

Compano Online Software

Manual Product & Item Relations COS PIM

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1 Introduction

Several types of relationships may exist between products and/or items. Examples include:

- Predecessor and successor
- Accessories
- Parts
- Optional product and Items
- Alternatives

The relationship can be between:

- Product and product
- Product and Item¹
- Item and Item

Note: The Dutch (2BA) and Belgian (InstallData) data pools only offer Product-Product relations in their Unifeed search engine. Links at item level are not shown but are supplied with (bulk) data downloads. Product references and/or relationships are included with the BMEcat 2005 ETIM Guideline V4.0 exchange format or via **DICO's** Item Relationship Message in the SALES005 format.

This manual describes how to handle relations between products and items in Compano Online Software.

1.1 Concepts

COS
Compano Online Software.

PIM
Product Information Management system.

Main product/item
Main product or item to which Parts, Accessories or optional product/items are linked.

Parts
Parts (sometimes also known as Components) are products that are a (technical) part of another product, for example a *gas block* is part of a *central heating boiler*. Parts are often identified as *spare parts*.

Accessories
Accessories are products (or items) that are made to be used in combination with a main product (or item), for example *suspension brackets* for a *radiator*, or an *inverter* for a *solar panel*. Accessories that are of the same brand as the main product/item are said to *belong* to the main product/item, or they are of a different brand but are a technical *fit*. Some accessories are *required*, which means that the main product/item cannot be used without them.

Alternatives

¹ Product-Item relationships have *not* been implemented in COS.

Some product or items can function as an alternative for another product. For instance, an alternative to a boiler could be another boiler of the same type but with a slightly higher capacity.

Predecessor and Successor

When products or items run out, there may be a (new) follow-up product or item. The relationship between both product (or items) can be indicated by linking them as predecessor and successor.

Optional products or items

Optional products and items are a special form of Accessory, where the end-user can choose the variant or type of accessory. For example, for a bath there are three different types of feet (modern, classic, and Victorian).

1.2 Relations in COS

Relations between products and items can be set in COS at both the Product and Item level. Perhaps unnecessarily, but *both records need to be present* in COS before a link between them can be established.

Product and Item relations can be established in COS either *manually* or by using an *import* file and import layout.

Note: This manual will first discuss how to establish these relations manually. For the import method see chapter 5. [IMPORT OF PRODUCT/ITEM RELATIONS](#).

1.2.1 Types of relations

Between Products and Items several types of relations can exist:

| DICO | Beschrijving | Description | How to set in COS | COS Code |
|------------|-------------------|-----------------------|---|----------|
| ALT | Alternatief | Alternative | Product Accessories type set to: COM | COM |
| BEO | Bevat onderdeel | Contains | Handled through the <i>Product parts</i> option | - |
| GSP | Gespiegeld | Mirrored | Product Accessories type set to: MIR | MIR |
| HOB | Hoort bij | Belongs to | Product Accessories type set to: BE2 | BE2 |
| KNZ | Kan niet zonder | Belongs to (required) | Product Accessories type set to: BE2 , and <i>Required to Yes</i> | BE2 |
| ONV | Onderdeel van | Part of | Inverse of <i>Product part</i> ; handled through the <i>Is part of</i> option | - |
| OPV | Opvolger | Successor | Set through the <i>Product successor code</i> | - |
| RES | Reserve | Spare part | Product part; <i>Spare part</i> set to Yes | - |
| TEP | Technisch passend | Fits to | Product Accessories type set to: FI2 | FI2 |
| VOO | Voorganger | Predecessor | Set through the <i>Product predecessor code</i> | - |

More information on item relations can be found at the [Ketenstandard Semantic Treehouse](#) > *Item Relations*.

Relationship can be between:

- Product – Product
- Product – Item
- Item – Item

For example

| Code | DICO | Code name | P-P | P-I | I-I | ID1 → ID 2 | ID 2 → ID1 |
|------|---------|-------------------------|-----|-----|-----|---|------------|
| PRE | VOO | Preceed | • | | • | Predecessor | Successor |
| COM | ALT | Comparable | • | | • | Comparable and Alternative | |
| CNO | - | Comparable Norm Product | • | • | | Meets requirements for standard product | |
| BE2 | HOB/KNZ | Belongs to | • | • | • | Belongs to, from same Series (made to be compatible) (specific) | |
| FI2 | TEP | Fits to | • | • | • | Fits to / Connects to (generic) | |

P-P: Product-product relationship

P-I: Product-article relationship

I-I: Item-item relationship

ID 1 → ID 2: Relationship from 1 to 2

ID 2 → ID 1: Relationship from 2 to 1

Preceed (PRE)

Preceed is a special compare where ID1 and ID2 are supplied by the same supplier and where ID1 is marked as running out.

Example: Boiler X (ID1) is a precursor to boiler Y (ID2) from the same manufacturer; size and performance may differ.

Comparable (COM)

Example: Boiler X (ID1) is similar to boiler Y (ID2). The boilers need not necessarily be produced by the same manufacturer.

Comparable Standard Product (CNO)

Example: The entered attribute values of standard product copper tube P1 (ID1) are 100% identical to those of another product or item (ID2)

Belongs to (BE2)

Example: Toilet seat 1 (ID1) belongs to Toilet 2 (ID2).

Fits to (FI2)

Example: Toilet seat 1 (ID1) technically fits WC2 (ID2).

2 Product to Product relations

Products relations can be between:

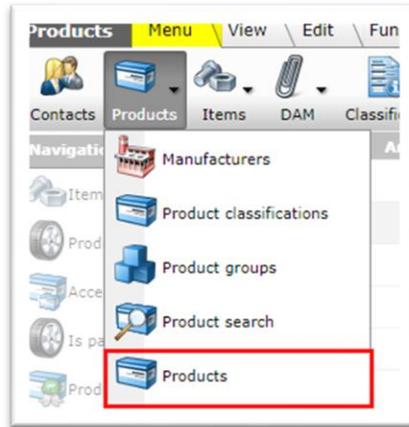
- Product and product part
- Product and product accessory
- Predecessor product and successor product

2.1 Product parts [BE2/FI2]

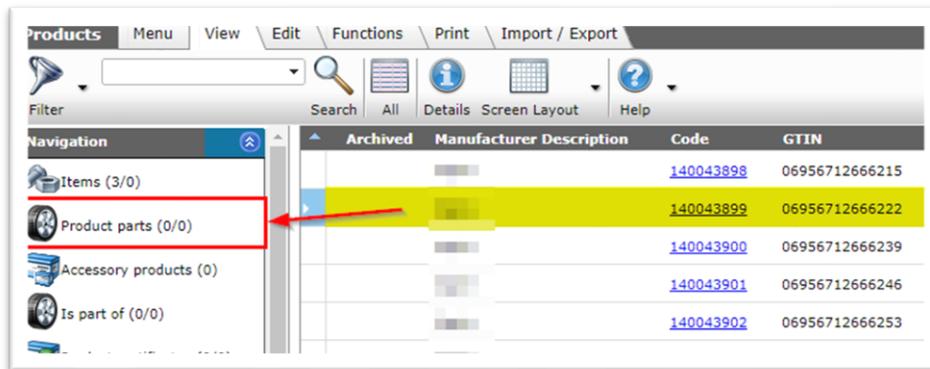
Parts are products that are a (spare) part of another product, for example a *gas block* in a *central heating boiler*.

To manually link parts to a product:

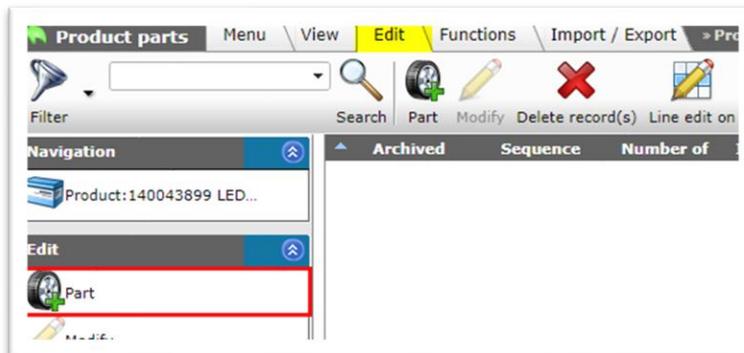
1. Through the Menu, go to *Products > Products*:



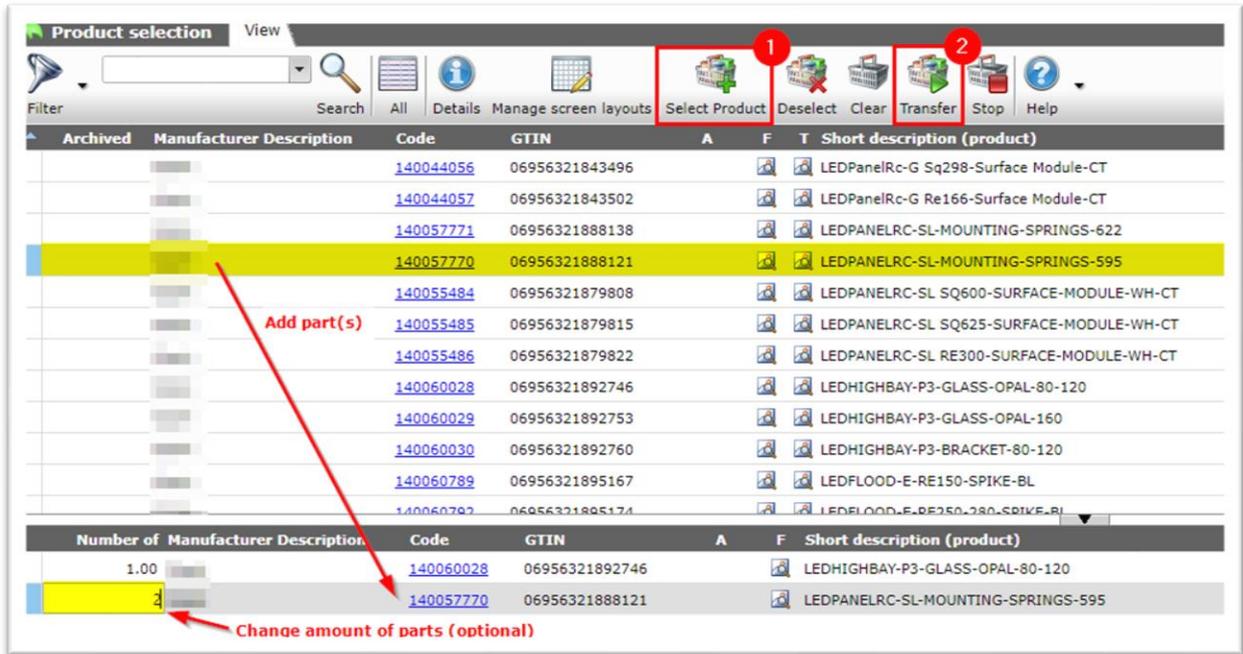
- In the Overview, select the product where you need to add Parts and, under *Navigation*, click on *Product parts*:



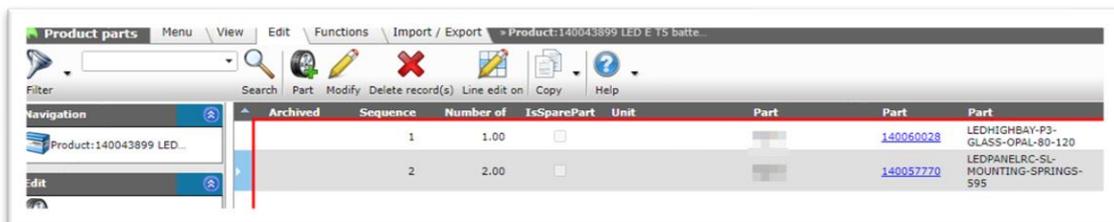
- In the next screen, under *Edit*, click on *+Part*:



- In the next screen you will be presented with the option to select one or more (spare) parts:



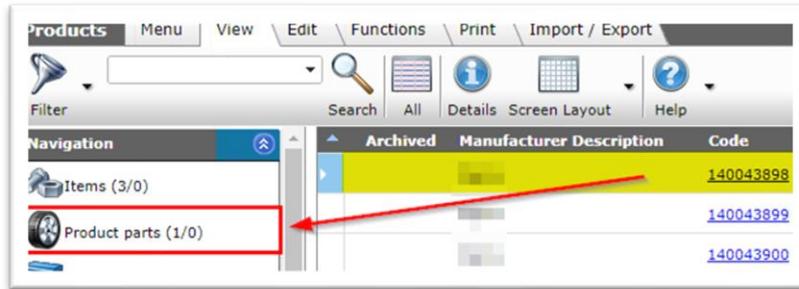
- a. First, use Filter and/or Search to find one or more products that need to be linked as part(s).
 - b. Manually select (all) product(s) to be added as part(s) and click on *+Select product* (1); these products will be placed in the 'shopping cart' at the bottom of the screen. Note: Double-clicking on a product **also places it in the 'shopping cart'**.
 - c. Number of (optional): Should you need to link multiple pieces of *the same* part to the product, click in the Number of column and type in the number of parts that are needed.
 - d. Next, click on *Transfer* (2), to link all the parts to the product.
5. The parts have now been linked to the main product and you will return to the Product Parts Overview:



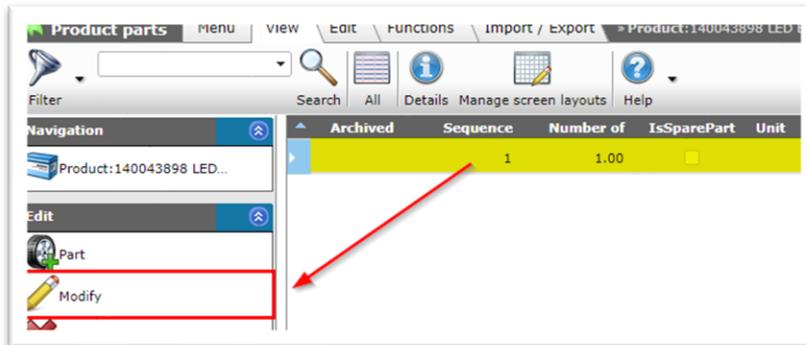
2.1.1 Spare parts

To indicate that a part qualifies as a *spare* part:

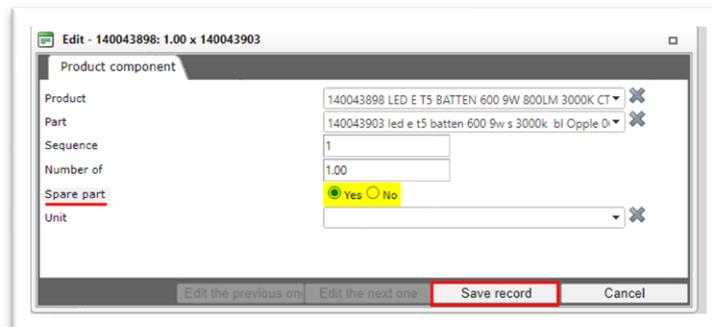
1. Through the Menu, go to *Products > Products*.
2. Select the Product that has spare parts and, under Navigation, click on *Product parts*.



3. In the Overview, select the part and, under Edit, click on *Modify*.



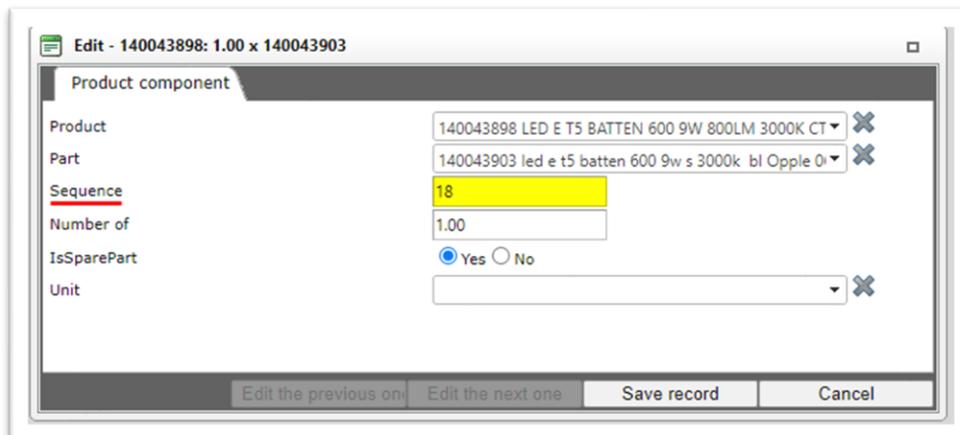
4. In the pop-up window, set *Spare part* to **Yes**:

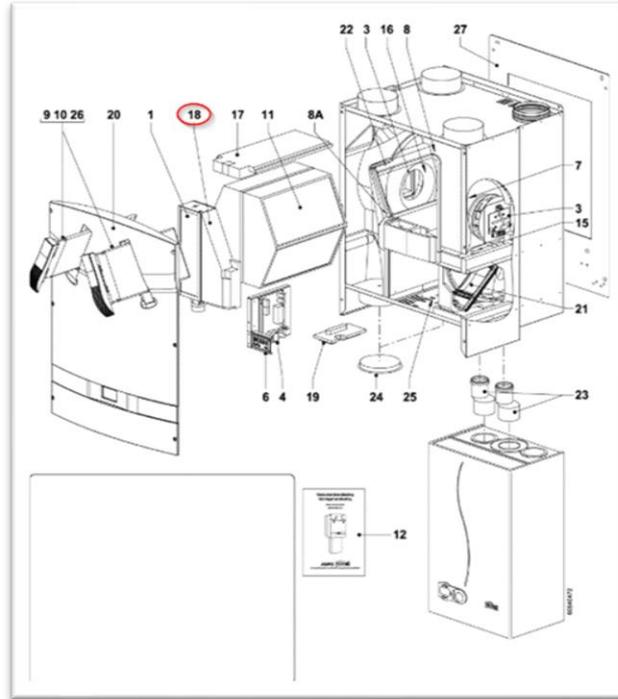


5. *Save* the record.

2.1.2 Order and 'Exploded View'

To indicate the position of a Part on an *Exploded View* drawing, a *Sequence* number can be specified:



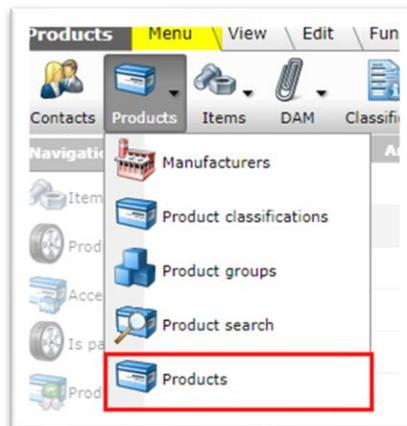


2.2 Product accessories

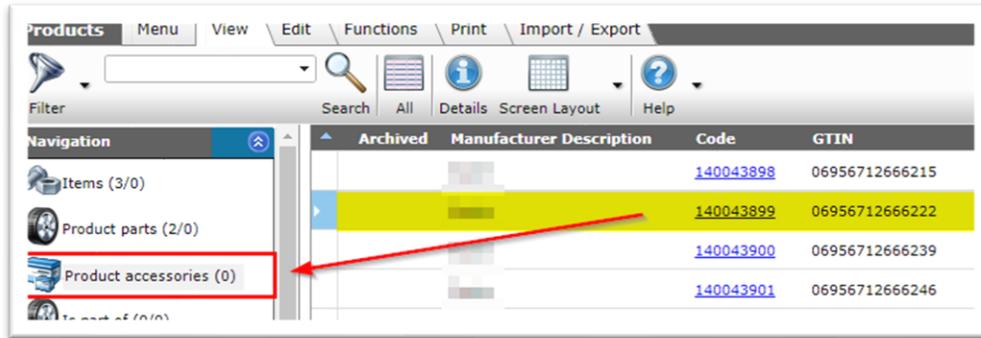
Product accessories are products that *belong to* or *fit to* another product.

To manually link product accessories to a product:

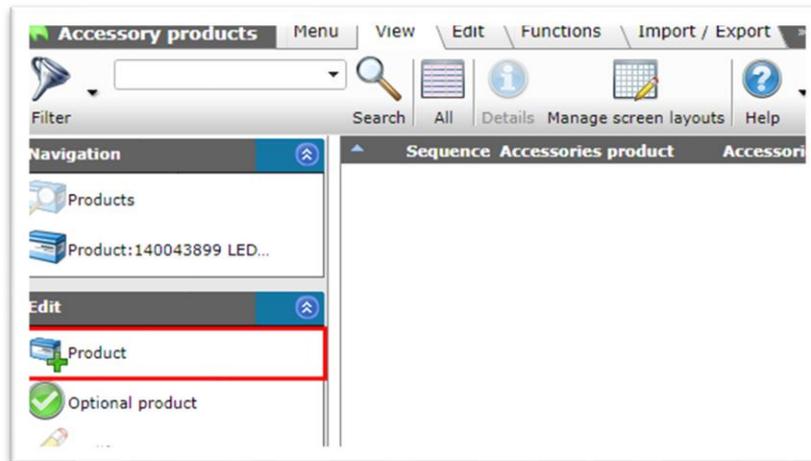
1. Through the Menu, go to *Products > Products*:



2. In the Overview, select the product where you need to add Accessories and, under *Navigation*, click on *Accessories products*:



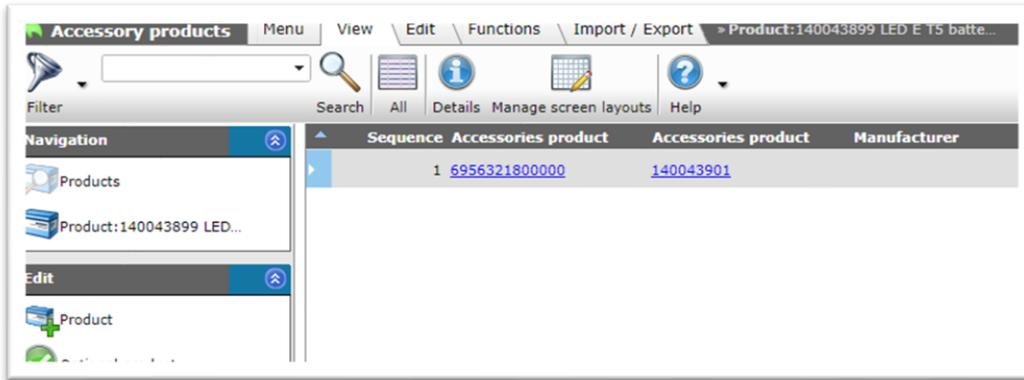
3. In the next screen, click on *+Product*.



4. In the next screen you will be presented with the option to select one or more accessories:



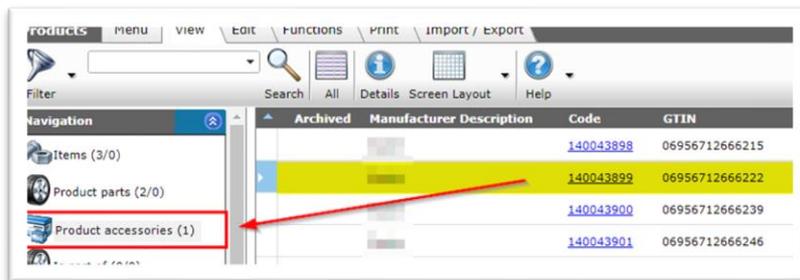
- First, use Filter and/or Search to find one or more products that need to be linked as accessory.
 - Manually select (all) product(s) to be added as part(s) and click on *+Select product* (1); these products will be placed in the 'shopping basket' at the bottom of the screen. **Note:** Double-clicking on a product also places it in the 'shopping basket'.
 - Number of (optional): Should you need to link multiple pieces of the same accessory to the product, click in the *Number of* column and type in the number of accessories that are needed.
 - Next, click on *Transfer* (2), to link all the accessories to the product.
5. The accessories have now been linked to the main product and you will return to the Product Accessories Overview:



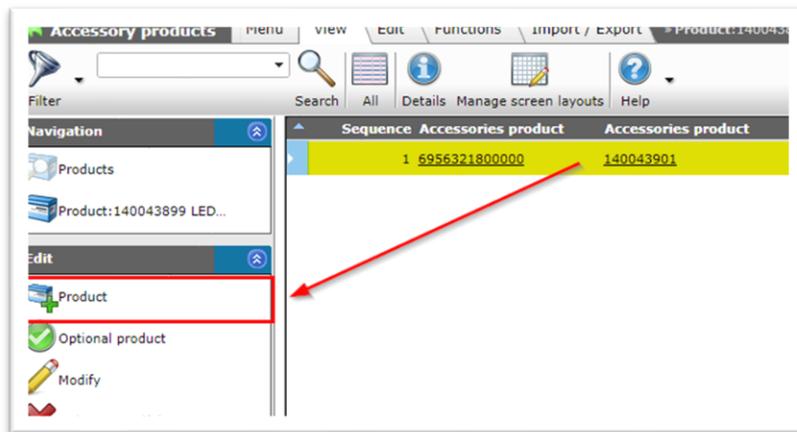
2.2.1 Set type of accessory

After adding the accessories, the *type of accessory* can be set individually:

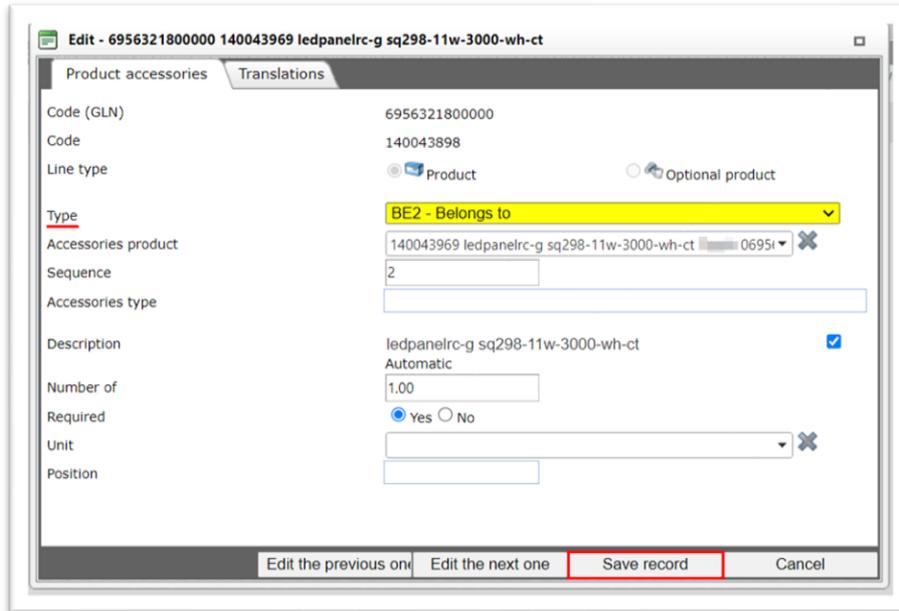
1. Through the Menu, go to *Products > Products*.
2. Select the Product that has accessories and, under Navigation, click on *Product accessories*:



3. In the Overview, select the accessory and, under Edit, click on *Modify*:



4. In the pop-up window:



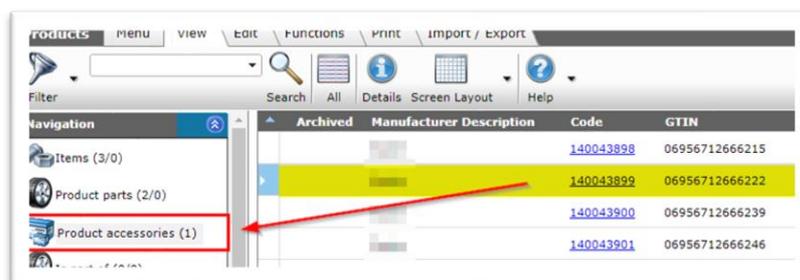
- a. Type: Set the type of the accessory to either:
 - i. **BE2 - Belongs to**: The accessory is specifically made to fit with the main product.
 - ii. **FI2 - Fits to**: The accessory technically fits to the main product.
 - b. Required: Set to **Yes** if the accessory is mandatory.
5. *Save* the record.

2.2.2 Group accessories

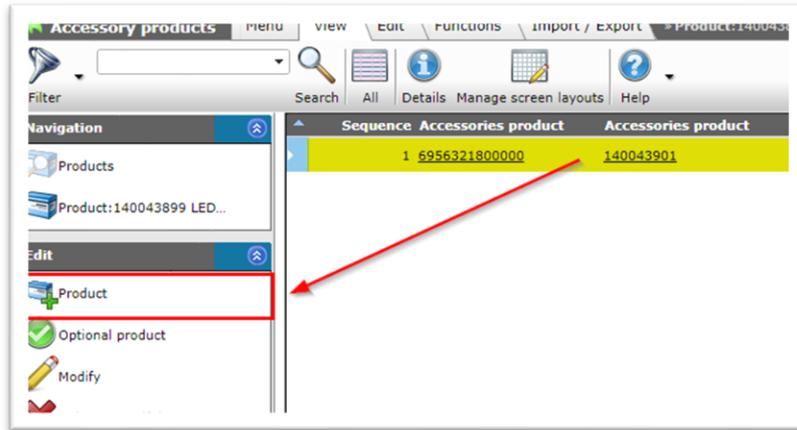
Accessories can be grouped by entering an Accessory type for each accessory.

To group an accessory:

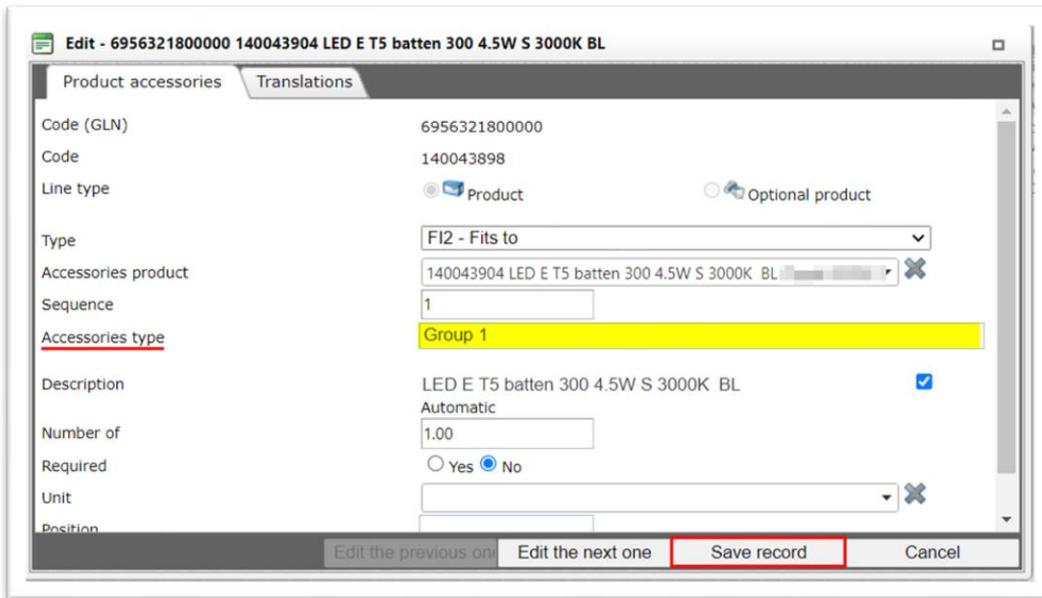
1. Through the Menu, go to *Products > Products*.
2. Select the Product that has accessories and, under Navigation, click on *Product accessories*.



3. In the Overview, select the accessory and, under Edit, click on *Modify*.



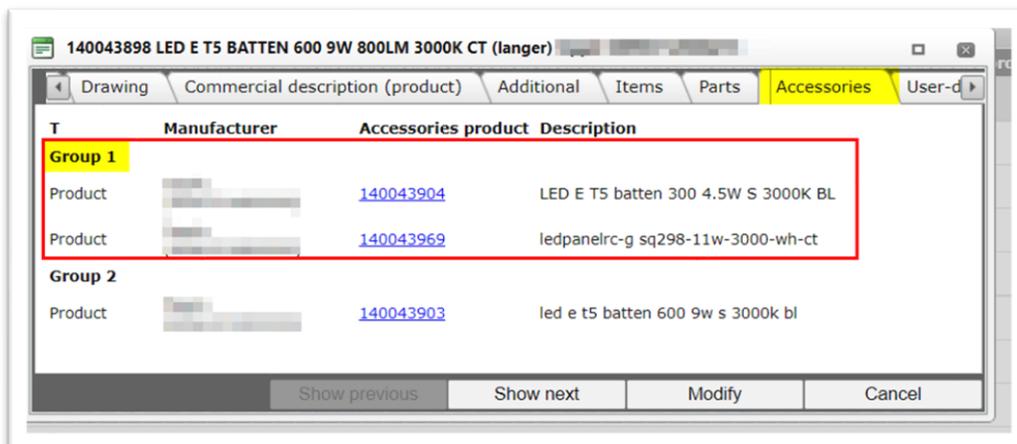
4. In the pop-up window:



a. Accessories type: Enter a text (label) for the group of this accessory. For instance: **Group 1**.

5. Save the record.

All accessories with the same *Accessories type* label will be grouped together on the Accessories tab of the Product information:



2.3 Alternative product [COM]

If there exists a *comparable alternative* to the main product, this relationship can be established by setting the *Accessory type* to COM:

1. Follow the instruction in paragraph [2.2 PRODUCT ACCESSORIES](#) and [2.2.1 SET TYPE OF ACCESSORY](#).
2. At step 4a, set the Type to **COM - Compares with - Alternative**.
3. *Save* the record.

2.4 Mirrored product [MIR]

If there exists a *mirrored variant* of the main product, this relationship can be established by setting the *Accessory type* to MIR:

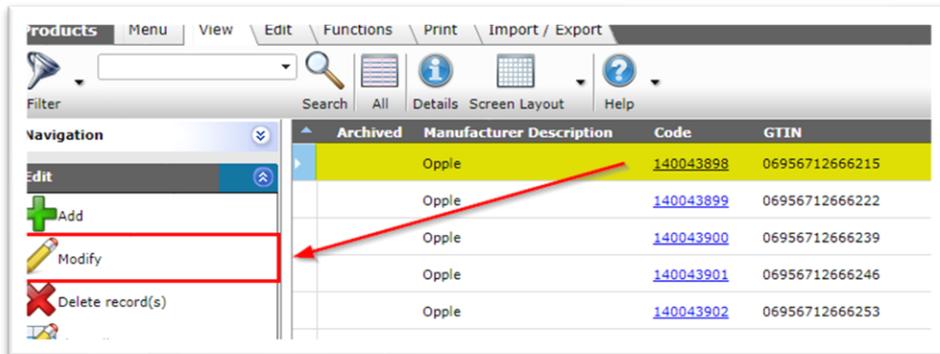
1. Follow the instruction in paragraph [2.2 PRODUCT ACCESSORIES](#) and [2.2.1 SET TYPE OF ACCESSORY](#).
2. At step 4a, set the Type to **MIR - Mirrored**.
3. *Save* the record.

2.5 Predecessor/Successor

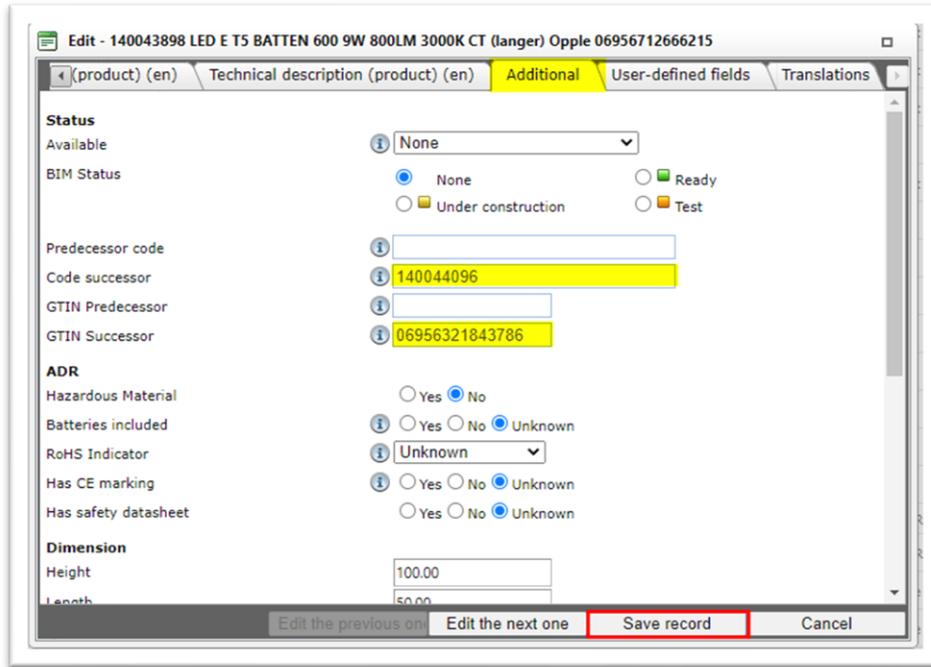
When products are phased out, they often get an (equivalent) successor.

To manually link products as *predecessor* and *successor*:

1. Through the Menu, go to *Products > Products*.
2. Select the phased-out product and, under Edit, click on *Modify*.



3. In the pop-window, on the tab *Additional*:



- a. Code successor²: Fill out the product code of the successor.
 - b. GTIN successor: Fill out the product GTIN of the successor.
4. *Save* the record.

Note: Either the *Product code* of the *GTIN* can be used; when available use both.

3 Item to Item relations

Relations of items can be between:

- Item and *item accessory*
- Item and *own alternative*
- Predecessor and successor

Note: At this moment (23-06-2022) Item-Item relations in COS are *not exported*. This feature will be implemented in a future version of the Compano software. However, the *Enclosed Item* and *Predecessor/Successor* relations are exported in the Price Catalogue of DICO/SALES005.

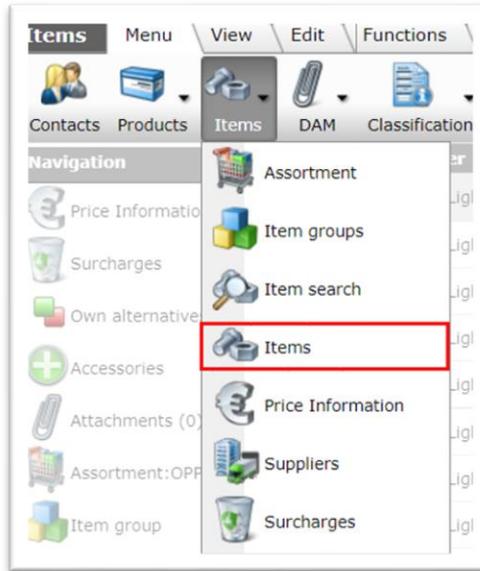
3.1 Item accessories [BE2/FI2]

Item Accessories are items that *belong to* or *fit to* another item.

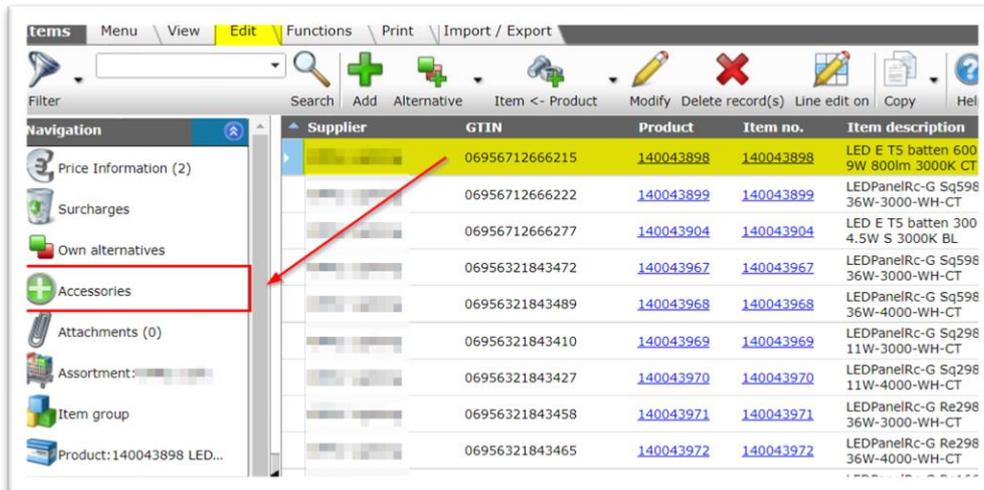
To manually link Item Accessories to a item:

1. Through the Menu, go to *Items > Items:*

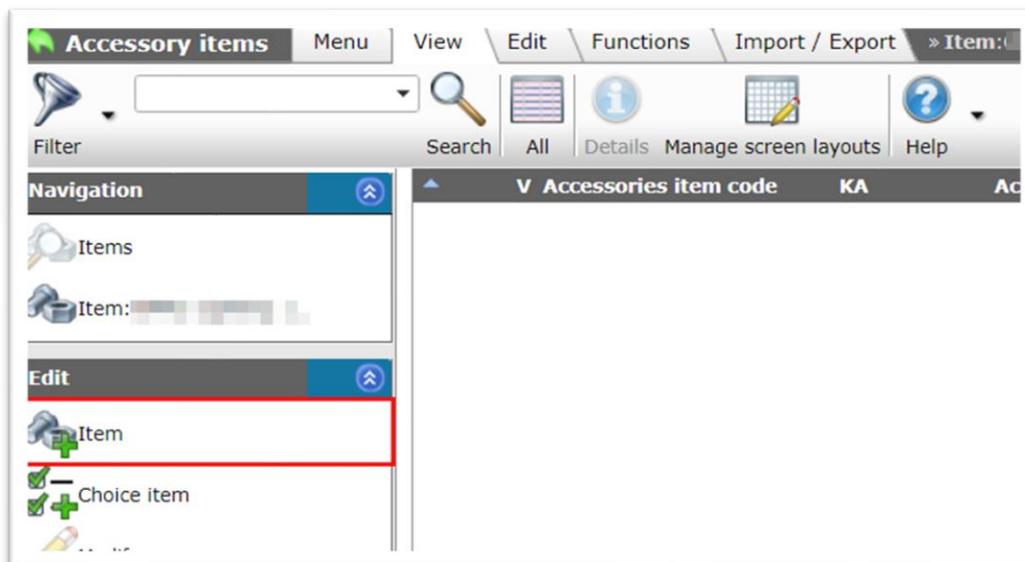
² Either product code or product GTIN will suffice, however filling out both fields is recommended.



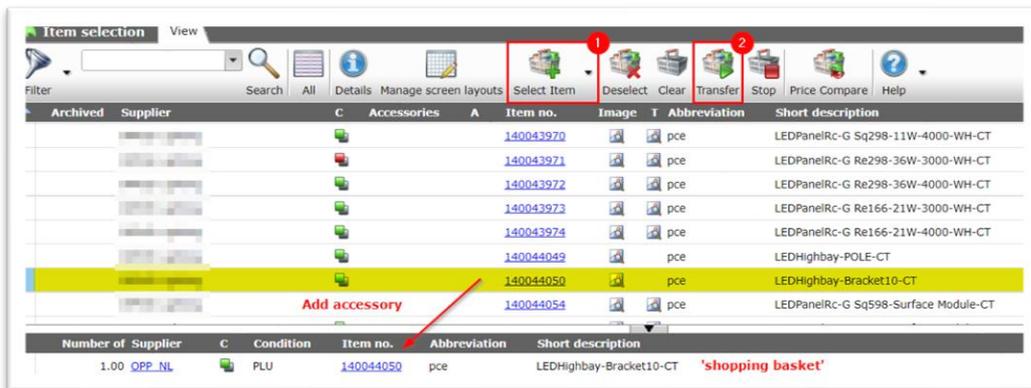
- In the Overview, select the item where you need to add Accessories and, under *Navigation*, click on *Accessories*:



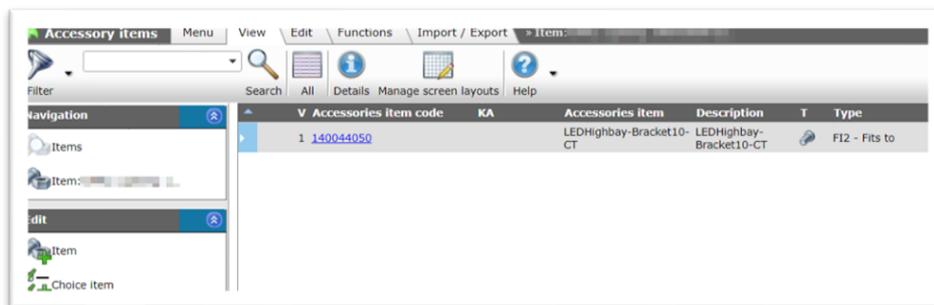
- In the next screen, click on *+Item*:



- In the next screen you will be presented with the option to select one or more accessories:



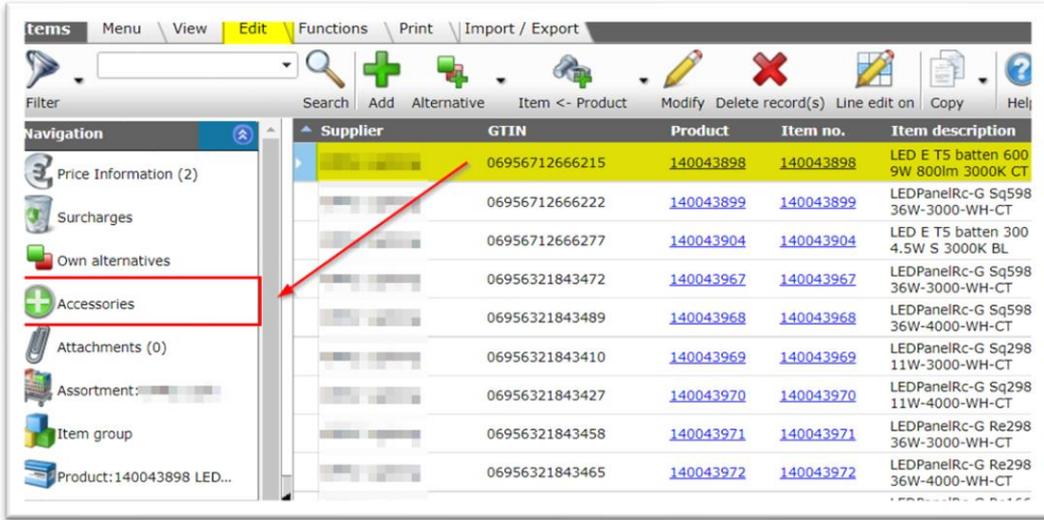
- First, use Filter and/or Search to find one or more items that need to be linked as accessory.
 - Manually select (all) item(s) to be added as part(s) and click on *+Select item* (1); these items will be placed in the 'shopping basket' at the bottom of the screen. **Note:** Double-clicking on a item **also places it in the 'shopping basket'**.
 - Optional: Change the *Number of* accessories in the shopping basket if you want to link multiple pieces of *the same* accessory to the item. To do this, click the number in *Number* and type in the new number for this accessory:
 - Next, click on *Transfer* (2), to link all the accessories to the item.
- The accessories have now been linked to the main item and you will return to the Item Accessories Overview:



3.1.1 Set type of accessory

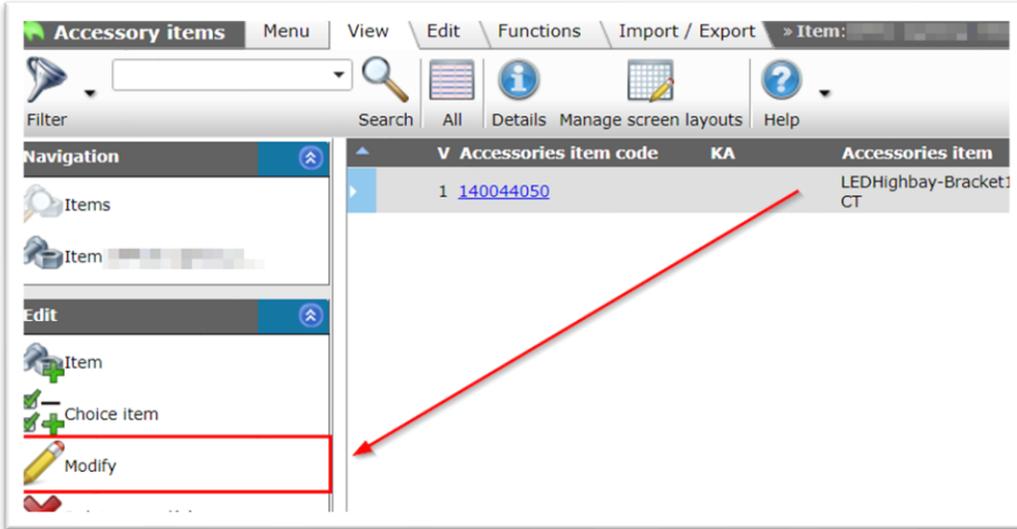
After adding the accessories, the type of the accessory relation can be set individually:

- Through the Menu, go to *Items > Items*.
- Select the Item that has accessories and, under Navigation, click on *Item accessories*.



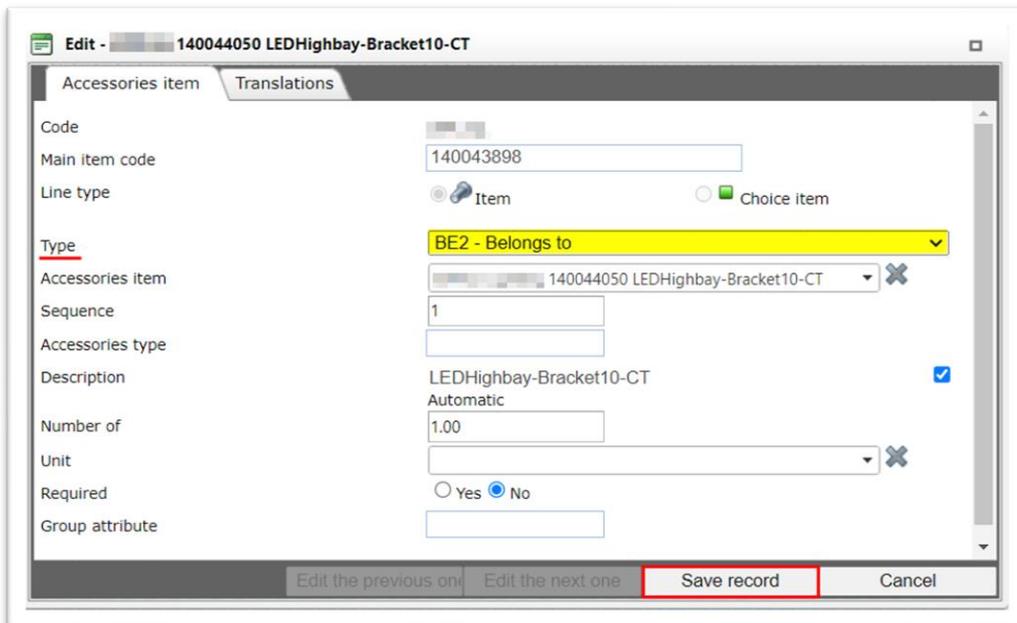
| Supplier | GTIN | Product | Item no. | Item description |
|----------|----------------|-----------|-----------|---------------------------------------|
| | 06956712666215 | 140043898 | 140043898 | LED E T5 batten 600 9W 800lm 3000K CT |
| | 06956712666222 | 140043899 | 140043899 | LEDPanelRc-G Sq598 36W-3000-WH-CT |
| | 06956712666277 | 140043904 | 140043904 | LED E T5 batten 300 4.5W S 3000K BL |
| | 06956321843472 | 140043967 | 140043967 | LEDPanelRc-G Sq598 36W-3000-WH-CT |
| | 06956321843489 | 140043968 | 140043968 | LEDPanelRc-G Sq598 36W-4000-WH-CT |
| | 06956321843410 | 140043969 | 140043969 | LEDPanelRc-G Sq298 11W-3000-WH-CT |
| | 06956321843427 | 140043970 | 140043970 | LEDPanelRc-G Sq298 11W-4000-WH-CT |
| | 06956321843458 | 140043971 | 140043971 | LEDPanelRc-G Re298 36W-3000-WH-CT |
| | 06956321843465 | 140043972 | 140043972 | LEDPanelRc-G Re298 36W-4000-WH-CT |

3. In the Overview, select the accessory and, under Edit, click on *Modify*.



| V | Accessories item code | KA | Accessories item |
|---|-----------------------|----|-------------------------|
| 1 | 140044050 | | LEDHighbay-Bracket10-CT |

4. In the pop-up window:



Edit - 140044050 LEDHighbay-Bracket10-CT
 Accessories item Translations

Code: []
 Main item code: 140043898
 Line type: Item Choice item
 Type: BE2 - Belongs to
 Accessories item: [140044050 LEDHighbay-Bracket10-CT]
 Sequence: 1
 Accessories type: []
 Description: LEDHighbay-Bracket10-CT Automatic
 Number of: 1.00
 Unit: []
 Required: Yes No
 Group attribute: []

Edit the previous one Edit the next one **Save record** Cancel

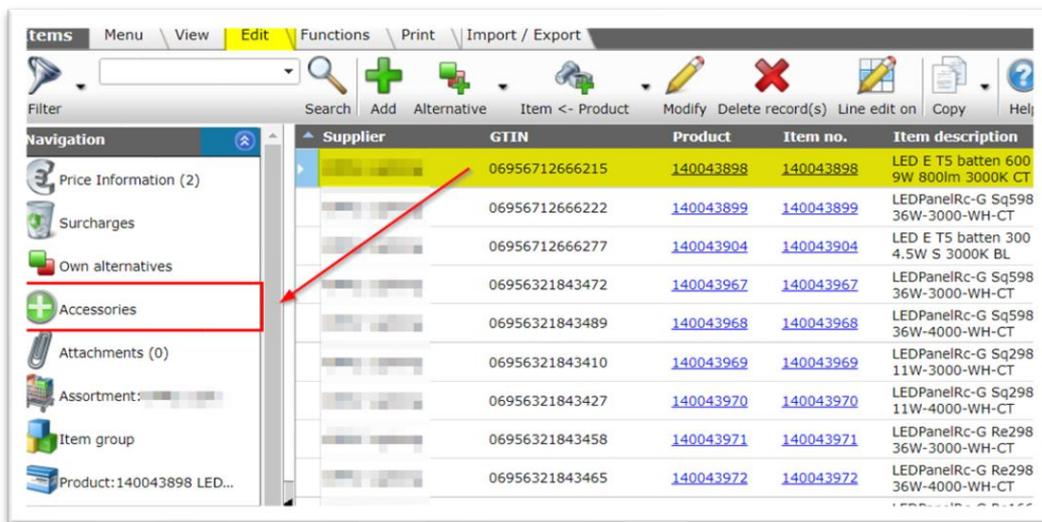
- a. Type: Set the type of the accessory to either:
 - i. **BE2 - Belongs to**: The accessory is specifically made to fit with the main item.
 - ii. **FI2 - Fits to**: The accessory technically fits to the main item.
 - b. Required: Set to **Yes** if the accessory is mandatory.
5. *Save* the record.

3.1.2 Group accessories

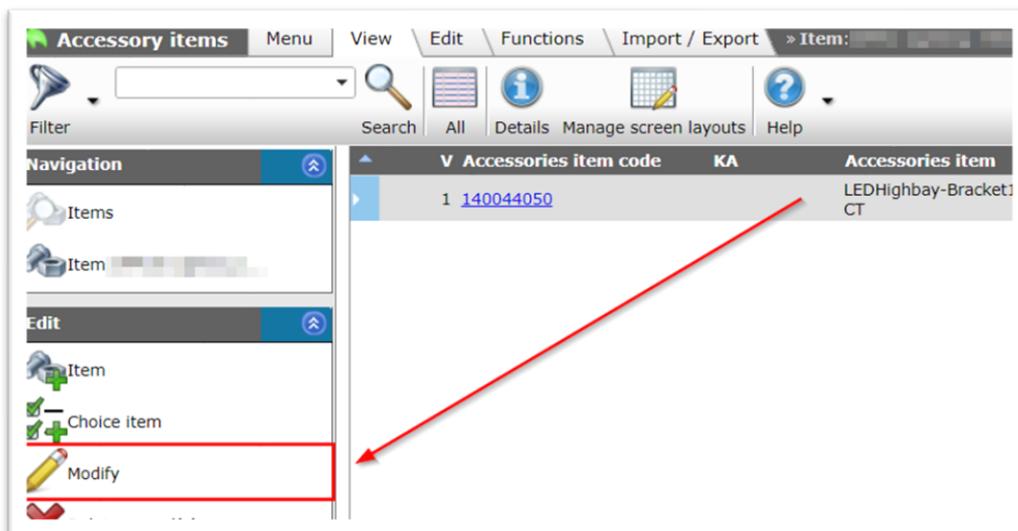
Accessories can be grouped by entering an *Accessory type* for each accessory.

To group an accessory:

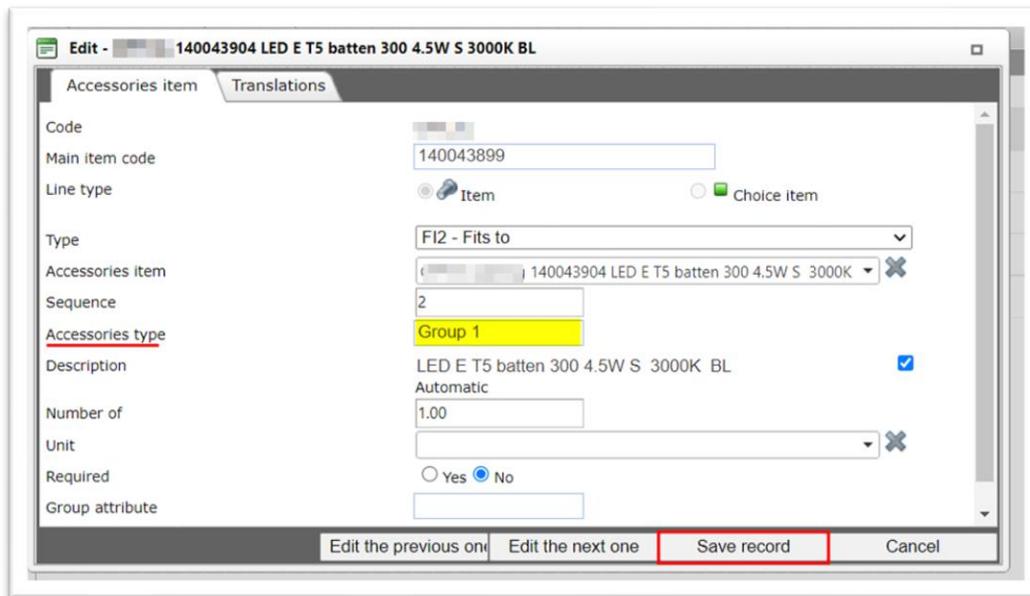
1. Through the Menu, go to *Items > Items*.
2. Select the Item that has accessories and, under Navigation, click on *Item accessories*.



3. In the Overview, select the accessory and, under Edit, click on *Modify*.

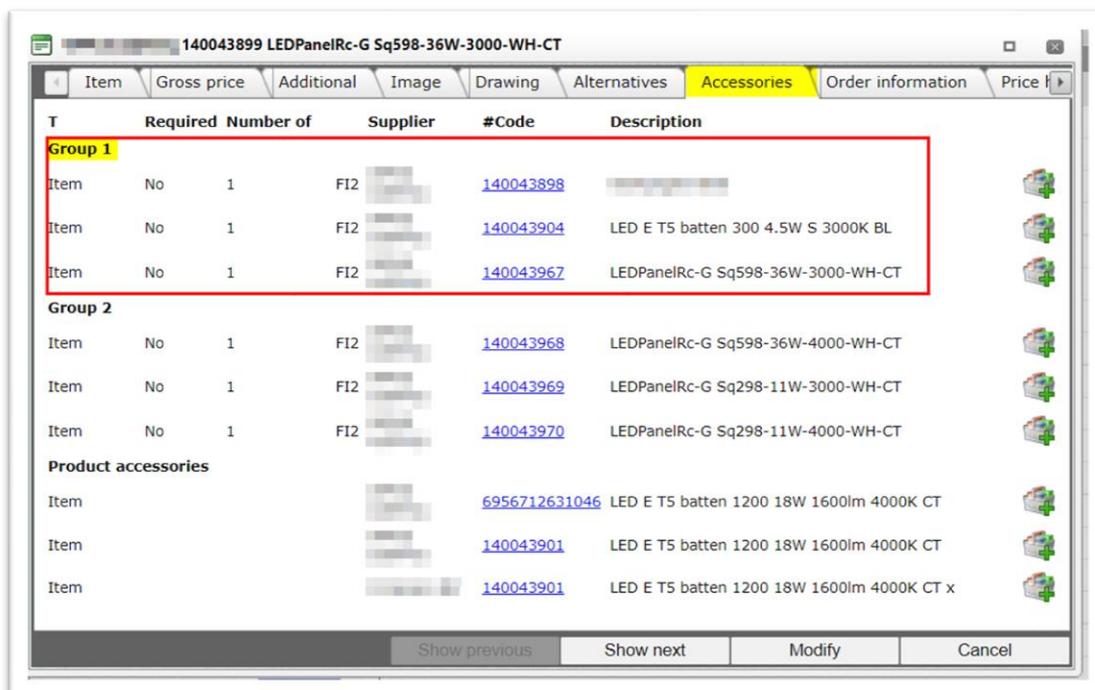


4. In the pop-up window:



- a. Accessories type: Enter a text (label) for the group of this accessory. For instance: **Group 1**.
5. *Save* the record.

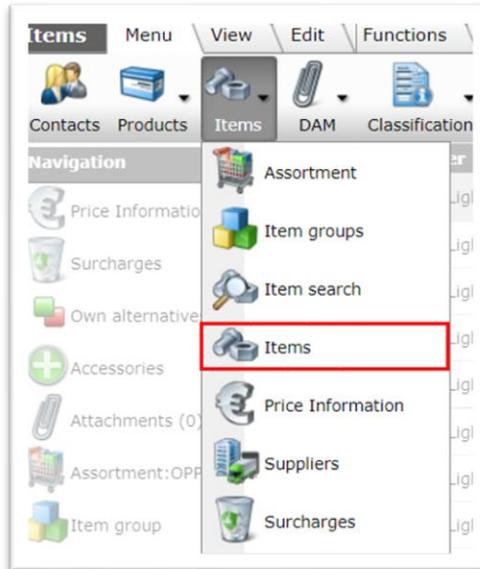
All accessories with the same Accessories type label will be grouped together on the Accessories tab of the Item information:



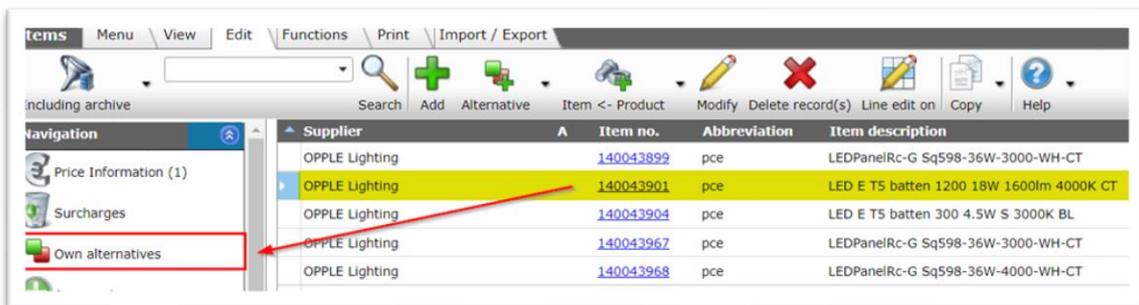
3.2 Own alternatives (COM)

To link *alternative items* from your own assortment:

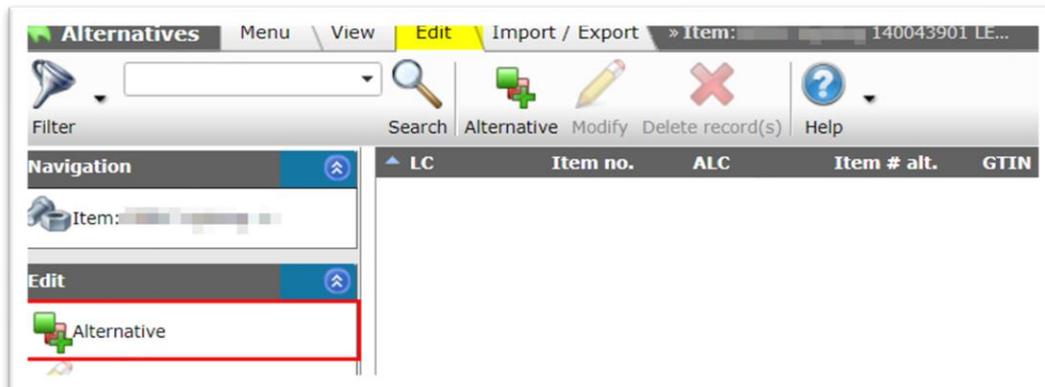
1. Through the Menu, go to *Items > Items*:



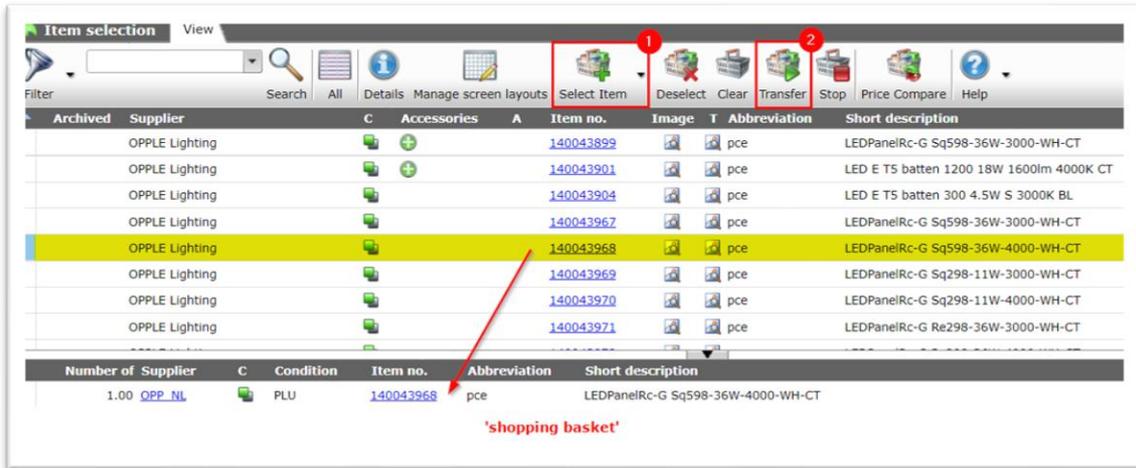
- In the Overview, select the item where you need to add Alternatives and, under *Navigation*, click on *Own alternatives*:



- In the next screen, click on *+Alternative*:



- In the next screen you will be presented with the option to select one or more alternatives:



- a. First, use Filter and/or Search to find one or more items that need to be linked as alternative.
 - b. Manually select (all) item(s) to be added as part(s) and click on *+Select item* (1); these items will be placed in the 'shopping basket' at the bottom of the screen.
Note: Double-clicking on a item **also places it in the 'shopping basket'**.
 - c. Next, click on *Transfer* (2), to link all the alternatives to the item.
5. The alternatives have now been linked to the main item and you will return to the Alternatives Overview.

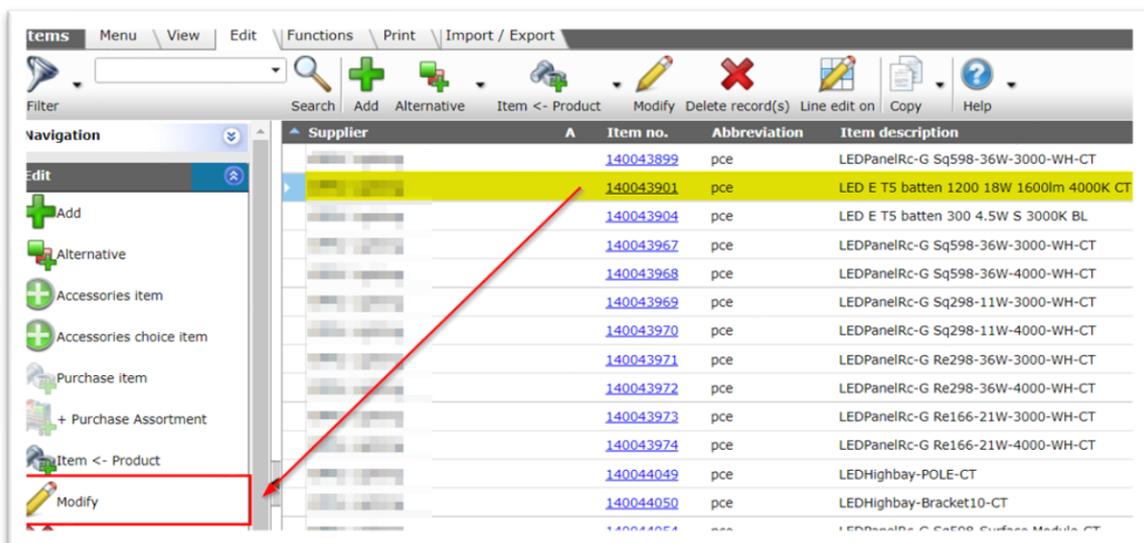
3.3 Predecessor/Successor

When items are phased out, they often get an (equivalent) successor.

Note: An Item could have multiple successors, however in COS only *one* successor relation can be indicated.

To manually link items as *predecessor* and *successor*:

1. Through the Menu, go to *Items > Items*.
2. Select the phased-out item and, under Edit, click on *Modify*.



3. In the pop-window, on the tab *Additional*:

- a. Code successor³: Fill out the item code of the successor.
- b. GTIN successor: Fill out the item GTIN of the successor.
- 4. *Save* the record.

Note: Either the *ITEM code* of the *GTIN* can be used; when available use both.

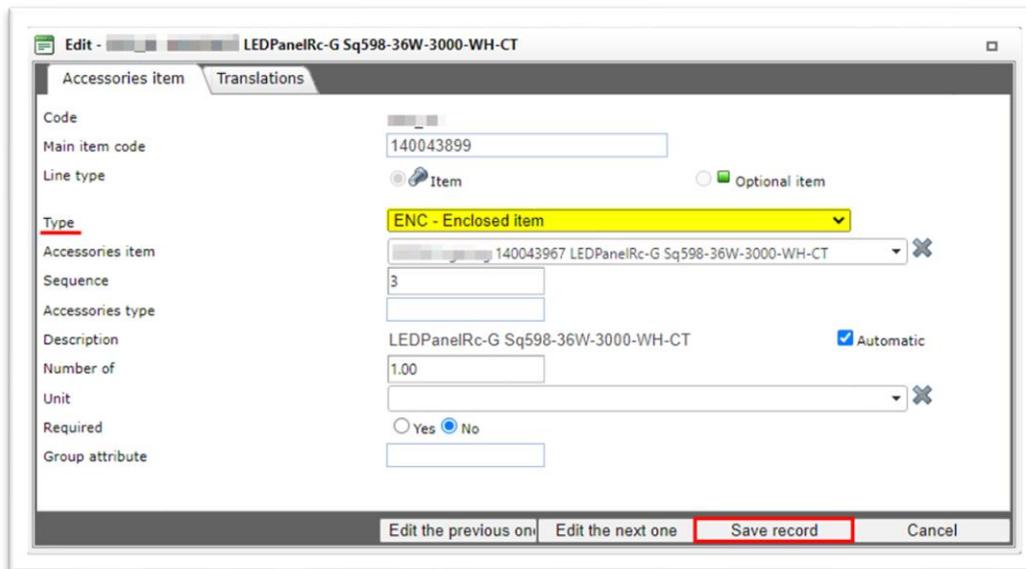
3.4 Enclosed items (ENC)

Sometimes an item is actually a *set of items*, where each item in the set can also be ordered separately. The items in the set are therefore *enclosed items*.

For example, a **central heating boiler + thermostat**, or a **valve + control lever**. Often, the set has a different price which is not the sum of the price of the individual items.

To enclose items in the '**set**'-item, these items need to be added as an Accessory of Accessory Type **ENC**.

³ Either item code or item GTIN will suffice, however filling out both fields is recommended.



Notes:

The enclosed item relation is communicated within DICO/SALES005 with the **EnclosedTradeItem**-tag in the *Price Catalogue.xml* and as of DQR-7 as a **PAK**-item:

- Accessories at item level are *not* included in SALES005/ItemRelations (L03 successor of **koppelingen.txt**), which will only report Product Accessories and Product Parts.
- For SALES005 the main item and the enclosed item *must be* of the same supplier.
- To indicate an enclosed item, there must be at least two items; one being the set-item and the other the enclosed item. These can be two different items (1x central heating boiler, 1x thermostat), however it could also be one set-item and multiple instances of one item, for instance, the main blister item contains 6x the single item.

4 Optional Products/Items

With *Optional Products* or *Optional Items* the (end-)customer can choose one or more additional optional product/items that fit or belong to the main product/item.

Note: Optional products and items are a special form of Accessories.

Example

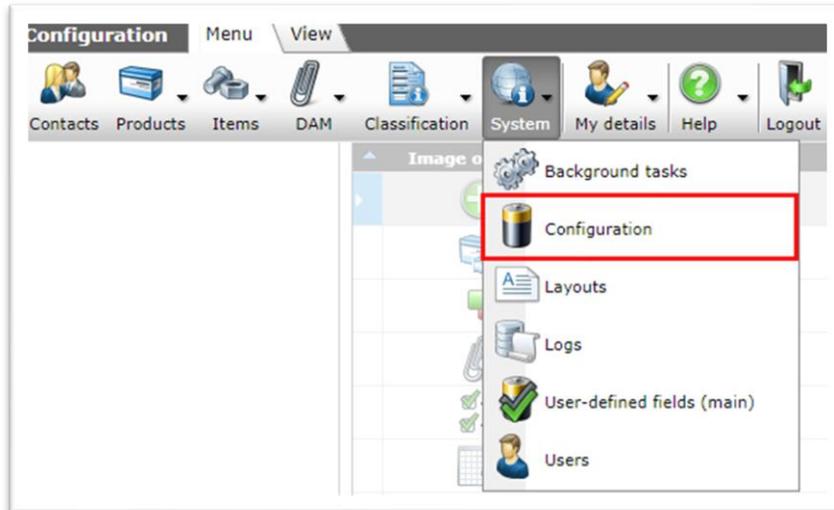
A bathtub is sold with two types of bathtub feet: **classic** and **modern**. Upon purchase of the bathtub, the customer needs to choose the type of feet he wants.

4.1 Create selection list

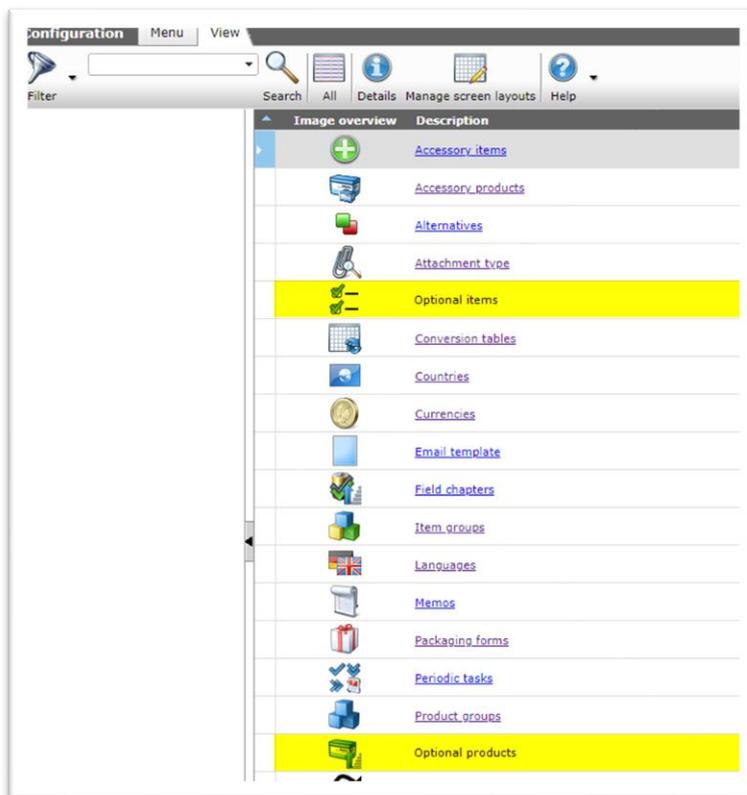
Optional product and items have to be selected from a Selection List, either an Optional Products Selection List or an Optional Items Selection List.

To create a selection list:

1. From the Menu, go to *System > Configuration*:

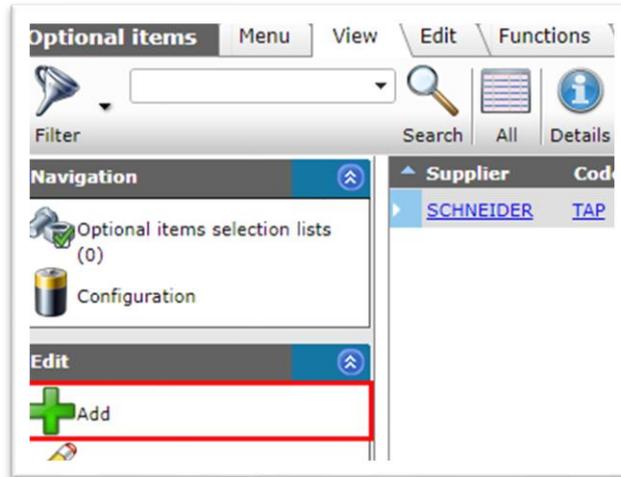


- For an Optional Item Selection List, choose *Optional items*, for an Optional Product Selection List, choose *Optional Products*.



- On the next screen, first create a Selection List⁴, by clicking on *+Add*.

⁴ The example in this paragraph is for creating an Optional Items Selection List, however the procedure for creating an Optional Products Selection List is similar.



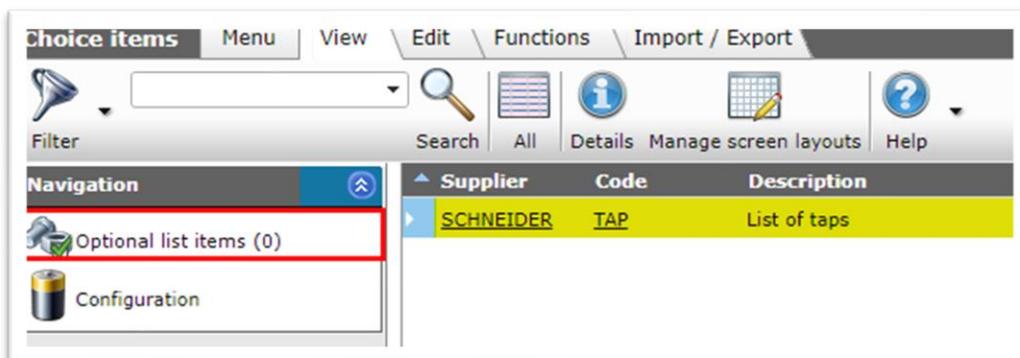
4. In the pop-up window:



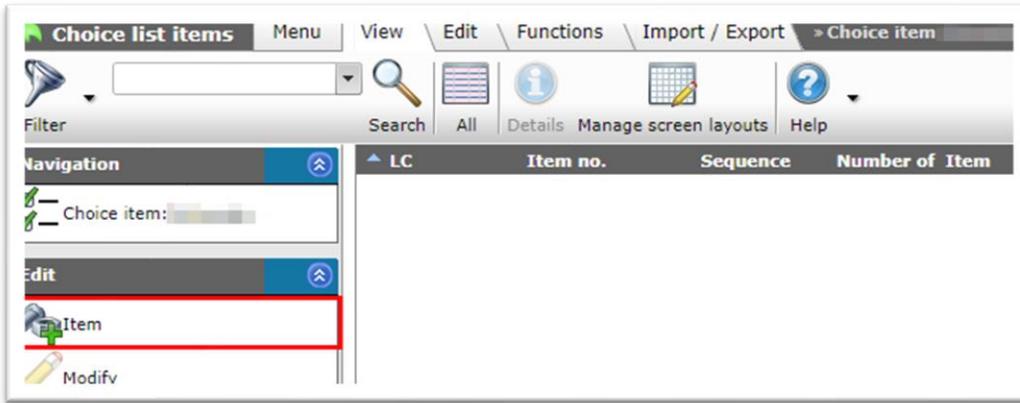
- a. Supplier: Select the supplier of the optional items.
 - b. Code: Type a (short) code for this selection list.
 - c. Description: Type a description for this selection list.
5. Save the selection list.

The selection list can now be populated with optional items:

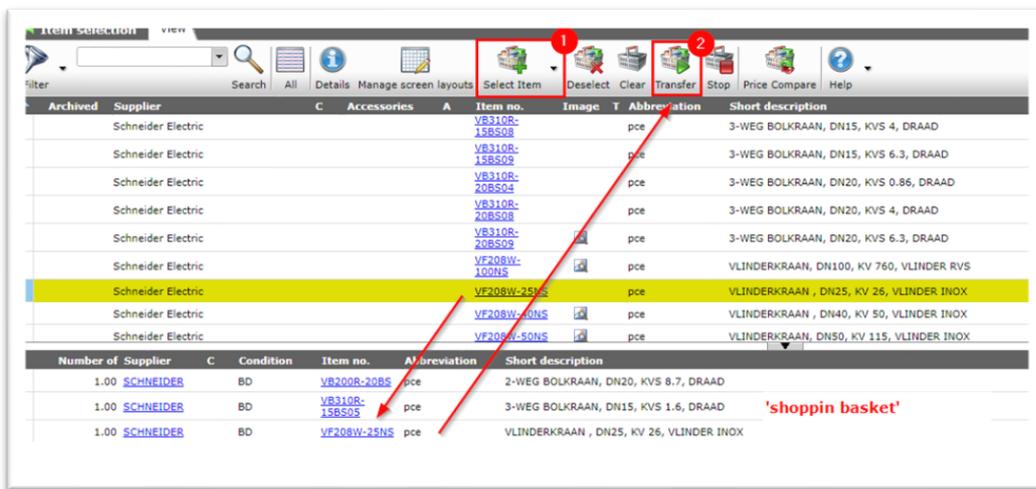
1. With the saved list selected, under *Navigation*, click on *Optional list items*:



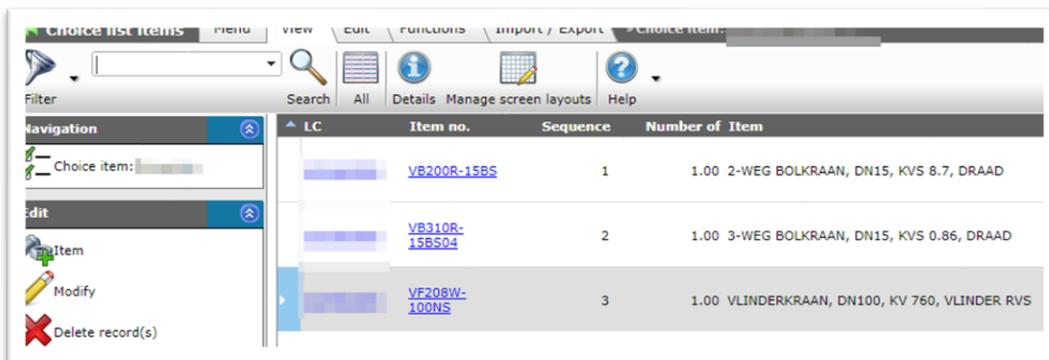
2. On the next screen, click on *+Item* to add optional items to the selection list:



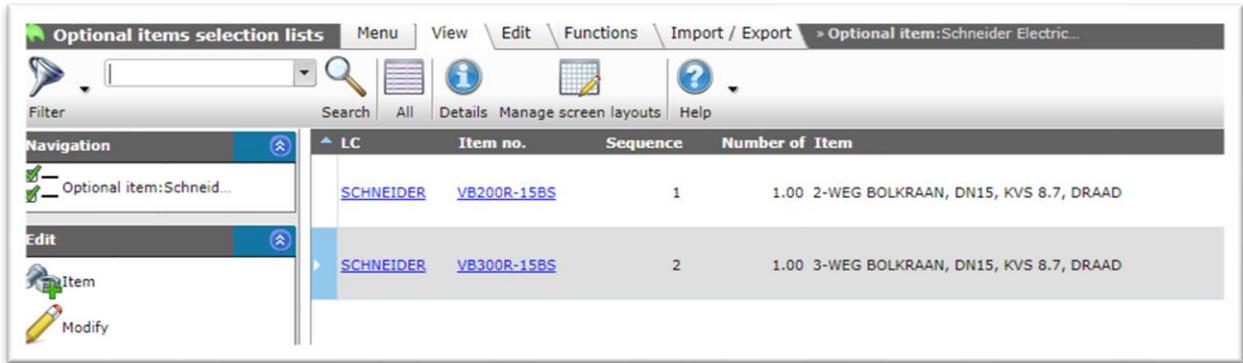
3. On the next screen, select one or more optional item(s) and either double-click or use the *Select Item* button (1) to add them to the shopping basket in the lower part of the screen:



4. Next, use the *Transfer* button (2) to transfer the items to the selection list:



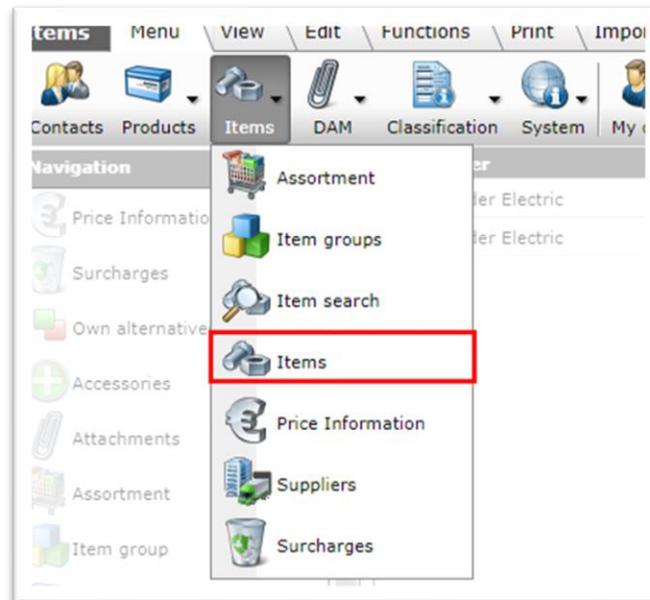
5. After the items have been transferred, you will return to the Optional items selection list overview, which will now contain optional items:



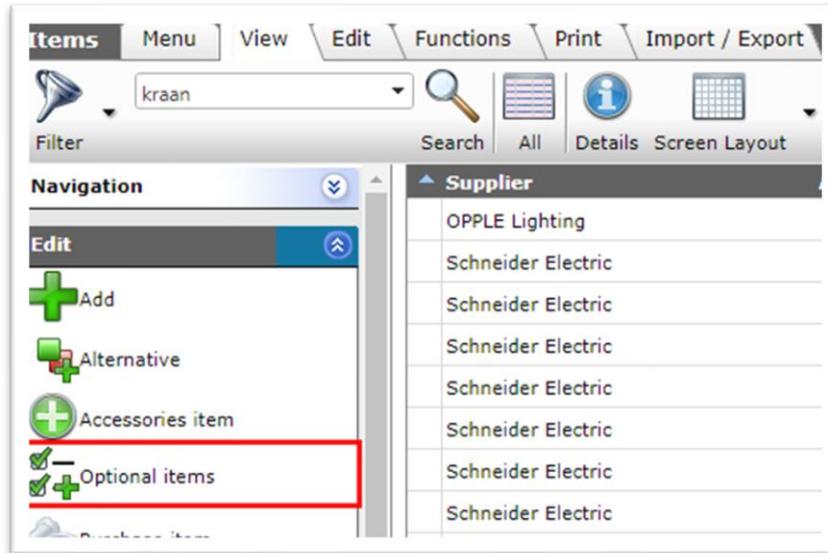
4.2 Add selection list to Item

Now that the Optional Item selection list is ready, you can add the list to an Item:

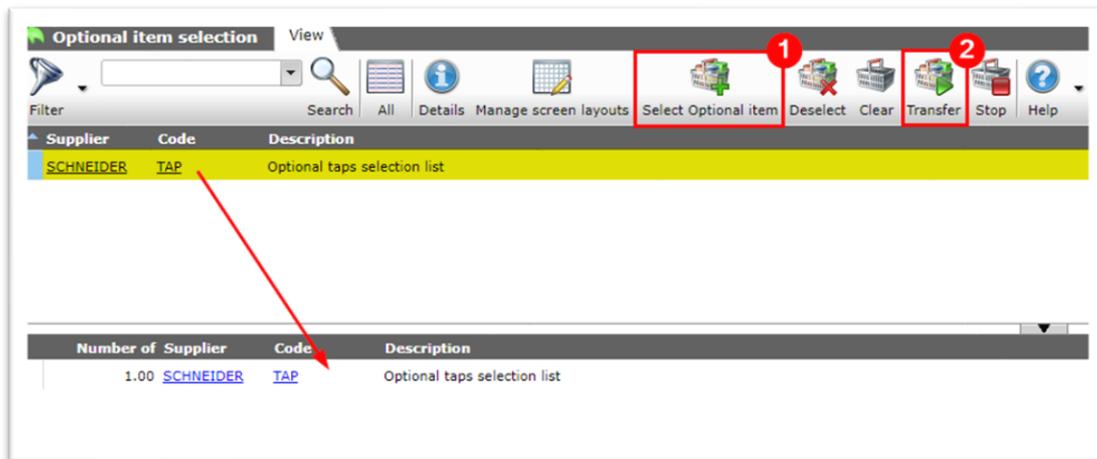
1. Through the *Menu*, go to *Items > Items*.



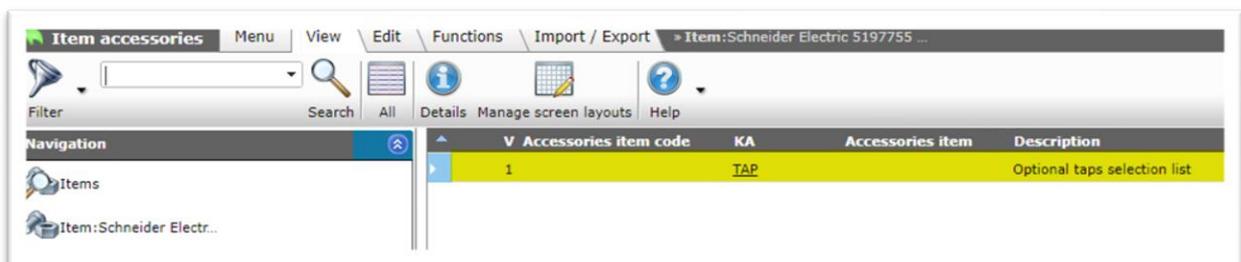
2. Select the item where you need to add the selection list and, under *Edit*, click on *+Optional items*.



3. On the next screen, select any selection list and either double-click or use the *Select Optional Item* button (1) to add it to the shopping basket in the lower part of the screen:



4. Next, use the *Transfer* button (2) to transfer the selection list to the Item.
5. After list been transferred, you will be redirected to the Item accessories overview, which will now contain an optional items list:

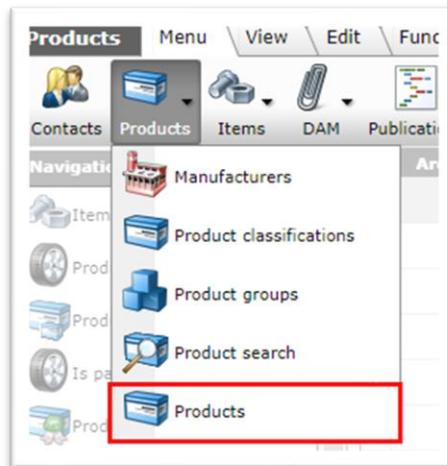


4.3 Add selection list to Product

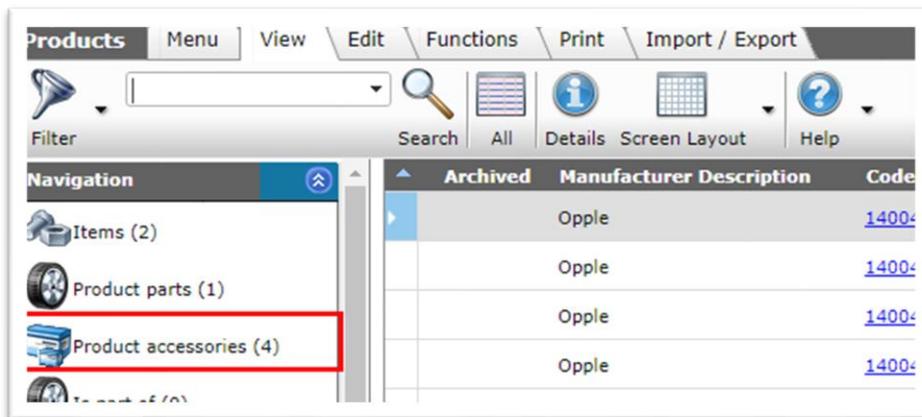
The procedure for creating an Optional Products *selection list* is similar to the one for Optional Items, see paragraph 4.1 CREATE SELECTION LIST.

To add an Optional Product selection list to a Product:

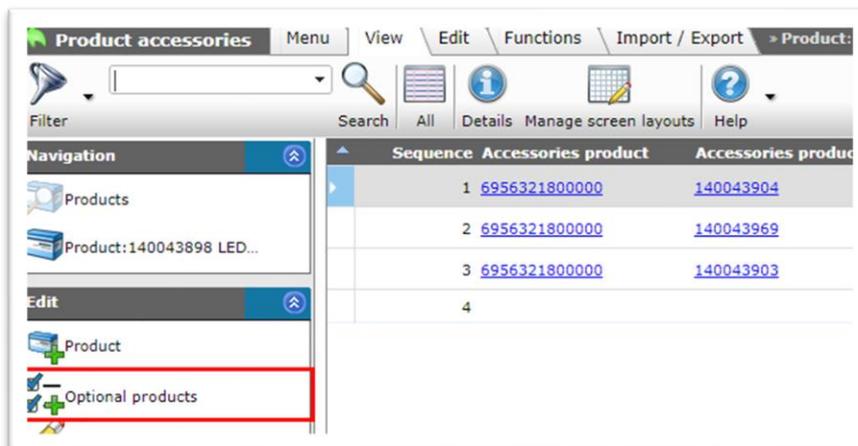
1. Through the Menu, to Products > Products:



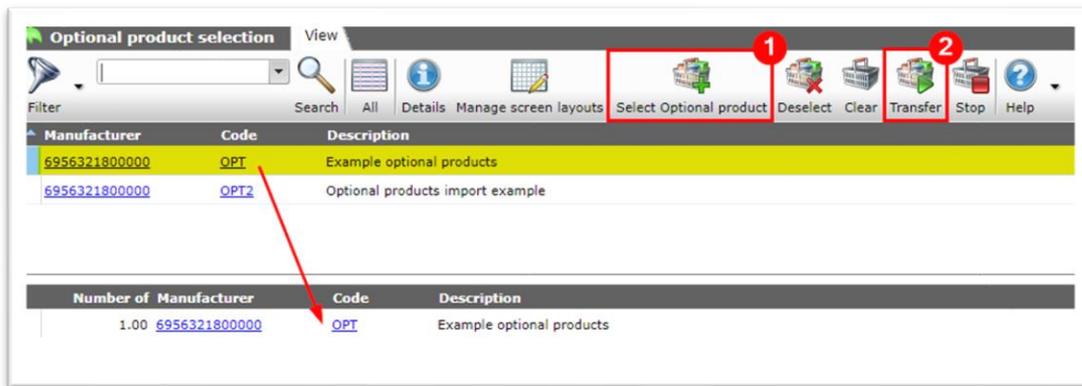
2. Next, via the Navigation menu, go to Product accessories:



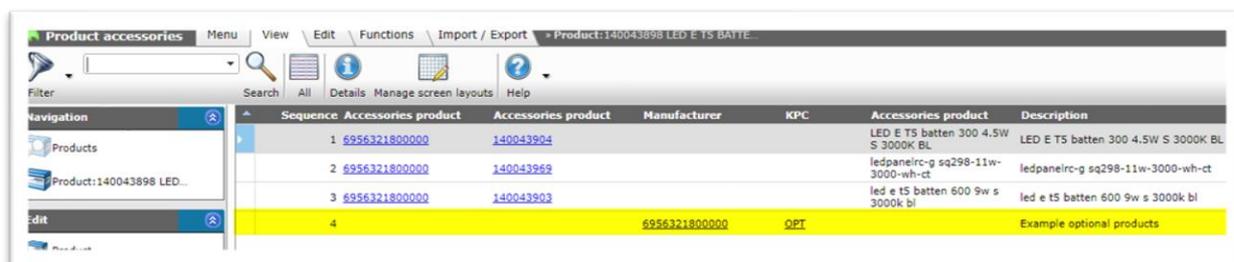
3. In the next window, select a Product and, under Navigation, click on Optional products:



4. On the next screen, select any selection list and either double-click or use the *Select Optional Product* button (1) to add it to the shopping basket in the lower part of the screen:



5. Next, use the *Transfer* button (2) to transfer the selection list to the Product.
6. After list been transferred, you will be redirected to the Product accessories overview, which will now contain an optional products list:



5 Import of product/item relations

Setting item and product relations manually per item/product is time-consuming. These relation can also be *imported* in bulk, using a combination of an Excel data file and an appropriate import layout.

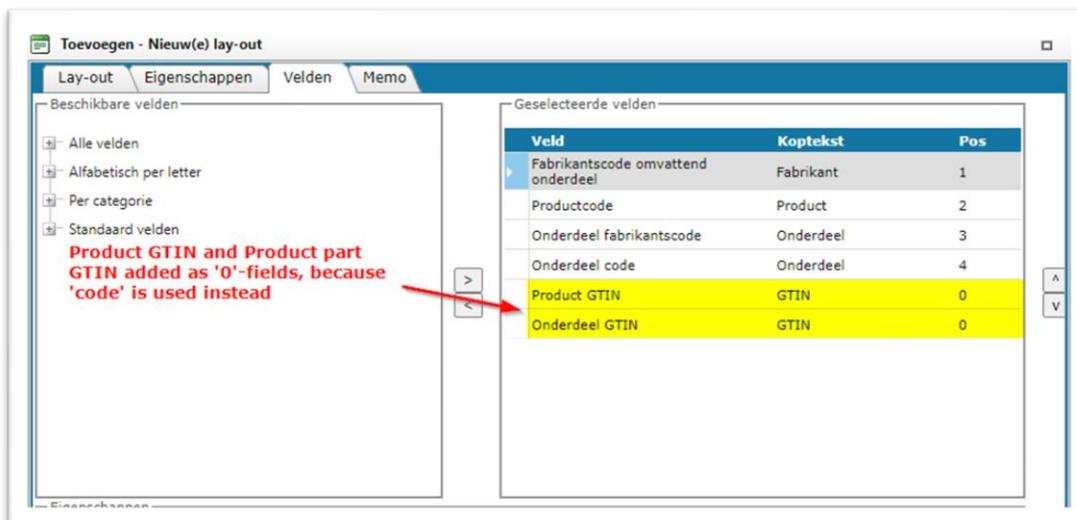
Note: Only the general instructions for import layout and import data file are explained in this chapter. For an explanation of the complete import procedure, please see the *Manual Universal Import/Export* which is available from the [Compamo Help website](http://www.compamo.com/help).

5.1 Product parts

To import product parts, the following fields are mandatory:

- Manufacturer part code comprising: Manufacturer code of product containing the part.
- Product code: Code of the product that contains the part.
- Product GTIN: GTIN of the product that contains the part.
- Manufacturer Part Code: Manufacturer code of the part.
- Part code: Product code of the part.
- Part GTIN: GTIN of the part.

Important: Even though you can use either the *Code* or *GTIN* of the product and product part, for both entities *all three* key fields (GLN, code and GTIN) need to be present in your import layout (!). Fields for which no data is provided can be added as a '0-field' with no value in the layout:



5.2 Product accessories

To import Product accessory relations, the following fields are *mandatory*:

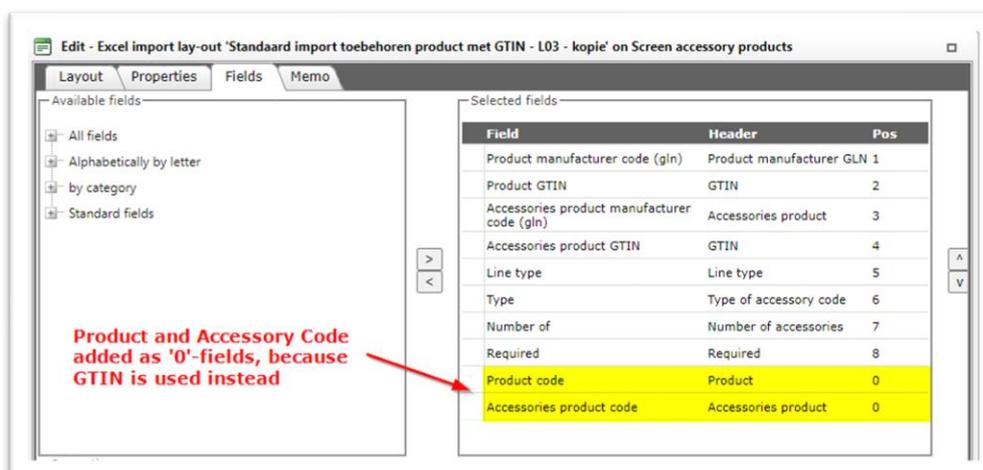
To identify the Product:

- Product manufacturer code (gln)
- Product code
- Product GTIN

To identify the Accessory:

- Accessories product manufacturer code (gln)
- Accessories product code
- Accessories product GTIN

Important: Even though you can use either the *Code* or *GTIN* of a product or accessory, for both entities *all three* key fields (GLN, code and GTIN) need to be present in your import layout (!). Fields for which no data is provided can be added as a '0-field' with no value in the layout:



Optional fields are:

- Line type: Type of accessory, either Product (accessory) or Optional Product
- Type: Type of accessory relation; **Fits to (FI2)**, **Belongs to (BE2)**
- Accessories type: Grouping label

- Sequence: Sequence number of the accessory; this can be used to identify the part by number in an Exploded View drawing.
- Required: Required accessory; only used for DICO/SALES005 exports (code **KZN – Kan niet zonder**).
- Unit: Unit measure; only used for PAB exports.
- Number of: The number of accessories that come with the product, or should be used.

For the import of Accessories a premade import template with two matching import layouts is available at the [Compano Help website](#):

- **Standaard import toebehoren product – L03**, which makes use of the fields **Product Code** and **Accessories Product Code**
- **Standaard import toebehoren product met GTIN – L03**, which makes use the fields **Product GTIN** and **Accessories Product GTIN**

Note: These templates are *not* suitable for importing *Optional products* or *Optional Items*.

5.3 Item accessories

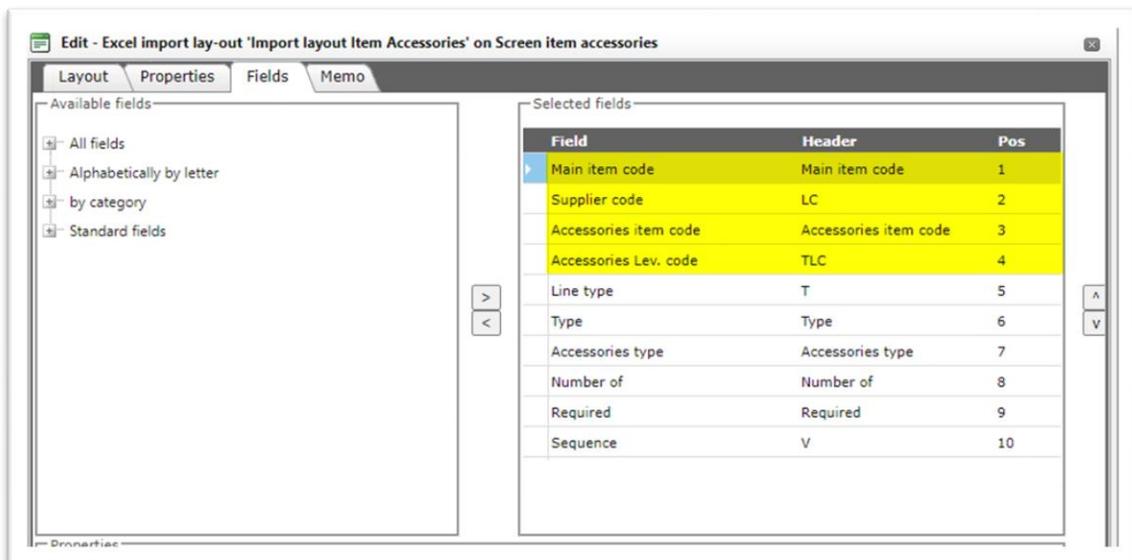
To import Item accessory relations, the following fields are *mandatory*:

To identify the Item:

- Supplier code
- Main item code

To identify the Accessory:

- Accessories supplier code (Accessories Lev. Code)
- Accessories item code



Optional fields are:

- Line type: Type of accessory, either Item (accessory) or Optional Item
- Type: Type of accessory relation; **Fits to (FI2)**, **Belongs to (BE2)**, etc.
- Accessories type: Grouping label
- Number of: The number of accessories that come with the product, or should be used.
- Required: Required accessory; only used for DICO/SALES005 exports (code **KZN – Kan niet zonder**).

- Sequence: Sequence number of the accessory; this can be used to identify the part by number in an Exploded View drawing.
- Unit code: Unit measure; only used for PAB exports.

Note: For the import of Item Accessories *no premade import templates* are available.

5.4 Product alternatives

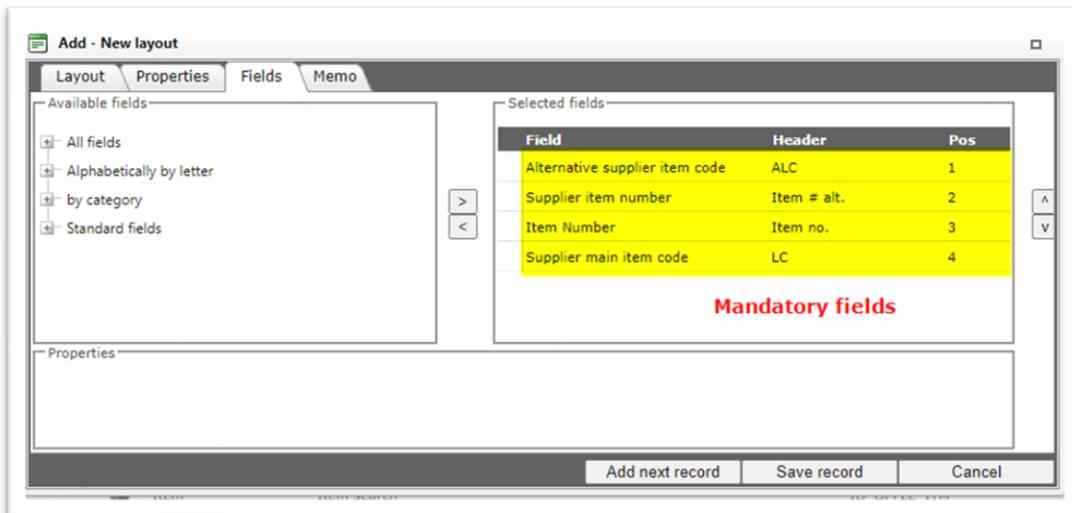
Product Alternatives, also called Product Synonyms, are only available with an additional Compano license. For more information, please contact the Compano Sales Department, sales@compano.com

5.5 Item alternatives

For Alternative Items, also known as Own Alternatives, the following data fields need to be present in the import file and import layout:

- Alternative supplier item code: Supplier code of the alternative item
- Supplier item number: Item number (code) of the alternative item
- Item number: Item number (code) of the main item
- Supplier main item code: Supplier code of the main item

Note: The 'main' item is the item to which the Alternatives are compared.



Optional fields are:

- Correction factor: Enter a correction factor to compensate for any differences between Item and Alternative Item in the use of Calculation Unit.

Note: For the import of Item Alternatives *no premade import templates* are available.

5.6 Optional products/items selections list

Optional products and items are a special type of accessory. However, before any optional product/items can be added to a Product/Item, first an *Optional Product/Item List*—which will contain the optional products/items that can be selected,—needs to be created.

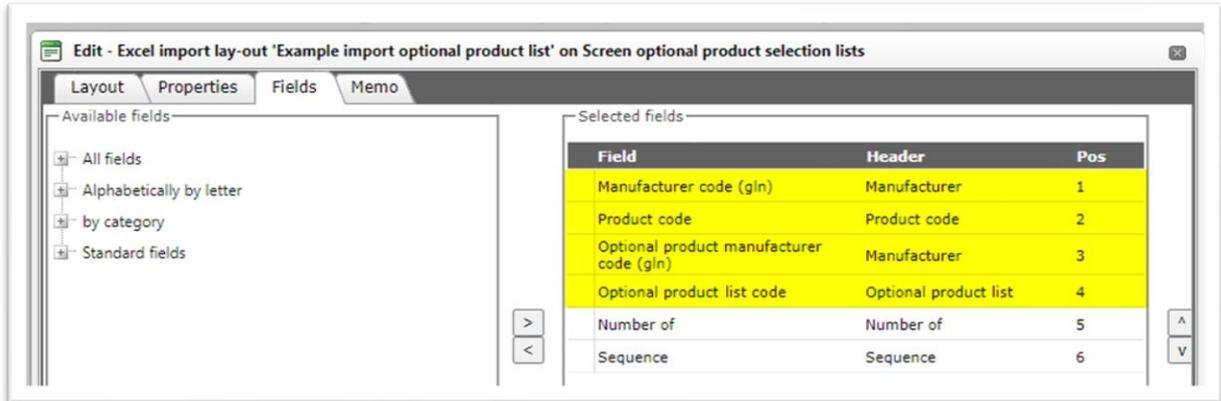
For instructions on how to create such a selection list, see paragraph [4.1 CREATE SELECTION LIST](#).

Note: This paragraph will explain how to populate a selection list with optional product/items. As the procedure for products and items is similar, only an example involving optional products will be given.

5.6.1 Import optional products/items

To import Optional Products into the list that you created, you will need an import file containing the optional product data and a corresponding import layout.

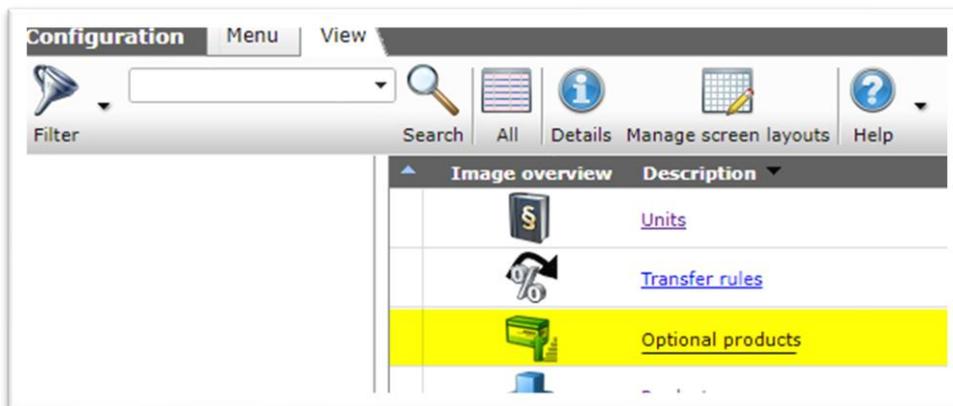
The following data fields need to be present in both the import file and import layout:



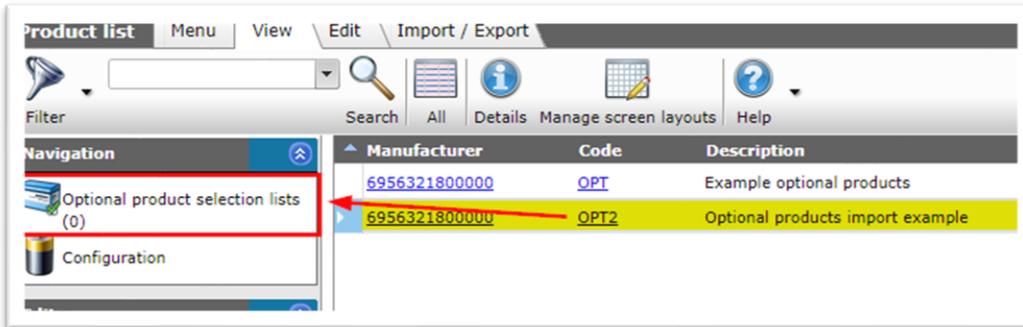
- Manufacturer code (GLN): Manufacturer Global Location Number
- Product code: Product code of the optional product(s)
- Optional product manufacturer code (gln): Manufacturer code of the optional product
- Optional product list code: Code of the product list; for example: **OPT2**

To import Optional Products into a Product List:

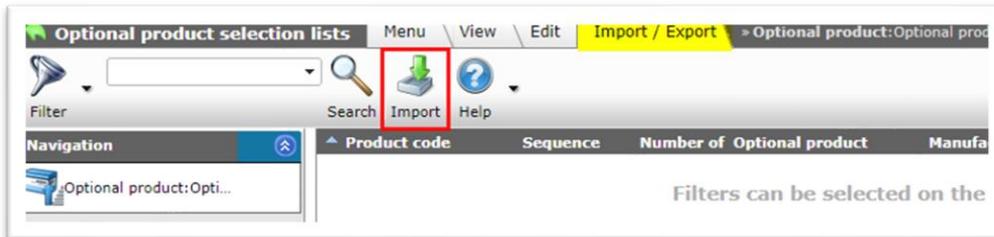
1. Through the Menu, go to *System > Configuration*.
2. In the Overview, click on the *Optional Products* link:



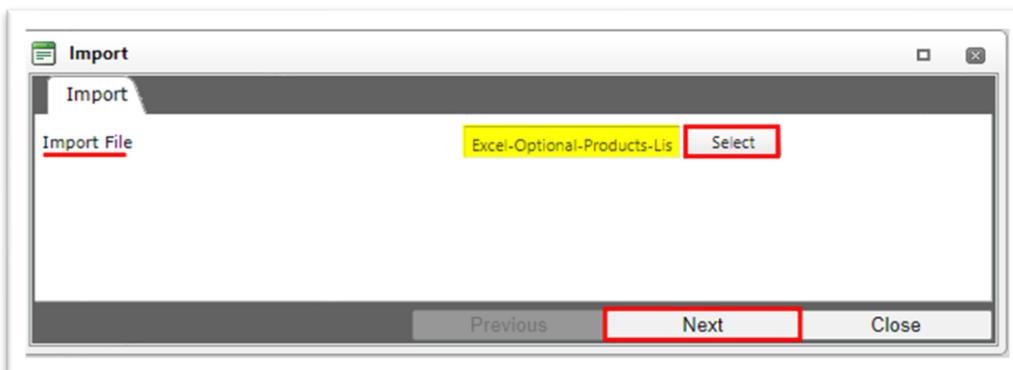
3. In the Overview, select a Product List and, under Navigation, click on *Optional product selection lists*.



4. On the next screen, switch to the Import/Export tab and click on *Import*.

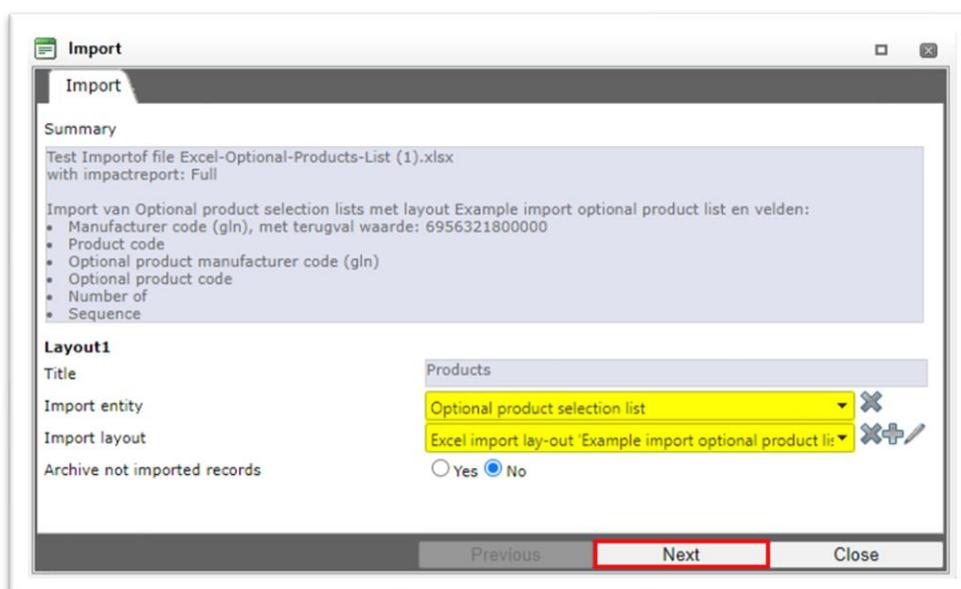


5. In the pop-up window:



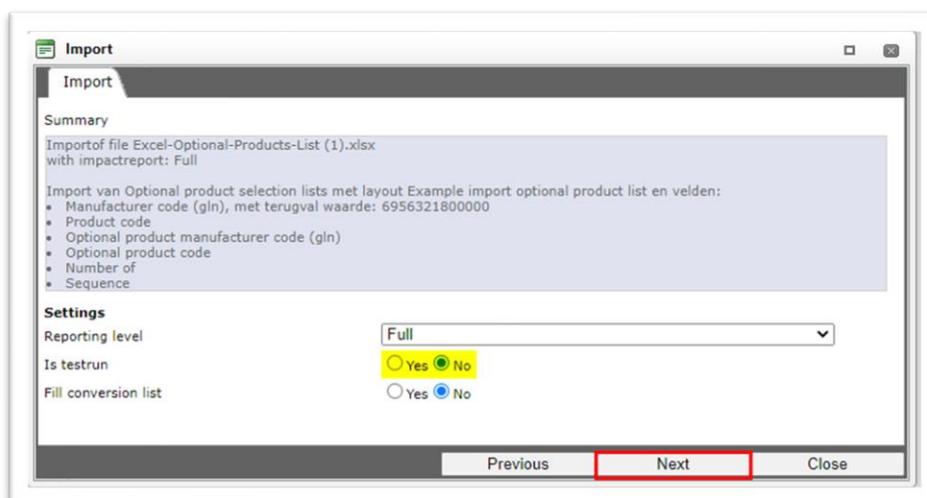
a. Import File: Select the import file containing the product list items.

6. Click on *Next*.

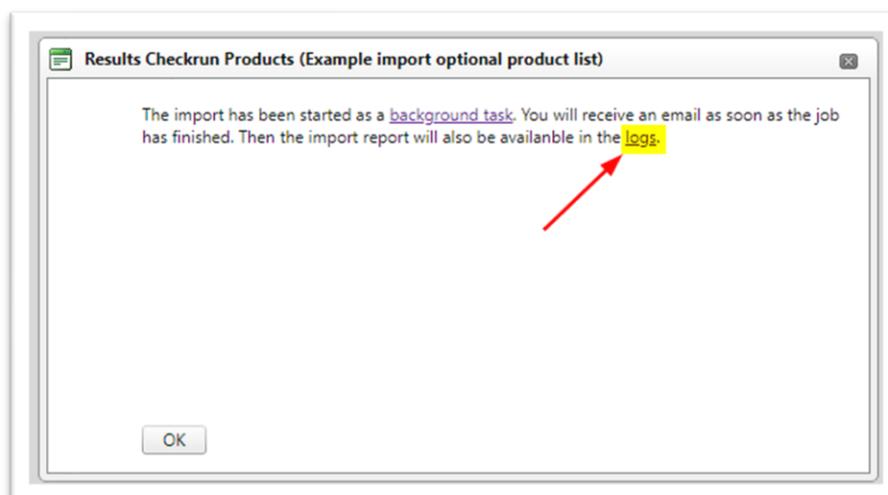


a. Import entity: Select the Optional product selection list

- b. Import layout: Select the correct import layout
 - c. Archive not-imported records (optional): When set to **Yes**, any optional products in the list in COS that are not present in your import file will be archived.
7. Click on *Next*.



- a. Reporting level: Leave this set to **Full** to receive a full import report including all warnings and errors.
 - b. Is testrun: Set this option to **No** to perform a real import. 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. Fill conversion list: Set this option to *Yes*, if you need to fill any Conversion lists that you might have created.
8. Click on *Next*.



- 9. Either wait for the Import report e-mail, or download the report from the Log files.
- 10. Once you click *OK*, you will return to the Optional products selection list, which will now contain the optional products that you imported:



| Product code | Sequence | Number of Optional product | Manufacturer |
|--------------|----------|----------------------------|--------------------------------|
| 140044055 | 1 | 2.00 | Optional product 6956321800000 |
| 140044054 | 1 | 1.00 | Optional product 6956321800000 |

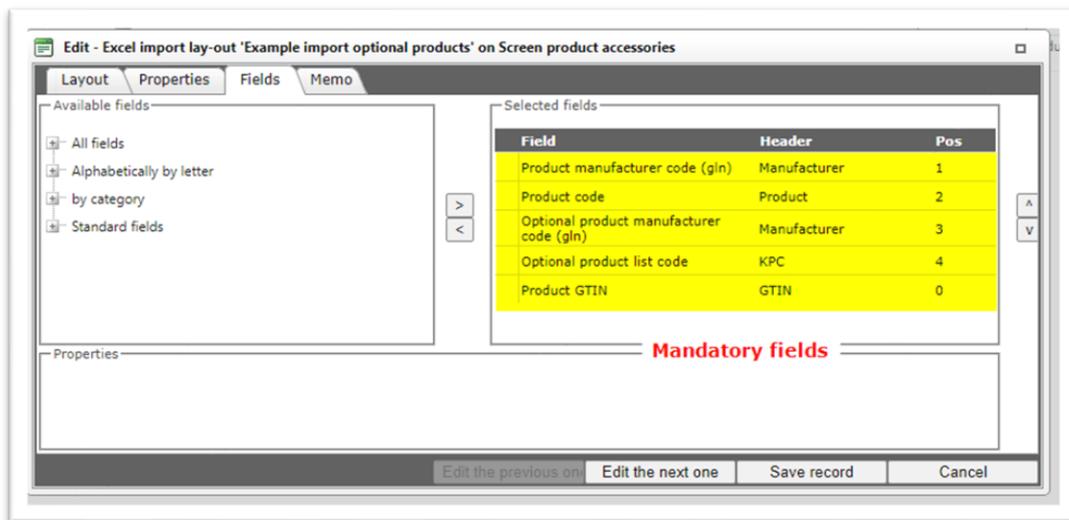
5.6.2 Import selection lists

Selection lists are added to a Product (or Item) as an Accessory. Thus, selection lists can be added to multiple Product (or Items) by using an Accessory import, with mandatory fields:

- Product manufacturer code (gln): Global Location Number of the manufacturer of the products to which the selection list is to be added.
- Product code and Product GTIN: Product number (or GTIN) of the products to which the selection list is to be added. Note: Both fields need to be present in your import layout, however only one of them needs to be filled out in your data file.

In addition to the mandatory Accessory fields, the following data fields also need to be present in the import file and import layout:

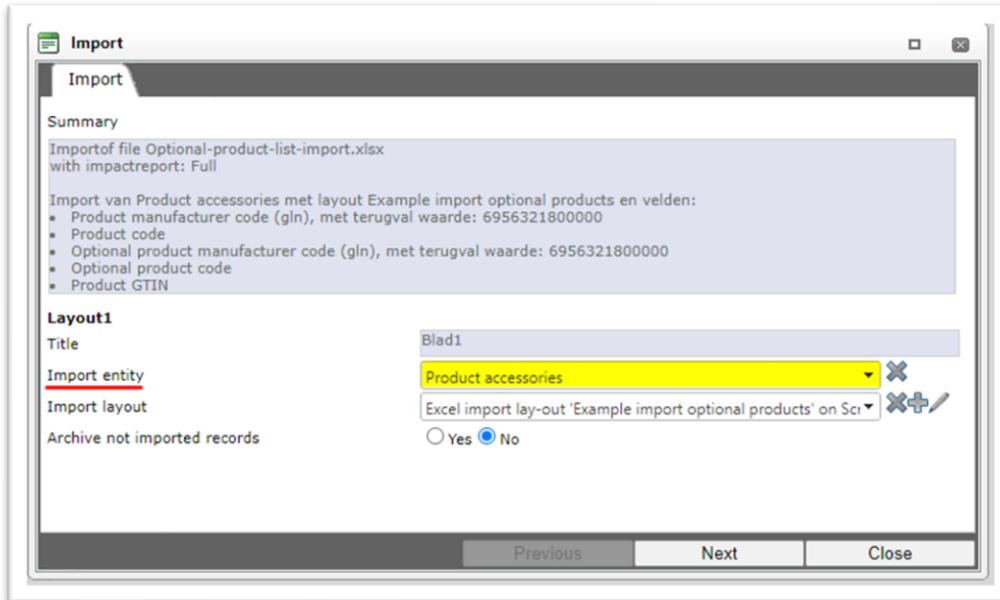
- Optional product manufacturer code (gln): Manufacturer code (GLN) of the optional product
- Optional product list code: Code of the optional product list.



| Field | Header | Pos |
|--|--------------|-----|
| Product manufacturer code (gln) | Manufacturer | 1 |
| Product code | Product | 2 |
| Optional product manufacturer code (gln) | Manufacturer | 3 |
| Optional product list code | KPC | 4 |
| Product GTIN | GTIN | 0 |

Mandatory fields

Important: For an *optional products selection list* import layout, select **Product accessories** as the *import entity*, as optional products are a special type of accessory:



5.6.3 Optional items

The procedure for adding Optional Items is similar to adding Optional Products, thus follow the instructions as outlined in paragraphs [5.6.1 IMPORT OPTIONAL PRODUCTS/ITEMS](#) and [5.6.2 IMPORT SELECTION LISTS](#).

However, there are some differences:

Import Optional Items into an Item List

Step 2: In the Overview, click on the *Optional Items* link.

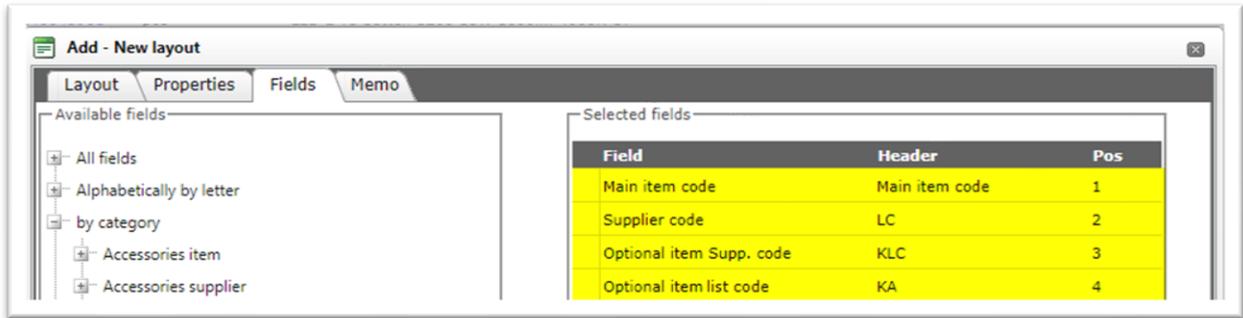
Import selection list

Selection lists are added to a Item as an Accessory. Thus, selection lists can be added to multiple Items by using an Accessory import, with mandatory fields:

- Supplier code: Code for the supplier of the items to which the selection list is to be added.
- Main Item code: Item code of the item to which the selection list is to be added.

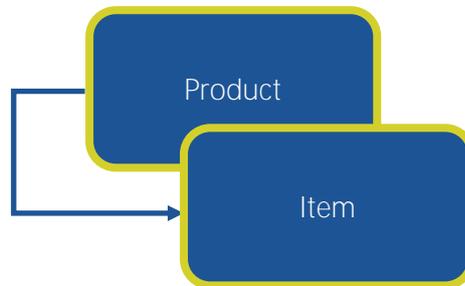
In addition to the mandatory Accessory fields, the following data fields also need to be present in the import file and import layout:

- Optional item Supplier code: Supplier code (GLN) of the optional item.
- Optional item list code: Code of the optional item list.



6 Inheritance of accessories and parts

Parts and Accessories are inherited from *Product* to *Item*.

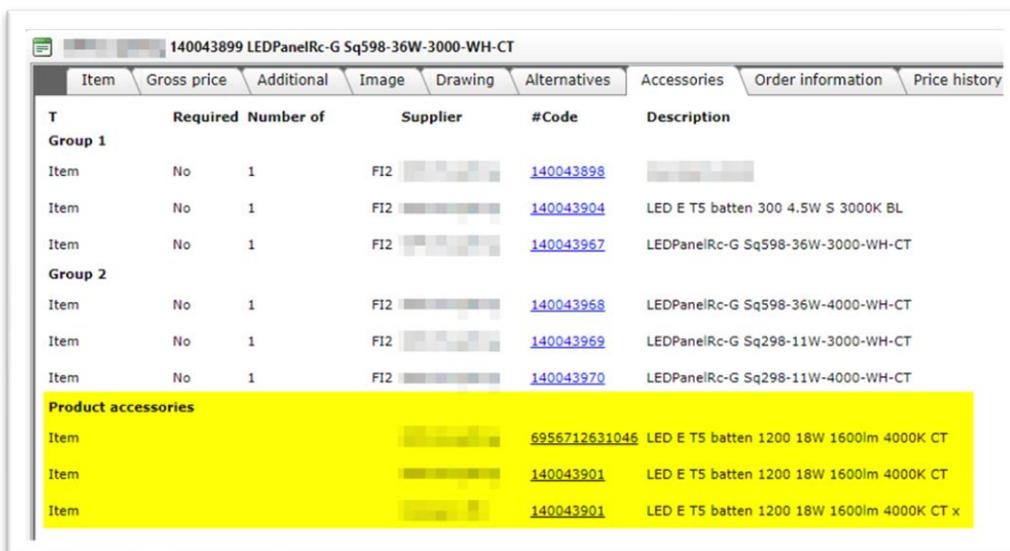


Note: If several items are derived from a product, each of which has (partly) the same accessories, you may link the accessories at *product level*.

But, if the items are part of different assortments, then you have to make sure that the accessories *also* appear as an item in *all those assortments*.

Example

This item inherits from the corresponding product the following accessories:



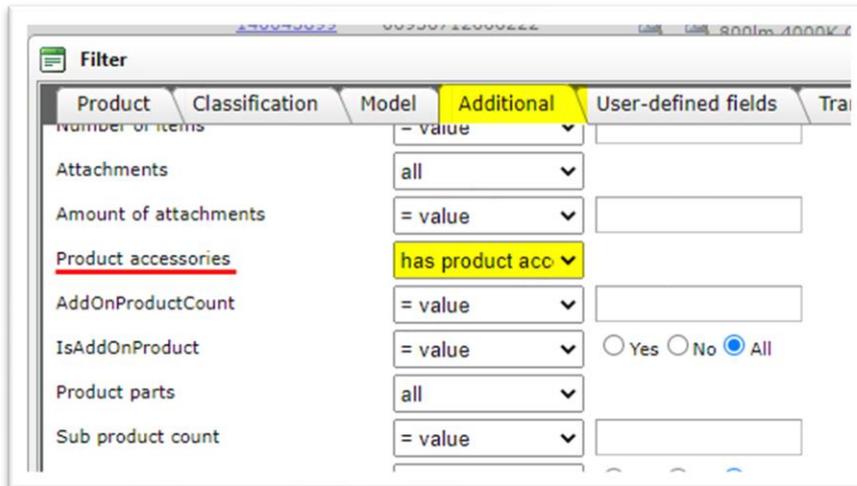
| Item | Gross price | Additional | Image | Drawing | Alternatives | Accessories | Order information | Price history |
|--|-----------------|------------------|-----------------|--------------|-------------------------------|--|-------------------|---------------|
| 140043899 LEDPanelRc-G Sq598-36W-3000-WH-CT | | | | | | | | |
| T | Required | Number of | Supplier | #Code | Description | | | |
| Group 1 | | | | | | | | |
| Item | No | 1 | FI2 | | 140043898 | | | |
| Item | No | 1 | FI2 | | 140043904 | LED E T5 batten 300 4.5W S 3000K BL | | |
| Item | No | 1 | FI2 | | 140043967 | LEDPanelRc-G Sq598-36W-3000-WH-CT | | |
| Group 2 | | | | | | | | |
| Item | No | 1 | FI2 | | 140043968 | LEDPanelRc-G Sq598-36W-4000-WH-CT | | |
| Item | No | 1 | FI2 | | 140043969 | LEDPanelRc-G Sq298-11W-3000-WH-CT | | |
| Item | No | 1 | FI2 | | 140043970 | LEDPanelRc-G Sq298-11W-4000-WH-CT | | |
| Product accessories | | | | | | | | |
| Item | | | | | 6956712631046 | LED E T5 batten 1200 18W 1600lm 4000K CT | | |
| Item | | | | | 140043901 | LED E T5 batten 1200 18W 1600lm 4000K CT | | |
| Item | | | | | 140043901 | LED E T5 batten 1200 18W 1600lm 4000K CT x | | |

7 Search

7.1 Find products with accessories

Products with accessories can be found through the filter option: *has product accessories*.

1. Through the Menu, go to *Products > products*.
2. Click on the *Filter* button and go to the *Additional* tab.
3. Set *Products Accessories* to **has product accessories**:



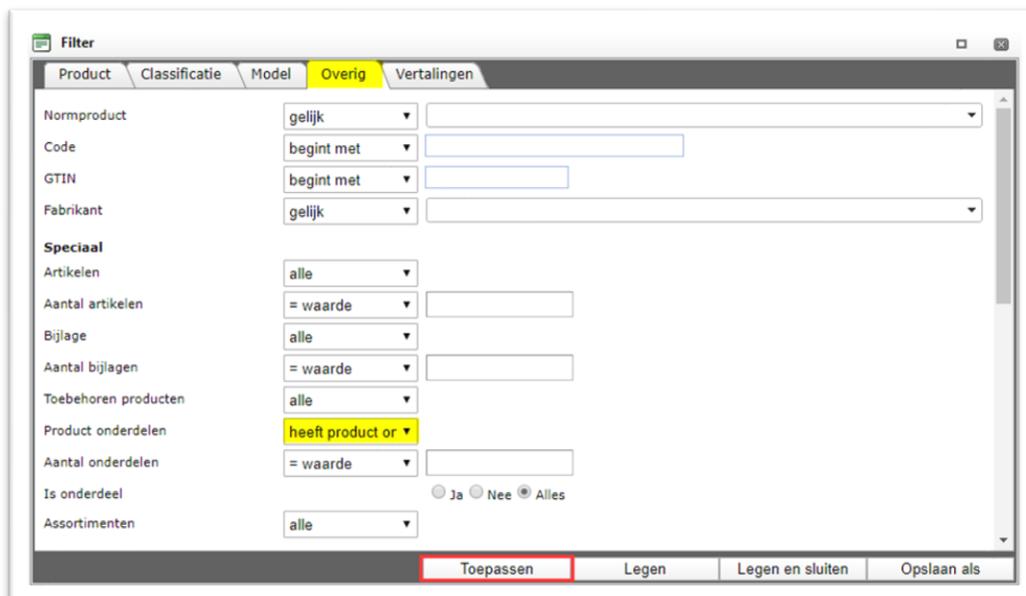
| Product | Classification | Model | Additional | User-defined fields | Tra |
|----------------------------|----------------|---------|-----------------|---|-----|
| Number of items | | = value | | | |
| Attachments | | all | | | |
| Amount of attachments | | = value | | | |
| <u>Product accessories</u> | | | has product acc | | |
| AddOnProductCount | | = value | | | |
| IsAddOnProduct | | = value | | <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> All | |
| Product parts | | all | | | |
| Sub product count | | = value | | | |

4. Then click the *Apply* button to activate the Filter.

7.2 Search for products with parts

Searching for products with accessories is the fastest with the filter 'has accessories':

1. Go to *Products* from the menu and click the *Filter* button under *View*
2. Go to the *Other* tab and under *Product parts*, select *has product parts*.



| Product | Classificatie | Model | Overig | Vertalingen |
|--------------------|---------------|------------|---|-------------|
| Normproduct | | gelijk | | |
| Code | | begint met | | |
| GTIN | | begint met | | |
| Fabrikant | | gelijk | | |
| Speciaal | | | | |
| Artikelen | | alle | | |
| Aantal artikelen | | = waarde | | |
| Bijlage | | alle | | |
| Aantal bijlagen | | = waarde | | |
| Toehoren producten | | alle | | |
| Product onderdelen | | | heeft product or | |
| Aantal onderdelen | | = waarde | | |
| Is onderdeel | | | <input type="radio"/> Ja <input type="radio"/> Nee <input checked="" type="radio"/> Alles | |
| Assortimenten | | alle | | |

3. Then, click the *Apply* button.

8 Export of Product/Item Relations

Part of the DICO/SALES005 format, is the option to export relations between products and items. These relations refer to parts, alternatives and accessories and are captured in the **ItemRelations.xml** of the DICO/SALES005 message.

Only product - product (PP) and item - item (AA) relationships can be established in COS. Note that PP-and AA-relationships can occur simultaneously in one relationship message, however, currently COS *only* support the export of PP-relations.

Note: At this moment Item-Item relations in COS are *not exported*. This feature will be implemented in a future version of the Compano software. However, the *Enclosed Item* and *Predecessor/Successor* relations are exported in the *Price Catalogue* of DICO/SALES005.

Product/Item relations export to 2BA / InstallData
 Product relationships are displayed in the 2BA Unifeed search engine only at the *product level* on the [Related] tab. Links at *item level* are not shown but are supplied with (bulk) data (download of data set). If the software package in which the data is read supports this functionality, references can be consulted.

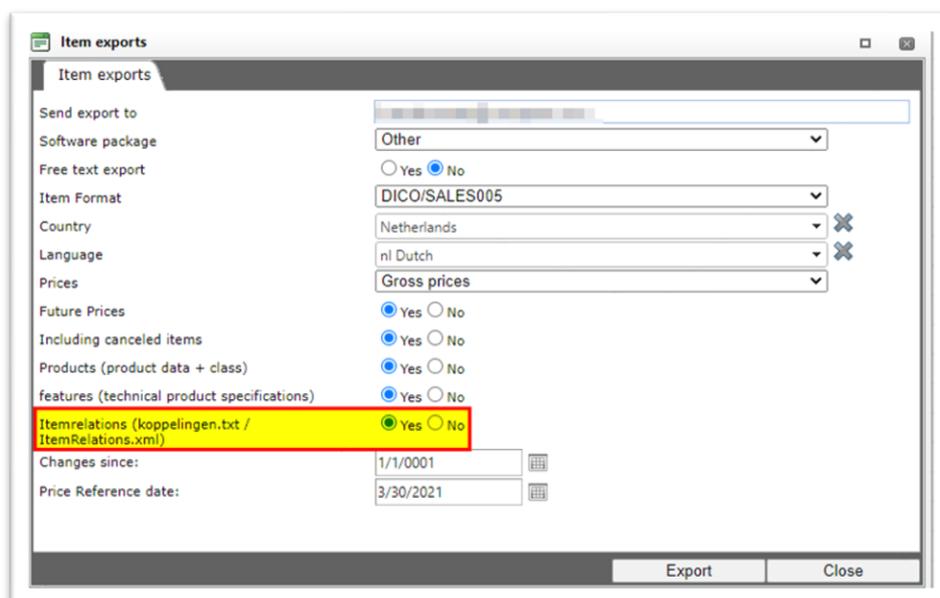
In COS and SALES005, the Item Relations message is an update of the existing **koppelingen.txt** (PAB/INSBOU4).

More information on item relations can be found at the [Ketenstandard Semantic Treehouse](#) > *Item Relations*.

8.1 Set export of Item Relations

When exporting in the DICO/SALES005 format, set the option *Itemrelations (koppeling.txt / ItemRelations.xml)* to **Yes**.

Note: The same option can be used for the item formats PAB to DICO/INSBOU004; this will export the older **koppelingen.txt** message.



The screenshot shows the 'Item exports' dialog box with the following settings:

- Send export to: [Empty field]
- Software package: Other
- Free text export: Yes No
- Item Format: DICO/SALES005
- Country: Netherlands
- Language: nl Dutch
- Prices: Gross prices
- Future Prices: Yes No
- Including canceled items: Yes No
- Products (product data + class): Yes No
- features (technical product specifications): Yes No
- Itemrelations (koppelingen.txt / ItemRelations.xml): Yes No**
- Changes since: 1/1/0001
- Price Reference date: 3/30/2021

Buttons: Export, Close

8.2 Rules of thumb

In COS PIM you can assign parts and accessories to a product or an item. Which option you choose depends on the situation for which you use the PIM system. Below are a few rules of thumb and examples:

8.2.1 Manufacturer

Manufacturers usually link parts or accessories to a main *Product*.

8.2.2 Wholesale

A *wholesaler* usually links accessories or parts to a main *Item*. Linking to an item has a number of advantages for a wholesaler:

- Link accessories from another brand, for example a *Grohe* faucet to a *Bruynzeel* bath.
- Link *different* accessories or parts to an item per assortment, for example with the Dutch assortment an inverter to 230 Volt, and with the American assortment an inverter to 110 Volt.

8.2.3 Inherit

If you link to *Product*, you have the option to have the linked accessories or parts inherited to all sales assortments.

8.2.4 Linking by product and item

A combination of linking to both a main product and a main item is also possible.