Compano Online Software

Manual
Attachments & Certificates
COS PIM

Version 7.2

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1 Introduction

This manual describes how you can add attachments (images, pdf, other) to items, products, item groups or product groups.

1.1 Glossary

COS
Compano Online Software.

Product
Products are delivered by manufacturers. A Manufacturer is the one who produces the actual product. Thus Apple is the manufacturer of the iPhone. In the ideal situation the manufacturer is responsible for the (digital) technical information which belongs to a physical product. The description of a product is defined in the **product information**.

Item
A product can be supplied as item by several suppliers. A supplier is the one who delivers the product as an item to the (end) customer. Thus, Amazon is a supplier of (the item) the iPhone. A supplier describes trade information (for example gross price, delivery time, stock, discount groups) of an item as **item information**.

Product group
Products can be categorized into groups. A product group contains products with corresponding product features. For example: LED lights can be categorized into the product groups Light bulbs, Spots or Tubes.

Item group
You can categorize items into groups. An item group contains articles with corresponding item information. For example: LED spots can be packaged per piece or per blister of three pieces. This results in the item groups 'Spots piece' and 'Spots blister'.

Attachment
An attachment is a file that can be added to a product, an item, a product group or an item group. An attachment can be an image, drawing, PDF file or any other computer file.

Attachment type
In order to submit attachments to data pools 2BA and InstallData, the exchange format `Attachment index [version number]` is used. According to this format, several types of attachments are distinguished. As an added feature, the Compano software allows you to define your own attachment types.

Certificate
A certificate is a written statement, intended as proof of the quality of a service or product. There are usually various criteria underlying the issuance of a certificate, such as standards, legal requirements or industry rules. The issuance of a certificate is usually preceded by a control act such as an inspection, audit or other forms of verification. Examples of certificates are: FSC certificates, RoHs certificates, CE Marking and warranty statements).

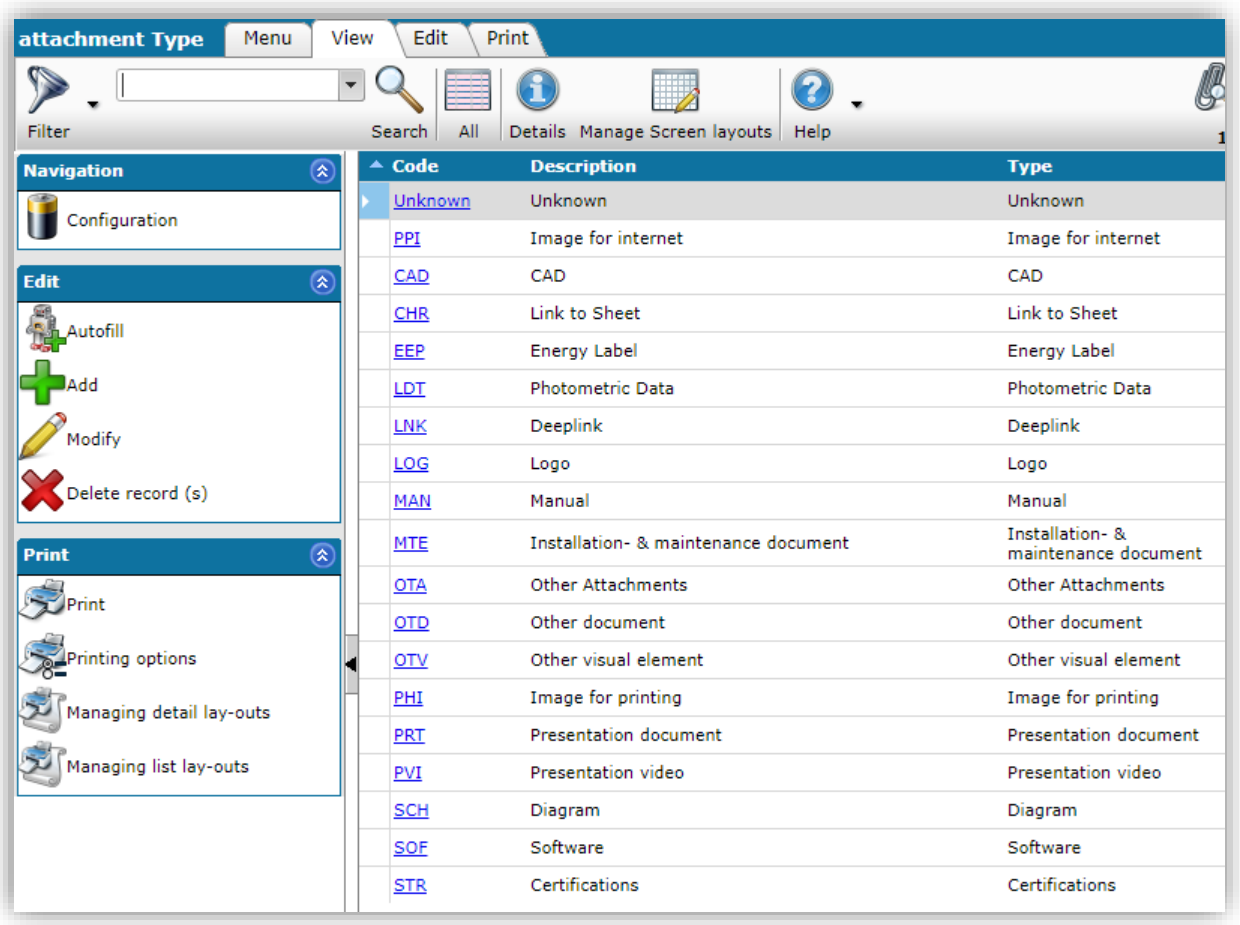
1.2 Attachment types

Types of Attachments that can be added to a product are, for instance:

- Image (JPG, PNG, etc.)
- Drawing (AI, EPS, SVG, etc.)
- 3D-model (CAD)
- Document (PDF, Word, Excel, etc.)
- Deep link (URL)

- Video (MP4, MKV, etc.)

In principle any type of file can be added as an attachment. COS contains some predefined Attachment Types, however you can also add your own Attachment Type to this list:



It is also possible to add your own attachment types to this list in COS. See paragraph 7.2 OWN ATTACHMENT TYPES for a further explanation.

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*Note: The procedure to add an attachment is the same for **all types** of attachments. Also the procedure for the adding of attachments for product groups, item groups, products or items is the same. Therefore, this manual will only contain examples of how to add an image to a Product or Product Group.*

1.2.1 File names

Important: Characters such as `[]\/:*?'"<>|&` are not allowed in file names of attachments. Please remove these characters before uploading or replace them with, for instance, a dash `-` or underscore `_`

Example
`Product&item-image.jpg → Product-and-item-image.jpg`

1.2.2 Automatic image resizing

It is usually not necessary to add images of varying size. Images will be automatically resized when requested, using the parameters `W` and `H` in the URL:

```
http://name.compano.nl/Data/Environments/00XXXX/Images/ProductGroup/Drawings
/D1112.t.jpg?W=300&H=300
```

The example above will generate a resized (300x300) version of the JPG-file `D1112.t.jpg` and store it in a cache folder 300x300 on the Compano server.

Note: Cache folders will be emptied when the original image is replaced. The new image will be resized on the next retrieval request.

The following image types can be resized this way:

- PNG
- JPG
- JPEG
- GIF
- WMF

1.3 Inheritance of attachments

Inside COS there are three ways to add images to products:

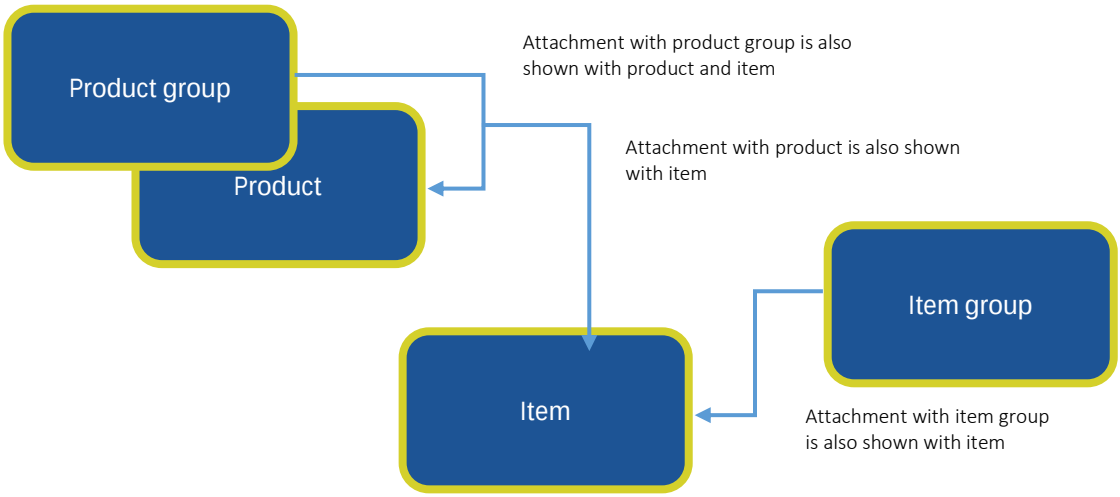
1. Add to a product → Add an attachment per product
2. Add to a product group → Add attachments per product group
3. Add within a publication structure (publication tree) → See the Compano *Manual Publications*

Next to that, the level at which attachments are added is important, because COS always shows attachments of a higher level. This is called inheritance of attachments.

Example
Which image is shown with item number 101.01?

Product group 100→ No image at *Product*, then the image of the *Product group* will be shown
Product 101.01→ No image at *Item* or *Item group*, then the image of the *Product* will be shown
Item group 100 → No image at *Item*, then image of the *Item group* will be shown
Item 101.01 → the image added at the item will be shown

You can find detailed examples in Appendix A.

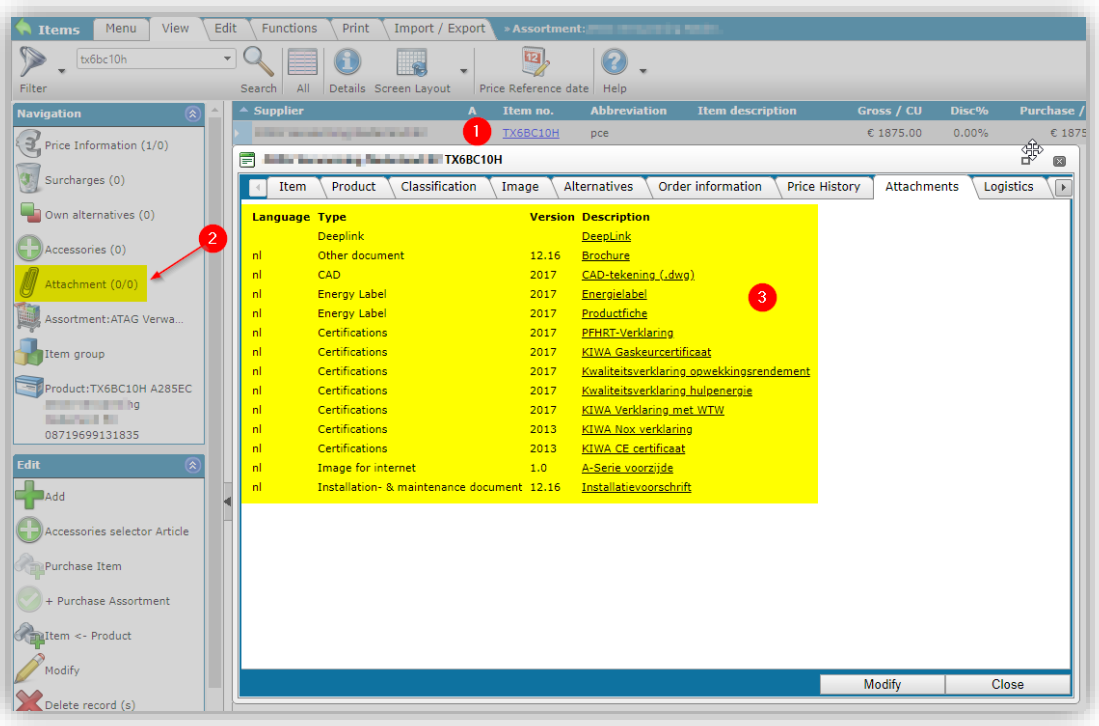


1.4 Attachment overview with item or product

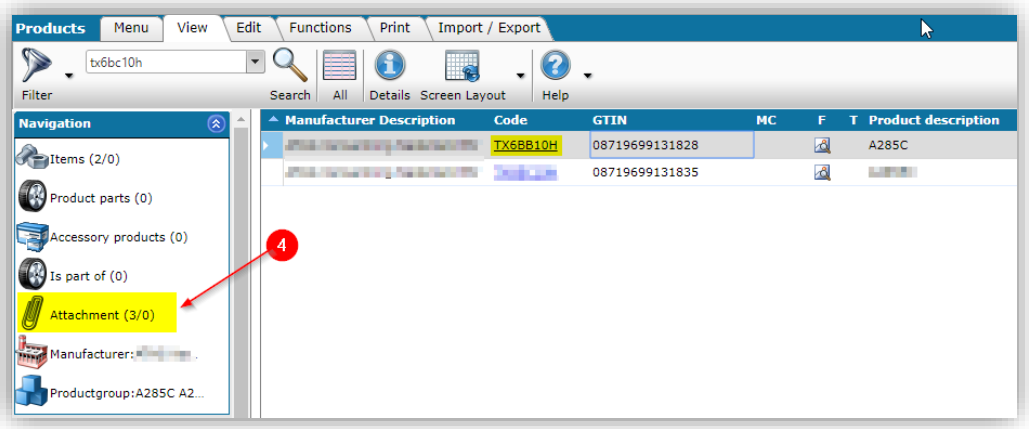
With the inheritance of attachments it is not always clear with which item an image is added. In the *Attachment overview* you will find more information.

Example
In the image below the selected **item** *TX6BC10H* (1) has NO attachments (2) on the level of the item itself, but because of the link with attachments on the level of product and product group, the item has ***fourteen*** attachments (3).

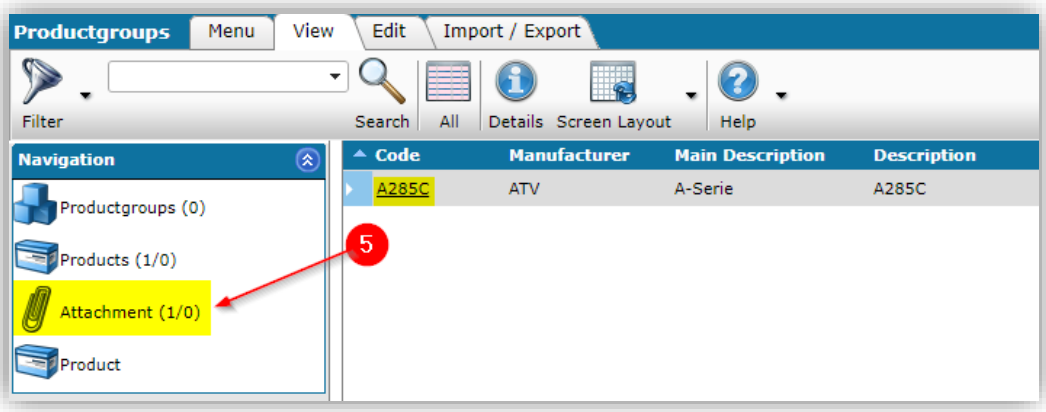
Note: To see if an item has attachments, you can always look at the *Details* of the item, on the tab *Attachments*.



When you go to **product** *TX6BC10H*, belonging to this item, then you will see that there are <u>three</u> attachments linked (4):



When you look at the **product group** *A285EC* you will see that there is one other linked attachment:



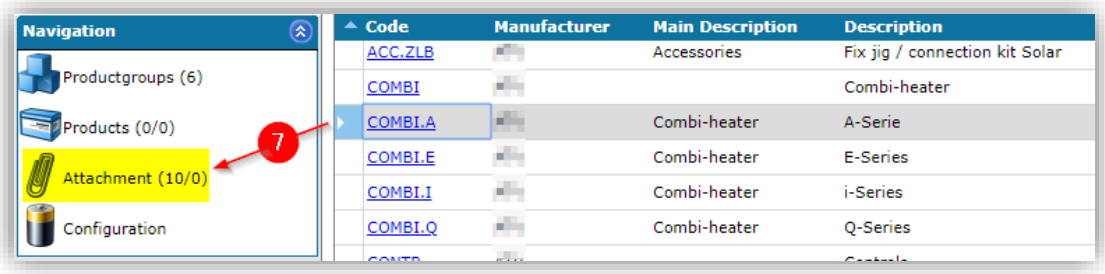
But where are the other ***ten*** linked attachments?

Nested product groups
It is also possible to *nest* product groups. This means that a product group can be part of one or multiple higher product groups.

The product group from this example is part of two 'higher' product groups. This is shown by the level of the product group (6):

The other ten attachments should then be linked to the two parent product groups *COMBI.A* and *COMBI*.

When you look at *Menu > Configuration > Product groups*, then you see that at the level of product group *COMBI.A*, the other ten attachments are linked:



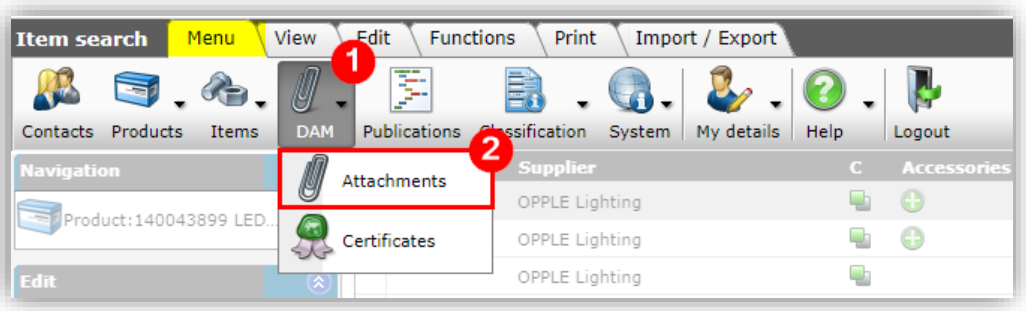
So, in this example, the attachments are linked as follows:
Product group level 1: COMBI → No attachments
Product group level 2: COMBI.A → Ten attachments
Product group level 3: A285EC → Two attachments
Product TX6BC10H → Three attachments

Note: The nesting of product or item groups will not be explained further in detail in this manual. The Compano consultant can advise when such a structure is needed.

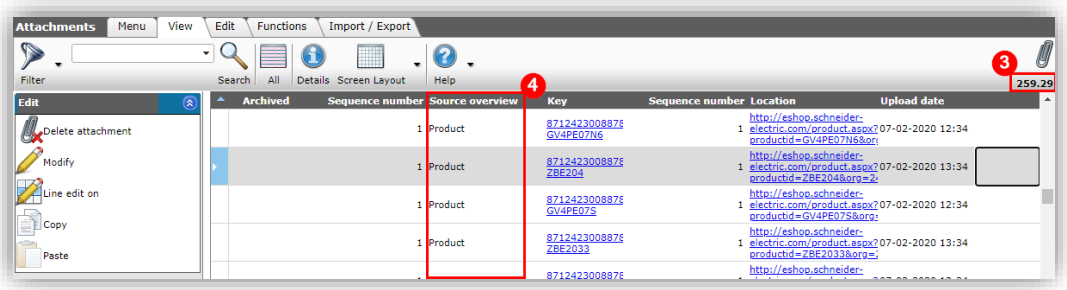
1.5 Overview of all attachments (system-wide)

It is also possible to get an overview of all attachments for all products, items, product groups and item groups:

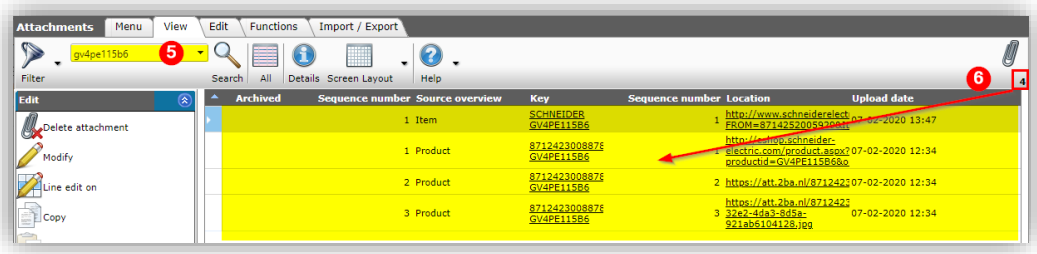
1. Through the Menu go to *Dam* (1) > *Attachments* (2):



2. In the screen that opens, you will now see an overview of **all** (3) attachments and you also see what the ***source*** is for the attachment (4):

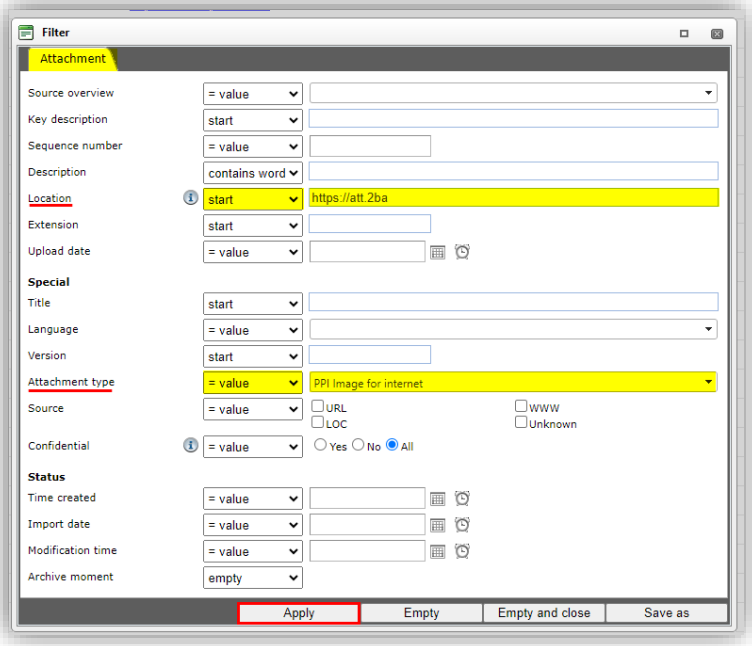


3. By searching / filtering (5) by, for example, product code you can get an overview of all attachments (6) quickly, which are linked to one product:



1.5.1 Filtering all attachments

Attachments in the Overview of all attachments can be filtered. For instance, to find all Images for internet (PPI) that were imported from 2BA (https://att.2ba), the filter can be set as follows:



1.6 General rules

But what is exactly the best way to add attachments? That depends strongly on your situation. Consult the Compano consultant for more advise about this.

As general rule:

- **Images for *Item* and *Item group* inherit linked images from *Product* or *Product group*.** When you have multiple items, which are all based on one product, then you simply add the image to the product; all items based on this product will fall back on these images.
- **When products or items have strong visual similarity an image should be added on the level of product or item groups**; all products or items in this group (for instance nuts and bolt) will fall back on the group image. Adding an image to a product group is preferable to adding to an item group (see previous rule of thumb).

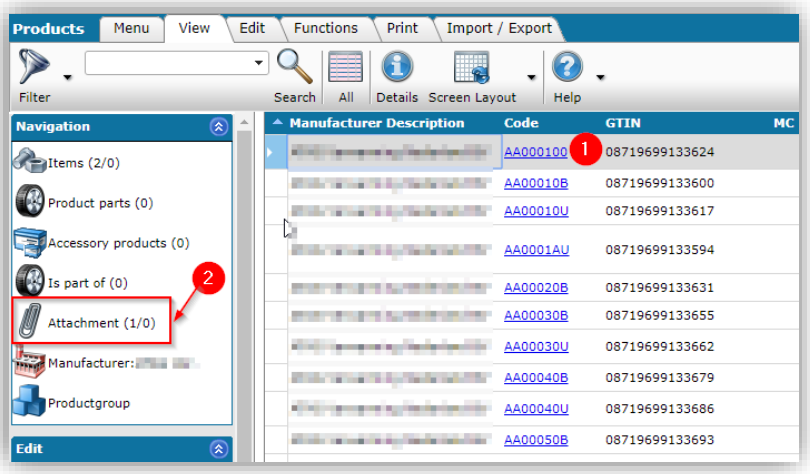
2 Add an attachment per product

In this chapter we will explain how to add an attachment to a product or item manually. The examples are about adding an ***image*** as attachment to a product. However, the procedure applies adding attachments to items as well and is similar for all types of attachments.

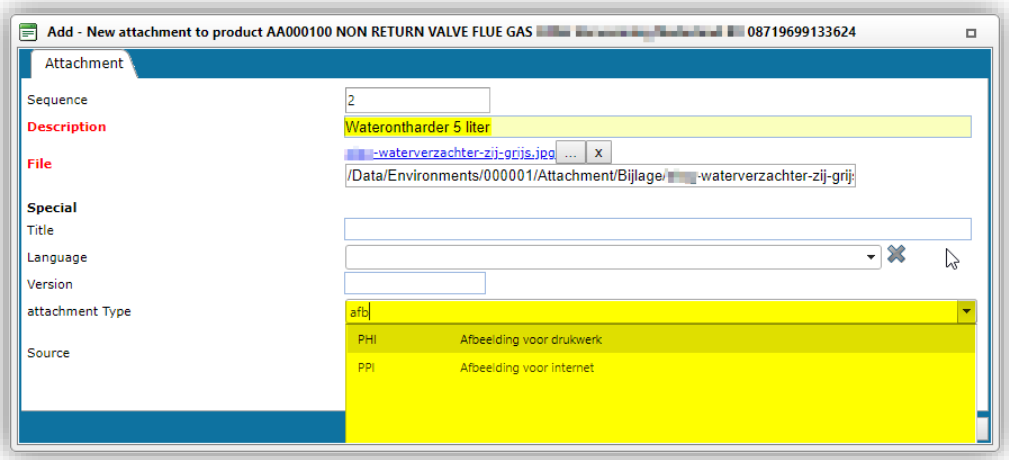
2.1 Add an attachment

To add an image to a product:

1. Go via the menu to *Products > Products* and search for the product with which you want to add the image.
2. Select the product in the list and click on the button *Attachment* in the *Navigation* panel:



3. Click the tab *Edit* and click *+Add* (and NOT on *+Attachments*!)
4. A popup window will open where you can add the image as an attachment:



Sequence: Type the sequence number here. This sequence number determines (for example on a product website), in which order the attachments are displayed. The attachment with the lowest number will be shown first.
Description (mandatory): Type a short description here of the attachment.
Location (mandatory): Add an attachment file:

- By uploading an image via the button:
- By typing a location (URL) to the image (file) in the field *File.* This URL is a reference to an external location, for example a (own) product website or media server: https://media.firm.com/product/series/293847.jpg.

Title: The title you want to give to an attachment (often the same as the description).
Language: Enter a language when that's relevant. Leave blank when the attachment is multilingual. For example with an energy label language can be relevant, because the same label is available in English, German and Portuguese. You add three separate attachments, where you define the language for every attachment. When you create a web feed for a Portuguese website later on, then only the Portuguese label is exported.
Version: Enter a version number if applicable when you use multiple versions of the same attachment.
Attachment Type: Choose the right attachment type here by typing a part of the word, for example `img` will give you two options: *Image for print* (high resolution) and *Image for internet* (low resolution). As indicated this can also be an attachment type which you have defined yourself.

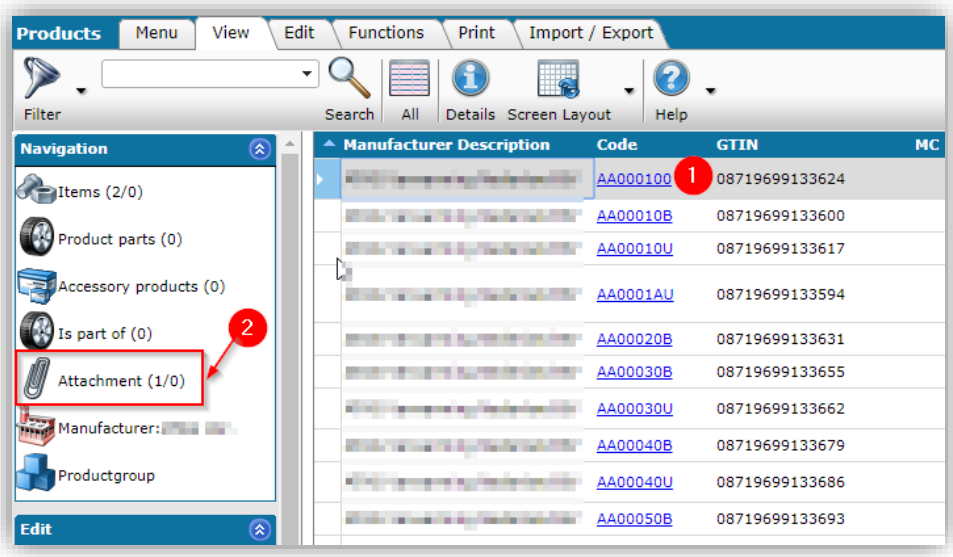
> Note: If you need to see the complete list of available attachment types, you need to clear this field first!

Source: The attachment source will be determined automatically.
Confidential: Set the option to *Yes* if the attachment is for internal use only. The attachment will then not be displayed in, for example, a customer environment. Also, the attachment is not exported in the BMECat, INSBOU or SALES format.

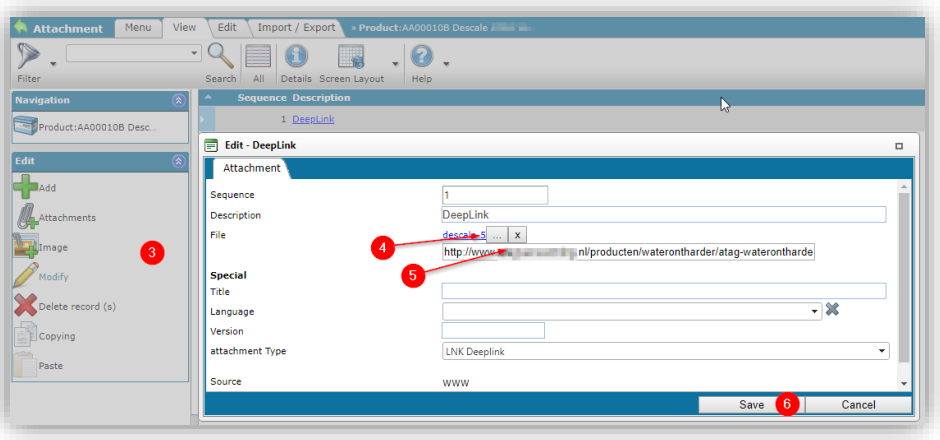
2.2 Edit an attachment

To edit or delete an image:

1. Go via the menu to *Items > Products* and search the product for which you want to add the image.
2. Select the product in the list and click the button *Attachment* in the *Navigation* pane:



3. Click on *Modify* (3) in the *Navigation* pane:



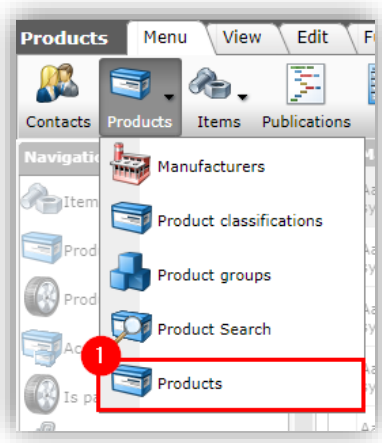
4. In the popup window that opens you can do the following with the image:
    a. **Edit**: Click on the button with the 3 dots (4) and select a new image, or type a new URL in the field.
    b. **Delete**: Click on the button with the 'x' (5) to delete the image.
5. Click on *Save* (6).

Please note: Images can also be deleted by selecting the image in the attachment screen and by clicking on *Delete record(s)* afterwards in the tab *Edit*.

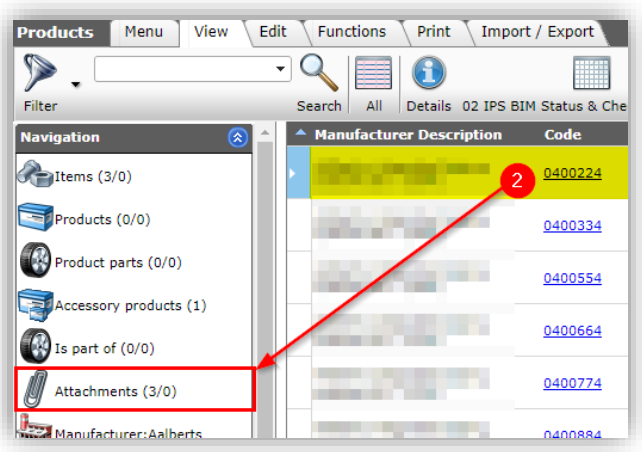
2.3 Archive/delete an attachment

An image can also be archived or deleted:

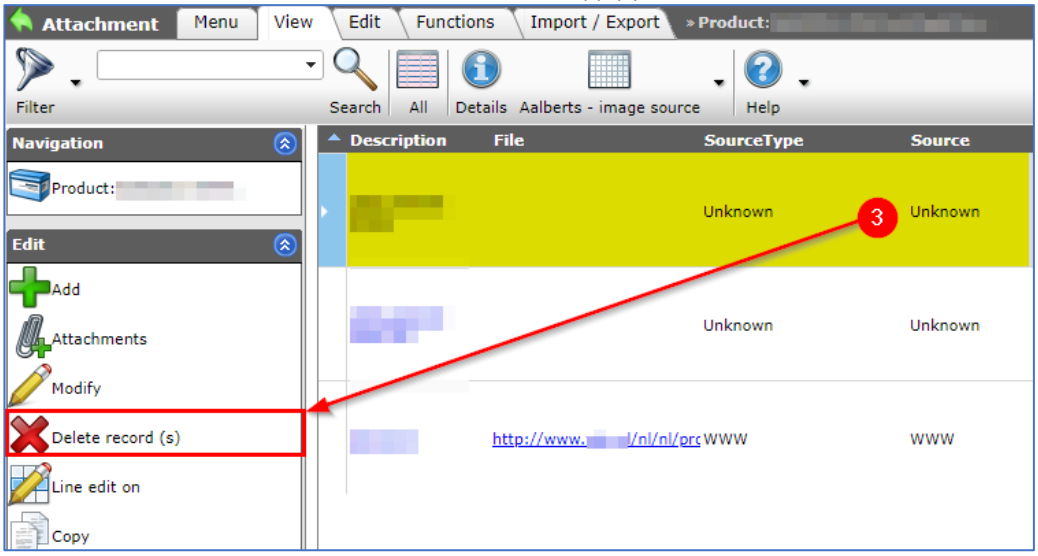
1. Through the menu go to *Products > Products* (2) and find the product where you want to archive or delete the image.



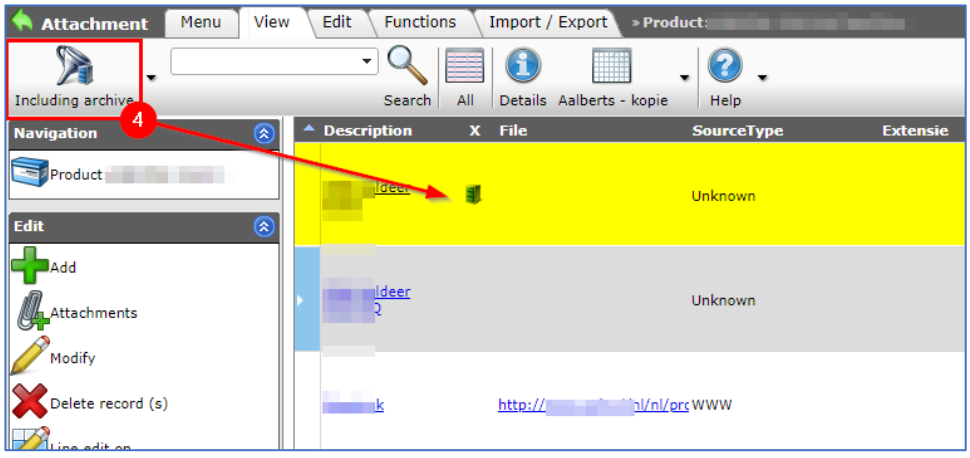
2. Select the product in the list and click the *Attachments* button (2) under *Navigation*.



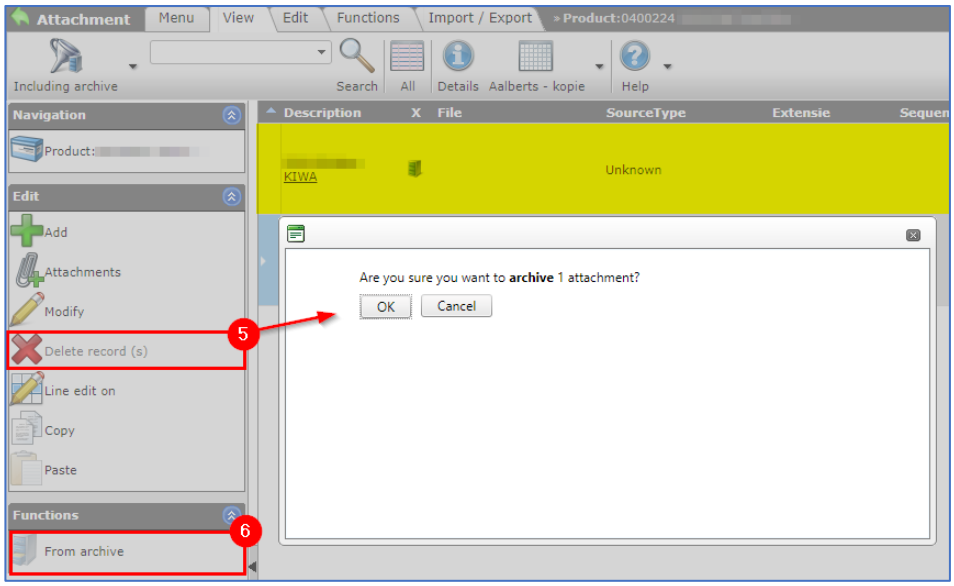
3. In the next screen, under *Edit* click on *Delete record(s)* (3):



4. Note: The image will disappear from the attachment overview, but will be ***archived*** first. By setting the *Filter* to *Include archive* (4), the image can be made visible again:



5. If you want to delete an image completely, select the archived image and under *Edit* click again on *Delete record(s)* (5):



6. An image can also be retrieved ***from the archive***. Select the archived image and under *Functions* click on *From Archive* (6).

Note: The *Archive status* of an attachment can be used in (XML/JSON) feeds or in (calculated) user-defined fields.

3 Add attachments per product group

As explained before, in principle an attachment can be added to:

- A product group → See later on in this manual
- A publication node in a publication tree → You can read more about this in the *Manual Publications*.

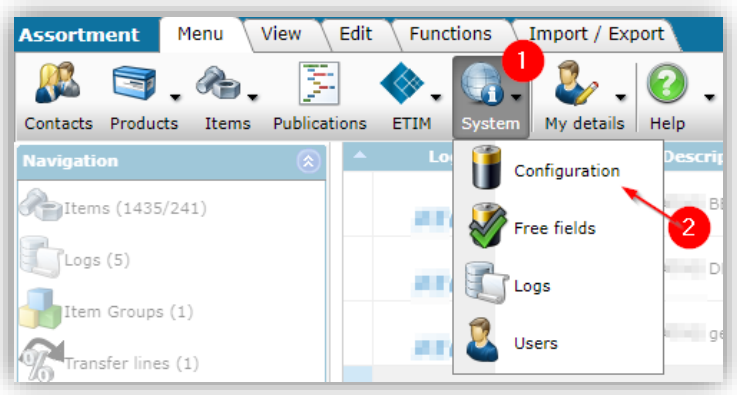
Which method you choose depends on the way the attachments will be used. Consult your **Compano consultant** on the best practice.

Tip: By adding attachments to product groups, then later on the attachments will be passed through to ***all*** *publication structures which are generated on the basis of product groups. This has the advantage that, even though there are multiple publication structures (for example a web shop, catalogue, etc.), you only have to add and maintain an attachment in one place (the product group). More information can be found in the* Manual Publications.

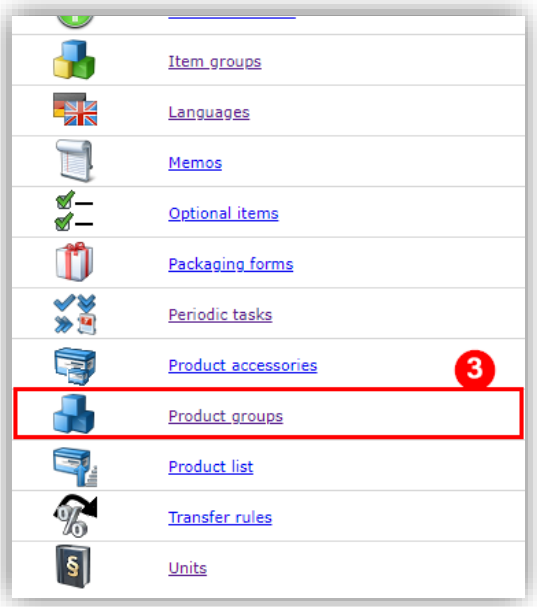
In the remainder of this chapter we will focus on adding attachments to product groups. As an example we will use the adding of images for a LED light web shop. For an overview of the web shop structure, see Appendix A.

Follow the steps below to add an attachment per product group manually:

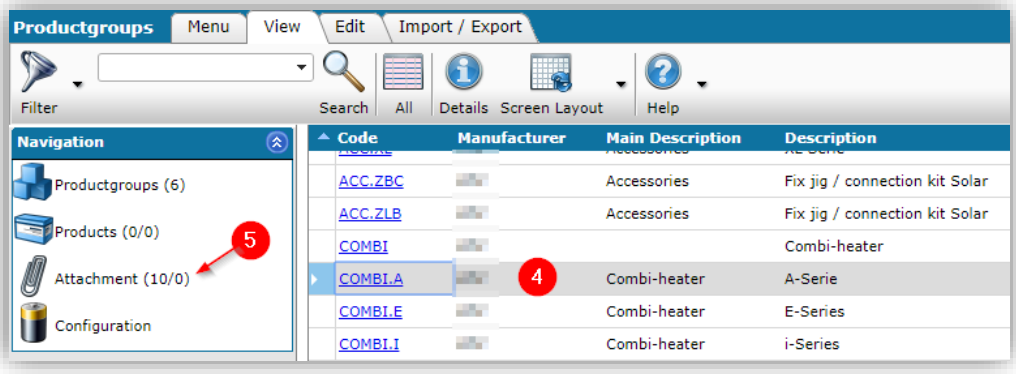
1. Go via *Menu > System* (1) to *Configuration*: (2)



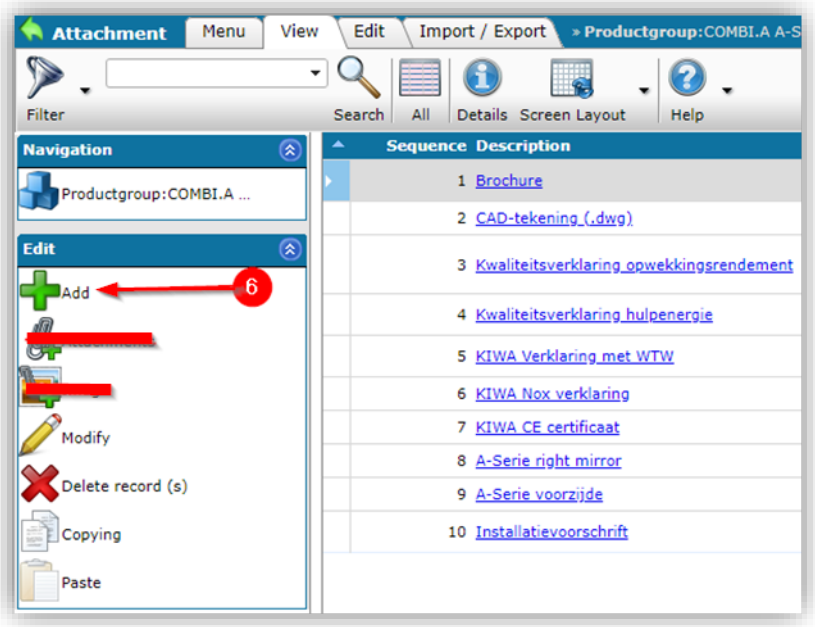
2. In the overview click on *Product groups* (3):



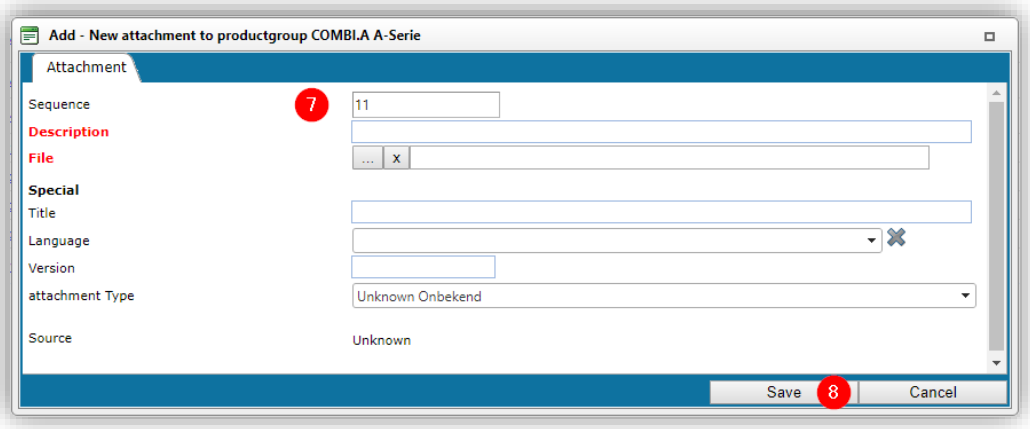
3. Select a product group (4) and click on *Attachment* (5):



4. In the following screen you will see an overview of all attachments that are added to this product group. You can use the button *+Add* (6) to add an attachment:



5. Enter the correct values (7) for the attachment in the popup screen. See 2.1 ADD AN ATTACHMENT for an explanation of the different fields:



6. Click *Save* (8) to save the attachment.

4 Link templates

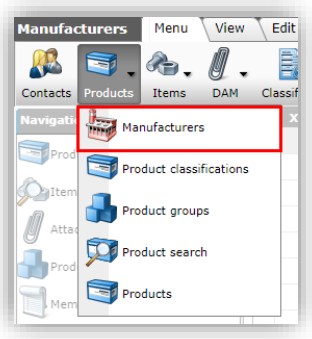
If you have an external source for images, drawings and/or deep links, such as the product website of your company, you can make use of ***link templates***. Link templates directly link an external attachment source to your product or item, provided that the structure of the link-URL can be constructed in a logical manner.

Example
Product pages on the website of the manufacturer Mercator always have the following structure:

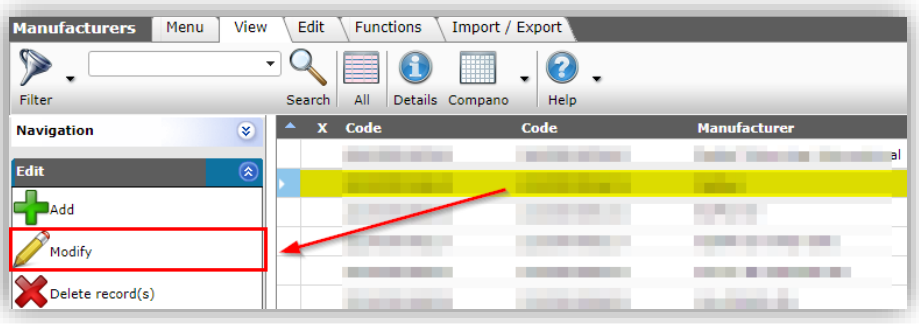
`www.mercator.eu/en/pid/[product code]`

Based on this structure, a deep link template can be created:

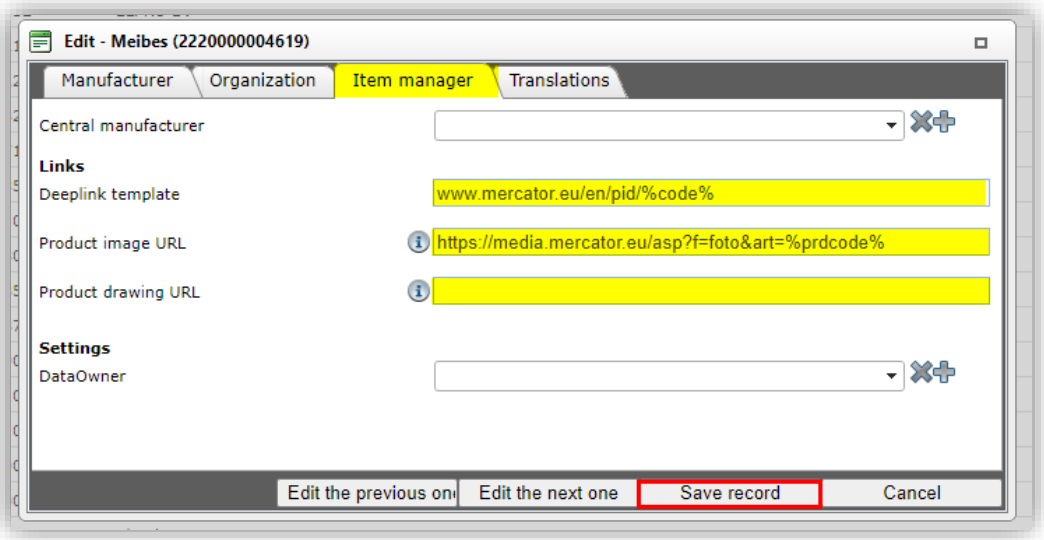
1. Go through the Menu to *Products > Manufacturers*:



2. In the next screen, select the manufacturer where you need to define the external source and under Edit click on *Modify*.



3. In the pop-up window, go to the Item management tab and enter the relevant templates / URLs:



4. Next, click on *Save record*.

Note: Several system variables can be used in the URL template:

- **%code%**: Product or Item code (number)
- **%groupcode%**: Product or Item group code
- **%ean%**: Product or Item ean
- **%gtin%**: Product or Item GTIN
- **%username%**: username for login to fi. TU website (only for Item)
- **%password%**: password for login to fi. TU website (only for Item)
- **%customercode%**: Customer code in COS

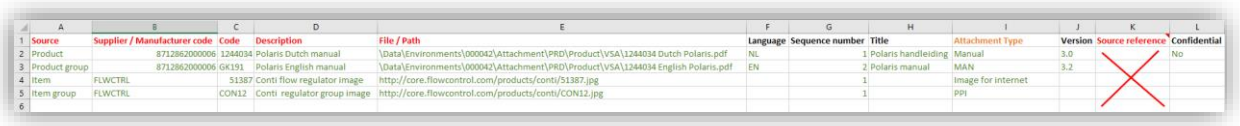
4.1 Link attachments via import template

Once the attachment files have been uploaded to the Compano server, you can link the attachments to the correct product, item, product group or item group.

4.1.1 Prepare template for linking attachments

Download the `Template import attachments` (Excel) from the Compano Help website.

Link attachments by filling out the correct data in the Excel template, using one Excel row per attachment.
Note: Columns marked in red font are mandatory.



	A	B	C	D	E	F	G	H	I	J	K	L
1	Source	Supplier / Manufacturer code	Code	Description	File / Path	Language	Sequence number	Title	Attachment Type	Version	Source reference	Confidential
2	Product	8712862000006	1244034	Polaris Dutch manual	\Data\Environments\000042\Attachment\PRD\Product\VSA\1244034 Dutch Polaris.pdf	NL	1	Polaris handleiding	Manual	3.0		No
3	Product group	8712862000006	GK191	Polaris English manual	\Data\Environments\000042\Attachment\PRD\Product\VSA\1244034 English Polaris.pdf	EN	2	Polaris manual	MAN	3.2		
4	Item	FLWCTRL	51387	Conti flow regulator image	http://core.flowcontrol.com/products/conti/51387.jpg		1		Image for internet			
5	Item group	FLWCTRL	CON12	Conti regulator group image	http://core.flowcontrol.com/products/conti/CON12.jpg		1		PPI			
6												

- **Source**: Indicate whether the attachment will be added to a product, product group, item or item group.
- **Supplier / Manufacturer code**: Enter the correct supplier / manufacturer code; when linking to a product/product group enter the manufacturer code, when linking to an item/item group enter the supplier code.
- **Code**: Enter the product, product group, item or item group code to which you want to add the attachment.
- **File / Path**: Enter the path to the attachment file:
  - *Attachment on Compano (FTP) server*: Enter the relative path to the file. See paragraph 4.1.2 ENTERING RELATIVE PATHS (FTP).
  - *Attachment on external server*: Enter the URL (exact path) of the attachment, for instance: https://mycompano.com/solar/phaesun/Sun_plus_s_50.jpg
- **Description**: Type a description for the attachment.
- **Language (optional)**: Attachments can be coupled with a specific language. For instance, a brochure in French, can be coupled with the French language code `fr`. This way, when exporting only French data, only the French brochures are exported.
- **Sequence number (optional)**: When adding multiple attachments, the sequence number can be used to specify in which order attachments are displayed. For instance, when adding multiple images, the sequence number could specify which images is shown first.
- **Title (optional)**: Enter a title for the attachment. This title could be used as, for instance, the image alt text on a website.
- **Attachment Type (recommended)**: Enter the correct attachment type code. This code is used on data pools 2BA and InstallData to identify the type of attachment.
-

• Code	Description	Type
CAD	CAD	CAD
CHR	Link to Sheet	Link to sheet
EEP	Energy Label	Energy Label
LDT	Photometric Data	Photometric Data
LNK	Deeplink	Deeplink
LOG	Logo	Logo
MAN	Instructions	Instructions
MTE	Installation- & maintenance document	Installation- & maintenance document
OTA	Other Attachments	Other attachments
OTD	Other document	Other document
OTV	Other visual element	Other visual element

PHI	Image for printing	Image for printing
PPI	Image for internet	Image for internet
PRT	Presentation document	Presentation document
PVI	Presentation video	Presentation video
SCH	Diagram	Diagram
SOF	Software	Software
STR	Certifications	Certifications
PAR	Parts list	Parts list/exploded view
Unknown	Unknown	Unknown
SDS	Veiligheidsinformatieblad	Link to sheet
REACH	REACH certificaat	Certifications
PDS	Product datasheet	Link to sheet

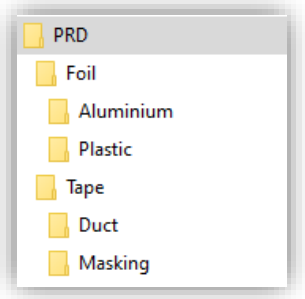
The list above shows the standard Attachment Types, however you can expand this list by adding your own attachment types, see paragraph: 7.2 OWN ATTACHMENT TYPES

- **Source reference (not used)**: The source reference has been deprecated, however the data column ***must*** be present in your import file.
- **Confidential (optional)**: When set to Yes, the attachment is not displayed in client environments and will not be exported in BMEcat and DICO (INSBOU/SALES) standard.

Save the Excel as a CSV file and import this into COS, see paragraph: 4.1.3 UPLOAD TEMPLATE FOR LINKING ATTACHMENTS.

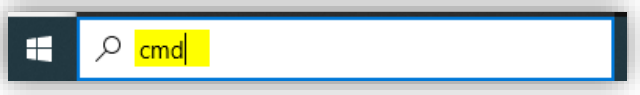
4.1.2 Entering relative paths (FTP)

When uploading attachments via FTP to the Compano server, these have probably been organized in folders, for instance:

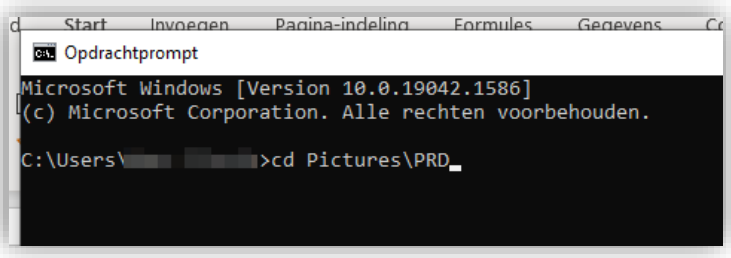


Relative paths to attachments in the folder structure can be generated using the following method (Windows):

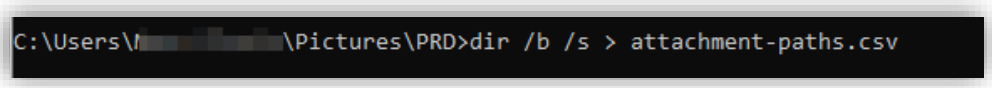
1. Type `cmd` and use `<ENTER>` in the Windows search box:



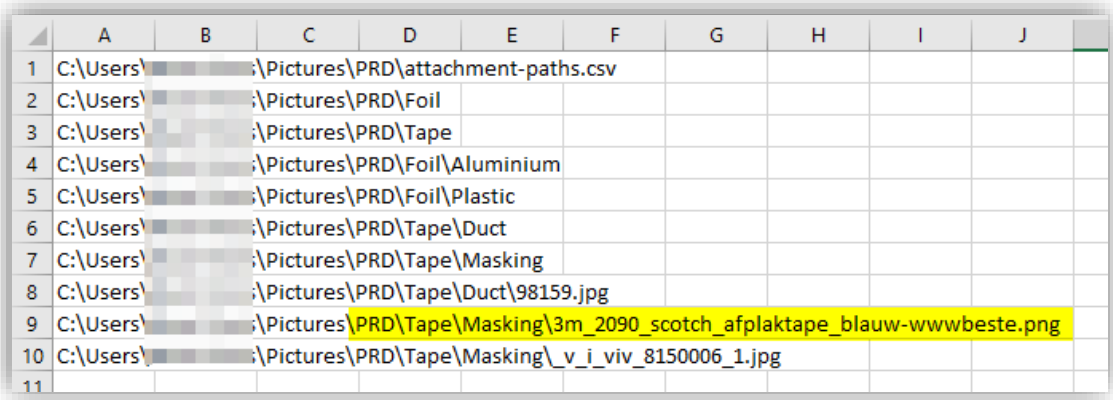
2. In the Windows terminal that opens, using the `cd` and `dir` commands, navigate to the top folder containing your attachments, for instance:



3. Next, in the terminal window, type `dir /b /s > attachment-paths.csv`

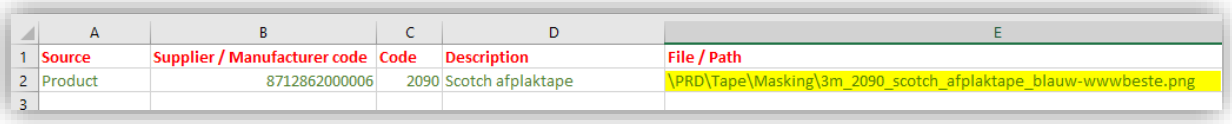


4. Close the terminal window and, using the file explorer, again navigate to the top folder containing your attachments.
5. Open the CSV file you generated:



	A	B	C	D	E	F	G	H	I	J
1	C:\Users\			\Pictures\PRD\attachment-paths.csv						
2	C:\Users\			\Pictures\PRD\Foil						
3	C:\Users\			\Pictures\PRD\Tape						
4	C:\Users\			\Pictures\PRD\Foil\Aluminium						
5	C:\Users\			\Pictures\PRD\Foil\Plastic						
6	C:\Users\			\Pictures\PRD\Tape\Duct						
7	C:\Users\			\Pictures\PRD\Tape\Masking						
8	C:\Users\			\Pictures\PRD\Tape\Duct\98159.jpg						
9	C:\Users\			\Pictures\PRD\Tape\Masking\3m_2090_scotch_afplaktape_blauw-wwwbeste.png						
10	C:\Users\			\Pictures\PRD\Tape\Masking_v_i_viv_8150006_1.jpg						
11										

6. For each of the attachments that you need to link, copy the relative path(s) to the linking attachments template:



	A	B	C	D	E
1	Source	Supplier / Manufacturer code	Code	Description	File / Path
2	Product	8712862000006	2090	Scotch afplaktape	\PRD\Tape\Masking\3m_2090_scotch_afplaktape_blauw-wwwbeste.png
3					

7. To each relative path, add the following suffix: `\Data\Environments\000003\Attachment`. The correct number for your COS application, can be found under *Menu > Help > Info*:

8. The final path is something like this:

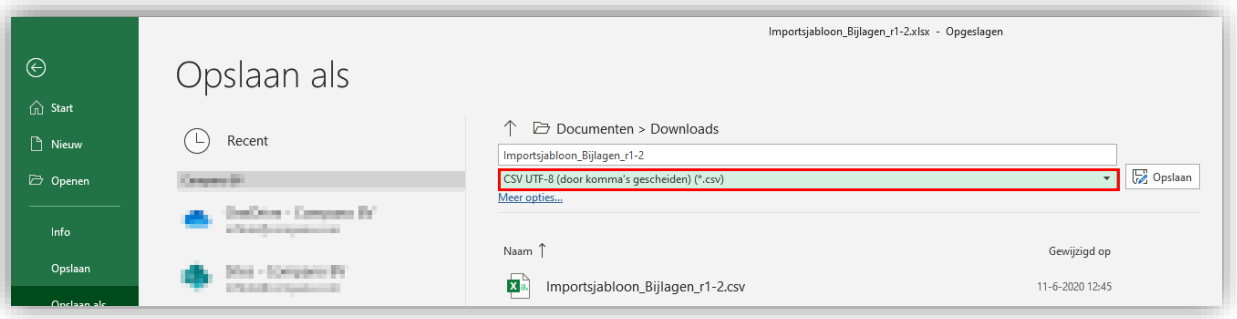
```
\Data\Environments\000003\Attachment\PRD\Tape\Masking\3m_2090_scotch_afplaktape_blauw-wwwbeste.png
```

	A	B	C	D	E
1	Source	Supplier / Manufacturer code	Code	Description	File / Path
2	Product	8712862000006	2090	Scotch afplaktape	\Data\Environments\000003\Attachment\PRD\Tape\Masking\3m_2090_scotch_afplaktape_blauw-wwwbeste.png

4.1.3 Upload template for linking attachments

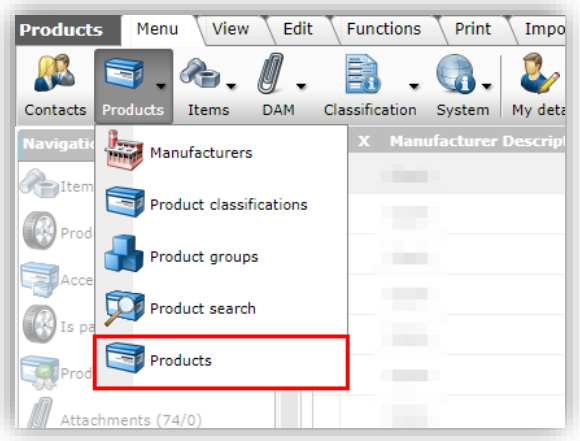
After this preparation the CSV file can be imported:

1. Important: First save the Excel as a ***CSV file***; choose `CSV-UTF-8` if you have this choice:

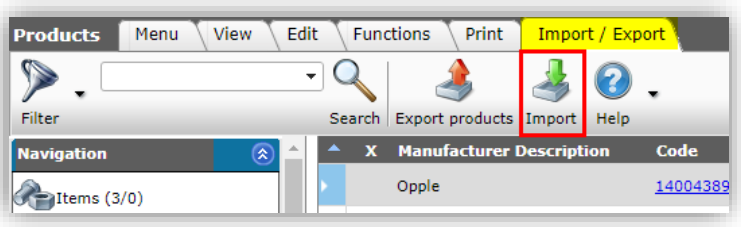


> *Note: If you want to make changes to your file, **always** do so in the Excel file and save it again as a CSV file. This prevents data corruption such as GLN numbers.*

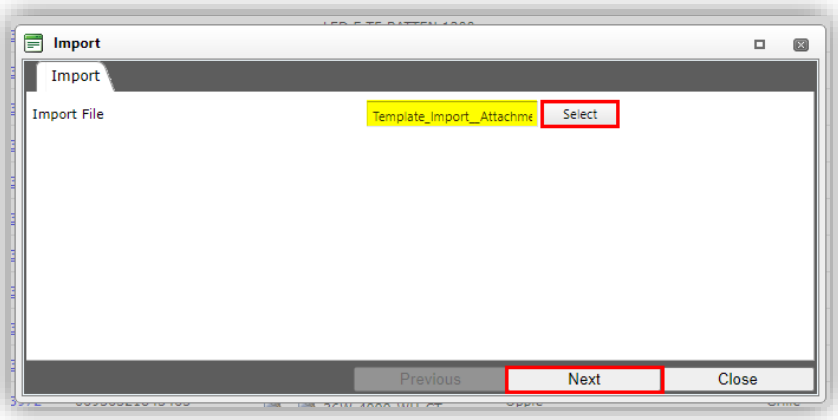
2. Now, the CSV file can be imported using any *Import* button in COS, for instance at *Products > Product*.



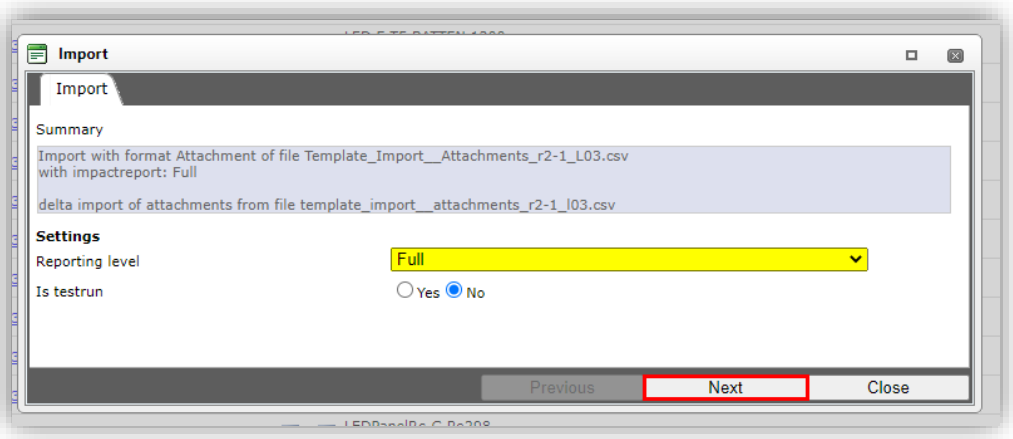
3. Next, go to the *Import / Export* tab and click on *Import*.



4. In the Import dialog Select the CSV file you created and click on *Next*:



5. In the next dialog screen:



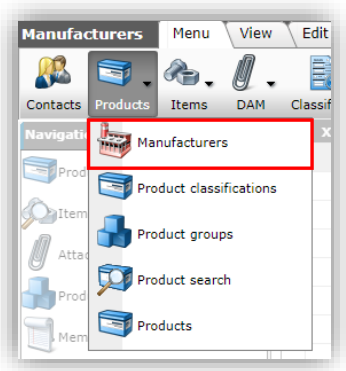
   a. **Reporting level**: Select the reporting level for the import report:
      i. ***None***: Don't generate an import report. This results in the fastest import.
      ii. ***Full***: Generate a full import report, including all changes to all fields. This results in the slowest import because all fields are checked.
      iii. ***Only warnings***: Generate an import report with only warnings. This import is generally faster than with a Full report.
   b. **Is testrun**: Set to *Yes* to simulate an import; this only generates an import report with possible errors and/or warnings. No data is imported!

The images are now added to the items / products or item groups / product groups you have entered. You will receive an email with a report when this process is finished. Open the report to see if the import was a success.

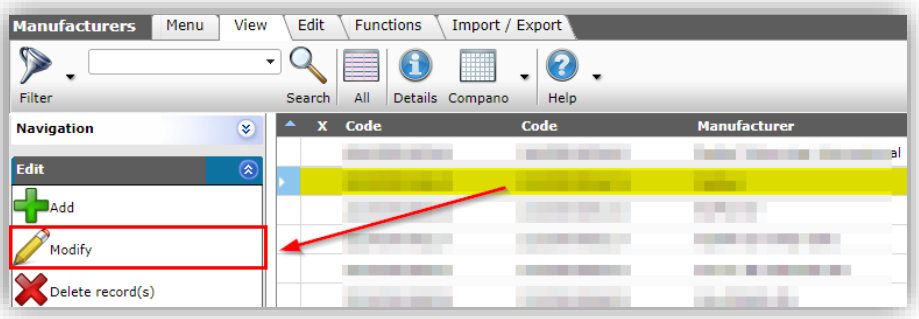
4.2 Multi-language deep link templates

The same method can be used to create deep links to web pages in different languages:

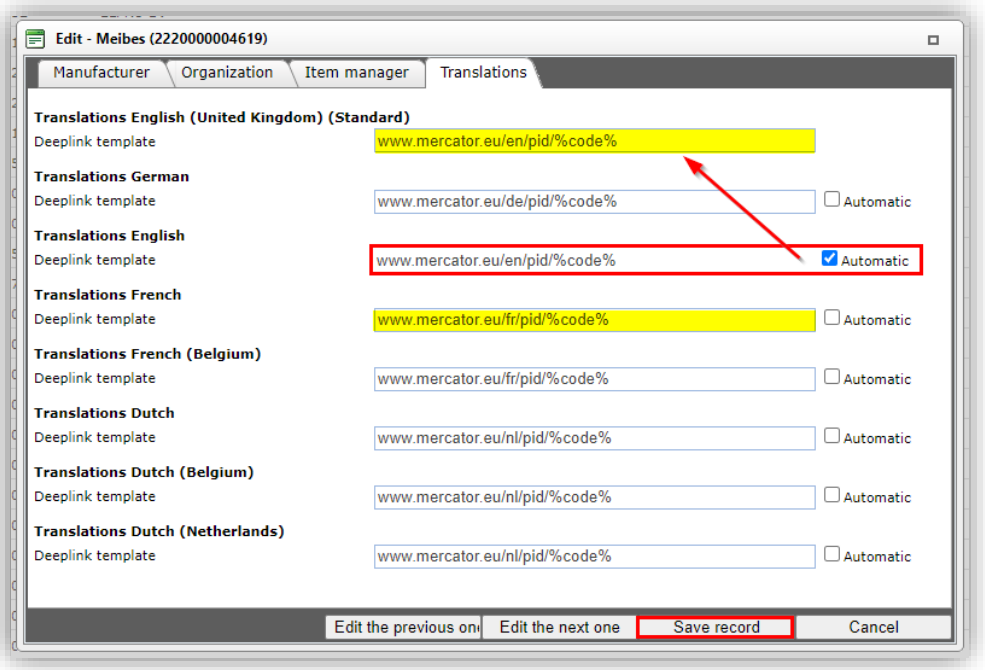
1. Go through the Menu to Products > Manufacturers:



2. In the next screen, select the manufacturer and under Edit click on *Modify*:



3. In the pop-up window, go to the *Translations* tab and enter the relevant templates / URLs for the different languages[1]:



[1] Note: By checking the tick box Automatic, the translation will automatically fall back; first on the 'main' languages, then on the language which is set as the 'standard' for your application.

5 Add attachment per item group

Adding an attachment to an item group is similar to adding an attachment to a product group; all items that are part of the item group inherit any attachments that have been linked to the item group.

Important: An item group ***NEVER*** inherits any attachments from a product or product group.

This means that if there no attachment added to the item, the application will *first* check whether it can find an attachment at the item group level. If there is no attachment to be found there, the item will inherit the attachment from the product. If there is no attachment at the product level, the item will inherit the attachment from the product group.

6 Add attachments using FTPS and import template

It is also possible to add multiple attachments to product groups at the same time. This procedures consists of two steps:

1. **Upload attachments via FTPS**: You can transfer your attachment files to your Compano server via the FTPS protocol. You will need a (free) FTPS account for this.
2. **Link attachments via an import template**: With an import template (spreadsheet) you can indicate which attachment(s) should be linked to which product, item, or group.

6.1 Transfer attachments via FTPS

FTPS stands for *File Transfer Protocol SSL.* With this protocol you can upload files from your computer to your Compano server. The FTPS protocol will ensure that this transfer is encrypted (secured). You will need FTPS software and an FTPS account from Compano.

- If you do not yet have a (free) **FTPS account**, request one via support@compano.com
- If you don't have **FTPS software** yet, download the open-source *FileZilla Client*

Note: As of January 15, 2021, the FTPS (FTP SSL/TLS) protocol is active. Older FTP accounts have been converted to the FTPS protocol.

6.1.1 Attachment folder structure

Before you start uploading attachments, it's good to think about how you are going to organize the attachments into folders. With a logical folder structure, it will be much easier to maintain attachments.

You are completely free to organize your folder structure. Compano gives the following tips for your consideration:

- Create root folders for Product and/or Item attachments, for example *PRD* and *ITM.*
- Create subfolders for Product and Product group attachments, for example, `ProductImage` and `ProductGroupImage`; the first folder is for unique product images, the second for product group-level images.
- Or, create subfolders for the different Attachment types, such as*: PPI, PHI, SCH, CAD* or one of the other types of the Chain Standard.

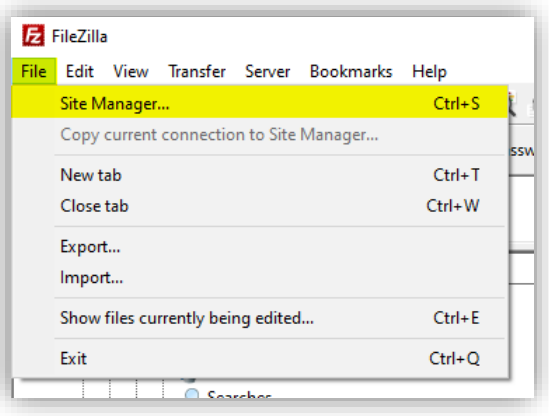
6.1.2 Upload attachments

To upload attachments using FTPS:

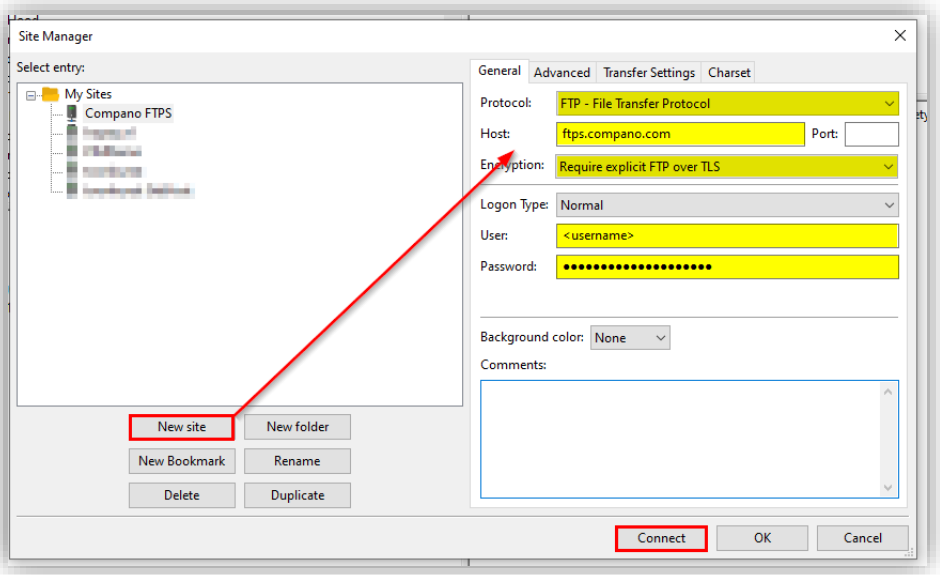
1. Start the FileZilla client and connect to the Compano FTPS server from Compano. Enter the correct credentials at *Host*, *User*, *Password* and *Port* and click on the button *Quickconnect*.

- Host address FTP: `ftps.compano.com`
- Host address FTPS: `ftps.compano.com` → Use: `Explicit FTP over TLS`

a. In FileZilla, through the main menu, go to *File> Site manager*.



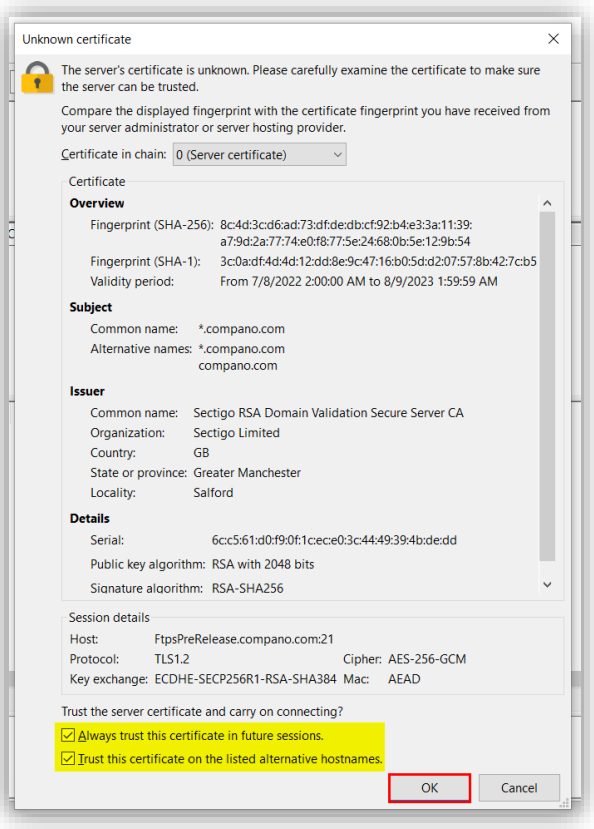
b. In the pop-up window, click on *New site* and enter the following details on the *General* tab:



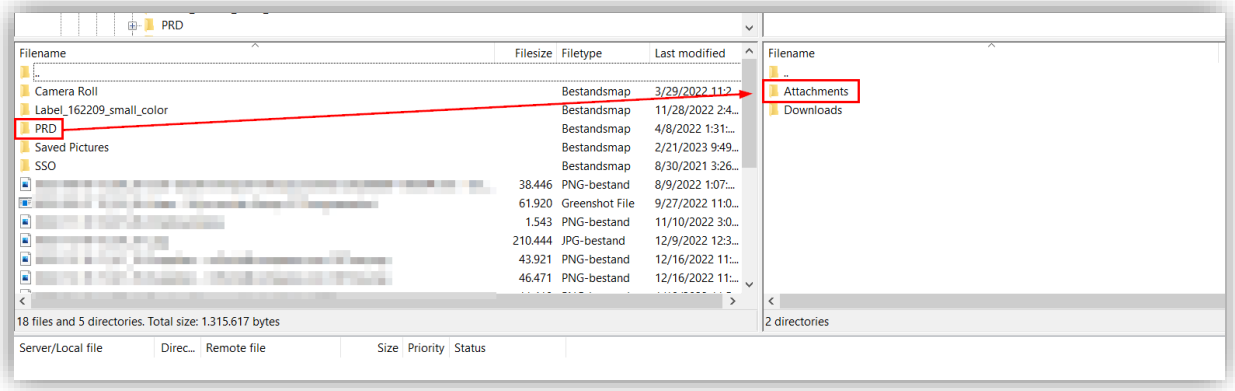
i. **Protocol**: Select the regular `File Transfer Protocol`
ii. **Host**: `ftps.compano.com`
iii. **Encryption**: Select `Require explicit FTP over TLS`
iv. **Logon type**: Select `Normal`
v. **User**: Type your Compano FTPS username
vi. **Password**: Type your Compano FTPS password

c. Next, click on *Connect*.

2. Opmerking: Wanneer je ***voor het eerst*** verbinding maakt met een nieuwe, beveiligde FTPS-site, moet je het ***beveiligingscertificaat*** vertrouwen. Zorg ervoor dat je de juiste vinkjes zet en klik dan op *OK*.



3. Once the connection has been established, you will see the folder structure on the Compano server. Drag the *PRD* folder you have created to the folder *Attachments* on the server (from the left column to the right column):



4. The folders and images are now being transferred. You can check if the transfer was a success by opening the (new) folders in the right column.

7 Exchange/Share attachments

Attachments of all types can be exchanged with a data pool such as 2BA or InstallData or can be shared using one of the standard exchange formats such as DICO-SALES005, INSBOU, BMEcat, FAB-DIS, etc.

Data pools and exchange standards usually define different attachment types and apply rules when exchanging/sharing this information.

7.1 Standard attachment types (Ketenstandaard)

The list below shows the standard Attachment Types, as defined by Ketenstandaard:

CAD	CAD
CHR	Link to sheet
EEP	Energy Label
LDT	Photometric Data
LNK	Deeplink
LOG	Logo
MAN	Instructions
MTE	Installation- & maintenance document
OTA	Other attachments
OTD	Other document
OTV	Other visual element
PHI	Image for printing
PPI	Image for internet
PRT	Presentation document
PVI	Presentation video
SCH	Diagram
SOF	Software
STR	Certifications
PAR	Parts list/exploded view
Unknown	Unknown

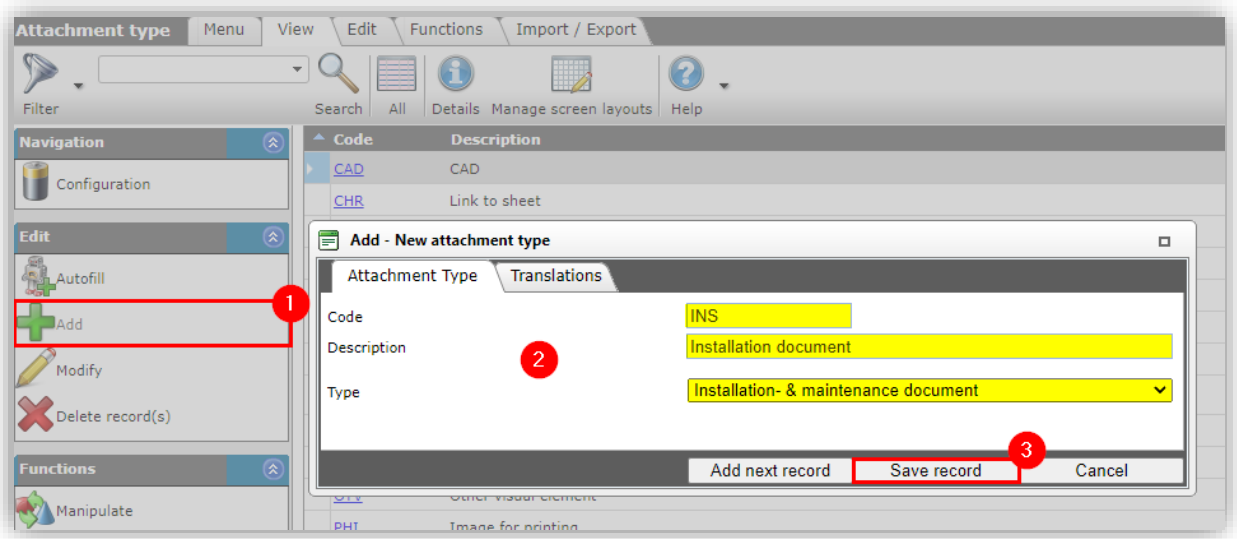
7.2 Own attachment types

In addition to the standard attachment types, you can also define your ***own*** attachment types.

Important: Own attachment types are not recorded by data pool 2BA, unless they are based upon an existing, standard attachment type.

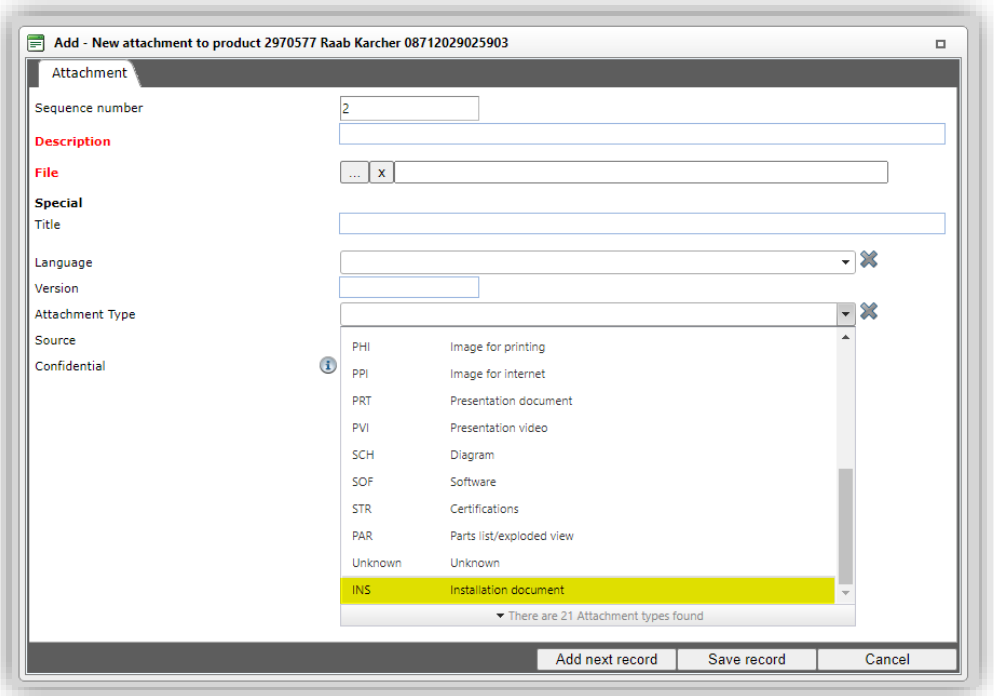
To define an own attachment type in COS:

1. Go to *Configuration > Attachment Type*



2. Use the *+Add* (1) button to add your own Attachment type, for example:
3. Enter the correct values in the pop-up screen (2):
    c. **Code**: Enter your own code here, for example `INS`. Note: This code is sent in data feeds (JSON, XML) and can therefore be used on, for example, your product website.
    d. **Description**: Type here a clear, short description of the type of attachment, for example *Installation document.*
    e. **Type**: Select here the type that best fits the attachment. Note: The Type you choose will be passed to data pools. However, data pools only recognize the default types; hence this field is a list box.
4. Then click on *Save* (3).

If you are now going to link new attachments, you can choose from all standard attachment types plus the types that you have defined yourself:



7.3 Original source indicator

Data pools 2BA and InstallData use a tag called Original source indicator to determine whether they will download an attachment to the data pool server, or whether to only record the referral URL.

The tag original source indicator is set by Compano according to the following rules:

Attachment on Compano server?	Original Source Indicator	Attachment downloaded by data pool?
Yes	False	Yes
No (external source)	True	No
Deep link	True	No

Note: The original source indicator is set automatically by Compano and ***cannot*** be changed by users of the application.

7.3.1 Presentatie video's

An exception is made for attachments of type ***PVI*** (presentation video); the *original source indicator* is set to `True` for this type, so that these videos are not unnecessarily downloaded by 2BA.

7.4 Exchanging images

Data pool 2BA will ***always*** download images of the type PPI independent of the setting of the original source indicator. When no PPI image is available, but a high resolution image(PHI) can be found on the Compano server, 2BA will download this image and scale it down.

7.5 Exchanging deep links

Within the DICO standard, a deep link must be specified as attachment type `LPP`. Only the ***first*** specified deep link is imported by 2BA as a product or item deep link. Should you specify multiple deep links, then these will be imported as attachment type `OTA` *(other)*.

Deep links in COS can be either individual attachments per product or item, or a general deep link URL template can be set for all products of a manufacturer or items of a supplier, see also chapter **4. LINK TEMPLATES**.

Important: With respect to exchanging deep links ,the COS application will first search for any `LNK` attachments at the product or item. The ***first*** *attachment of type `LNK` will then be exported as an attachment of type `LPP`. If no `LNK`-attachment is available, the application will check whether a* ***deep link template*** *has been filled out for the Manufacturer or Supplier and if so it will export the resulting URL as an `LPP`-attachment.*

---

8 Certificates

A certificate is a document containing a certified statement by an authorizing agent identifying that a product has fulfilled certain requirements. Certificates can take the form of quality marks, (safety) statements, verified labels, etc.

Some examples are:

- Sanitary Conformity Certificate

- BREEAM Declaration BREEAM (Building Research Establishment Environmental Assess-ment Method)
- DOCCE Declaration of Conformity (Conformité Européenne)
- RoHS (Restriction of Hazardous Substances)
- Safety Datasheet

Compared to the separate Certificate option under *Add attachments*, this Certificate option now allows for more detailed information on the certificate to be entered and exported, such as:

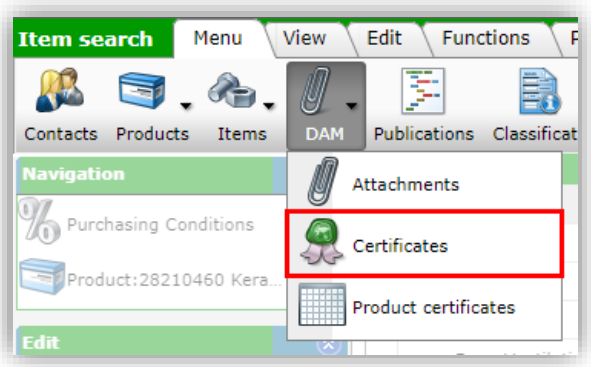
- Type of certificate
- Certificate issuer
- Number
- Sub number
- Claim type
- Claim Description
- Starting date
- Date of revision
- Expiration date

8.1 Add a certificate

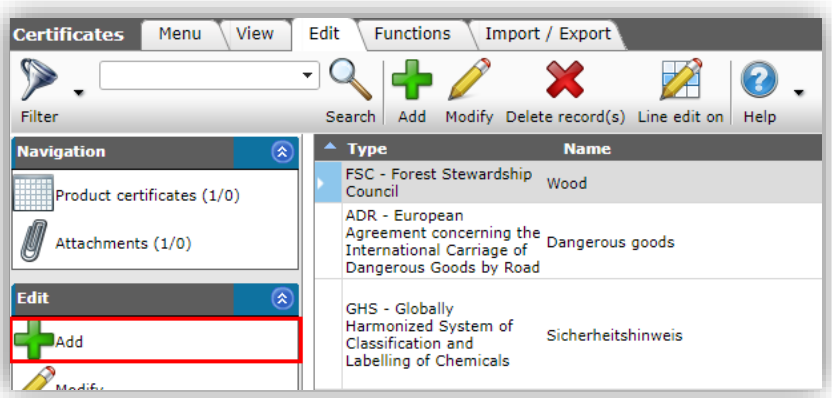
Note: Certificates first need to be added to the application and only then can be linked to products.

To add a Certificate:

1. Go through the Menu to *DAM > Certificates*:

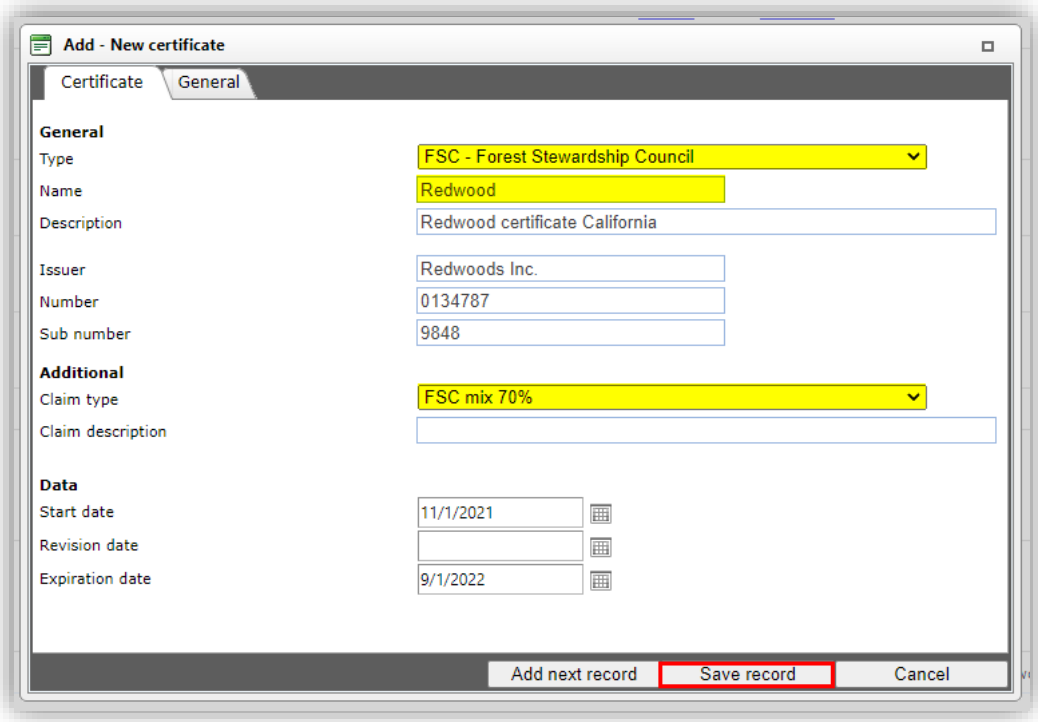


2. Under Edit, click *+Add*:



3. In the pop-up screen:

Certificate tab



   a. **Type**[2]: Choose the type of certificate, for example FSC. Several predefined types are available.
   b. **Name**: Type a name for the certificate. Note: The name of a certificate is mandatory and, if unique, can be used to distinguish between multiple certificates with the same (or no) certificate Number. Max. length is 35 characters.
   c. **Description**: Type an (extended) description for the certificate.
   d. **Issuer**: Type the name of the organization that issued the certificate.
   e. **Number**: Type the number of the certificate. Note: Filling out a certificate number is strongly recommended, however for a DICO/SALES005 export, a certificate number is ***not*** mandatory.
   f. **Sub number**: Enter the sub-number of the certificate.
   g. **Claim type**: Choose the claim type, for example like FSC 70%, FSC 100%, etc.
   h. **Claim description**: Type a description for the claim type.
   i. **Start date**: Choose the date on which the certificate takes effect.
   j. **Revision date**: Choose the date on which the certificate was revised.
   k. **Expiration date**: Choose the date the certificate expires.

4. Click the *Save record* button to save the certificate.

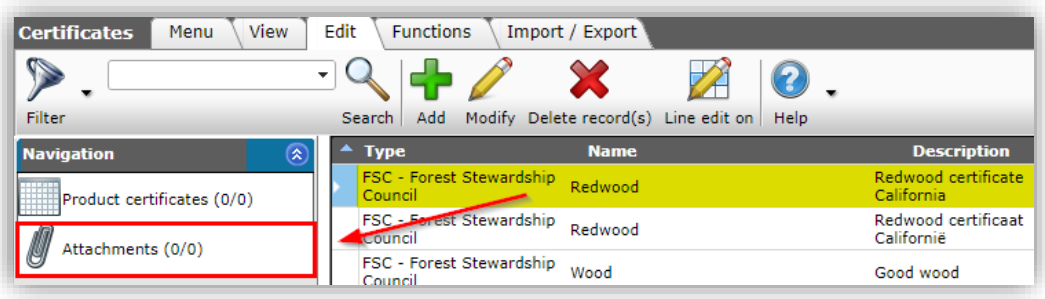
8.1.1 Certificate with attachment

A certificate can also have attachments, for example a scan of the certificate document.

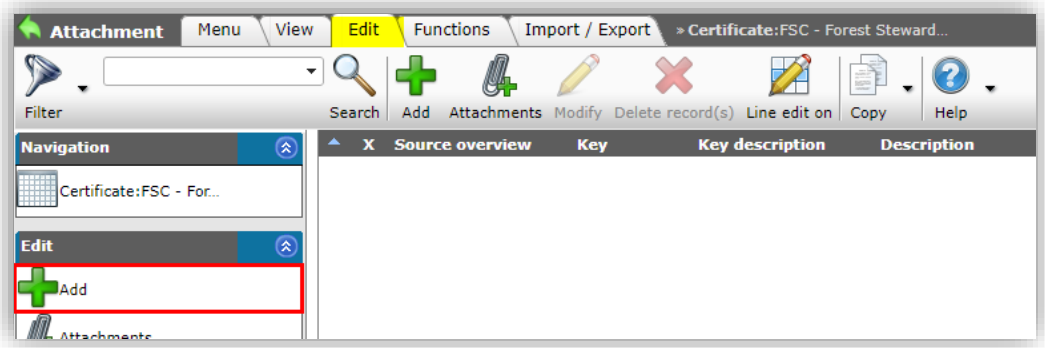
To add an attachment to a certificate:

1. Go through the Menu to *DAM > Certificates*.
2. Select the certificate to which you want to add an attachment and click on *Attachments* under Navigation:

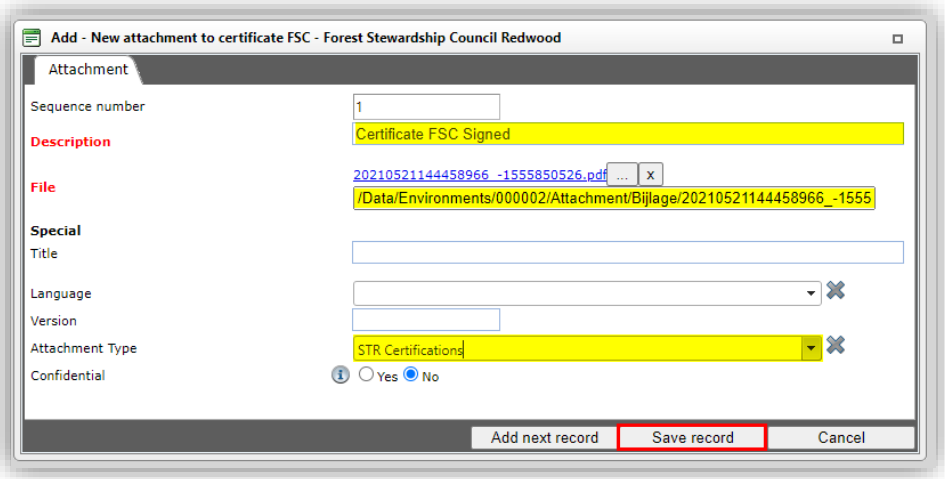
[2] Mandatory fields are marked in red font.



3. On the next screen, click *+Add*.



4. In the pop-up screen:



a. **Description**: Type a description for the attachment
b. **File**: Upload and/or choose a file
c. **Attachment type** (optional): Choose an attachment type

Note: Attachments to Certificates are always ***files*** (PDF, JPG, etc.) and ***never*** a reference to a web page or external download; so URLs are not allowed.

8.2 Linking certificates to product

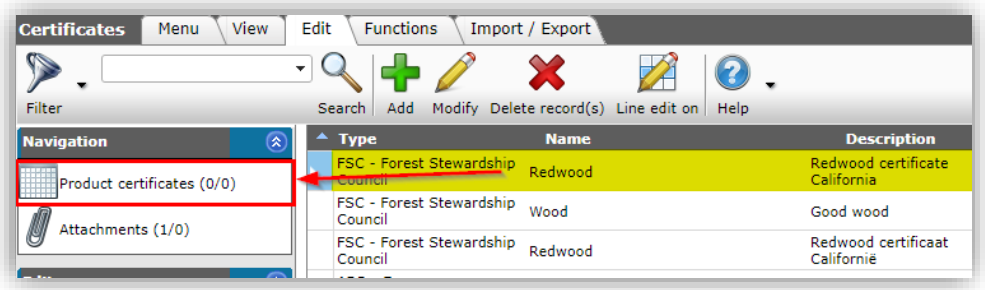
After adding the certificates you can link them to products. This can be done in two ways:

- Link the certificate to one or more products
- Link the product to one or more certificates

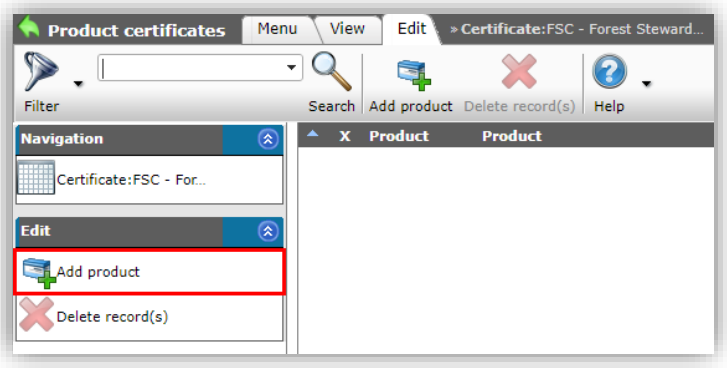
8.2.1 Link the certificate to product(s)

To link one or more products to a certificate:

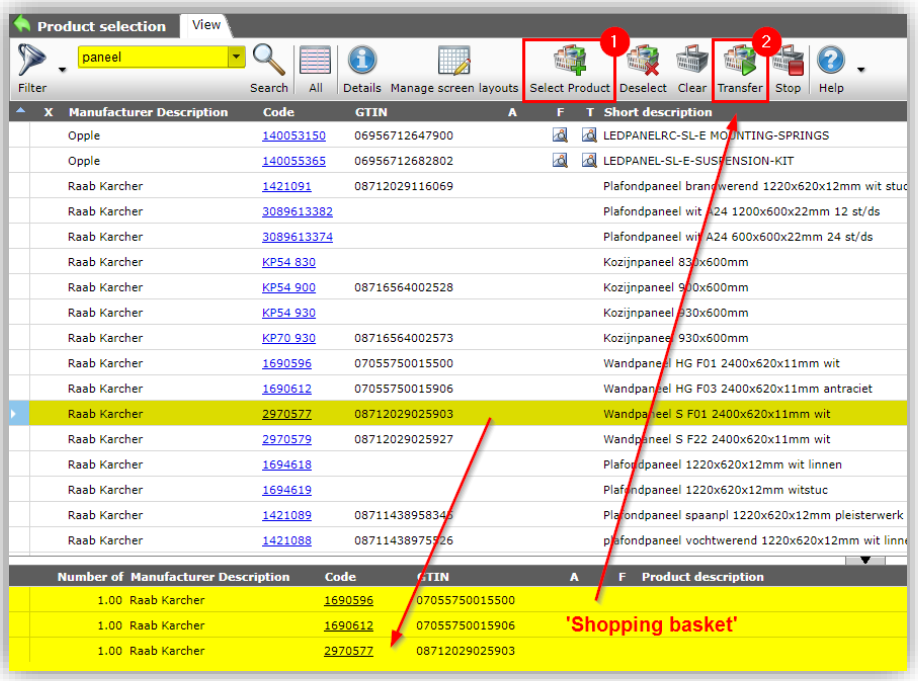
1. Go to *DAM > Certificates* via the Menu.
2. Select the certificate you want to link products to and click on *Product certificates* under Navigation:



3. In the next screen, click on *+Add Product:*



4. In the next screen, select the products you need to link the certificate to. Here you can use the Filter or the Search box and choose one or more products:



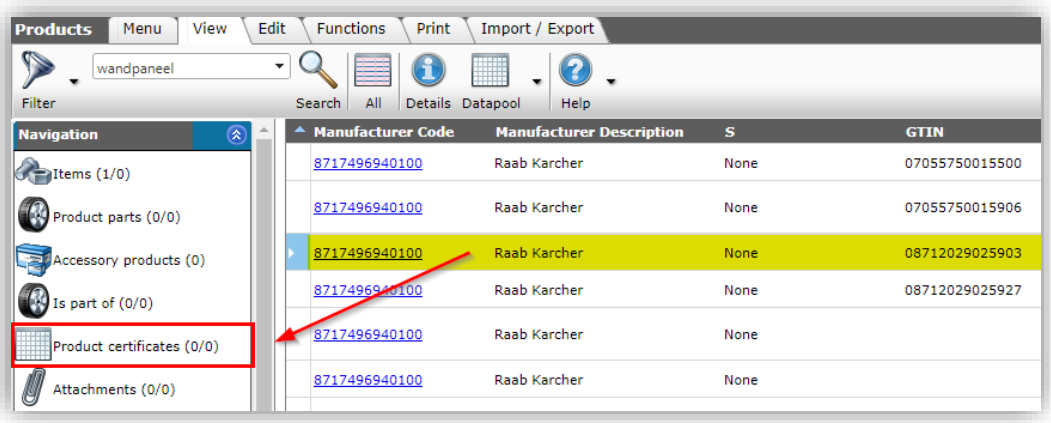
5. Select products and click *Select product* (or double-click in the list).
6. Click on *Transfer* to copy the contents of your 'shopping cart'.

7. The certificate is now linked to the product(s) from your shopping cart.

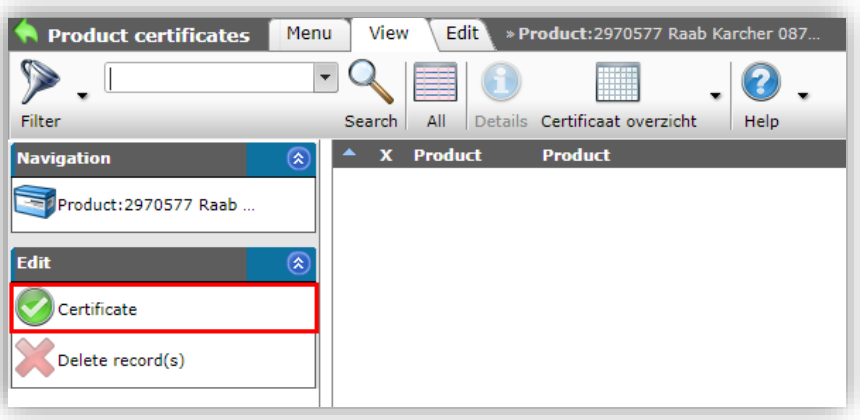
8.2.2 Link the product to certificates

Conversely, you can also link (several) certificates to one product:

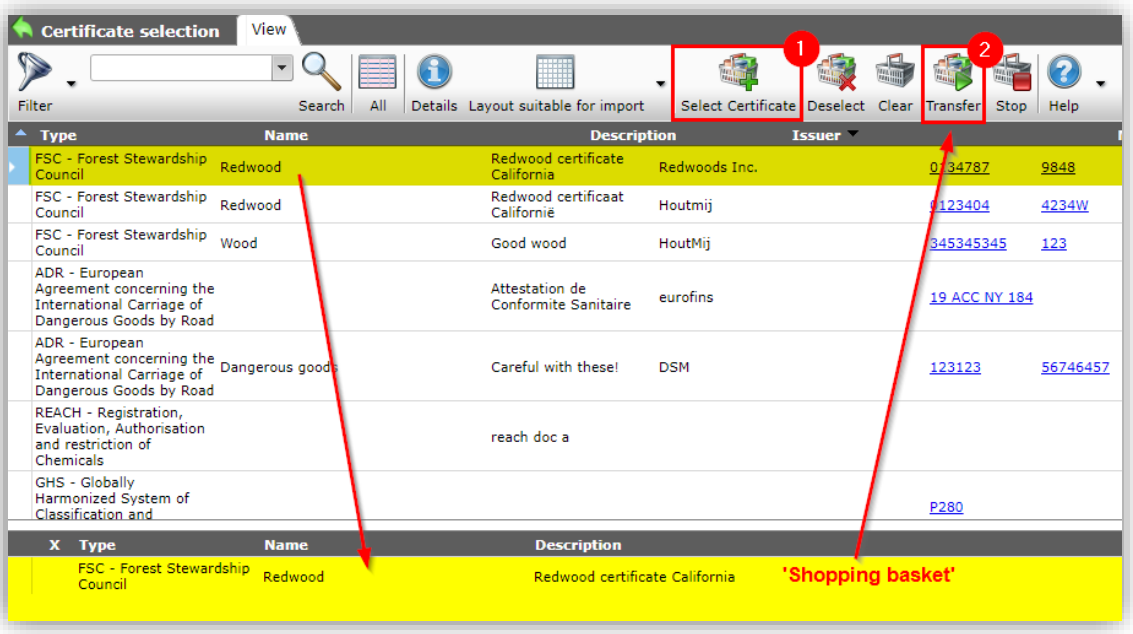
1. Go to *Products > Products* via the Menu.
2. At Navigation click on *Product certificates*:



3. Click on *Certificate* in the next screen under Edit:



4. In the next screen, select the certificates you want to link to the product. Here you can use the Filter or Search box and choose one or more certificates:



5. Select certificates and click *Select Certificate* (or double-click in the list)
6. Click on *Transfer* to copy the contents of your 'shopping cart'
7. The product is now linked to the certificate(s) from your shopping cart[3].

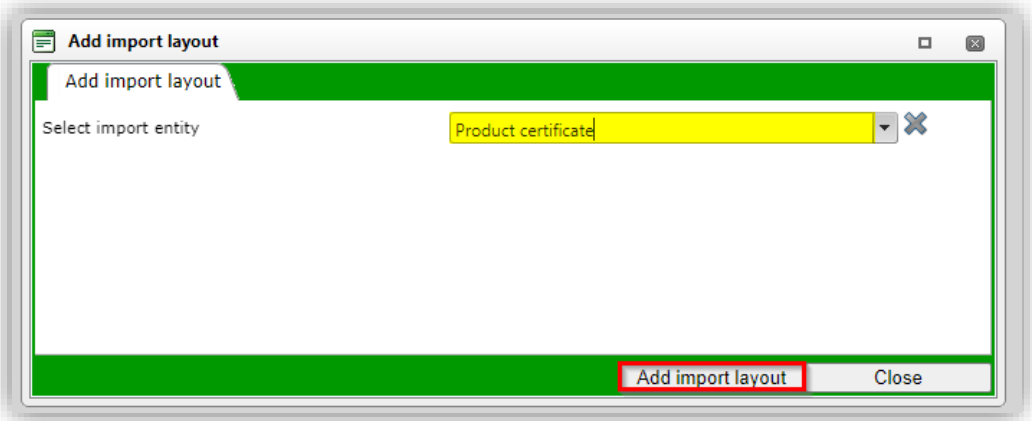
8.2.3 Import certificate-product links

Links between certificates and product can also be imported.

Note: Detailed information on imports can be found in the *Manual Universal Import/Export*.

To import certificate-product links, first create an appropriate import layout:

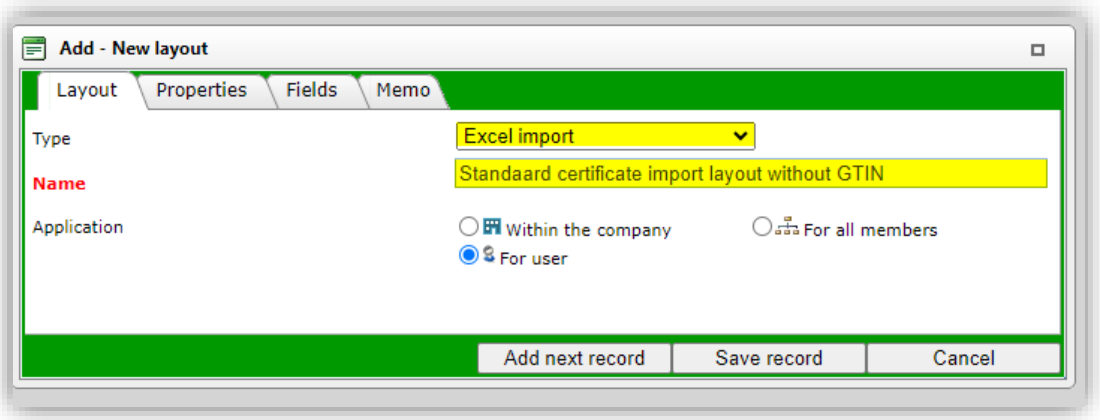
1. Through the Menu, go to System > Layouts.
2. Under Edit, click on +Add import layout.
3. In the pop-up window:



   a. Select import layout: Select the `Product certificate` entity.
   b. Click on *Add import layout*.
4. On the next screen:

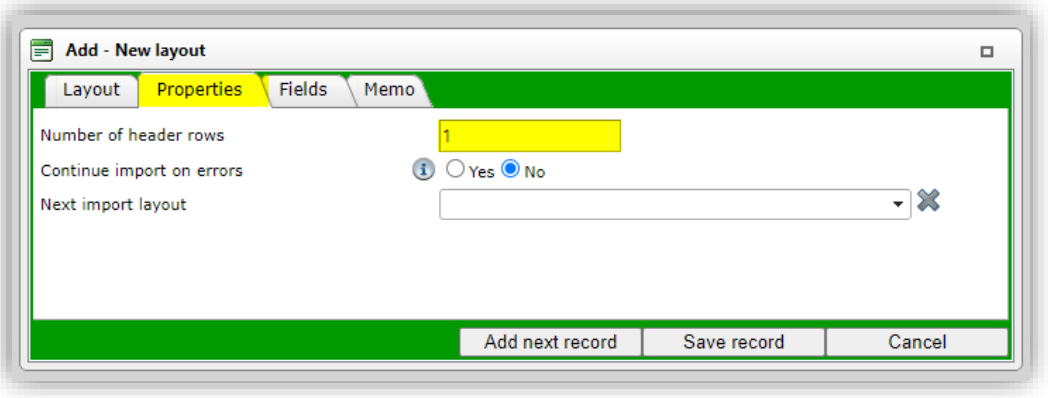
Layout tab

[3]Note: The shopping cart is limited to 1000 records.



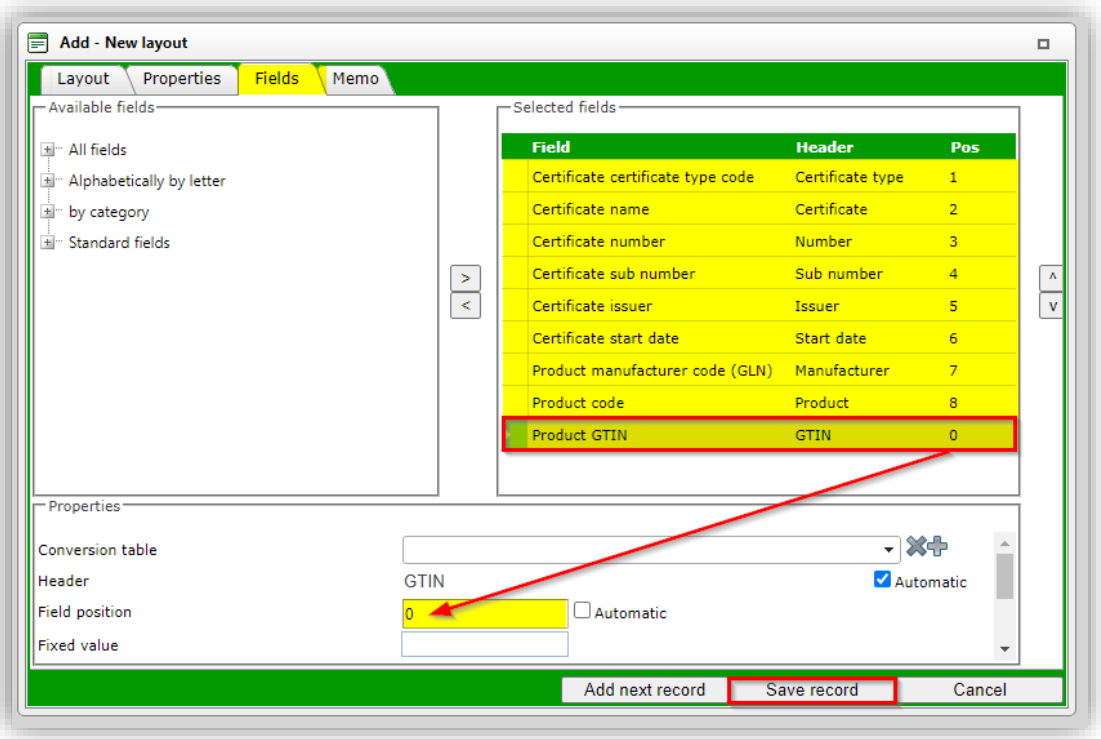
a. **Type**: Select the type of import file (Excel or text-formatted).
b. **Name**: Type a name for the layout.

Properties tab



a. **Number of header rows**: Set the number of header rows.

Fields tab



a. **Selected fields**: Add all the data fields that need to be imported with their corresponding Pos number, indicating the number of the column in the Excel-file (Column A = 1, Column B = 2, etc.).

5. Save the record.

The following data fields are ***mandatory***:

- Certificate type
- Certificate name
- Certificate number
- Certificate sub number
- Certificate issues
- Certificate start date
- Product code
- Product GTIN

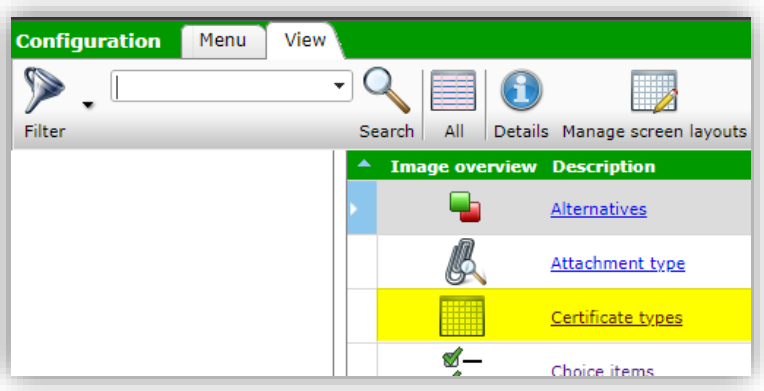
Note: Either the Product code or the Product GTIN can be used to identify the product that needs to be linked. Make sure to set the option that is ***not used*** to field position (Pos) 0.

8.3 Certificate types

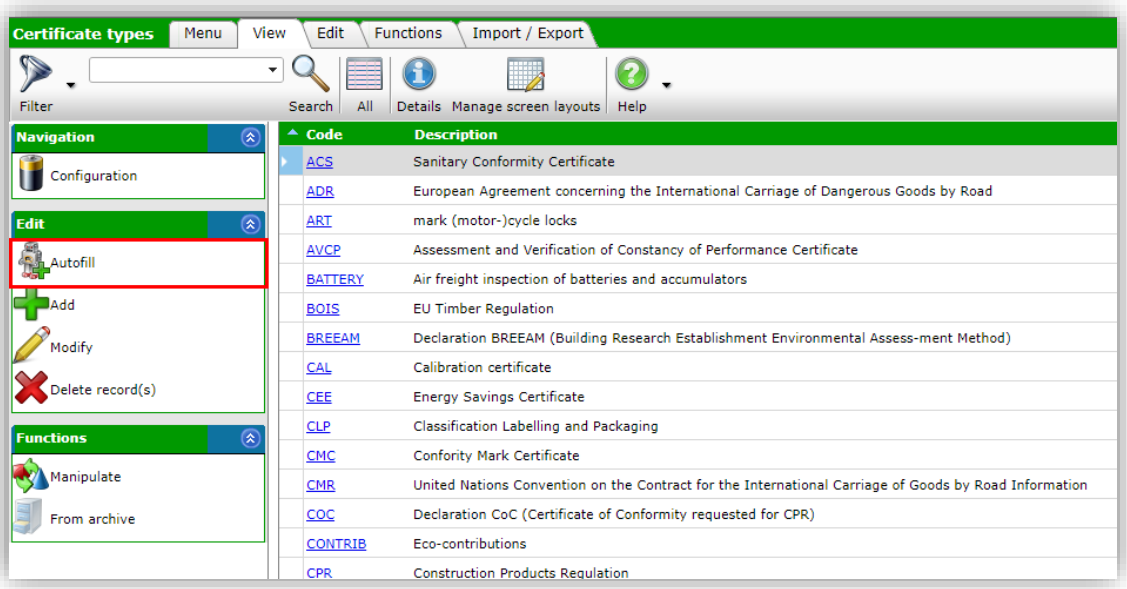
The COS application offers over 60 types of commonly used Certificate Types.

To add ***all*** common certificate types:

1. Through the Menu, go to *System > Configuration* and click on the option *Certificate Types*.



2. On the next screen, use the button *Autofill* to add all available Certificate Types[4]:



3. Optional: Use the *+Add* button to add your own Certificate Type(s); also see the next paragraph.

Note: The default Overview, indicates how and with which Type Code certificate types will be exported in the industry standard formats DICO/SALES, BMEcat, DQR, FAB-DIS and ETIM xChange:

Code	Description	Type for DICO/SALES	Type for BMEcat	Type for DQR	Type for FAB-DIS	TypeForXChange
TSTAP	Test approval	None	MD33	None	None	ATX001 - Approval / certificate
SVGW_water	SVGW water	None	MD99	#ZL	#TECH	ATX001 - Approval / certificate
SEAL	Seal of Approval	Seal	MD31	None	None	ATX001 - Approval / certificate
PDSEL	Product data sheet for energy label	None	MD07	None	None	ATX003 - Data sheet
ETA	Declaration ETA (European Technical Assessment)	None	MD55	None	None	ATX004 - Declaration (other)
DOP	Declaration of Performance	DOP	MD51	None	DOP	ATX005 - Declaration of performance (DOP)
EPD	Declaration EPD (Environmental Product Declaration)	EPD	MD54	None	None	ATX006 - Environmental product declaration (EPD)
REACH	Registration, Evaluation, Authorisation and restriction of Chemicals	REACH	MD05	REACH	None	ATX007 - REACH declaration
ROHS	Declaration RoHS	RoHS	MD49	None	RoHS	ATX008 - RoHS declaration
WEEE	Waste of Electrical and Electronic Equipment	WEEE	None	None	None	ATX009 - WEEE declaration
EEL	EU energy label	EEL	MD06	None	None	ATX012 - Energy label
LCA	Life-Cycle Assessment	None	None	None	None	ATX013 - LCA document
SDS	Safety data sheet	SDS	MD03	GG	FDS	ATX019 - Safety data sheet
WAR	Declaration warranty (Warranty statement)	None	MD56	None	None	ATX021 - Warranty statement
ACS	Sanitary Conformity Certificate	None	None	None	ACS	None
LQC	Limited Quantity Value	LQC	None	None	None	None
KOMO	KOMO	KOMO	None	None	None	None

Note: Not all certificate types will be available in every industry standard format.

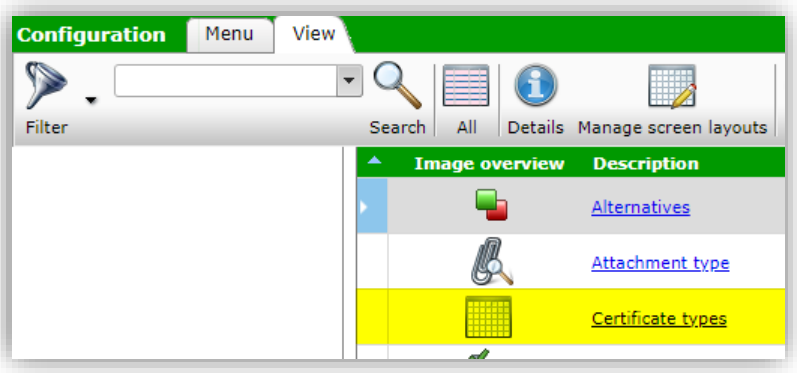
[4] In a standard COS application, only the DICO/SALES certificates types are available.

8.3.1 Add a certificate type

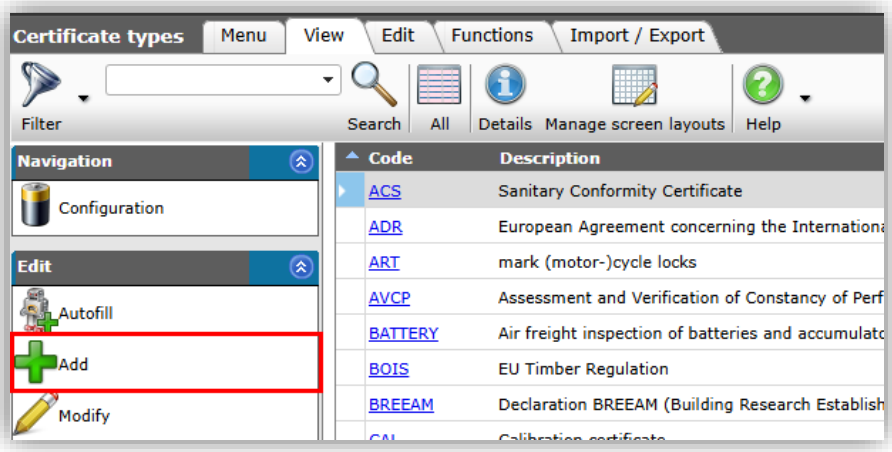
Certifcate types can also be added manually, for instance to add your own (variants of a) certificate.

To add a Certificate Type:

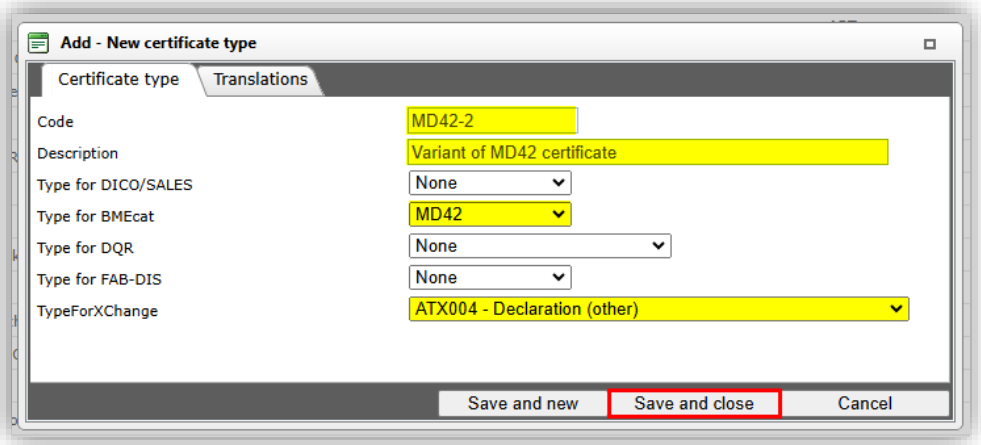
1. Through the Menu, go to *System > Configuration*.
2. Click on *Certificate types*:



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



4. In the pop-up window:



a. **Code**: Enter a Code for the Certificate.
b. **Description**: Enter description for the Certificate.

c. **Type DICO/BMEcat/DQR/FAB-DIS/ETIM xChange**: Optionally, if this certificate should be exported in an industry standard formats, set the relevant Type for each of the industry standards.

5. Save the record.

8.4 Import of certificates

Certificates can also be linked to products via an Import:

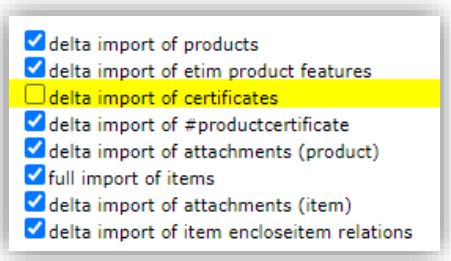
- DICO/SALES005 import
- Manual import

8.4.1 DICO import

Certificates will be imported using a DICO/SALES005 import file. Any certificate data present in the SALES005 productdata.xml file will be imported:

- Any existing certificates which are present in COS, but are not offered in the SALES005 data file, will be removed from COS, except any certificates with attachments of type OTA or DQR.
- Multiple certificates can be added to a product, provided the combination of Certificate number, SubNumber, Issuer, and StartingDate is unique.

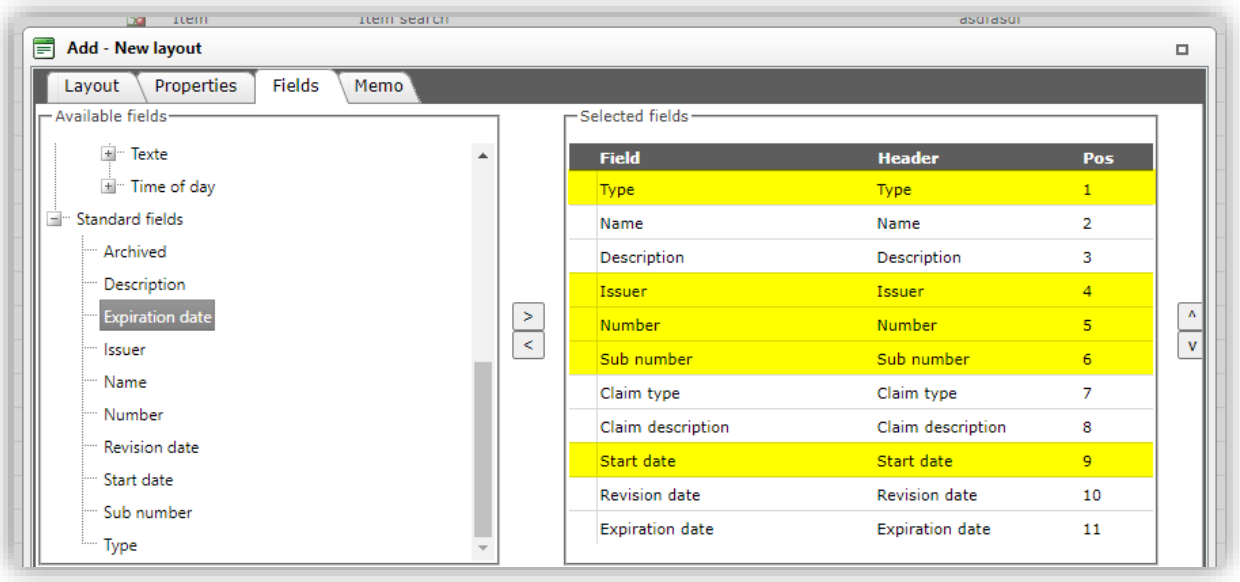
Note: When manually adding additional certificates, after a first import via SALES005, you must make sure to uncheck the box for ***delta import product*** certificates with each ***subsequent*** SALES005 import to prevent the manually added certificates from being removed:



8.4.2 Manual import

Certificates can also be imported manually, thus creating the Certificates. Note that these certificates then still need to be linked to products.

For an import of Certificates, the following fields are required:



a. **Type**: Enter a certificate type from the drop-down list available in the application; it is sufficient to enter the letter code of the type here, for example GHS. Alternatively, the value other can be entered.
b. **Name**: Enter the name of the Certificate. Note: Use different names in case of multiple certificates with the same ***type, number*** and ***sub number***. Max. length is 35 characters.
c. **Issuer**: Type the name of the issuing authority, for example, KEMA.
d. **Number**: Enter the certificate number here
e. **Sub number**: Enter the certificate sub number here. Note: This field is only mandatory if you enter multiple certificates of the ***same type and with the same number***. So, two certificates of the type GHS and with number 102 are then given as sub numbers 01 and 02.
f. **Start date**: Enter the start date of the certificate here.

Excel templates are available on the Compano Help website with which Certificates can be imported: Template_Import Certificaten_r[#-#]_L04 (NL) and Template_Import_Certificates_r[#-#]_L04 (EN)

For these imports, use the Standaard import certificaten L04 import templates, or create your own import template.

For a detailed description of how to import data from an Excel file format, please see the *Manual Universal Import/Export*, which is available on the Compano Help website.

8.4.3 Linking certificates to products (import)

The links between Certificates and Products can also be made via an Excel import. Key fields for this import are: Type, Number, Sub-number, Issuer, Start date, Manufacturer (GLN), Product code.

A standard import template and a corresponding import layout are available for this import. The data field name has also been added as a key field so that ***certificates can also be identified as unique*** by 'name'.

Templates:
Template_Link_Certificaten_aan_Producten_r#-#_L04.xslx
Template_Link_Certificates_to_Products_r#-#_L04.xslx

Layout:
Standaard import product certificaat link - L04 (v#.#)

8.5 Export of certificates

The COS application offers over 60 common types of Certificates. Certificates can be exported using an industry standard format (DICO/SALES, BMEcat, DQR, FAB-DIS or ETIM xChange), or using the standard Export function.

8.5.1 Industry standard export

Note: The default Overview, indicates how and with which Type Code certificate types will be exported in the industry standard formats DICO/SALES, BMEcat, DQR, FAB-DIS and ETIM xChange. Not all certificate types will be available in every industry standard format:

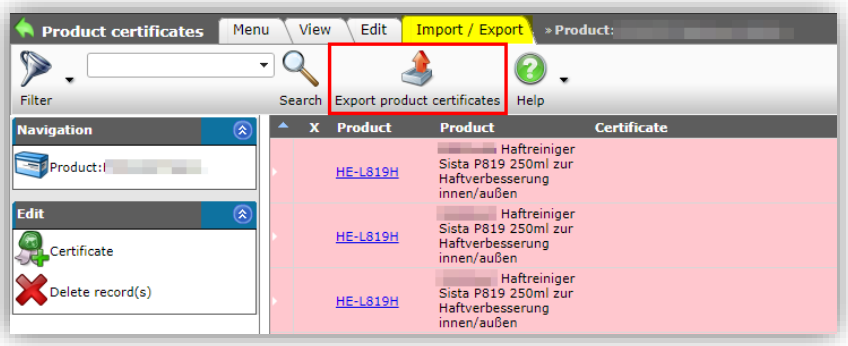
Code	Description	Type for DICO/SALES	Type for BMEcat	Type for DQR	Type for FAB-DIS	TypeForXChange
TSTAP	Test approval	None	MD33	None	None	ATX001 - Approval / certificate
SVGW_water	SVGW water	None	MD99	#ZL	#TECH	ATX001 - Approval / certificate
SEAL	Seal of Approval	Seal	MD31	None	None	ATX001 - Approval / certificate
PDSEL	Product data sheet for energy label	None	MD07	None	None	ATX003 - Data sheet
ETA	Declaration ETA (European Technical Assessment)	None	MD55	None	None	ATX004 - Declaration (other)
DOP	Declaration of Performance	DOP	MD51	None	DOP	ATX005 - Declaration of performance (DOP)
EPD	Declaration EPD (Environmental Product Declaration)	EPD	MD54	None	None	ATX006 - Environmental product declaration (EPD)
REACH	Registration, Evaluation, Authorisation and restriction of Chemicals	REACH	MD05	REACH	None	ATX007 - REACH declaration
ROHS	Declaration RoHS	RoHS	MD49	None	RoHS	ATX008 - RoHS declaration
WEEE	Waste of Electrical and Electronic Equipment	WEEE	None	None	None	ATX009 - WEEE declaration
EEL	EU energy label	EEL	MD06	None	None	ATX012 - Energy label
LCA	Life-Cycle Assessment	None	None	None	None	ATX013 - LCA document
SDS	Safety data sheet	SDS	MD03	GG	FDS	ATX019 - Safety data sheet
WAR	Declaration warranty (Warranty statement)	None	MD56	None	None	ATX021 - Warranty statement
ACS	Sanitary Conformity Certificate	None	None	None	ACS	None
LQC	Limited Quantity Value	LQC	None	None	None	None
KOMO	KOMO	KOMO	None	None	None	None

Note: For the correct export of certificates in the BMEcat, DQR or FAB-DIS exchange format, also see the corresponding Manuals available on the Compano Help website.

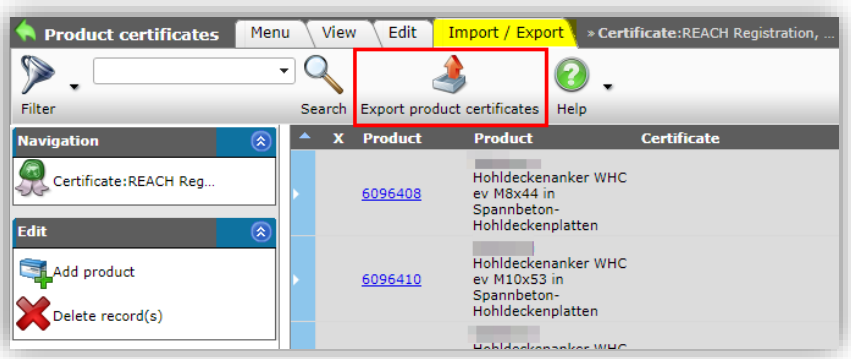
8.5.2 Standard export

Certificates can also be exported using the standard Export function in combination with either the screen layout or an export layout. This function is available on the following overviews:

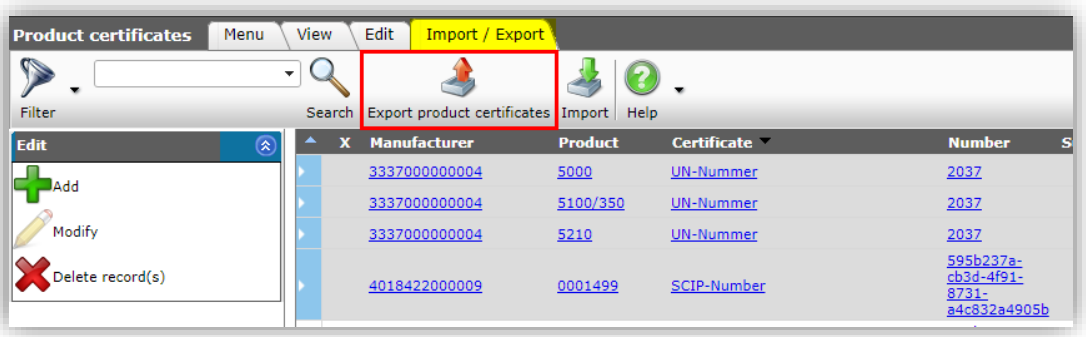
- Product certificates Overview under ***Products***: *Menu > Products > Product certificates*



- Product certificates Overview under ***Certificates***: *Menu > DAM > Certificates > Product certificates*:



- Product certificates Overview under ***Product certificates***: *Menu > DAM > Product certificates*:



8.5.3 JSON export

For the Product Certificate overview, that shows which certificate is linked to which product(s), a JSON feed can be defined. This JSON feed is useful, for instance, for making certificate downloads available for all products.

For more information, see the Manual JSON Feeds.

8.6 View certificates

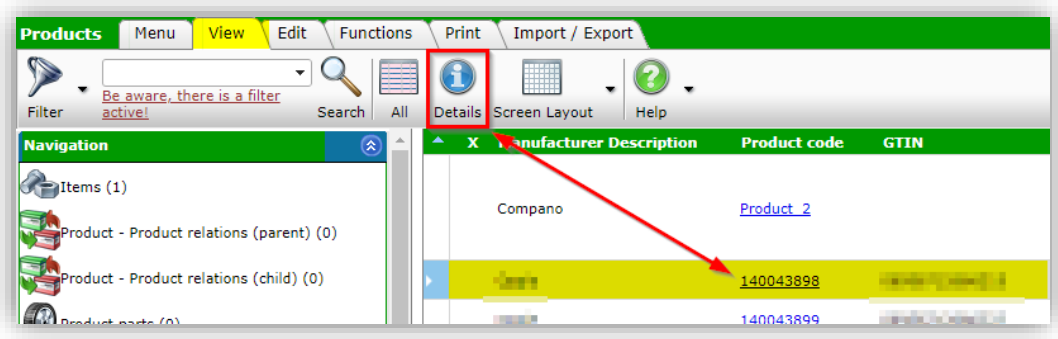
There are two options to view which certificates are linked to a Product:

- Certificate tab on Product
- All certificates Overview

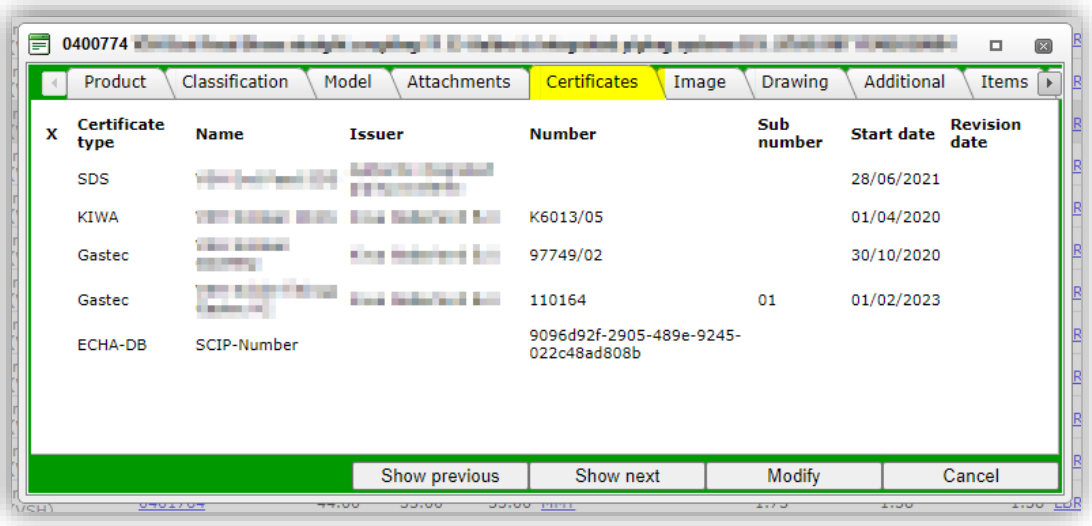
8.6.1 Certificate tab on product

Which certificates are linked to a Product, can be viewed on the Certificates tab of the Product information: C

1. Through the Menu, go to any Product overview.
2. Select a Product and either click on the *Product Code* or on the *Details* button under View:



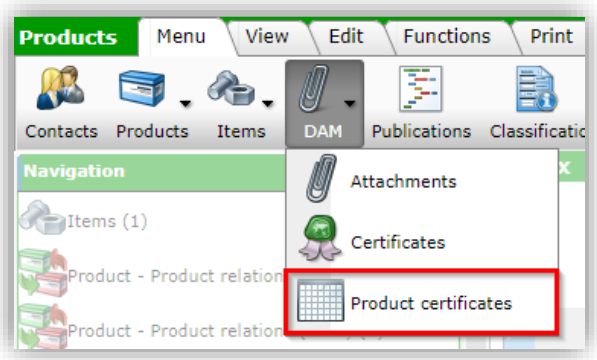
3. Any linked Certificates show in the pop-up information window, on the Certificates tab:



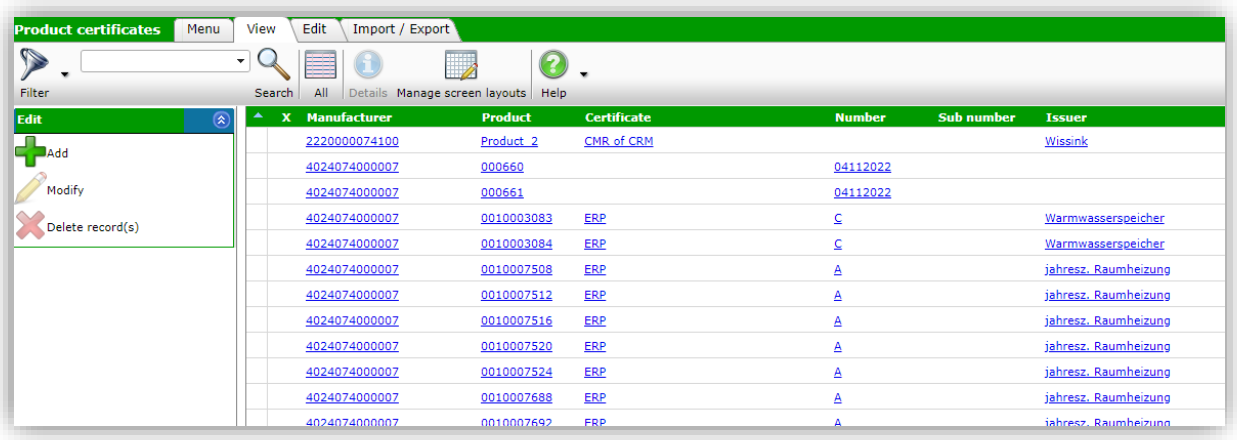
8.6.2 All certificates overview

To view ***all*** certificates which are linked to ***all*** Products:

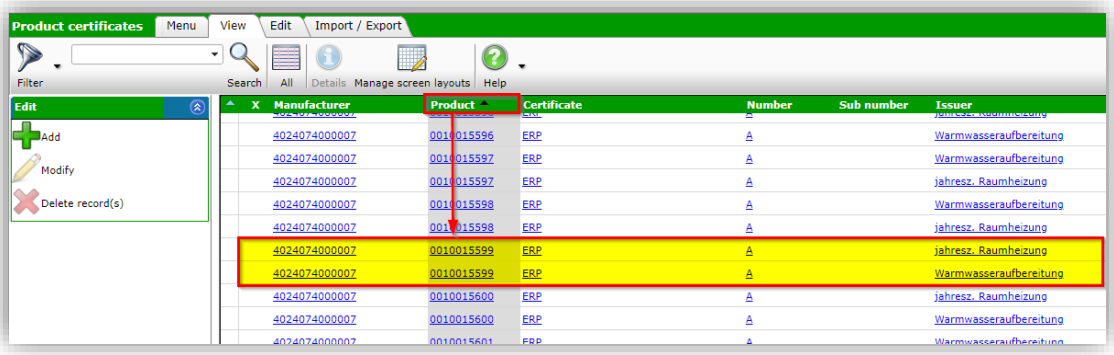
1. Through the Menu, go to *DAM > Product certificates*:



2. The Overview will show all `certificate – product` links, ordered by Certificate Type:



3. Or, by ordering on `Product Code`, all certificates on a single Product can be grouped together:



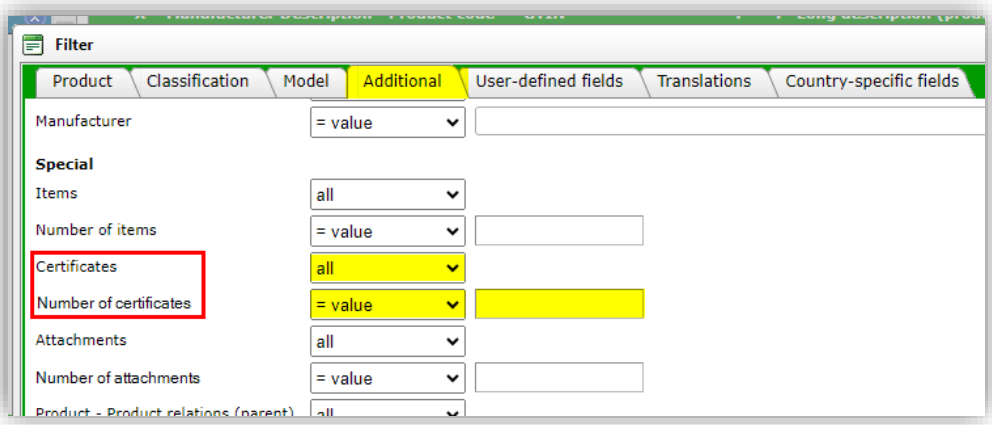
8.7 Filter and Search certificates

Certificates can be filtered and/or searched on the following overviews:

- Product overview
- Product certificates overview

8.7.1 Filter on Product overview

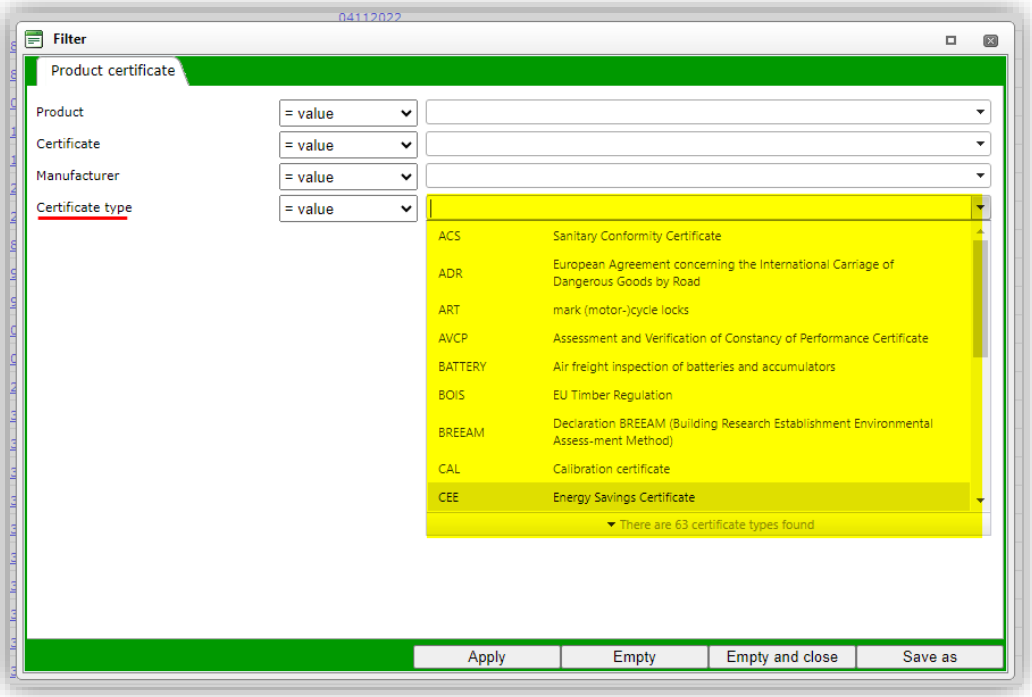
On the Product Overview, the Filter box can be used to filter on linked Certificates. The filter tab *Additional* offers the following filter options:



- **Certificates**:
  - ***Has certificates***: Product has certificates (regardless of archive status)
  - ***Has no certificates***: Product has no certificates at all
  - ***Has unarchived certificates***: Product has active certificates (and possibly also archived certificates)
  - ***Has archived certificates***: Product has archived certificates (and possibly also active certificates)
  - ***Has no unarchived certificates***: Product does not have active certificates
  - ***All***: Show all Products (default setting)
- **Number of certificates**: Filter on the number of Certificates.

8.7.2 Filter on Product certificate overview

The Filter on the Product certificate overview can be used to filter on (a combination of):



- **Product**: Select a product from the drop-down menu.
- **Certificate**: Select a certificate from the drop-down.
- **Manufacturer**: Select a manufacturer from the drop-down menu.
- **Certificate type**: Select a certificate type from the drop-down.

Note: This Filter can be set on either the Product certificates Overview of a single Product, or on the All certificates Overview.

9 Appendix A. Examples of adding images

To explain how the adding of attachment works, we will show an example of the adding of images to product groups.

Example
For a web shop which sells lightning, LED lamps are structured in the following way:

Product group structure

LED lamps
- LED Light bulbs
  - Socket E27
    - Warm-white
    - Bright
    - Flame
  - Socket E14
    - Warm-white
    - Bright
    - Flame
- LED Spots
  - Socket GU10
    - Non dimmable
    - Dimmable
  - Socket MR16
    - Non dimmable
    - Dimmable
- LED Tubes
  - 60 cm
  - 120 cm
  - 150 cm

Linked images

Generic image LED lamp
- Generic image LED Light bulb E27
  - No image
    - Image LED E27 warm-white
    - Image LED E27 bright
    - Image LED E27 flame
  - Generic image LED Light bulb E14
    - Image LED E27 warm-white
    - Image LED E27 bright
    - Image LED E27 flame
- Generic image LED spot
  - Image LED spot GU10
    - No image
    - No image
  - Image LED spot MR16
    - No image
    - No image
- Generic image LED tube
  - No image
  - No image
  - No image

When we point out the part with LED light bulbs, this results in the following images:

Level	Description	Images	Link
1	LED Light bulbs		Generic image LED light bulb with socket E27
• **2**	• Socket E27		Inherited form level 1 *LED Light bulbs*
○ **3a**	○ Warm-white		Own unique image
○ **3b**	○ Bright		Own unique image

- **3c**
- Flame

Own unique image

In the example above a generic image of a LED light bulb with a socket type E27 is linked on the first level. On the second level no image is linked, that is why this level inherits the image of the above level 1. On the third level every lamp has its own unique image.

The part with the LED spots looks differently:

Level	Description	Image	Link
1	LED Spots		Generic image led-spot
• **2a**	• Socket GU10		Generic image led-spot GU10
○ **3a**	○ Non dimmable		Inherited from level 2a
○ **3b**	○ Dimmable		Inherited from level 2a
• **2b**	• Socket MR16		Generic image led-spot MR16
○ **3a**	○ Non dimmable		Inherited from level 2b
○ **3b**	○ Dimmable		Inherited from level 2b

Another setup is chosen here. Because you can't see if the lamp is dimmable and only the socket differs, every led spot can inherit the image from the second level. Only on the first and second level an image is linked.

For LED tubes it is even more easier:

Level	Description	Image	Link
1	LED Tubes		Generic image LED tube
• **2a**	• Length 60cm		Inherited from level 1
• **2b**	• Length 120cm		Inherited from level 1
• **2c**	• Length 150cm		Inherited from level 1

For the image it doesn't matter which length the tubes have in this setup. One image on all levels will do.

10 Common certificate types

The most commonly used Certificate Types are:

Code	Certificate description
Adr	European Convention for the International Carriage of Dangerous Goods by Road
Art	ART quality mark two-wheeler locks
Cal	calibration certificate
Cmr	International convention on cross-border road transport information
Decl	Supplier's declaration of preferential origin
Din	DIN information
Docce	Declaration of Conformity DoC/CE (Declaration of Conformity/ Conformité Européenne)
Shell	Declaration of performance
Eccn	Export Control Classification N umber
Eco	ECO label
Eel	EU energy label
EPD	Environmental Product Declaration
FSC	Forest Stewardship Council
Gas approval	Gaskeur quality mark
Gastec Hotels	Gastec quality mark
Ghs	Method of classification, marking and labelling of chemicals and preparations.
IHM	Inventory of hazardous materials
150	ISO information
Ispm	International Standards For Phytosanitary Measures No. 15
Kema	KEMA quality mark
Kh	Certified wood
KIWA	KIWA quality mark
Komo	KOMO quality mark
LQC	Limited Quantity Value
Mtcs	Malaysian Timber Certification System
Pefc	Programme for Endorsement of Forest Certification
Pvw	Police quality mark safe home
REACH	Registration, evaluation, authorization and restriction of chemicals
RoHS	Restriction of Hazardous Substances
Sds	Safety data sheet
Seal	Label
UN	Dangerous substances identification number
WEEE	Waste Electrical and Electronic Equipment (WEEE) Directive

Note: This list can be expanded in COS by making use of the Autofill function under *System > Configuration > Certificate types*.