras
Layout Properties Fields Memo		
Available fields Increment quantity Price date Price per price unit (PU) and price qu Price quantity (PQ) Unit code Add data field Max cuttable length unit Max cuttable length unit Order unit (OU) Progenties	Selected fields Field Header Pos Item number Item no. 1 Supplier code Supplier 2 Key data fields for entity 'Item' •	A V
Header Field position Fixed value Conversion table	Item no. Automatic Automatic Automatic	
	Add next record Save record Cancel	

- 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 FIELDS PER ENTITY</u>.

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

																		\diamond	\diamond	\diamond	
																			\diamond		
\diamond		63		<																	
\diamond			63																		



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:

Layout Properties	Fields Memo
Available fields	
- Product	-
	fields
Dates and time	
···· Names and descr	intions
	lescription per product
Classification	
* Numbers	mormation
Ī	
Other	
References (illustr	ration)
- Translations	
	Outch (Netherlands)
Brand (pr	oduct)/Dutch (Netherlands)
Commerc	ial description (product)/Dutch
Descriptio	on (product)/Dutch (Netherland
Series (pr	oduct)/Dutch (Netherlands)
Short des	cription (product)/Dutch (Neth
Size desci	ription/Dutch (Netherlands)
····· Technical	description (product)/Dutch (N
Type (pro	duct)/Dutch (Netherlands) 🚽 🔻

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:





Application	= value	✓ 🗆 🎞 Within t	he company	Ser me	
		🗌 🖧 For all ı			
Туре	= value	✓ □ S [®] Report		□ Impactanalysis	
		Screen		🗆 📄 OData OData	
		Z 🖾 Excel e:		Feed	
		Excel in		Filter setting	
		🗌 🖾 Text ex	port	Free form	
_		🗌 🖾 Text im	port	🗌 🔜 Report template	
Source	= value	<u> </u>			•
Name	start	~			
Last Used	= value	~			
Languages	= value		lish (United Kingdom)	fr French	
		nl Dutch		en English	
		_ de German	1		

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 Viev	v Edit	F	unctions					
Filter		- Q	rch All	1 Details	s Manage screen layouts			
Navigation	\otimes	•	Standard	A	Name	т	Source	Overview
Conversion tables						26	Item	Items
				8	Admin	10	Item	Item search
Attachments (0/0)		•		3	Admin	<u>.</u>	Item	Items
				4		Q	#ProductCertificate	ProductCertificates
Edit	۲					3	Product	Product classification
Add export layout				.		55	Product	Product search
Import layout						26	Assortments	Assortments
		-		***		150	Item	Item search
Modify				-		9	Certificate	Certificates
			~	2	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:





ay-outs Menu Bekijken	Bewerken	Fun		Import/Export	-				
⋟.	<u> </u>		0) 🛃	ℯ ⑨				
ilteren	Zoeken	Alles	Detai	s Schermlay-outs beheren	Help				
lavigatie 😵	🔺 Stan	daard	T	Naam	т		Overzicht	Rapport	Naam
ewerken			8		Ē	Artikel	Artikelen		Compano LOS
ewerken 🛞			8		B	Assortimenten	Assortiment		Compano L05
Feed lay-out	1	×	m		B	Log	Logs		Compano L05
Impact analyse lay-out			8	Henriëtte Stam	2	Artikel	Artikelen		Import artikelen
			8	Henriëtte Stam	2	Product	Producten		Import producten
Vrij formulier	(<u>.</u>			Rapportsjabloon		Rapportsjabloon	PIM BASIS Artikelblad
Voeg export lay-out toe	(<u>.</u>		8	5 Artikel		Productklasse	PIM BASIS Artikelblad
)		.		8	5 Product		Productblad	PIM BASIS Productblad
Voeg import lay-out toe	(<u>.</u>			Rapportsjabloon		Rapportsjabloon	PIM BASIS Productblad
Voeg rapportsjabloon toe	(-		2	Artikel	Artikelen		Standaard artikel import in Excel - L03 (v2.3)
A	(81		2	Artikel	Artikelen	KOPIE	Standaard artikel import in Excel - L03 (v2.3) - kopie
Wijzigen	(2	Artikel - Artikel relatie	Artikel - Artikel relaties		Standaard artikel relaties import - L04 (v1.1)
Verwijderen record(s)	(<i>.</i> #•		2	Certificaat	Certificaten		Standaard certificaat import - L03 (v1.0)
Kopiëren	(<i>.</i> #•		2	Product certificaat	Product certificaten		Standaard import link certificaten aan producten
	[<i>.</i>		2	Toebehoren product	Toebehoren producten		Standaard import toebehoren product - L03 (v2.2)
Plakken			<i>.</i> #•		2	Toebehoren product	Toebehoren producten		Standaard import toebehoren product met GTIN - LO



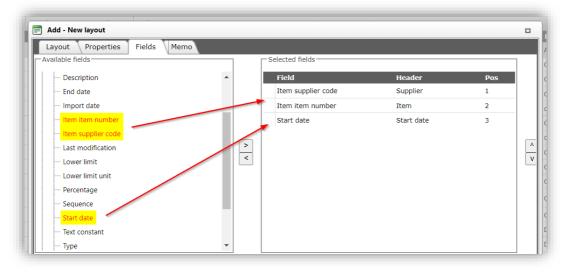


5 Appendix A: Key data fields per Entity

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: General version (1.1) for PIM International
- Nederlands: Dutch version (2.3) for Dutch language-only PIM applications

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

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

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



5.2 Item

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</u><u>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</u> <u>Help website</u>.

5.4 Certificate

Mandatory fields	Field selector category	Remark
Туре	Certificate > Other	Value cannot be empty
Number	Certificate > Codes	Value can be empty
Sub number	Certificate > Codes	Value can be empty
Issuer	Certificate > Names and 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 Help</u> <u>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 the shared import layout:

• 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

Man	datory	/ fields			F	ield s	electo	r cate	egory		Re	mark					1		
Sup	plier 1	(parer	nt)		lt	em re	lations	> Re	ferenc	es							1		
Sup	plier 2	(child)			lt	em re	lations	> Re	ferenc	es							1		
Item	n code	1 (pare	ent)		lt	em re	lations	> Co	des										
Item	n code	2 (chil	d)		lt	em re	lations	> Co	des								\sim		
Seq	uence	numbe	ər		lt	em re	lations	> Nu	mbers								~		
Тур	е				lt	em re	lations	> Oth	ner							\sim	\bigcirc		
Vali	d from				lt	em re	lations	> Tin	ne of d	ay							~		
A rea	0	ise tem	\circ				0	\circ			0	\diamond							
A rea	0	se tem plate_	\circ				0	\circ			0	xlsx							
○ ○	Tem		impor	∽t_ar	tikel	_rela	aties_	PIM_	Basis_	_r1-1	0	xlsx				\diamond	○○○	 <td></td>	
○ ○		plate_	impor be imp	rt_ar	tikel with t	_rela	aties_	PIM_F	Basis_ ayout:	_r1-1	0	xlsx				\diamond	\diamond	○○	
○ ○		plate_ e can b	impor be imp	rt_ar	tikel with t	_rela	aties_	PIM_F	Basis_ ayout:	_r1-1	0	×lsx				○○○	 <	 <	
○ ○		plate_ e can b	impor be imp	rt_ar	tikel with t	_rela	aties_	PIM_F	Basis_ ayout:	_r1-1	0	×lsx	$ \circ \circ$	$ \circ \circ$			 ○ ○ ○ 69 		



Note: This template is **not** suitable for importing optional products or optional items.

5.7 Surcharges

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

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

5.8 User-defined fields

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

5.9 LCA product data

Mandatory fields	Field selector category	Remark				
Manufacturer code (GLN)	Manufacturer	-				
Product code	Standard fields	-				
LCA – declared unit code	LCA declared unit	-				
LCA – declared unit quality	Product > numbers	-				
LCA – Reference lifetime	Product > numbers	-				
LCA – Functional unit	Product > Translations >	Functional unit is a language-				
[language code]	[language code]	specific text field; make sure to use different import for different languages.				
LCA – Third-party verification	Product > Other	-				

A ready-to-use template is available for importing LCA Product Data:

Template_Import_LCA-data_NL_r1-1.xlsx

This template can be imported with the shared import layout:



• LCA data import NL (v1.1)¹⁸

5.10 LCA declarations

Mandatory fields	Field selector category	Remark
Product manufacturer code	Product	
Product productcode	Product	
Stage	LCA declaration > Other	
Indicator	LCA declaration > Other	
GWP total	LCA declaration > Numbers	
AP	LCA declaration > Numbers	
EP, aquatic freshwater	LCA declaration > Numbers	
EP, aquatic marine	LCA declaration > Numbers	
EP, terrestrial	LCA declaration > Numbers	
Роср	LCA declaration > Numbers	
ODP	LCA declaration > Numbers	
ADPE	LCA declaration > Numbers	
ADPF	LCA declaration > Numbers	
WDP	LCA declaration > Numbers	
PERT	LCA declaration > Numbers	
Penrt	LCA declaration > Numbers	

A ready-to-use template is available for importing LCA Product Data:

• Template_Import_LCA-declarations_r1-1.xlsx

This template can be imported with the shared import layout:

• LCA declarations import (v1.1)

		¹⁸ Not€	e: This	import	layou	t is land		-specifi	ic (NL)	and th	us only	y valid	for Fu	nction	al Unit	descri	ptions	in Dut	ch	\diamond	
																			\diamond	\diamond	\langle
\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond		74		<
\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond	\diamond			71		



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.

Product classifications	Menu	View I	dit Functions Print Import	/ Export
Filter	•	Search All	Details Screen Layout	
Navigation (Status 	Class feature % Manı 🗼 🛛	TIM Dynamic
Items (4/0)			76.92%	
			76.92%	TIM 7
Product features (2)			76.92%	мся
Attachments (4/0)			76.92%	ETIM8
Manufacturer			76.92%	system

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

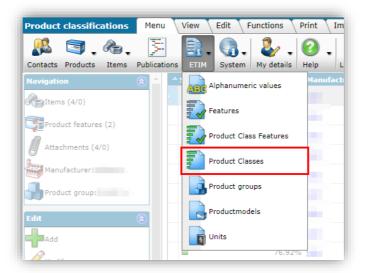
- 1. Go to https://www.etim-international.com/downloads/
- 2. Choose the version you need in the left-hand menu, for example ETIM7
- 3. Download the corresponding *IXF-file*¹⁹, or example ETIM-7.0-ELECTRICALHVACS-IXF-METRIC-EIDENL-NO-CHANGE-CODES-2017-09-01.zip (ETIM International DE/NL)

ETIM International			About us Classification Tools News Model releases Downloads Contact Q
Version All Versions		P	ETIM-7.0-ALL-SECTORS-IXF-METRIC-IMPERIAL-EINL-2017-09-06.zip ① Details Added on: August 8, 2019
 7.0 6.0 5.0 	(14) (4) (2)	2IP	ETIM-7.0-ALL-SECTORS-ACCESS-METRIC-EI-2017-09-01-1.zip ① Details Added on: August 8, 2019
C 8.0 Language	(11)	ZIP	ETIM-7.0-ALL-SECTORS-IXF-METRIC-EINL-2017-09-01.zip ① Details Added on: August 8, 2019
 All Languages Belgian Dutch 	(3) (4)	210	ETIM-7.0-ALL-SECTORS-ACCESS-METRIC-EI-2017-09-01.zip ① Details Added on: August 8, 2019 Download
 ETIM English German Italian 	(9) (2) (2)	20	ETIM-7.0-ELECTRICALHVACS-ACCESS-METRIC-EI-2017-09-01.zip ① Details Added on: August 8, 2019 Download
Format All Formats 		P	ETIM-7.0-ELECTRICALHVACS-IXF-METRIC-EIDENL-NO-CHANGE-CODES- 2017-09-01.zip & & & & & & & & & & & & & & & & & & &
Access	(7)		

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

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

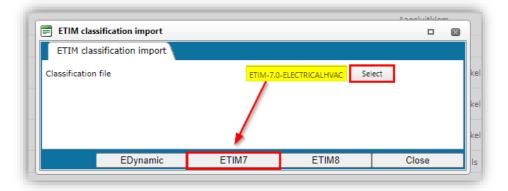




5. Go to the Import/Export tab and click on ETIM classification import.

Product Classes Me	enu 🔪 Vie	w Ec	dit Functions	Import / E	Export				
	4		2	•	•	*	?		
	Search	Import	Manage layouts	Excel Import	Excel Update	ETIM	classification import	Help	
Navigation	۲	🔺 Cla	assification system	em Code	Name	e (zh-CN)	Name (cs-0	Z)	N
Productmodels (2/1)		ET:	IM Dynamic	<u>EC000</u>	0001				
		ET	IM 7	5000	0001				

6. In the pop-up window:



- 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>
 - 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.

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>
```

2. The data processing via FTPS is automated as a nightly job.

