

Manual Product & Item Relations COS PIM

File	COS_PIM_Manual_Product_And_Item_Relations
COS version(s)	L03
Revision and date	1.1, 18-11-2022

🌱 狑 💭

📌 Compano Online Software

Contents

1	Intro	oduction	4
	1.1	Concepts	4
	1.2	Relations in COS	5
	1.2.1	Types of relations	5
2	Proc	luct to Product relations	6
	2.1	Product parts (BE2/FI2)	6
	2.1.1	Spare parts	8
	2.1.2	2 Order and 'Exploded View'	9
	2.2	Product accessories	
	2.2.1	Set type of accessory	
	2.2.2	2 Group accessories	
	2.3	Alternative product (COM)	
	2.4	Mirrored product (MIR)	
	2.5	Predecessor/Successor	
3	Item	to Item relations	
	3.1	Item accessories (BE2/FI2)	
	3.1.1	Set type of accessory	
	3.1.2	2 Group accessories	
	3.2	Own alternatives (COM)	
	3.3	Predecessor/Successor	
	3.4	Enclosed items (ENC)	
4	Opti	onal Products/Items	
	4.1	Create selection list	
	4.2	Add selection list to Item	
	4.3	Add selection list to Product	
5	Imp	ort of product/item relations	
	5.1	Product parts	
	5.2	Product accessories	
	5.3	Item accessories	
	5.4	Product alternatives	
	5.5	Item alternatives	
	5.6	Optional products/items selections list	
	5.6.1	Import optional products/items	
	5.6.2	2 Import selection lists	
	5.6.3	3 Optional items	
6	Inhe	ritance of accessories and parts	
7	Sear	ch	

oftware	7	•	
line S			
0 On			7.1
npan			7.2
Cor		8	E
n -			8.1

7.1	Find products with accessories	42
7.2	Search for products with parts	42
Expo	ort of Product/Item Relations	43
8.1	Set export of Item Relations	43
8.2	Rules of thumb	44
8.2.1	Manufacturer	44
8.2.2	2 Wholesale	44
8.2.3	3 Inherit	44
8.2.4	Linking by product and item	44

Compano Online Software

🍠 🌮 💭

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

<u>Note</u>: 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.

<u>Note</u>: 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	СОМ
BEO	Bevat onderdeel	Contains	Handled through the Product parts option	-
GSP	Gespiegeld	Mirrored	Product Accessories type set to: MIR	MIR
НОВ	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</i> to Yes	BE2
ONV	Onderdeel van	Part of	Inverse of <i>Product</i> <i>part</i> ; handled through the <i>Is part of</i> option	-
ΟΡ٧	Opvolger	Successor	Set through the Product successor code	-
RES	Reserve	Spare part	Product part; Spare part set to Yes	-
TEP	Technisch passend	Fits to	Product Accessories type set to: FI2	FI2
voo	Voorganger	Predecessor	Set through the Product predecessor code	-

More information on item relations can be found at the <u>Ketenstandard Semantic Treehouse</u> > *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 \rightarrow ID 2	ID 2 → ID1
PRE	VOO	Preceed	•		•	Predecessor	Successor
COM	ALT	Comparable	•		•	Comparable a	nd Alternative
CNO	-	Comparable Norm Product	•	•		Meets requireme proc	ents for standard duct
BE2	HOB/KNZ	Belongs to	•	•	•	Belongs to, fro (made to be com	m same Series patible) (specific)
FI2	TEP	Fits to	•	•	•	Fits to / Conne	cts to (generic)

P-P: Product-product relationship

P-I: Product-article relationship

I-I: Item-item relationship

ID 1 \rightarrow ID 2: Relationship from 1 to 2

ID 2 \rightarrow 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 produces 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)

<u>Belongs to (BE2)</u> Example: Toilet seat 1 (ID1) belongs to Toilet 2 (ID2).

<u>Fits to (FI2)</u>

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:*





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

Products Menu View	it \ Functions \ Print \ Import / Export		
Eilter			
Navigation	Archived Manufacturer Description	Code	GTIN
Ttems (3/0)		140043898	06956712666215
		140043899	06956712666222
		140043900	06956712666239
Accessory products (0)	100	140043901	06956712666246
Is part of (0/0)	inter .	140043902	06956712666253

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



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

	- Q			
er	Search	All Details	Manage screen layouts	Select Product Deselect Clear Transfer Stop Help
Archived	Manufacturer Description	Code	GTIN	A F T Short description (product)
	100 C	140044056	06956321843496	📓 📓 LEDPanelRc-G Sq298-Surface Module-CT
	date in the second second	140044057	06956321843502	📓 📓 LEDPanelRc-G Re166-Surface Module-CT
	1000	140057771	06956321888138	LEDPANELRC-SL-MOUNTING-SPRINGS-622
	1 N	<u>140057770</u>	06956321888121	LEDPANELRC-SL-MOUNTING-SPRINGS-595
		140055484	06956321879808	LEDPANELRC-SL SQ600-SURFACE-MODULE-WH-CT
	Add part(s)	140055485	06956321879815	LEDPANELRC-SL SQ625-SURFACE-MODULE-WH-CT
		140055486	06956321879822	LEDPANELRC-SL RE300-SURFACE-MODULE-WH-CT
		140060028	06956321892746	LEDHIGHBAY-P3-GLASS-OPAL-80-120
		140060029	06956321892753	📓 📓 LEDHIGHBAY-P3-GLASS-OPAL-160
	-	<u>140060030</u>	06956321892760	LEDHIGHBAY-P3-BRACKET-80-120
		140060789	06956321895167	LEDFLOOD-E-RE150-SPIKE-BL
		1/10060792	06956321895174	A LEDELOOD-E-RE250-280-SPIKE-RI
Number	of Manufacturer Description	Code	GTIN	A F Short description (product)
1.0	00	140060028	06956321892746	LEDHIGHBAY-P3-GLASS-OPAL-80-120
	4	140057770	06956321888121	LEDPANELRC-SL-MOUNTING-SPRINGS-595

- a. First, use Filter and/or Search to find one or more products that need to be linked as part(s).
- 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.
 <u>Note</u>: 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:

ter	• (arch Part Mo	dify Delete recor	d(s) Line edit d	n Copy Help			
vigation 🛞	•	Archived	Sequence	Number of	IsSparePart Unit	Part	Part	Part
Product: 140043899 LED			1	1.00		-	140060028	LEDHIGHBAY-P3- GLASS-OPAL-80-120
	•		2	2.00		100	<u>140057770</u>	LEDPANELRC-SL- MOUNTING-SPRINGS

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*.

Product parts Menu	iew <u>Eait</u> Funct		/ Export	roduct:1400438	98 LED I
Filter	Search All De	tails Manage scr	een layouts He	elp	
Navigation 🛞	 Archived 	Sequence	Number of	IsSparePart	Unit
Product:140043898 LED	•	1	1.00		
Edit					
Part					
Modify					

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

Product component			
Product	140043898 L	D E T5 BATTEN 600 9W 800	DLM 3000K CT 🕶 🗱
Part	140043903 le	d e t5 batten 600 9w s 3000)k bl Opple 0🔻 🗱
Sequence	1		
Number of	1.00		
Spare part	● Yes ○ No		
Unit		_	- 💥
Edit the p	revious on Edit the next	one Save record	Cancel

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:

Product component	t		
Product		140043898 LED E T5 BATTEN 600 9W 800LM 3000K CT -	×
Part		140043903 led e t5 batten 600 9w s 3000k bl Opple 0	×
Sequence		18	
Number of		1.00	
sSparePart		● Yes ○ No	
Jnit		•	×

🏷 Compano Online Software

🍠 🌮 💭



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:*

▶.	•	- 🔍 📃	1 . ?		
ilter		Search All	Details Screen Layout Help		
avigation	۵ 🗅	Archived	Manufacturer Description	Code	GTIN
Items (3/0)			100	<u>140043898</u>	06956712666215
Product parts (2/0)		•		<u>140043899</u>	06956712666222
				<u>140043900</u>	06956712666239
Product accessories (0)			100 C	140043901	06956712666246

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

Accessory products	nu View Edit Functions Import / Export
⋟.	-< = ① □ ② ,
Filter	Search All Details Manage screen layouts Help
Navigation 📀	Sequence Accessories product Accessori
Products	
Product:140043899 LED	
Edit 📀	1
Product	
Optional product	
<i>A</i>	

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



- a. 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'.
- c. 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.
- d. 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:

Accessory products	Menu	View Edit	Functions \ Import	/ Export > Product:14004	43899 LED E T5 batte
▶.	• (۵ 🗐 🌔		○ .	
Filter	S	earch All Deta	ils Manage screen layo	uts Help	
Navigation	8	Sequence A	cessories product	Accessories product	Manufacturer
Products		1 <u>69</u>	56321800000	<u>140043901</u>	
Product:140043899 LED					
Edit	۲				
Product					

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:

Product accessories Transla	ations	
Code (GLN)	6956321800000	
Code	140043898	
Line type	🔍 🍽 Product 🛛 🖓 Optional pro	duct
Туре	BE2 - Belongs to	
Accessories product	140043969 ledpanelrc-g sq298-11w-3000-wh-ct	695(-
Sequence	2	
Accessories type		
Description	ledpanelrc-g sq298-11w-3000-wh-ct Automatic	
Number of	1.00	
Required	● Yes ○ No	
Unit		-
Position		

- 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

Compano Online Software

🍠 🌮 💭

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*.

▶.	•		🚺 🗌 . 🕜		
ilter		Search All	Details Screen Layout Help		
lavigation	^ (Archived	Manufacturer Description	Code	GTIN
Ttems (3/0)				140043898	06956712666215
Product parts (2/0)			inne	140043899	06956712666222
				140043900	06956712666239
Product accessories (1)			in the second seco	140043901	06956712666246

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



4. In the pop-up window:

Product accessories Translatio	ns		
Code (GLN)	6956321800000		
Code	140043898		
Line type	Product	Optional product	
Туре	FI2 - Fits to	~	
Accessories product	140043904 LED E T5 batten 300	4.5W S 3000K BL	
Sequence	1		
Accessories type	Group 1		
Description	LED E T5 batten 300 4.5W S Automatic	3000K BL	
Number of	1.00		
Required	O Yes 🔍 No		- 1
Unit		- 26	
Position			

- 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:

Drawing	wing Commercial description (product) Additional Items Parts Accessories User									
т	Manufacturer	Accessorie	s product Descriptio	n						
Group 1										
Product	1000	140043904	LED E T5 b	atten 300 4.5W S 300	DOK BL					
Product	-	<u>140043969</u>	ledpanelrc-	g sq298-11w-3000-w	h-ct					
Group 2		•								
Product		<u>140043903</u>	led e t5 bat	ten 600 9w s 3000k l	bl					
		Show previous	Show next	Modify	Ca	ncel				



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.

(product) (en) 🔪 Techn	ical description (product) (en)	Additional	User-defined fields	Translations
Status				
Available	None		~	
BIM Status	None		🔿 📟 Ready	
	🔾 🖴 Under d	onstruction	🔿 🗖 Test	
Predecessor code	(1)			
Code successor	140044096			
GTIN Predecessor				
GTIN Successor	(1) 0695632184	3786		
ADR				
Hazardous Material	🔾 Yes 🖲 No			
Batteries included	🚺 🔾 Yes 🔾 No	Unknown		
RoHS Indicator	Unknown	~		
Has CE marking	① Yes ○ No	Unknown		
Has safety datasheet	⊖ Yes ⊖ No	O Unknown		
Dimension				
Height	100.00			

- 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.

Compano Online Software

🍠 🌮 🗾

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

<u>Note</u>: 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.



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

▶.	- 🔍 🕂	🔩 . 🙈	. /	K 🛛	2 6.0
lter	Search Add Alt	ernative Item <- Product	Modify Delete	record(s) Line e	dit on Copy He
avigation 🔗	🔺 🔺 Supplier	GTIN	Product	Item no.	Item description
Price Information (2)		06956712666215	<u>140043898</u>	<u>140043898</u>	LED E T5 batten 60 9W 800lm 3000K C
Surcharges	/	06956712666222	140043899	140043899	LEDPanelRc-G Sq59 36W-3000-WH-CT
		06956712666277	140043904	140043904	LED E T5 batten 30 4.5W S 3000K BL
Own alternatives		06956321843472	140043967	140043967	LEDPanelRc-G Sq59 36W-3000-WH-CT
Accessories	THE COMPANY	06956321843489	140043968	140043968	LEDPanelRc-G Sq59 36W-4000-WH-CT
Attachments (0)	the second	06956321843410	140043969	140043969	LEDPanelRc-G Sq2 11W-3000-WH-CT
Assortment:	and the second	06956321843427	140043970	140043970	LEDPanelRc-G Sq2 11W-4000-WH-CT
Item group	-	06956321843458	140043971	140043971	LEDPanelRc-G Re29 36W-3000-WH-CT
Product: 140043898 LED		06956321843465	140043972	140043972	LEDPanelRc-G Re2

3. In the next screen, click on +Item:

Accessory items Menu	View Clit Functions Import / Export *I	tem:
⋟.		
Filter	Search All Details Manage screen layouts Help	
Navigation 🔗	 V Accessories item code KA 	Ac
Items		
Item:		
Edit 🛞		
Rem		
Choice item		

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

•		• •	•				-	1		 .
er 🛛		Search All	Details Man	age screen layouts	s Select Item	Deselec	t Clear	Transfer S	Stop Price Compare	Help
Archived	Supplier		C Acces	sories A	Item no.	Image	T Abb	reviation	Short descriptio	n
	and the second		-		140043970		🛃 pce		LEDPanelRc-G Sq2	98-11W-4000-WH-CT
	and the second		-		140043971	1	🛃 pce		LEDPanelRc-G Re2	98-36W-3000-WH-CT
	Contraction (Second		-		140043972		🛃 pce		LEDPanelRc-G Re2	98-36W-4000-WH-CT
	and street		a		140043973	<u>a</u>	🛃 pce		LEDPanelRc-G Re1	66-21W-3000-WH-CT
	Contract of Contract of Contract		e		140043974	<u>a</u>	🛃 pce		LEDPanelRc-G Re1	66-21W-4000-WH-CT
	International Address		-		140044049	1	pce		LEDHighbay-POLE	-CT
	Collection against		-	1	140044050	3	pce		LEDHighbay-Brack	et10-CT
	and the second	Add	l accessory		140044054	1	🛃 pce		LEDPanelRc-G Sq5	98-Surface Module-CT
			-m-	/						
Number	of Supplier	C Condition	Item no.	Abbreviatio	n Short d	escription				

- a. 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.
 <u>Note</u>: Double-clicking on a item also places it in the 'shopping basket'.
- c. <u>Optional</u>: 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:
- d. Next, click on *Transfer* (2), to link all the accessories to the item.
- 5. The accessories have now been linked to the main item and you will return to the Item Accessories Overview:

Accessory items Menu	View Edit	Function	s \ Import / Expo	rt 🔪 Iter	n:			
▶.	• 🔍 📄			12.				
Filter	Search All	Details Ma	anage screen layouts	Help				
Navigation 🛞	• v	Accessories i	item code KA		Accessories item	Description	Т	Туре
Items) 1 (140044050			LEDHighbay-Bracket10- CT	LEDHighbay- Bracket10-CT	P	FI2 - Fits to
ttem:								
dit								
Reltem								
Choice item								

3.1.1 Set type of accessory

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

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

🌱 🌮 💭

tems Menu View Edit	Functions Print	Import / Export			
▶.	- 🔍 📫 📲	. 🙈	. /	K 📝	2 1
Filter	Search Add Alterna	tive Item <- Product	Modify Delete	record(s) Line e	edit on Copy Hel
Navigation 🛞	 Supplier 	GTIN	Product	Item no.	Item description
Price Information (2)	· ·	06956712666215	140043898	140043898	LED E T5 batten 600 9W 800lm 3000K CT
Surcharges		06956712666222	140043899	140043899	LEDPanelRc-G Sq598 36W-3000-WH-CT
		06956712666277	140043904	140043904	LED E T5 batten 300 4.5W S 3000K BL
Own alternatives		06956321843472	140043967	140043967	LEDPanelRc-G Sq598 36W-3000-WH-CT
Accessories	International International	06956321843489	140043968	140043968	LEDPanelRc-G Sq598 36W-4000-WH-CT
Attachments (0)	and strength	06956321843410	140043969	140043969	LEDPanelRc-G Sq298 11W-3000-WH-CT
Assortment:	and the second	06956321843427	140043970	140043970	LEDPanelRc-G Sq298 11W-4000-WH-CT
Htem group		06956321843458	140043971	140043971	LEDPanelRc-G Re298 36W-3000-WH-CT
Product: 140043898 LED	and the second	06956321843465	140043972	140043972	LEDPanelRc-G Re298 36W-4000-WH-CT
	4				1500 ID- 0 D-100

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

Accessory items Menu	View Edit Functions Import / Export View	em:
▶.		
Filter	Search All Details Manage screen layouts Help	
Navigation 🛞	 V Accessories item code KA 	Accessories item
Items	1 140044050	LEDHighbay-Bracket1 CT
Item		
Edit 🛞		
Item		
Choice item		
Modify		
····		

4. In the pop-up window:

Accessories item Translation	5		
Code	(199.9)		
Main item code	140043898		
Line type	🔍 🏈 Item	Choice item	
Туре	BE2 - Belongs to		~
Accessories item	140044050	LEDHighbay-Bracket10-CT	- 🗱
Sequence	1		
Accessories type			
Description	LEDHighbay-Bracket10- Automatic	СТ	
Number of	1.00		
Unit			- 💥
Required	🔿 Yes 🖲 No		
Group attribute			

- 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*.

•	ا 🗣 🍋	. 🍖 .	2	κ 🗾	2 🗗 . 🔇
er	Search Add Alternative	e Item <- Product	Modify Delete	record(s) Line e	dit on Copy He
rigation 🛞 📤	 Supplier 	GTIN	Product	Item no.	Item description
Price Information (2)		06956712666215	140043898	<u>140043898</u>	LED E T5 batten 600 9W 800lm 3000K CT
Surcharges		06956712666222	140043899	140043899	LEDPanelRc-G Sq598 36W-3000-WH-CT
our charges		06956712666277	140043904	140043904	LED E T5 batten 300 4.5W S 3000K BL
Own alternatives		06956321843472	140043967	140043967	LEDPanelRc-G Sq598 36W-3000-WH-CT
Accessories	100 million	06956321843489	140043968	140043968	LEDPanelRc-G Sq598 36W-4000-WH-CT
Attachments (0)	and setting	06956321843410	140043969	140043969	LEDPanelRc-G Sq298 11W-3000-WH-CT
Assortment:	1000	06956321843427	140043970	140043970	LEDPanelRc-G Sq298 11W-4000-WH-CT
Item group	and a state of the	06956321843458	140043971	140043971	LEDPanelRc-G Re298 36W-3000-WH-CT
Product: 140043898 LED	and special	06956321843465	140043972	140043972	LEDPanelRc-G Re298 36W-4000-WH-CT

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

Accessory items Menu	View Edit Functions Import / Export > Iter	m:
▶.	$\overline{\mathbf{Q}}$	
Filter	Search All Details Manage screen layouts Help	
Navigation 🔗 🛞	 V Accessories item code KA 	Accessories item
Items	1 140044050	LEDHighbay-Bracket1 CT
Item		
Edit		
Realitem		
🖉 🗕 Choice item		
Modify		
· · · · · · ·		

4. In the pop-up window:

Accessories item	Translations				
Code		100.00			
Main item code		14004389	9		
Line type		🖲 🏈 Item	1	🔿 🖬 Choice item	
Туре		FI2 - Fits	to		~
Accessories item		6	140043904 LED E	T5 batten 300 4.5W S 300	ок 🕶 🞇
Sequence		2			
Accessories type		Group 1			
Description		LED E T5	batten 300 4.5W S 3	BOOOK BL	
		Automatic			
Number of		1.00			
Unit					- 🕷
Required		🔾 Yes 🔘	No		
Group attribute					
	Edit th	e previous one	Edit the next one	Save record	Cancel

- 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:

< Item	Gross p	orice Additi	ional	Image	Drawing Alte	rnatives	Accessories	Order information	on Price I
т	Required	Number of	s	upplier	#Code	Descriptio	n		
Item	No	1	FI2	22.	140043898				4
Item	No	1	FI2		140043904	LED E T5 b	atten 300 4.5W	S 3000K BL	4
Item	No	1	FI2	-	140043967	LEDPanelRo	-G Sq598-36W-	3000-WH-CT	4
Group 2									
Item	No	1	FI2	-	140043968	LEDPanelRo	-G Sq598-36W-	4000-WH-CT	4
Item	No	1	FI2		140043969	LEDPanelRo	-G Sq298-11W-	3000-WH-CT	4
Item	No	1	FI2	-	140043970	LEDPanelRo	-G Sq298-11W-	4000-WH-CT	4
Product a	ccessories								
Item				-	6956712631046	LED E T5 b	atten 1200 18W	1600lm 4000K CT	1
Item					140043901	LED E T5 b	atten 1200 18W	1600lm 4000K CT	4
Item					140043901	LED E T5 b	atten 1200 <mark>1</mark> 8W	1600lm 4000K CT 3	< 📬
				Shown	revious	Show next	M	odify	Cancel

3.2 Own alternatives (COM)

To link *alternative items* from your own assortment:

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



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

2.			ч.		a.	🧷 🗙	🎽 📄 🛛 🕗 🗸
cluding archive		Search Add	Alternative	Item	<- Product	Modify Delete reco	ord(s) Line edit on Copy Help
avigation 🛞	1	 Supplier 		۸	Item no.	Abbreviation	Item description
Price Information (1)		OPPLE Lighting			140043899	pce	LEDPanelRc-G Sq598-36W-3000-WH-CT
		OPPLE Lighting	_	_	140043901	pce	LED E T5 batten 1200 18W 1600lm 4000K C
Surcharges		OPPLE Lighting			140043904	pce	LED E T5 batten 300 4.5W S 3000K BL
Own alternatives		OPPLE Lighting			140043967	pce	LEDPanelRc-G Sq598-36W-3000-WH-CT
own alternatives		OPPLE Lighting			140043968	pce	LEDPanelRc-G Sq598-36W-4000-WH-CT

3. In the next screen, click on +Alternative.



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

•		- (2 📃						. 🤹	5				2	
er		S	earch All	Deta	ils Manag	e screen	layouts	Select Item	Deselec	t Clear	Transfer	Stop	Price Compare	e Help	
Archived	Supplier			С	Accesso	ries	A	Item no.	Image	T Abb	reviation	S	hort descripti	on	
	OPPLE Lighting			-	0			140043899	1	🛃 pce		LE	DPanelRc-G So	1598-36W	-3000-WH-CT
	OPPLE Lighting			-	•			140043901	1	🛃 pce		LE	D E T5 batten	1200 18W	1600lm 4000K 0
	OPPLE Lighting			-			- 53	140043904	1	🛃 pce		LE	D E T5 batten	300 4.5W	S 3000K BL
	OPPLE Lighting			-				140043967	1	🛃 pce		LE	DPanelRc-G Se	1598-36W	-3000-WH-CT
	OPPLE Lighting			-			1	140043968		🛃 pce		LE	DPanelRc-G S	1598-36W	-4000-WH-CT
	OPPLE Lighting			-			1	140043969		🚮 pce		LE	DPanelRc-G S	q298-11W	-3000-WH-CT
	OPPLE Lighting			-		1		140043970	1	🛃 pce		LE	DPanelRc-G So	298-11W	-4000-WH-CT
	OPPLE Lighting			-		1		140043971		d pce		LE	DPanelRc-G R	298-36W	3000-WH-CT
						1				-					
Number o	f Supplier	C	Condition	Ite	m no.	Abbre	viation	Short d	lescription	1					
1.00	OPP NL	-	PLU	140	043968	pce		LEDPane	elRc-G Sq59	8-36W-4	000-WH-C	т			

- a. First, use Filter and/or Search to find one or more items that need to be linked as alternative.
- 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. <u>Note</u>: 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.

<u>Note</u>: 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*.

tems Menu View	lit \Functions \ Print \Import / Export	
⋟.	三〇、 🛖 🛼 、 🙈 、🧪 💥 🛛 🖉 🗋 . 🞯 . 🦳	
Filter	Search Add Alternative Item <- Product Modify Delete record(s) Line edit on Copy Help	
Navigation (3	A Item no. Abbreviation Item description	
die	140043899 pce LEDPanelRc-G Sq598-36W-3000-WH-CT	
	L > 140043901 pce LED E T5 batten 1200 18W 1600im 4000	к ст
DbA	140043904 pce LED E TS batten 300 4.5W S 3000K BL	
Alternative	140043967 pce LEDPanelRc-G Sq598-36W-3000-WH-CT	
4	140043968 pce LEDPanelRc-G Sq598-36W-4000-WH-CT	
Accessories item	140043969 pce LEDPanelRc-G Sq298-11W-3000-WH-CT	
Accessories choice item	140043970 pce LEDPanelRc-G Sq298-11W-4000-WH-CT	
	140043971 pce LEDPanelRc-G Re298-36W-3000-WH-CT	
Purchase Item	140043972 pce LEDPanelRc-G Re298-36W-4000-WH-CT	
+ Purchase Assortment	140043973 pce LEDPanelRc-G Re166-21W-3000-WH-CT	
Them of Braduct	140043974 pce LEDPanelRc-G Re166-21W-4000-WH-CT	
	140044049 pce LEDHighbay-POLE-CT	
Modify	140044050 pce LEDHighbay-Bracket10-CT	
	1400440E4 peo LEDBonalDa O SaE00 Surface Madula CT	

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

Edit - OPPLE Lighting 140	0043901 LED E T5 batten 1200 18W 1600lm 4000K CT	
Item Gross price	Additional Commercial description (en) Technical description (en) Pr 🕨
Country of provenance	(i)	* *
Status		
Stock item	🚺 🖲 Yes 🔾 No	
Can be ordered	🚺 🖲 Yes 🔾 No	
IsRefurbished	🔿 Yes 🔿 No 🖲 Unknown	
IsReused	🔿 Yes 🔿 No 🖲 Unknown	
is cuttable	No	
Max cuttable length		
Max cuttable length unit		×
Status code	None	
Predecessor code	1	
Code successor	140043970	
GTIN Predecessor	1	
GTIN Successor	(1) 0638459673426	
Logistics		
Delivery time		•
	Edit the previous one Edit the next one Save record C	ancel

- 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.

<u>Note</u>: 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.

Accessories item Translati	ions		
Code			
Main item code	140043899		
Line type	🖲 🏈 Item	🔿 📟 Optional item	
Туре	ENC - Enclosed item	~	
Accessories item	140043967 L	EDPanelRc-G Sq598-36W-3000-WH-CT	- 🕷
Sequence	3		
Accessories type			
Description	LEDPanelRc-G Sq598-36\	N-3000-WH-CT	Automatic
Number of	1.00		
Unit			- 💥
Required	O Yes No		
Group attribute			
	Edit the previous on Edi	t the next one Save record	Cancel

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 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*:

🌱 🌮 💭



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



3. 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:

Optional items selection I	list	
Supplier	Schneider Electric (SCHNEIDER)	- 🗶
Code	TAP	
Description	Optional taps selection list	
escription	Optional taps selection list	

- 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:*

Filter Se	earch All	Details Ma	anage screen layouts	Help
Navigation	Supplier SCHNEIDER	Code TAP	List of taps	

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:

	•		1		2		. 🤹					2	•
		Search All	Details	Manage scr	en layouts	Select Item	Deselect	Clear	Transfer	Stop I	Price Compare	Help	
Archived Supplie	r		C A	ccessories	۸	Item no.	Image	T Abbr	eviation	Sh	ort descriptio	n	
Schneide	er Electric					VB310R- 15BS08		pce		3-V	EG BOLKRAA	N, DN15,	KVS 4, DRAAD
Schneid	er Electric					VB310R- 15BS09		p_e		3-V	EG BOLKRAA	N, DN15,	KVS 6.3, DRAAD
Schneide	er Electric					VB310R- 20BS04		pce		3-V	EG BOLKRAA	N, DN20,	KVS 0.86, DRAAD
Schneide	er Electric					VB310R- 20BS08		pce		3-V	EG BOLKRAA	N, DN20,	KVS 4, DRAAD
Schneide	er Electric					VB310R- 20BS09		pce		3-V	EG BOLKRAA	N, DN20,	KVS 6.3, DRAAD
Schneide	er Electric					VF208W- 100NS		pce		VLI	NDERKRAAN,	DN100, F	V 760, VLINDER RVS
Schneide	er Electric					VF208W-25		pce		VLI	NDERKRAAN ,	DN25, K	V 26, VLINDER INOX
Schneid	er Electric					VF208W-JONS	- 2	pce		VLI	NDERKRAAN ,	DN40, K	V 50, VLINDER INOX
Schneide	er Electric				/	VF208 N-50NS	2	pce		VLI	NDERKRAAN,	DN50, K\	/ 115, VLINDER INOX
Number of Suppl	lier C	Condition	Item	no. 🐴	breviation	1 Short d	escription						
1.00 SCHN	EIDER	BD	<u>VB200</u>	R-20BS		2-WEG B	BOLKRAAN, D	ON20, KV	S 8.7, DRA	AD			
1.00 SCHN	EIDER	BD	VB310 15BS0	<u>R-</u> pce		3-WEG E	BOLKRAAN, E	ON15, KV	S 1.6, DRA	AD	'shopp	in ba	sket'
1.00 SCHN	EIDER	BD	VF208	W-25NS por		VLINDER	RKRAAN , DN	125, KV 2	6, VLINDE	R INOX			

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

Filter	Search All	Details Manage scre	een layouts Help		
Navigation 🛞	▲ LC	Item no.	Sequence N	Number of	Item
Choice item:		VB200R-15BS	1	1.00	2-WEG BOLKRAAN, DN15, KVS 8.7, DRAAD
adit 🛞	_	VB310R- 15BS04	2	1.00	3-WEG BOLKRAAN, DN15, KVS 0.86, DRAAD
Modify	•	<u>VF208W-</u> 100NS	3	1.00	VLINDERKRAAN, DN100, KV 760, VLINDER RVS

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

🍋 Optional items selection li	ists	Menu	View Ledit I	Functions \setminus I	mport	/ Export	» Optional item:Schneider Electric
⋟.∟	• (()		?		
Filter	S	earch All	Details Manage s	creen layouts	Help		
Navigation 🛞		LC	Item no.	Sequence	:	Number of	Item
Optional item:Schneid		SCHNEIDER	VB200R-15BS	1		1.00	2-WEG BOLKRAAN, DN15, KVS 8.7, DRAAD
Edit 🛞		SCHNEIDER	VB300R-15BS	2		1.00	3-WEG BOLKRAAN, DN15, KVS 8.7, DRAAD
Modify							

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*.

29

🍠 🌮 🜅

Items Menu View	Edit \ Functions \ Print \ Import / Export
📡 🚬 kraan	- 🤍 🗐 🚺 🛛 .
Filter	Search All Details Screen Layout
Navigation	🛞 📤 🔺 Supplier .
- 10	OPPLE Lighting
Edit	Schneider Electric
Add	Schneider Electric
Alternative	Schneider Electric
-	Schneider Electric
Accessories item	Schneider Electric
Optional items	Schneider Electric
A number that	Schneider Electric

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:

🗟 Optional it	tem selection	View									
. 🖉		• Q		1							健 .
Filter		Search	All	Details	Manage screen layouts	Select Optional	item Deselec	t Clear	Transfer	Stop	Help
 Supplier 	Code	Description									
SCHNEIDER	ТАР	Optional taps	selectio	n list							
Number	of Supplier	Code	Des	cription							
1.0	00 SCHNEIDER	ТАР	Opti	ional tap	s selection list						
		_									

- 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:

🗟 Item accessories	Menu View	Edit	Funct	tions \ Import / Expo	ort » Iten	n:Schneider I	Electric 5197755	
▶.	- Q		6		健 .			
Filter	Search	All	Details	Manage screen layouts	Help			
Navigation		8	<u>^</u>	V Accessories ite	m code	ка	Accessories item	Description
j⊇Items ?e]Item:Schneider Electr				1		TAP		Optional taps selection 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:

- Compano Online Software
 - 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:

Product accessories	enu] View \ Edit \ Functions \ Import /	Export > Product:
▶.□		2.
Filter	Search All Details Manage screen layout	ts Help
Navigation	Sequence Accessories product	Accessories produc
Products	1 6956321800000	<u>140043904</u>
Product: 140043898 LED	2 6956321800000	140043969
	3 6956321800000	140043903
Edit (4	
Product		
gOptional products]	
10		

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:

▶.	•	9 🗐 🤅			۵			0
ilter	S	Search All Det	ils Manage screen layouts Select	t Optional product	Deselect Clear	Transfer	Stop	Help
Manufacturer	Code	Description						
6956321800000	OPT	Example option	l products					
<u>6956321800000</u>	OPT2	Optional produc	s import example					
Number of Man	ufacturer	Code	Description					
	221000000	OPT	Example optional products					

- 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:

Product accessories Menu	View Edit Functions Import	Export > Product:140	043898 LED E TS BATTE			
▶		0.				
Filter	Search All Details Manage screen layou	ts Help				
Navigation 🛞	 Sequence Accessories product 	Accessories product	Manufacturer	KPC	Accessories product	Description
Products	1 6956321800000	140043904			LED E TS batten 300 4.5W S 3000K BL	LED E T5 batten 300 4.5W S 3000K BL
Product: 140042808 LED	2 6956321800000	140043969			ledpanelrc-g sq298-11w- 3000-wh-ct	ledpanelrc-g sq298-11w-3000-wh-ct
JP1000000140043878 LED	3 6956321800000	140043903			led e t5 batten 600 9w s 3000k bl	led e t5 batten 600 9w s 3000k bl
Edit 🛞	4		6956321800000	OPT		Example optional products
San Baradinat						

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.

<u>Note</u>: 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 <u>Compano Help website</u>.

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.

<u>Important</u>: 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:

Beschikbare velden	Γ	-Geselecteerde velden		
Alle velden		Veld	Koptekst	Pos
- Alfabetisch per letter		Fabrikantscode omvattend onderdeel	Fabrikant	1
+ Per categorie		Productcode	Product	2
Standaard velden		Onderdeel fabrikantscode	Onderdeel	3
Product GTIN and Product part GTIN added as '0'-fields, because	_	Onderdeel code	Onderdeel	4
'code' is used instead	2	Product GTIN	GTIN	0
L		Onderdeel GTIN	GTIN	0

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

<u>Important</u>: 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:

Layout Properties Fields Memo			
- Available fields	Selected fields		
t All fields	Field	Header	Pos
- Alphabetically by letter	Product manufacturer code (gln)	Product manufacturer GLN	1
= by category	Product GTIN	GTIN	2
Standard fields	Accessories product manufacture code (gln)	Accessories product	3
	Accessories product GTIN	GTIN	4
	Line type	Line type	5
	Туре	Type of accessory code	6
Product and Accessory Code	Number of	Number of accessories	7
added as '0'-fields, because	Required	Required	8
GTIN is used instead	Product code	Product	0
	Accessories product code	Accessories product	0

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 <u>Compano Help website</u>:

- 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, <u>sales@compano.com</u>

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.

Layout Properties Fields Memo		- Selected fields			7
∎– All fields		Field	Header	Pos	
Alphabetically by letter		Alternative supplier item code	ALC	1	
- by category		Supplier item number	Item # alt.	2	l r
- Standard fields	<	Item Number	Item no.	3	11
		Supplier main item code	LC	4	
		Ма	ndatory fields		
Properties					1

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.

<u>Note</u>: 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:

Layout Properties Fields Men	10			
Available fields		-Selected fields		
t − All fields		Field	Header	Pos
Alphabetically by letter		Manufacturer code (gln)	Manufacturer	1
by category		Product code	Product code	2
t Standard fields		Optional product manufacturer code (gln)	Manufacturer	3
		Optional product list code	Optional product list	4
	>	Number of	Number of	5
	<	Sequence	Sequence	6

- Manufacturer code (GLN): Manufacturer Global Location Number
- Product code: Product code of the optional product(s)
- Optional product manufacturer code (gIn): 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.

🗟 Optional product selecti	on lists	Menu	View	Edit	Import / Export	» Optional product:	Optional pro
Filter	• Q	rch Import	(2) Help	•			
Navigation (8 - P	roduct code		Sequen	ce Number of	Optional product	Manufa
Optional product:Opti					Filte	rs can be selecte	ed on the

5. In the pop-up window:

Import File Excel-Optional-Products	-Lis Select	

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

6. Click on Next.

Import			
import			
Summary			
Test Importof file Excel-Optional-Produc with impactreport: Full Import van Optional product selection li Manufacturer code (gln), met terugv Product code Optional product manufacturer code Optional product code Number of Sequence	ts-List (1).xlsx sts met layout Example import op al waarde: 6956321800000 (gln)	tional product list en ve	elden:
Layout1			
Title	Products		
Import entity	Optional product select	ion list	- ×
Import layout	Excel import lay-out 'Ex	ample import optional p	oroduct li: 🔻 🗱 🖗 🖊
Archive not imported records	○ Yes No		
	Provinue	Next	Close

a. Import entity: Select the Optional product selection list

🔥 Compano Online Software

🍠 🌮 💭

- 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*.

Import			_
Import			
Summary			
Importof file Excel-Optional-Prod with impactreport: Full Import van Optional product sele Manufacturer code (gin), met Product code Optional product manufacture: Optional product code Number of Sequence	ucts-List (1).xlsx ction lists met layout Example import optional terugval waarde: 6956321800000 r code (gln)	product list en velden:	
Sattings			
Settings	Full		~
Reporting level			
Reporting level Is testrun	O Yes No		
Reporting level Is testrun Fill conversion list	O Yes ● No ○ Yes ● No		
Reporting level Is testrun Fill conversion list	O Yes ● No O Yes ● No		
Reporting level Is testrun Fill conversion list	Ores ● No Ores ● No		

- 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:

 Optional product sele _ 	ction I	ists Menu	View Edit	Import / Export	* Optional product:0	Optional product
Filter		Search Import	Help			
Navigation	\otimes	Product code	e Seque	ence Number o	of Optional product	Manufacturer
Optional product:Opti		140044055		1 2.00	Optional product	6956321800000
Edit	۲	<u>140044054</u>		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. <u>Note</u>: Both fields need to be present in your import layout, however only one of them needs to 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 (gIn): Manufacturer code (GLN) of the optional product
- Optional product list code: Code of the optional product list.



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

🥰 🌮 🛴

Import				
Summary				
Importof file Optional-product-list-impor with impactreport: Full Import van Product accessories met lay • Product manufacturer code (gln), me • Product code • Optional product manufacturer code • Optional product code • Broduct GTIN	rt.xlsx out Example imp it terugval waard (gln), met terugv	ort optional products er e: 6956321800000 val waarde: 695632180	n velden: 0000	
* Product GTIN				
Title	Blad1			
Import entity	Prod	uct accessories		- 🗙
Import layout	Excel	import lay-out 'Example	import optional product	ts' on Scr 🕶 🗱 🗭
Archive not imported records	○ Ye	es 🔍 No		

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.

Layout Properties Fields Memo			
Available fields	Selected fields		
∎ All fields	Field	Header	Pos
II [™] Alphabetically by letter	Main item code	Main item code	1
j	Supplier code	LC	2
Accessories item	Optional item Supp. code	KLC	3
The American Sector Pro-	Ontional item list code	KA	А

6 Inheritance of accessories and parts

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



<u>Note</u>: 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 histor
т	Required	Number of	Su	pplier	#Code	Description		
Group 1								
Item	No	1	FI2		140043898			
Item	No	1	FI2		140043904	LED E T5 batt	en 300 4.5W S 3000K BL	
Item	No	1	FI2	10. No.	140043967	LEDPanelRc-G	Sq598-36W-3000-WH-C	т
Group 2								
Item	No	1	FI2		140043958	LEDPanelRc-G	Sq598-36W-4000-WH-C	т
Item	No	1	FI2		140043969	LEDPanelRc-G	Sq298-11W-3000-WH-C	т
Item	No	1	FI2		140043970	LEDPanelRc-G	Sq298-11W-4000-WH-C	т
Product ac	cessories							
Item					6956712631046	LED E T5 batt	en 1200 18W 1600im 400	ок ст
Item					140043901	LED E T5 batt	en 1200 18W 1600lm 400	ок ст
Item					140043901	LED E TS batt	en 1200 18W 1600lm 400	OK CT X

7 Search

🥰 🌮 💭

这 Compano Online Software

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:

Draduct Classification	Model	ional Usor defined fields	Tre
Number of Items	- value		
Attachments	all	~	
Amount of attachments	= value	~	
Product accessories	has product	taco 🛩	
AddOnProductCount	= value	~	
IsAddOnProduct	= value	✓ O Yes O No O 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 M	1odel Overig Ver	rtalingen			_
Normproduct	gelijk 🔻				•
Code	begint met 🔹				
GTIN	begint met 🔹				
Fabrikant	gelijk 🔻				•
Speciaal					
Artikelen	alle 🔹]			
Aantal artikelen	= waarde 🔻				
Bijlage	alle 🔹]			
Aantal bijlagen	= waarde 🔹				
Toebehoren producten	alle 🔻]			
Product onderdelen	heeft product or 🔻				
Aantal onderdelen	= waarde 🔻				
Is onderdeel		🔘 Ja 🔍 Nee 🖲 Alles			
Assortimenten	alle 🔻]			
		Toepassen	Legen	Legen en sluiten	Opslaan als

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.

<u>Note</u>: 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 / InstalIData 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 <u>Ketenstandard Semantic Treehouse</u> > *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**.

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

Item exports						
Send export to						
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	iiii				
Price Reference date:	3/30/2021					
	_	_				_
			Export		lose	

8.2 Rules of thumb

🍠 🌮 💭

🗞 Compano Online Software

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.