



Compano Online Software

Manual Product & Item Relations COS PIM

version L4-4

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1 Introduction

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

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

These relations can be between:

- Product and product
- Item and Item

Note: The Dutch (2BA) and Belgian (InstallData) data pools only offer Product-Product relations in their *Unifeed* search engine. Relations at item level are not shown but will be supplied with (bulk) data downloads.

Product and Item relations are also included with the *BMEcat 2005 ETIM Guideline V4.0* exchange format or via **DICO's** Item Relation Message in the SALES005 format.

As of Compano software-version L04, the system for management of these product-product and item—item relations has been overhauled to better fit the export to branches standards and offer a more intuitive user-interface.

This manual describes how to handle relations between products and items in Compano Online Software, using this new Relations system.

1.1 Concepts

COS

Compano Online Software.

PIM

Product Information Management system.

Parent product/item

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

Child product/item

Part, Accessory or Choice product/item which is linked to a Parent Product or Item.

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

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 relation between both product (or items) can be indicated by linking them as predecessor and successor.

Choice products or items

Choice 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).

Enclosed items

Sometimes an item is not a single item, but rather a *set of items*, where each item in the set can also be ordered separately. The items in the set are therefore called *enclosed items*.

Compound products

A compound product consists of multiple products or parts. Think of a camera body and a lens. Both can be sold separately, but also as a kit. Such a kit of body and lens is called a composite product.

2 Types of relations

Between Products and Items several types of relations can exist:

- Predecessor – Successor
- Comparable
- Fits to
- Contains – Is part of (products only)
- Belongs to
- Cannot without
- Spare
- Mirrored
- Enclosed item (items only)

Relations can be between:

- Product – Product
- Item – Item

Example

Code	DICO	Code name	P-P	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 relation

I-I: Item-item relation

ID 1 → ID 2: Relation from 1 to 2

ID 2 → ID 1: Relation 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).

Product and Item relations can be exchanged using a industry standard format, such as DICO/SALES, BMEcat, DQR or FAB-DIS.

In DICO/SALES, relations are exchanged in the **ItemRelations.xml** file, however despite its name, both types of relationships (Product and Item) are exchanged.



Note: The *Enclosed Item relation* is an exception; this relation will be communicated in the **PriceCatalogue.xml** file of DICO/SALES005.

Important: In the listing below *Product – Product* relations are indicated, however most relationship types are also applicable to *Item – Item* relations, unless otherwise indicated.

2.1 Opvolger - Successor [OPV – SUC]

Product 1 will be replaced by **product 2**, thus **product 2** is the new product. This is a 1 to N relation, as for **product 1** there could be *multiple successor products* and thus more than 1 relation may be of the type *Successor*.

2.2 Voorganger - Predecessor [VOO – PRE]

Product 1 has **product 2** as its predecessor. This is a 1 to N relation, as for **product 2** there could be multiple predecessor products and thus more than 1 relation may be of the type *Predecessor*.

Example
2 older types of boiler are replaced by 1 new, modern type.

2.3 Alternatief - Comparable [ALT – COM]

Product 1 and **product 2** are technically not exactly the same, however **product 2** can still replace **product 1**, thus **product 2** is an Alternative for **product 1**.

Note: The relation *Alternative* can be reciprocal, however as this is not always the case a reciprocal relation has to be set manually in COS, i.e., *both relations* should be set.

Example
A wrench with both a ring and open-end of size 8. The alternative is a ring wrench with both sizes 8 and 10. Note that the size 8 only wrench is not an alternative to the spanner with size 8 and 10, as size 10 will be missing.

2.4 Technisch passend – Fits to [TEP -FI2]

Product 2 fits to **product 1**; the two products together form a solution based on their specifications. Note that in this case there is *no main product*; both products are needed.

Note: The relation *Fits to* can be reciprocal, however as this is not always preferable, a reciprocal relation must be set manually in COS, i.e., *both relations* should be set.

Example
4 types of pipes fit on 17 different fittings. Of these 4 types of pipes only 2 types are commonly used. For commercial purposes, the reciprocal *Fits to* relation is only set for these 2 types of pipes.

2.5 Onderdeel van – Is part of [ONV – IPO]

Product 2 is part of **product 1**; together with one or more other parts (products) it constitutes a whole.

This relation is reciprocal with *Bevat onderdeel - Contains*, thus if there is a *Is part of* relation, there must also be a *Contains* relation.

Note: This type of relation *only* applies to Products.

2.6 Bevat onderdeel – Contains [BEO – PAR]

Product 2 contains **product 1** as a part; together with one or more other parts (products)
Product 2 constitutes a whole.

This relation is reciprocal with *Onderdeel van – Is part of*. Also, this relation could be linked with *Reserve – Spare*; thus, if there is a *Bevat onderdeel - Contains* relation, there must also be a *Is part of* or *Spare* relation.

2.7 Hoort bij – Belongs to [HOB – BE2]

Product 2 is an accessory to **Product 1**, thus **product 2** *Hoort bij – Belongs to* **product 1**.

Note: The relation *Belongs to* can be reciprocal, however as this is not always preferable, a reciprocal relation must be set manually in COS, i.e., *both relations* should be set.

Example
 A certain type of Toilet Seat belongs to a type of Toilet.

2.8 Kan niet zonder – Cannot without [KNZ -CNW]

Product 1, together with **Product 2**, constitutes a (working) whole and this relation is *mandatory*; **product 2** *must be added to* **product 1**.

Example
 For a certain type of Bath tub, a set of feet need to be added; the bath tub cannot be installed without the feed.

Note: the DICO/SALES005 standard supports the option where **Product 2** is part of a *selection list* from which one product must be chosen. This option is not implemented¹ in COS, however different options-for instance, two different sets of feet can be used for this bath tub-can be grouped together with the Group Code.

2.9 Reserve – Spare [RES – SPA]

Product 2 is a *Reserve* onderdeel – *Spare* part of **product 1**.

Note: This relation is similar to *Is part of*, however Spare part usually indicates that the part can be replaced by anyone, where a part of relation type *Is part of* usually requires a mechanic.

Example
 A wall-mounted gas heater contains a gas block.

2.10 Gespiegeld – Mirrored [GSP – MIR]

Product 2 is the mirrored version of **product 1**.

¹ 20 July 2023



Note: This relation is reciprocal and needs to be set for *both products*.

2.11 Ingesloten artikel – Enclosed item (ENC)

Sometimes an item is not a single item, but rather a *set of items*, where each item in the set can also be ordered separately. The items in the set are therefore called *enclosed items*.

Item 1 is a set of items, where **Item 2, 3** and **4** are part of this set; the relation of **Item 2, 3** and **4** are set as *Enclosed item* to **Item 1**.

Note: This type of relation *only* applies to Items.

Examples

- Central heating boiler + thermostat + expansion vessel
- Valve + control knob + color ring

3 Setting relations

Relations between products and items can be set in COS at both the Product and Item level. Needless to say, *both records need to be present* in COS before a link between them can be established².

Product and Item relations can be established in COS:

- Manually for a single product/item pair
- Manually for multiple product/item pairs
- Via import; see chapter [7. IMPORT OF PRODUCT/ITEM RELATIONS](#)

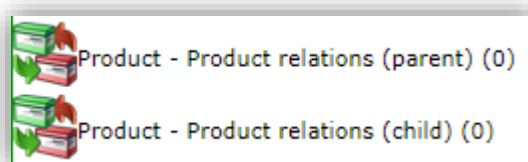
This manual first describes how to *manually* set single and multiple relations between Product-Product and Item-Item pairs.

The basic procedure is the same for all types of relations. Relationship types that differ from the basic procedure, are explained in Chapters 4 and 5.

3.1 Reciprocal relations

Relations are set between a **Product (parent)** and **Product (child)** or **Item (parent)** and **Item (child)**.

Often, the relation can (or needs to) be set both ways. The Compano interface provides for both options:



- Product- Product relations (parent): Sets a relation from *parent to child*, where the selected product (parent) is **product 1**, and the child product is **product 2**.
- Product- Product relations (child): Sets a relation from *child to parent*, where the selected product (child) is **product 2**, and the parent product is **product 1**.

In addition, multiple relations can be set per Product or Item. For instance, one Product might have multiple successor Products.

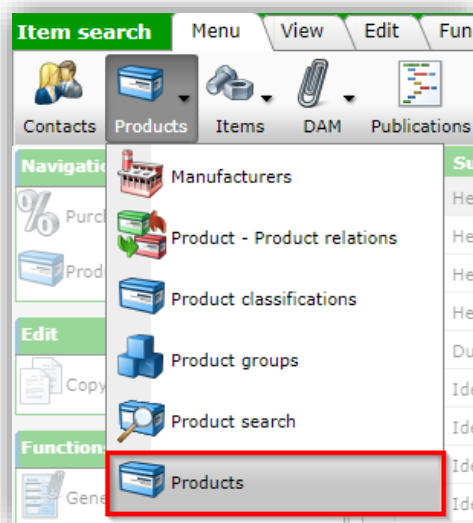
3.2 Manually setting a single relation

Note: All examples given below, are for setting a Product-Product relation; the procedure for Item-Item relations is similar and can be started from any Item overview.

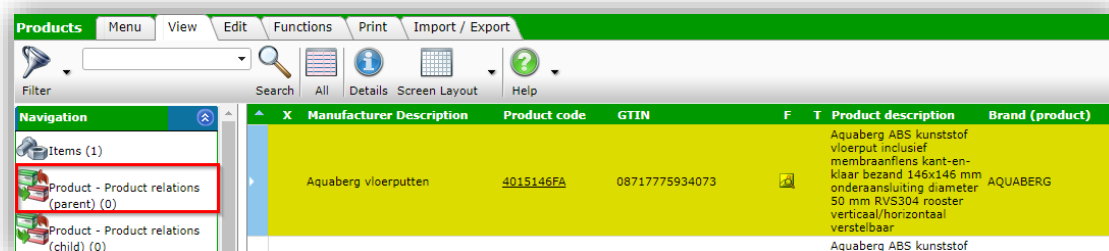
To set a relation for a single product pair:

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

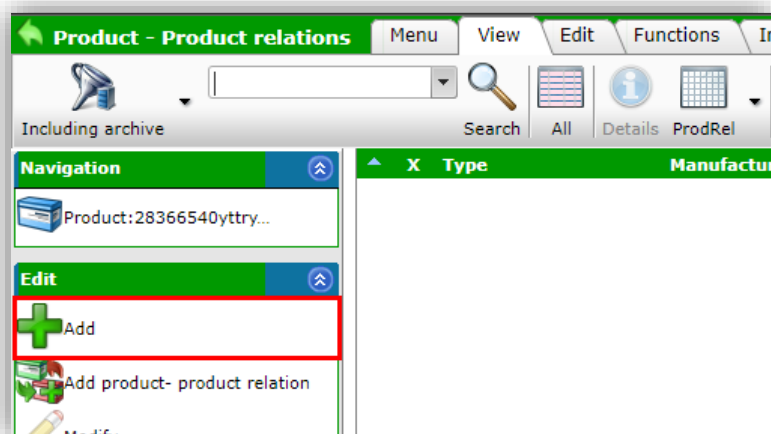
² An exception to this are Predecessor relations. Relations to Predecessor Products and Items are handled by setting relations between product/item numbers or GTINs, either manually or by making use of an import.



2. On the Overview, select the (parent) product for which to set the relation and, under Navigation, click on *Product – Product relations (parent)*.



3. On the next screen, click on *+Add* to add a *single* Product - Product relation:



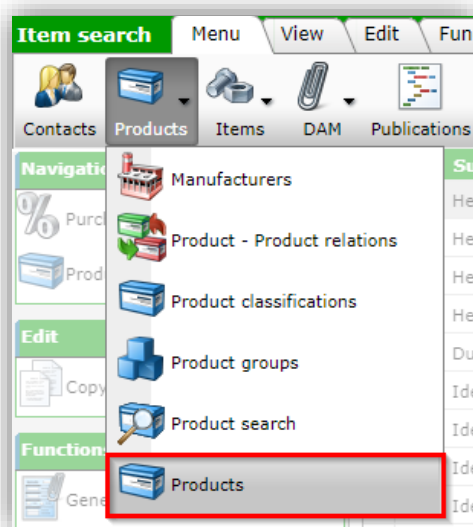
4. In the pop-up window:

- a. Type: Select the type of relation.
 - b. Manufacturer 1: Displays the Manufacturer of the parent product.
 - c. Product 1: Displays the selected parent product.
 - d. Manufacturer 2: Select the Manufacturer of the child product³.
 - e. Product 2: Select the child product.
 - f. Fill out any other necessary fields. Note: For detailed instructions on each relation type, see the relevant section under chapter [4 PRODUCT - PRODUCT RELATIONS](#) and chapter [5 ITEM - ITEM RELATIONS](#).
5. Save the record.

3.3 Manually setting multiple relations

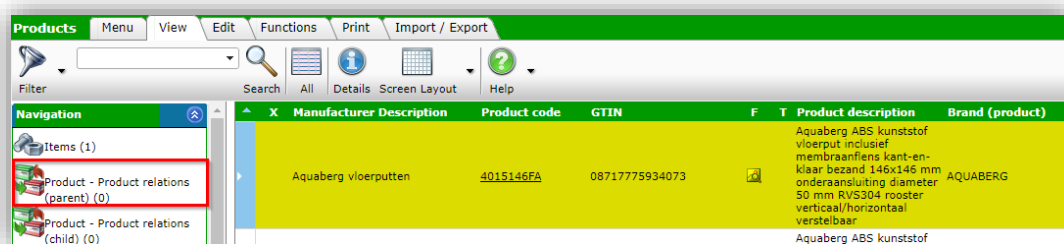
To set relations for multiple product or item pairs:

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

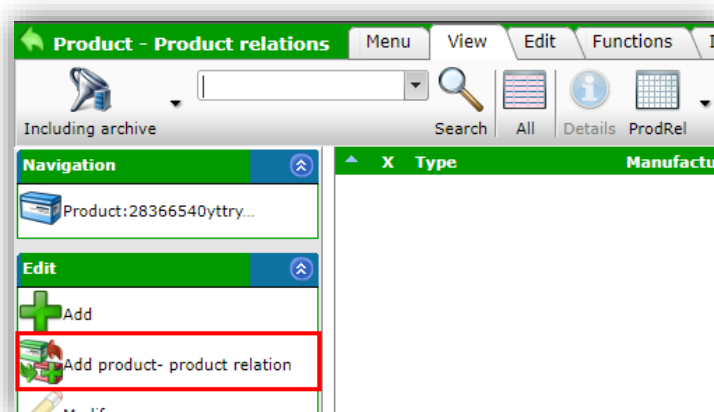


³ If only *one* manufacturer/supplier is available in COS PIM, then Manufacturer 2 / Supplier 2 is automatically filled out.

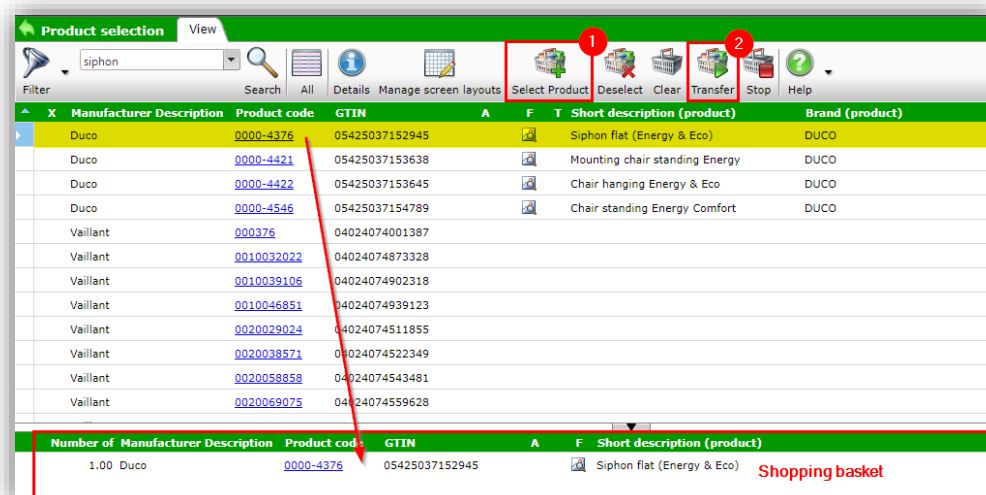
- On the Overview, select the product for which to set the relation and, under Navigation, click on *Product – Product relations (parent)*.



- On the next screen, click on *+Add product-product relation* to add *multiple* Product - Product relations:



- On the next screen:



- Use the Filter and Search options to find all the child products that have a relation with the parent product.
- Click on *Select Product* (1) to add child products to the Shopping Basket (bottom part of the screen).

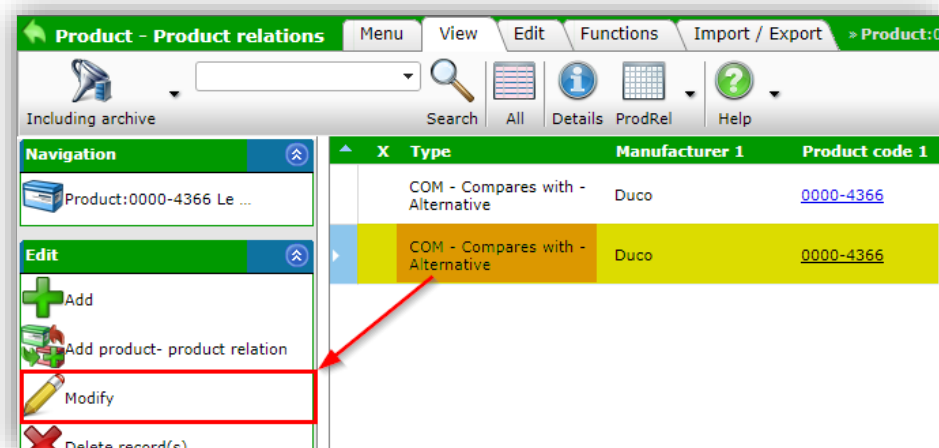
- c. Next, click on *Transfer* (2) to transfer the selected child products to the parent product, thus establishing a (F12) relation⁴.

3.4 [Re]set relation type

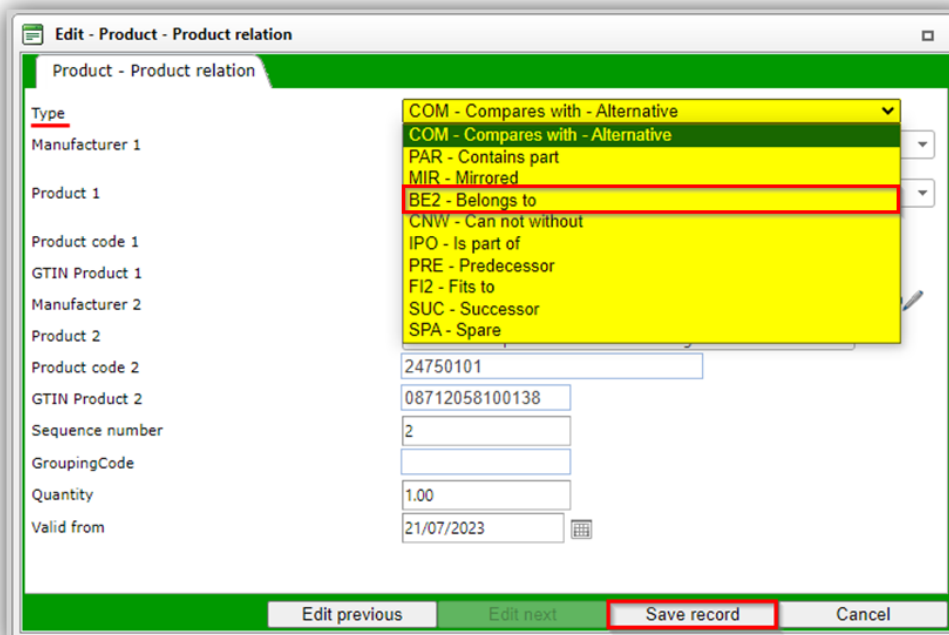
The relation Type indicates which type of relation exists between Parent and Child. The corresponding Relation Type Code will be included/used in the industry standard file (DICO/SALES, BMEcat, DQR, FAB-DIS).

To (re)set the relation type:

1. Select the child product and, under Edit, click on *Modify*:



2. In the pop-up window:



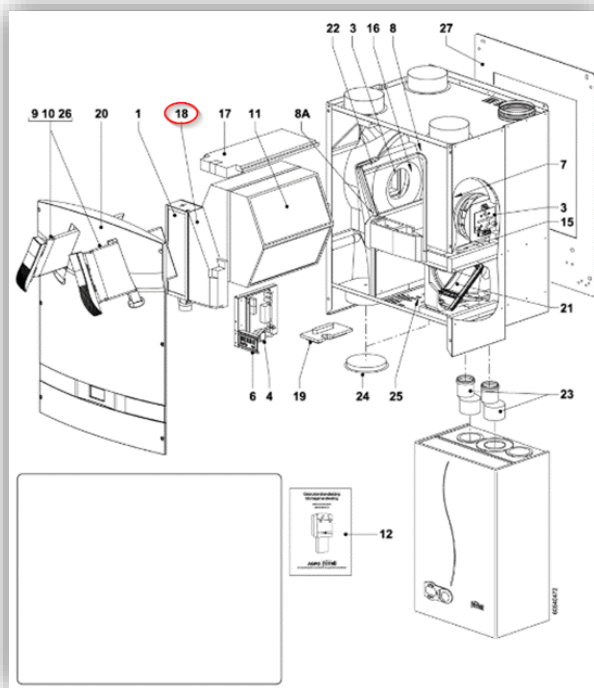
⁴Important: All relations added this way will, by default, be of relation type **F12 / TEP**, as this is the most common relationship type. Should you need to reset the relationship type, please see the next paragraph.

- a. Type: Select the correct relation type.
3. Save the record.

3.5 Sequence number [Order and 'Exploded View']

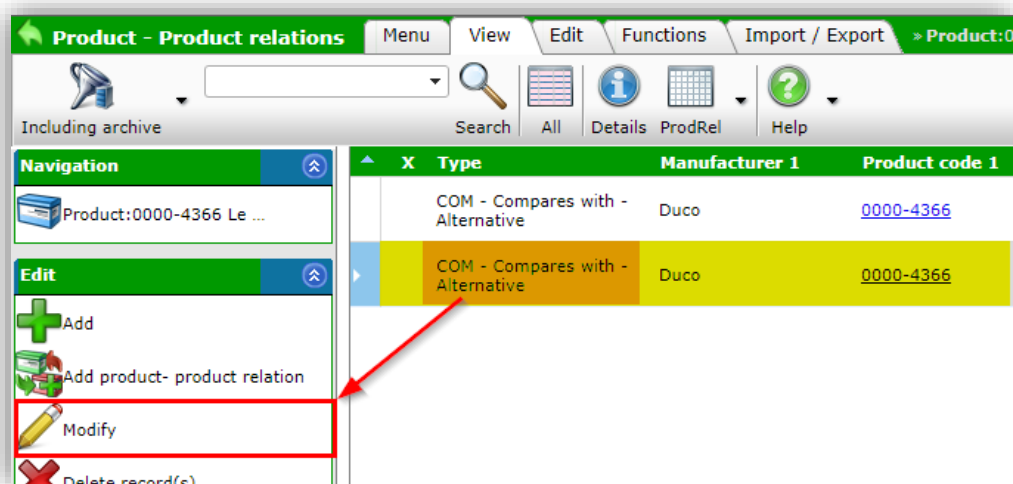
The Sequence Number can be used to:

- Order Product relations on the Relations tab.
- Indicate the position of a Part on an *Exploded View* drawing:



To set the *Sequence number* of a relation:

1. Select the child product and, under Edit, click on *Modify*:



2. In the pop-up window:

Edit - Product - Product relation

Product - Product relation

Type: #COM

Manufacturer 1: Heering Kunststof Profielen BV (8712058000001)

Product 1: 28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108097

Product code 1: 28210460

GTIN Product 1: 08712058108097

Manufacturer 2: Heering Kunststof Profielen BV (8712058000001)

Product 2: 28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108097

Product code 2: 28210460

GTIN Product 2: 08712058108097

Sequence number: 5

GroupingCode: Heering group

Quantity: 1.00

Valid from: 24/08/2023

Buttons: Edit previous, Edit next, Save record, Cancel

- a. Sequence number: Type a sequence number.
3. Save the record.

3.6 Grouping relations

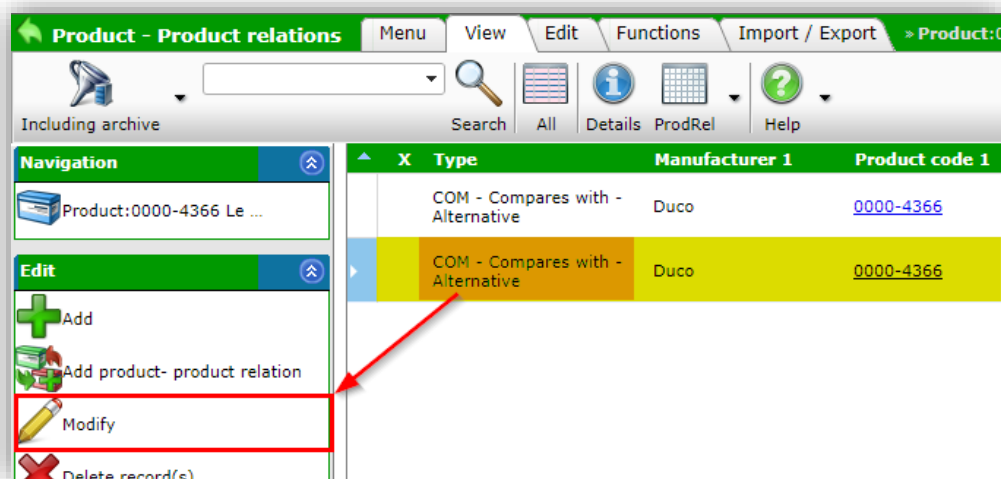
Relations can be grouped by entering a Grouping Code for each relation. Relations with the same code will be grouped together on the Relations tab of a Product (or Item):

Type	IsRequired	GLN Manufacturer 2	Product code 2	GTIN Product 2	Quantity
Heering group					
#FI2	No	8712058000001	28366540	08712058058477	1
#COM	No	8712058000001	28210460	08712058108097	1
#COM	No	8712058000001	28366540	08712058058477	1
Keralit					
#CNW	Yes	8712058000001	24750101	08712058100138	1
#BE2	No	8712058000001	24300129	08712058102569	1

In addition, a Group Code can also be used to group related products together on a website or web shop, as the code can be exported in a data feed.

To add a group code to a relation:

1. Select the child product and, under Edit, click on *Modify*:



2. In the pop-up window:

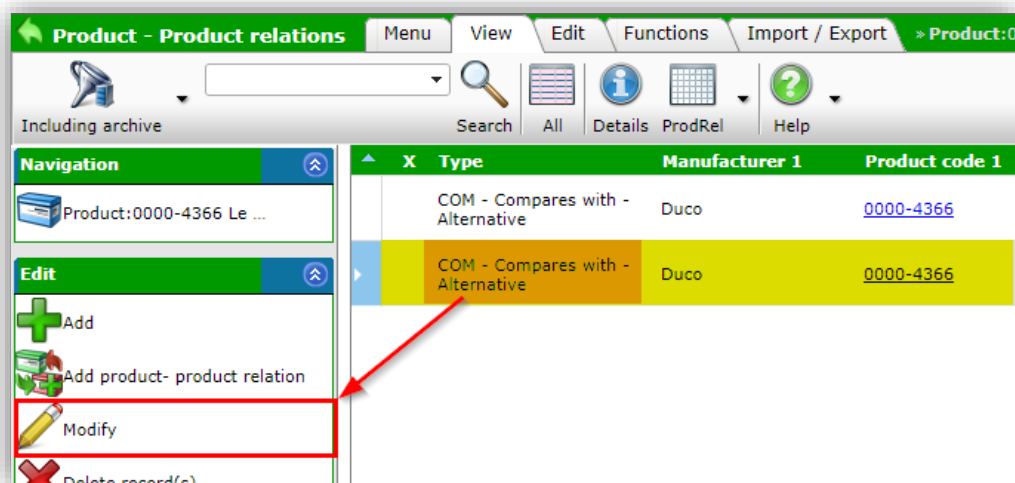
- a. Grouping Code: Type a code for the group.
3. Save the record.

3.7 Quantity

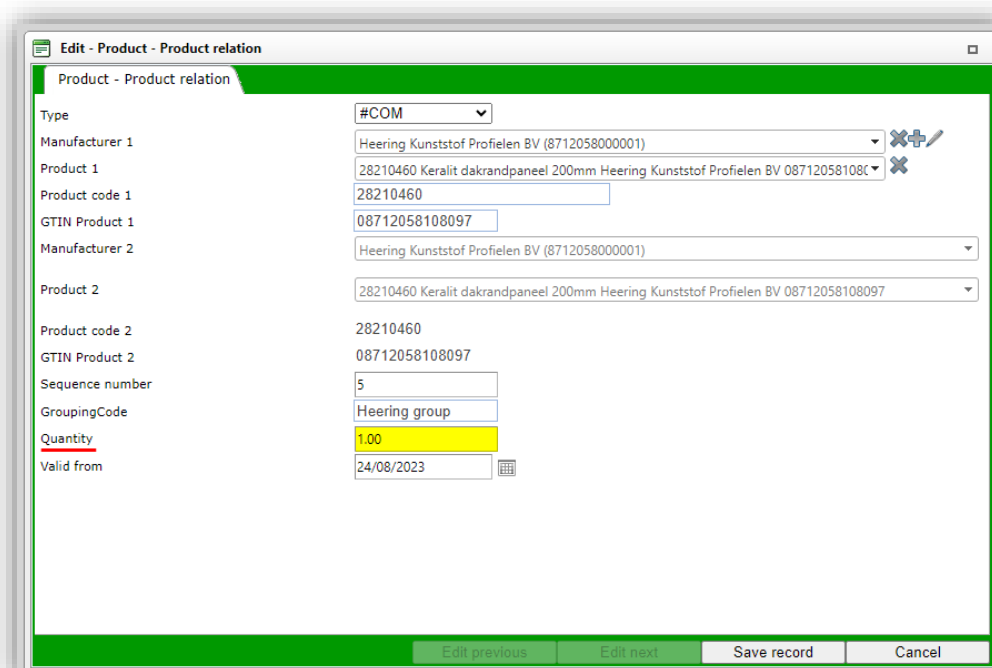
Sometimes multiple instances of a relation are required, for instance for a bathtub four feet are necessary parts. The number of instance required can be set using the Quantity field.

To the quantity of a relation:

1. Select the child product and, under Edit, click on *Modify*:



2. In the pop-up window:

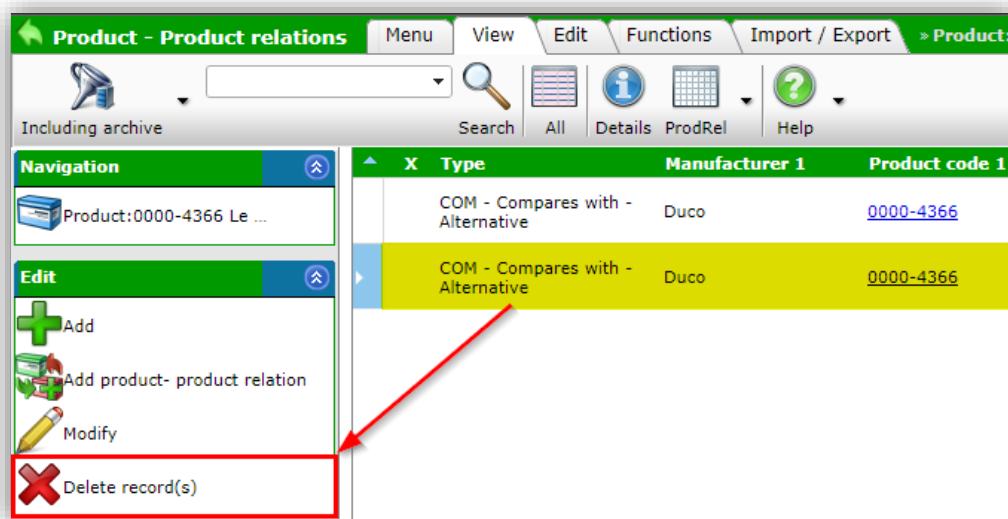


- a. Quantity: Type a number to indicate the required quantity of a relation.
3. Save the record.

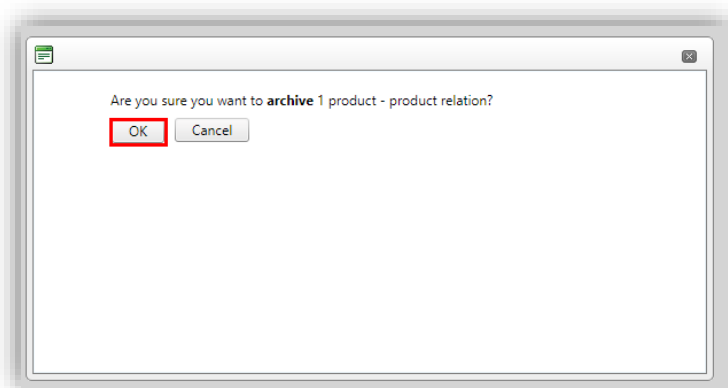
3.8 Archiving / Deleting relations

Relations can be archived or deleted, through the *Delete* function:

1. On the Product -Product relations Overview, select the Parent of Child product and, under Edit, click on *Delete record(s)*.



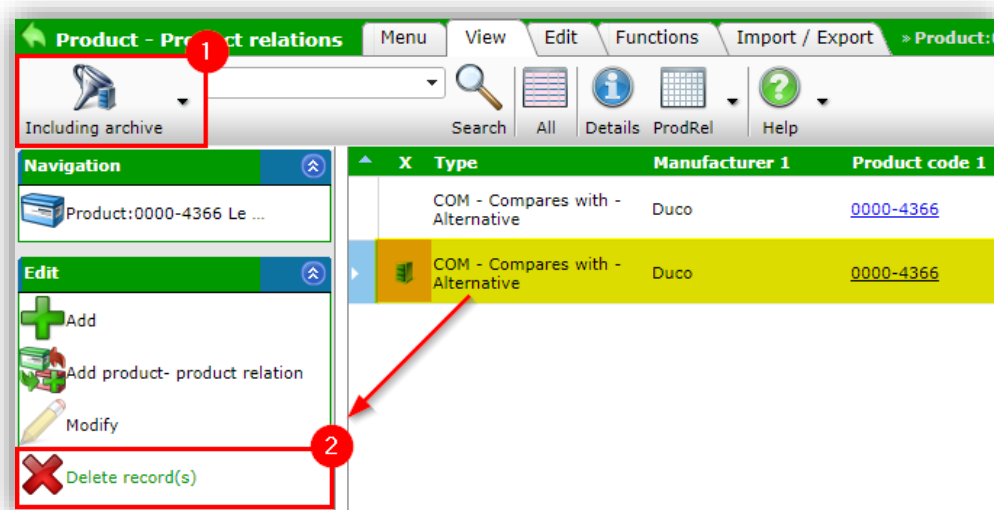
2. On the pop-up window, click on *OK* to confirm:



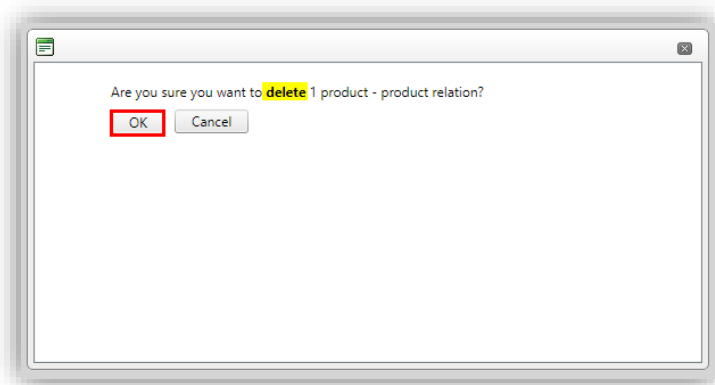
3. Note that the relation will first be *Archived*.

To delete a relation, a further step is necessary:

1. On the Product -Product relations Overview, first set the Filter to Including Archive, then select the archived relation and, under Edit, click on *Delete record(s)*.



2. On the pop-up window, click on *OK* to confirm:



3. The relation will now be irretrievably deleted.



4 Product - Product relations

Product - Product relations can be between:

- Predecessor product and successor product
- Product and alternative product
- Product and technical fitting product
- Product and product (spare) part
- Product and product accessory
- Product and mirrored product

Product – Product relations can be set through the Parent – Child method; see chapter [3 SETTING RELATIONS](#).

For relation types where this method differs or needs explanation, see the remainder of this chapter.

4.1 Predecessor – Successor [PRE / SUC]

When products are phased out, they often get an (equivalent) successor. Apart from the Parent – Child method, these predecessor – successor relations can also be set via **Product Predecessor/Successor Code** or **GTIN**, using the Edit – Product method described below.

Note: When using *Product Codes* to set predecessor-successor relation, this type of relation will at the same time be recorded as a Product-Product relation:

Product - Product relations					
Menu View Edit Functions Import / Export > Product: 140043898 Montagebalk T5...					
Including archive Search All Details ProdRel Help					
X	Type	Manufacturer 1	Product code 1	Short description (product)	Manufacturer 2
	Successor	Opple	140043898		Opple
					140044096

To set *predecessor* and *successor* relations via Product Codes and/or Product GTINs:

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

Products				
Menu View Edit Functions Print Import / Export				
Filter Search All Details Screen Layout Help				
Navigation	Archived	Manufacturer Description	Code	GTIN
Edit + Add ✎ Modify ✖ Delete record(s) ✎ Line edit on		Opple	140043898	06956712666215
		Opple	140043899	06956712666222
		Opple	140043900	06956712666239
		Opple	140043901	06956712666246
		Opple	140043902	06956712666253
		Opple	140043903	06956712666260

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

- a. Code successor⁵: Fill out the product code of the successor.
- b. GTIN successor: Fill out the product GTIN of the successor.
4. *Save* the record.

Notes:

- Relations established through Edit Product/Item will only establish a product-product or item-item relation when the Product codes or Item codes are used; use of the GTIN codes will *not* result in a product-product or item-item relation.
- When entering a product code or item code, the application will try to identify an existing predecessor or successor record, but if it cannot be found, the predecessor or successor code will be saved but a product-product or item-item relationship will *not* be established.

4.1.1 Multiple Predecessors / Successors

The Product/Item-relations system allows for setting *multiple* predecessors and/or successors.

Example

Both boiler types **S100** and **S100-A** will be replaced with *one* new type: **SA-100**. In this case, boiler **SA-100** will have *two* predecessor relations.

Simply add as many predecessor or successor relations as needed.

Note: Multiple predecessors / successors will *not* be reflected in the Product – View/Edit interface, as this allows only for *one* predecessor / successor to be set.

⁵ Either product code or product GTIN will suffice, however filling out both fields is recommended.

5 Item - Item relations

Item – Item relations can be between:

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

Product – Product relations can be set through the Parent – Child method; see chapter [3 SETTING RELATIONS](#).

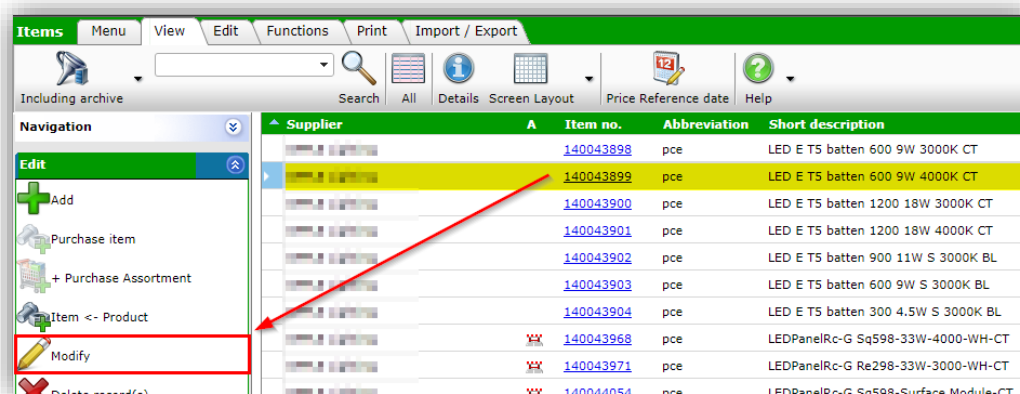
For relation types where this method differs or needs explanation, see the remainder of this chapter.

5.1 Predecessor/Successor [PRE / SUC]

When items are phased out, they often get an (equivalent) successor. Apart from the Parent – Child method, these predecessor – successor relations can be via Item Predecessor/Successor Code or GTIN.

To manually set *predecessor* and *successor* relations via item codes or product GTINs:

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 successor: Fill out the item code of the successor.
 - b. GTIN successor (optional): Fill out the item GTIN of the successor.
4. *Save* the record.

Notes:

- Relations established through Edit Product/Item will only establish a product-product or item-item relation of type Predecessor or Successor when the *Product code* or *Item code* are used; GTIN predecessor or successor codes will *not* result in parent-child relation.
- When entering a product code or item code, the application will try to identify an existing predecessor or successor record, but if it cannot be found, the predecessor or successor code will be saved but a product-product or item-item relationship will *not* be established.

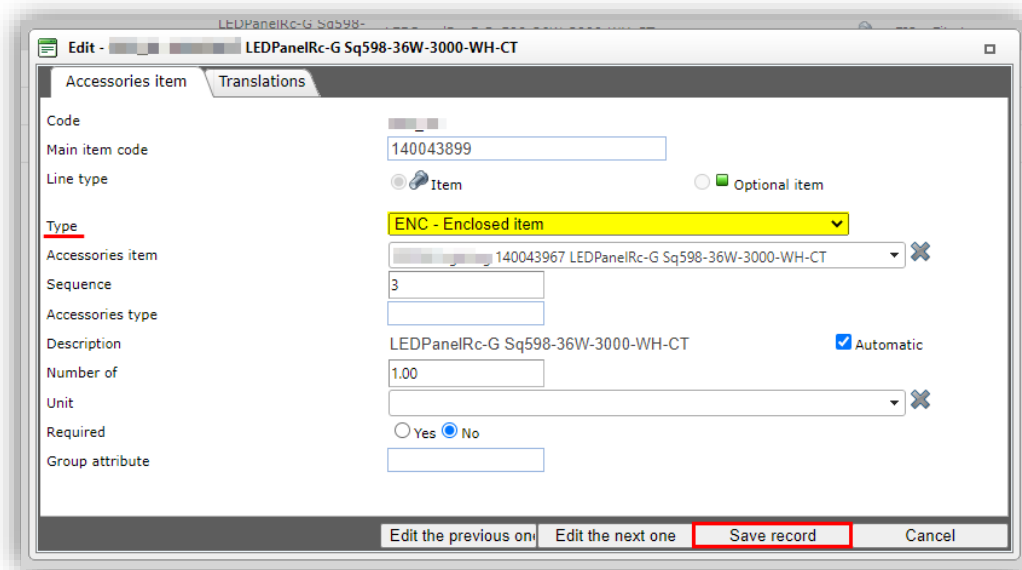
5.2 Enclosed items (ENC)

Sometimes an item is not a single item, but rather a *set of items*, where each item in the set can also be ordered separately. The items in the set are therefore called *enclosed items*. Often, the set has a different price which is not the sum of the price of the individual items.

Examples

- Central heating boiler + thermostat
- Valve + control lever

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



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.xml (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.

6 Choice Products/Items

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

Note: Choice 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 (s)he wants.

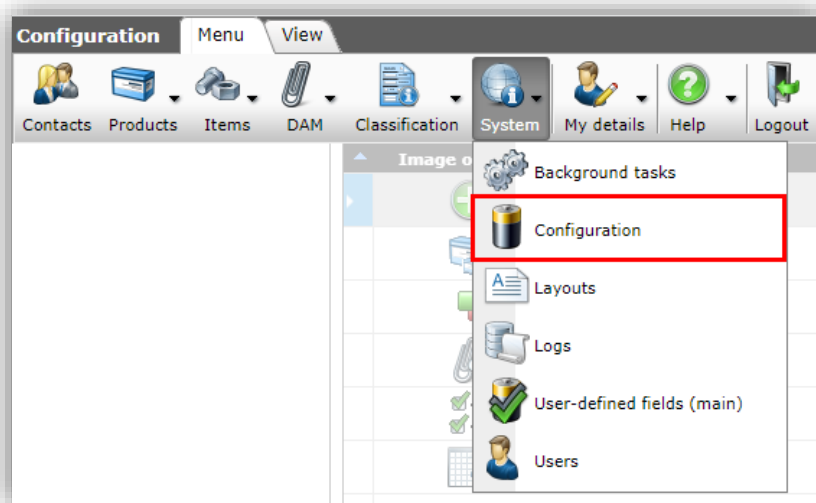
Note: In the remainder of this chapter, an example for Choice Items will be given; the procedure is similar for Choice Product.

6.1 Create selection list

Choice products and items have to be selected from a *Selection List*, either a **Choice Products Selection List** or a **Choice Items Selection List**.

To create a selection list:

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



2. For an Choice Item Selection List, choose *Items choice list*, for an Choice Product Selection List, choose *Products choice list*.

Item choice list	Choice items selection list
Condition classifications	Division, Paired condition group
Condition types	Central purchase condition, Purchasing Condition
Conversion tables	Conversion Value, ETIM Product class feature
Countries	Address, Item, Assortment land, Product
Currencies	Supplier
Customer groups	Purchasing contract, Contact, Item surveillance, Salescontract
Email template	
Field chapters	User-defined field
Item accessories	Item
Item groups	Attachment, Item, Item group, Publication
Languages	Attachment, Contact, Country, Environment, Translation field, Layout language, Synonym, Visitor
Memos	
Packing forms	Central purchase condition, Item, Purchasing Condition
Periodic tasks	
Product accessories	Product
Product choice list	Choice product selection list

- On the next screen, first create a Selection List⁶, by clicking on *+Add*

The screenshot shows the 'Choice items' menu with tabs for Menu, View, Edit, Functions, and Imp. The 'Edit' tab is active. In the 'Edit' section, the '+Add' button is highlighted with a red box. The 'Navigation' section shows 'Choice items selection list (2)' and 'Configuration'. The 'Supplier' section shows 'SCHNEIDER' and 'TAP'.

- In the pop-up window:

The screenshot shows the 'Add - New choice item' pop-up window. It has a 'Choice item' tab. The 'Supplier' field is a dropdown menu with 'SCHNEIDER' selected. The 'Code' field is a text input with 'TAP' entered. The 'Description' field is a text input with 'Choice taps selection list' entered. At the bottom, there are three buttons: 'Add next record', 'Save record' (highlighted with a red box), and 'Cancel'.

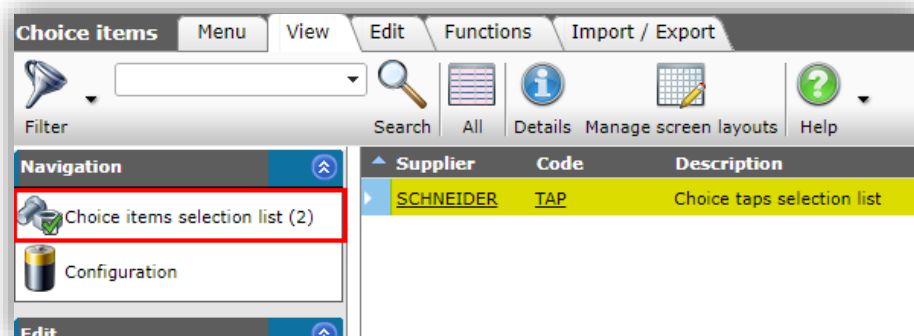
- Supplier: Select the supplier of the choice items.

⁶ The example in this paragraph is for creating an Choice Items Selection List, however the procedure for creating an Choice Products Selection List is similar.

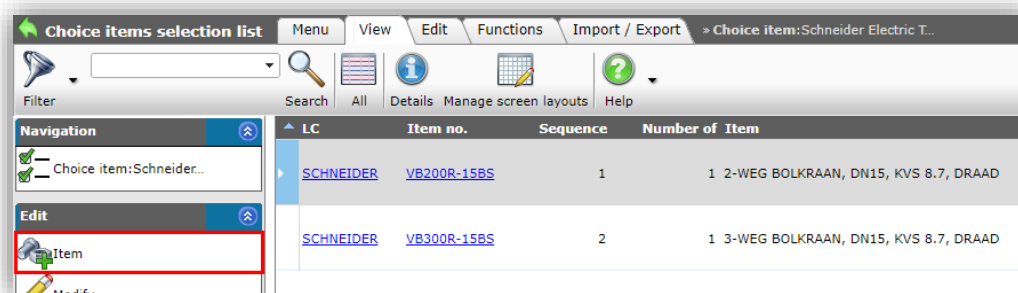
- b. Code: Type a (short) code for this selection list.
- c. Description: Type a description for this selection list.
5. Save the selection list.

The selection list can now be populated with choice items:

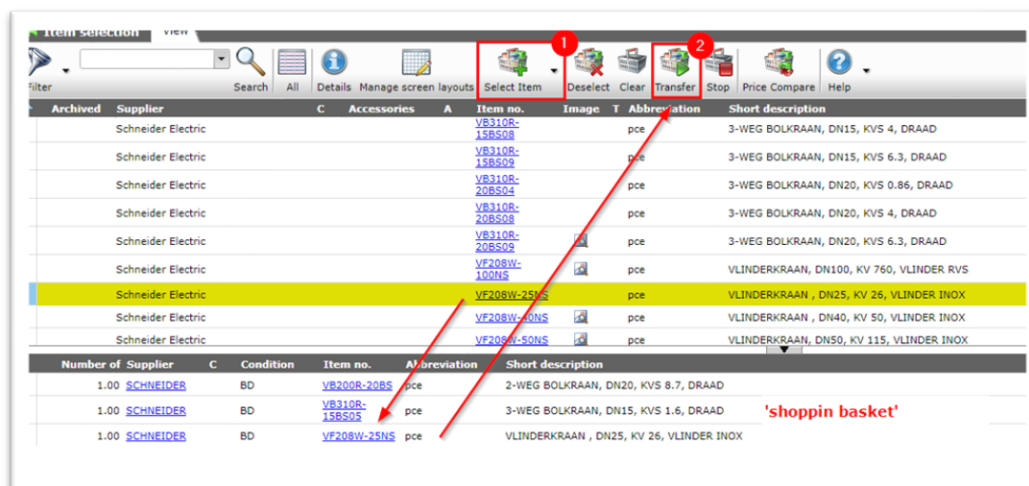
1. With the saved list selected, under *Navigation*, click on *Choice items selection list*:



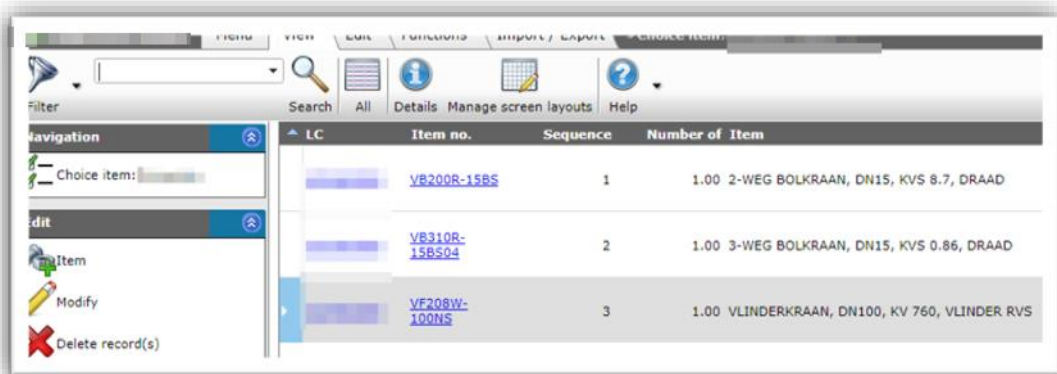
2. On the next screen, click on *+Item* to add choice items to the selection list:



3. On the next screen, select one or more choice 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:



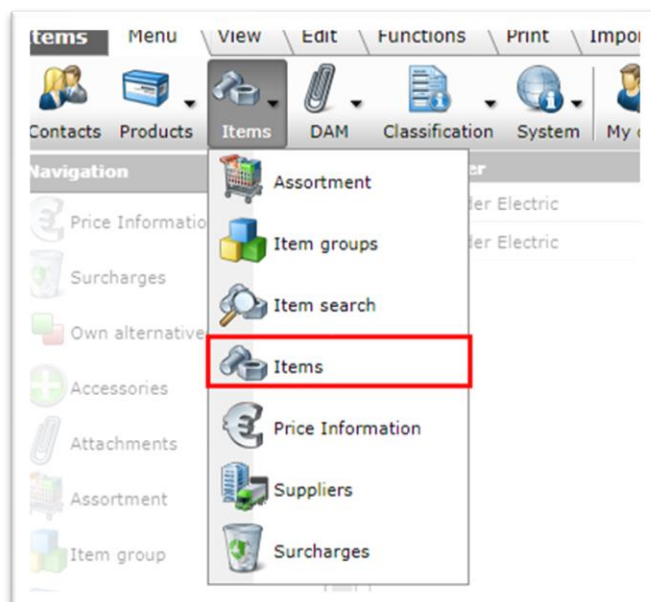
4. Next, use the *Transfer* button (2) to transfer the items to the selection list:
5. After the items have been transferred, you will return to the *Choice items selection list* overview, which will now contain choice items:



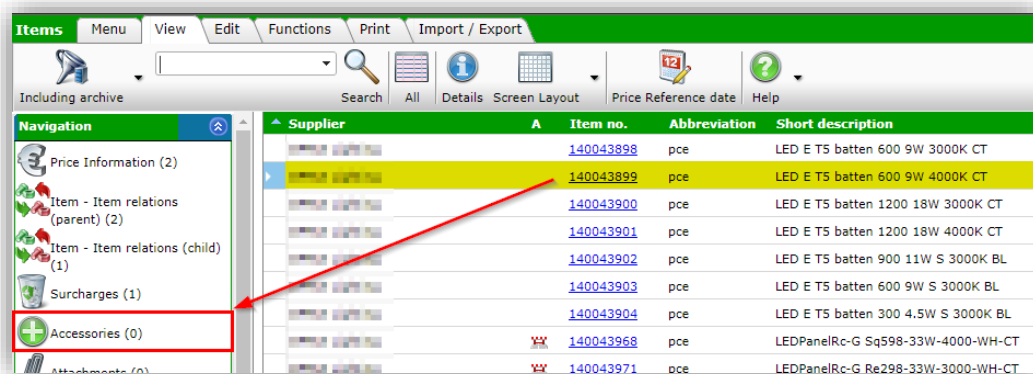
6.2 Add selection list to Item

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

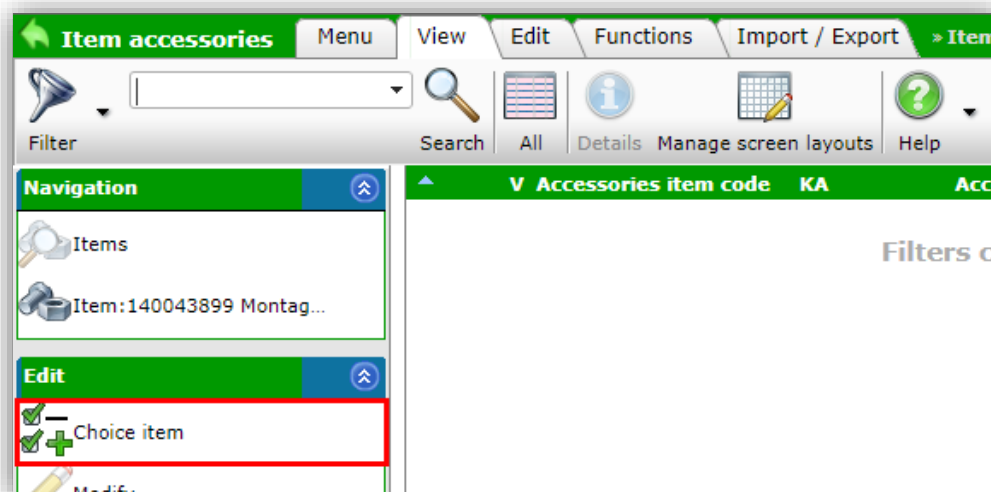
1. Through the *Menu*, go to *Items > Items*.



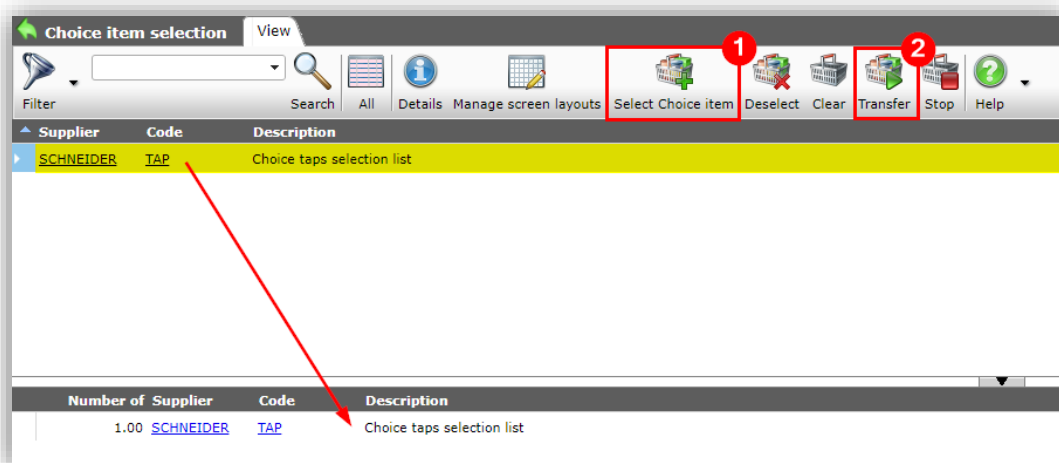
2. Select the item where you need to add the selection list and, under *Edit*, click on *Accessories*:



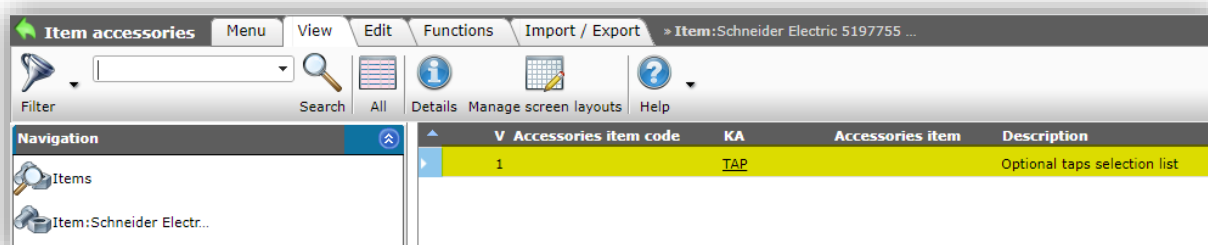
3. On the next screen, under *Edit*, click on *+Choice item*.



4. On the next *Choice item selection* screen, select any selection list and either double-click or use the *Select Choice Item* 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 Item.
6. After list been transferred, you will be redirected to the Item accessories overview, which will now contain an choice items list:

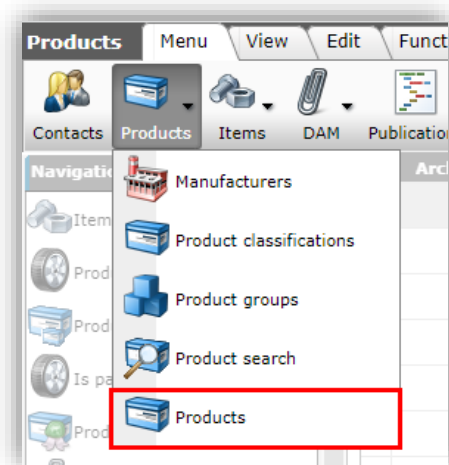


6.3 Add selection list to Product

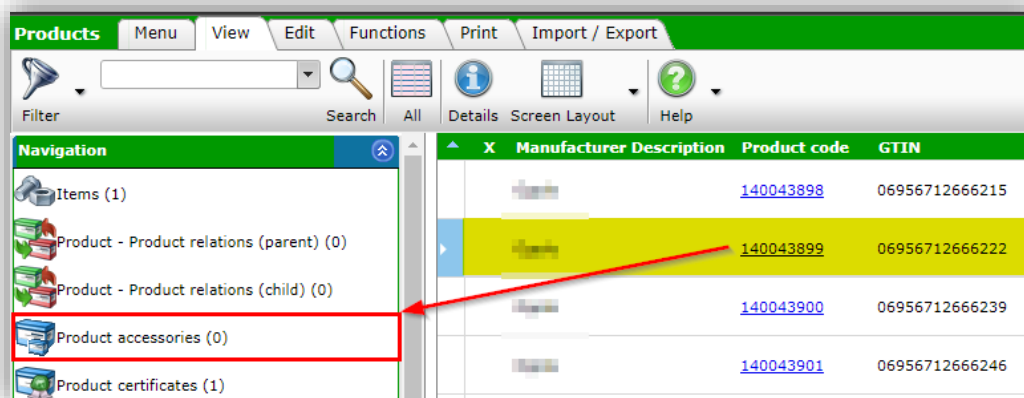
The procedure for creating an Product choice *selection list* is similar to the one for Choice Items, see paragraph [6.1 CREATE SELECTION LIST](#).

To add an Product choice selection list to a Product:

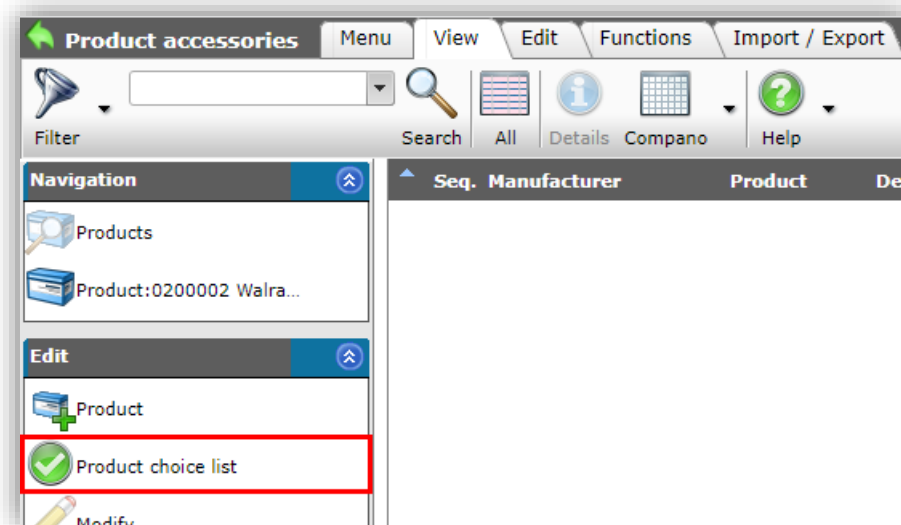
1. Through the Menu, to Products > Products:



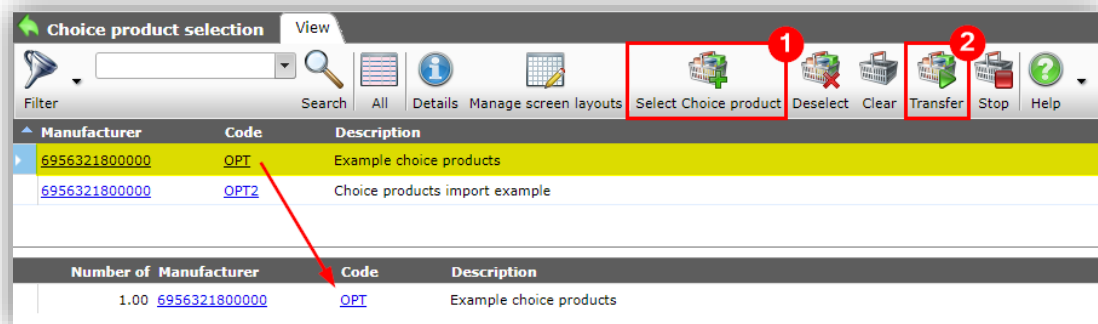
2. Next, via the Navigation menu, go to Product accessories:



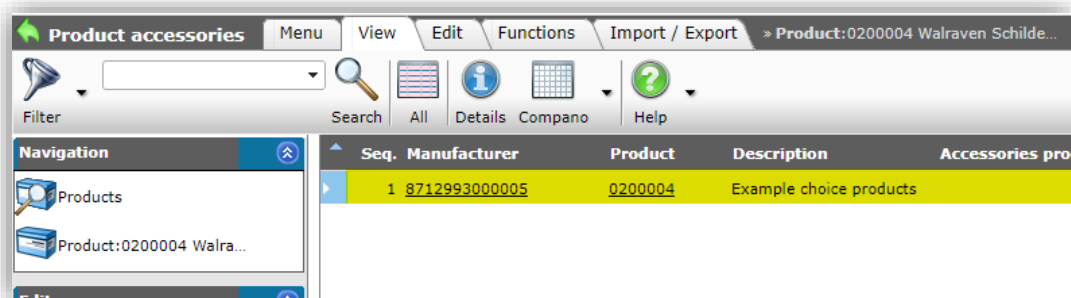
3. In the next window, select a Product and, under Navigation, click on *Product choice list*.



4. On the next screen, select any selection list and either double-click or use the *Select Choice 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 the list has been transferred, you will be redirected to the Product accessories overview, which will now contain an choice products list:



7 Import of product/item relations

Product and Item relations can be imported by using:

- An industry standard format
- An Excel data file with appropriate import layout

7.1 Industry standard import

Product and Item relations can be imported using the following industry standard formats:

- DICO/SALES
- BMEcat

7.1.1 DICO/SALES

When using a DICO/SALES formatted data file:

- Product relations will be imported (option)
- Item relations will be imported (option)
- Enclosed item relations (ENC) will be imported (option)
- Relations in COS which are not present in the data file, will be archived (only with a *mutation code 9* data file⁷)

Import

Import

Summary

Test Import with format SALES0051 of file SALES005_DirectProfile_van_Itho_Daalterop_(SA_MF)_20230904_143118_bzip2.zip with impactreport: Full

Delta import of manufacturers from file productdata.xml
Delta import of products from file productdata.xml
Delta import of etim product features from file productdata.xml
Delta import of certificates from file productdata.xml
Delta import of product certificates from file productdata.xml
Delta import of attachments from file productdata.xml
Delta import of manufacturers from file pricecatalogue.xml
full import of items from file pricecatalogue.xml
Delta import of attachments from file pricecatalogue.xml
Delta import of item - item relations from file pricecatalogue.xml
Delta import of item - item relations from file itemrelations.xml
Delta import of product - product relations from file itemrelations.xml

Settings

Reporting level: Full

Is checkrun: ☒ Yes ☐ No

Selected Files:

- ☒ Delta import of manufacturers (product)
- ☒ Delta import of products
- ☒ Delta import of etim product features
- ☒ Delta import of certificates
- ☒ Delta import of product certificates
- ☒ Delta import of attachments (product)
- ☒ Delta import of manufacturers (item)
- ☒ full import of items
- ☒ Delta import of attachments (item)
- ☒ Delta import of item enclosure item relations
- ☒ Delta import of item relations
- ☒ Delta import of Product - Product relations

Previous Next Close

⁷ Note: Any relations which have the 'archived' status in the data file, but which are not present in COS will *not* be imported.

7.1.2 BMEcat

BMEcat does *not* support all relation types which can be defined in COS. In addition, BMEcat does not distinguish between product - product relationships and item - item relationships.

The following relations in BMEcat, as defined in the PRODUCT_REFERENCETYPE field, will be imported as:

BMEcat	Relation type in COS
Similar	ALT- COM (alternatief)
Consist_of	BEO – PAR (Bevat onderdeel)
	GSP - MIR (Gespiegeld)
Accessories	HOB – BE2 (Hooft bij)
Mandatory	KNZ – CNZ (Kan niet zonder)
	ONV – IPO (Onderdeel van)
followup	OPV - SUC (Opvolger)
Sparepart	RES - SPA (Reserve)
Select , Others	TEP - FI2(Technisch passend)
	VOO PRE (Voorganger)

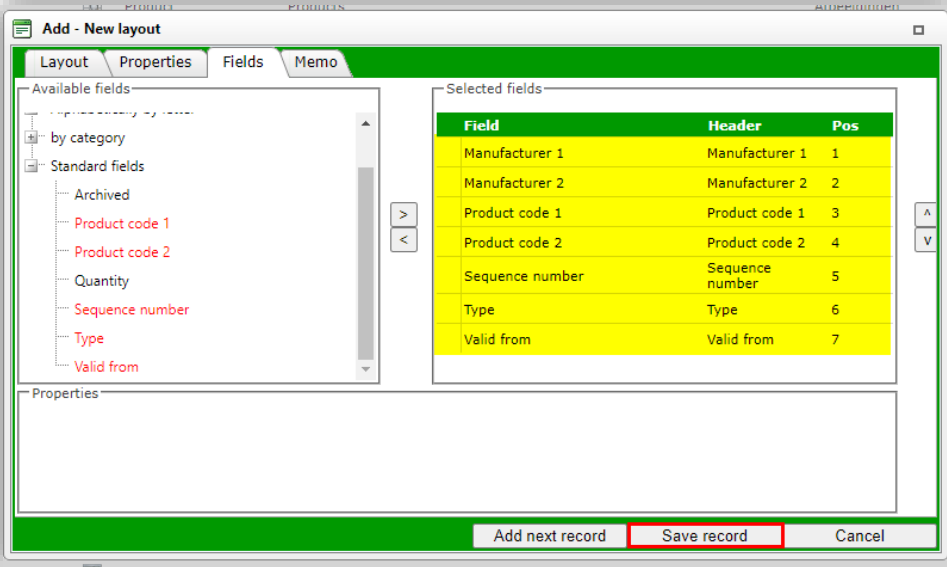
7.2 Excel import

Product-Product and Item-Item relations can be established by means of an Excel import. This import combines an Excel data file with an Import layout. This chapter describes which *key data fields* need to be present in the Excel data file and import layout.

Note: A general description of importing data using a combination of an Excel data file and a custom import layout, can be found in the *Manual Universal Import/Export*, which is available from the [Compano Help website](http://www.compano.com).

7.2.1 Product-Product relations

To import product-product relations, the following fields are mandatory:



Field	Header	Pos
Manufacturer 1	Manufacturer 1	1
Manufacturer 2	Manufacturer 2	2
Product code 1	Product code 1	3
Product code 2	Product code 2	4
Sequence number	Sequence number	5
Type	Type	6
Valid from	Valid from	7

- **Manufacturer 1**: Manufacturer code of the parent product.
- **Manufacturer 2**: Manufacturer code of the child product.
- **Product code 1**: Product code of the parent product.
- **Product code 2**: Product code of the child product.
- **Sequence number**: Order in which the relations are added (can be random).
- **Type**: Type of the product-product relation.
- **Valid from**: Date from which the product-product relation is valid.

Additional relevant fields are optional:

- GTIN product 1: GTIN of the parent product.
- GTIN product 2: GTIN of the child product.
- Grouping code: Grouping code of the relation.
- Quantity: Quantity of child products for this relation.

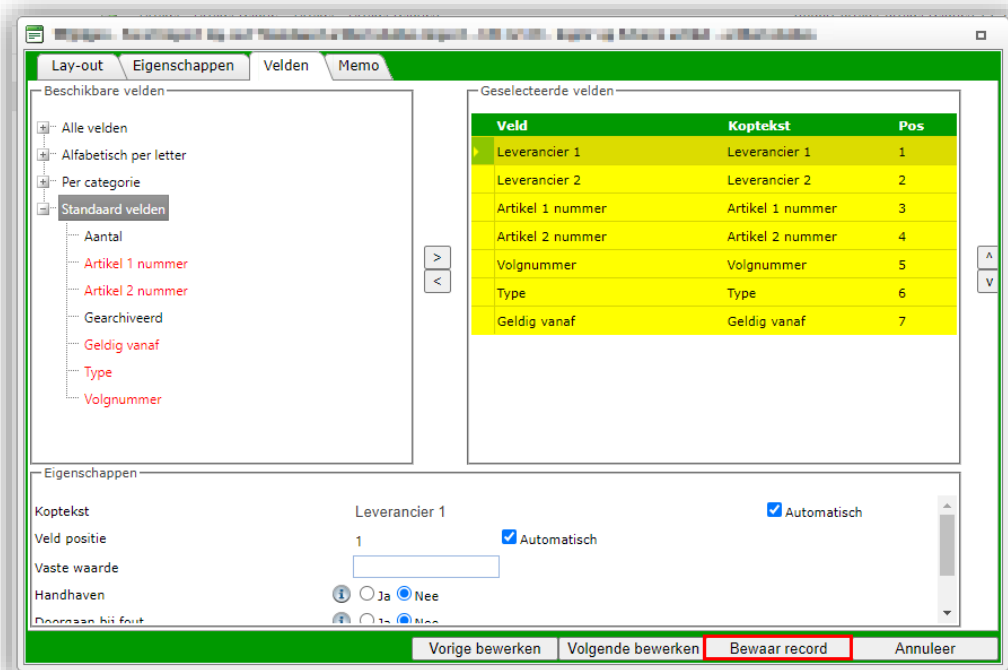
Note: Only the following Codes are allowed for Product Type:

- COM
- PAR
- MIR
- BE2
- CNW
- IPO
- PRE
- FI2
- SUC
- SPA

7.2.2 Import-Item relations

To import item-item relations, the following fields are mandatory:

To import product-product relations, the following fields are mandatory:



Veld	Koptekst	Pos
Leverancier 1	Leverancier 1	1
Leverancier 2	Leverancier 2	2
Artikel 1 nummer	Artikel 1 nummer	3
Artikel 2 nummer	Artikel 2 nummer	4
Volgnummer	Volgnummer	5
Type	Type	6
Geldig vanaf	Geldig vanaf	7

Eigenschappen

Koptekst: Leverancier 1

Veld positie: 1

Vaste waarde:

Handhaven: ☐ Ja ☒ Nee

Automatisch: ☒

Doorgaan bij fout: ☐ Ja ☒ Nee

Vorige bewerken Volgende bewerken **Bewaar record** Annuleer



- **Supplier 1**: Supplier code of the parent item.
- **Supplier 2**: Supplier code of the child item.
- **Item code 1**: Item code of the parent item.
- **Item code 2**: Item code of the child item.
- **Sequence number**: Order in which the relations added (can be random).
- **Type**: Type of the item-item relation.
- **Valid from**: Date from which the item-item relation is valid.

Additional relevant fields are optional:

- GTIN item 1: GTIN of the parent item.
- GTIN item 2: GTIN of the child item.
- Grouping code: Grouping code of the relation.
- Quantity: Quantity of child items for this relation.

Note: Only the following Codes are allowed for Item Type:

- COM
- MIR
- BE2
- CNW
- PRE
- FI2
- SUC
- ENC

7.2.3 Import layouts

For PIM-customers of Compano with a shared application, two basic import layouts for Product and Item relations are available:

Product relations: **Standaard product relaties import - L04 (v#.#)**

Item relations: **Standaard artikel relaties import - L04 (v#.#)**

The (v#.#) version number indicates which corresponding Excel file should be used as a data template. These templates are available from the [Compano Help website](#):

Template_import_product_relations_PIM_Basic_v#-#_L04

Template_import_item_relations_PIM_Basic_v#-#_L04

7.3 Choice products/items selections list

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

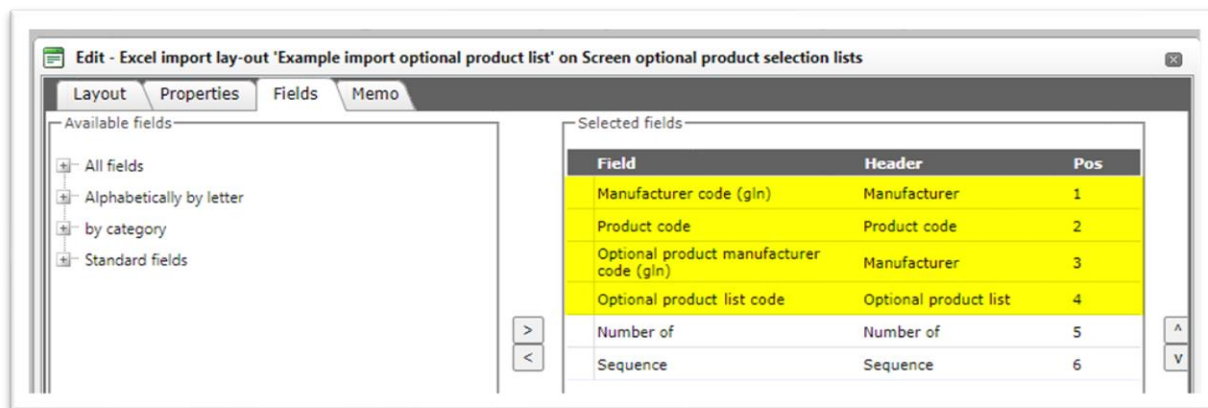
For instructions on how to create such a selection list, see paragraph [6.1 CREATE SELECTION LIST](#).

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

7.3.1 Import choice products/items

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

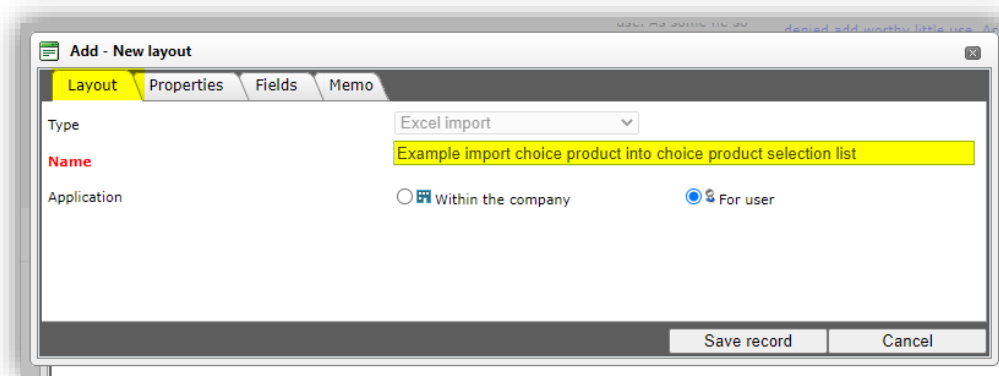
The following data fields need to be present in both the import file and import layout:



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

First, create an Import Layout:

1. Through the Menu, go to *System > Layouts*.
2. Under Edit, click on *+Add Import Layout*
3. Select the entity **Choice Product Selection List**
4. In the pop-up window on the Layout tab:



- a. Name: Enter a name for the layout.

5. Switch to the Properties tab:

Add - New layout

Layout **Properties** Fields Memo

Number of header rows: 1

Continue import on errors: ☐ Yes ☒ No

Save record Cancel

- a. Number of header rows: Set the number of header rows.
 - b. Continue import on errors: Set to **Yes** if you need to do a test run first, reporting all errors.
6. Switch to the Fields tab:

Add - New layout

Layout Properties **Fields** Memo

Available fields:

- All fields
- Alphabetically by letter
- by category
 - Choice product
 - Code
 - Manufacturer code (gln)
 - Choice product selection list
 - Codes
 - Product code
 - Numbers
 - Texte
 - Manufacturer
 - Standard fields
 - Manufacturer code (GLN)

Selected fields:

Field	Header	Pos
Manufacturer code (GLN)	Manufacturer	1
Product code	Product code	2
Choice product manufacturer code (gln)	Manufacturer	3
Choice product code	Choice product	4
Number of	Number of	5
Sequence	Sequence	6

Properties:

Header: Product code ☒

Field position: 7 ☒ Automatic

Fixed value:

Conversion table:

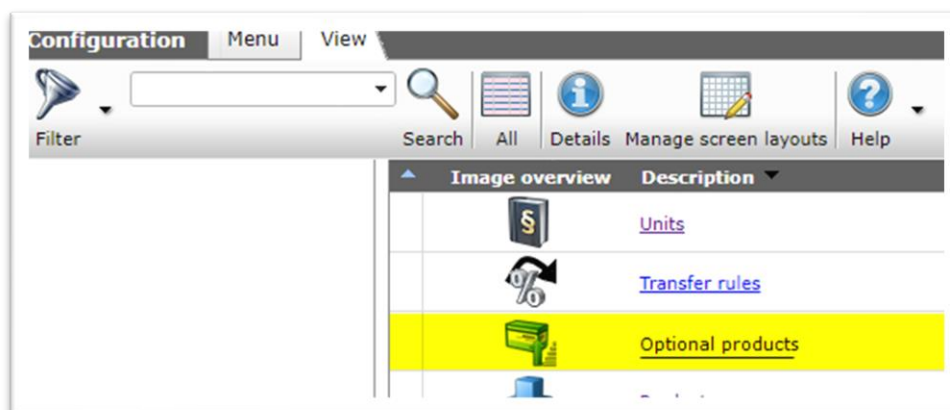
Maintain: ☐ Yes ☒ No

Save record Cancel

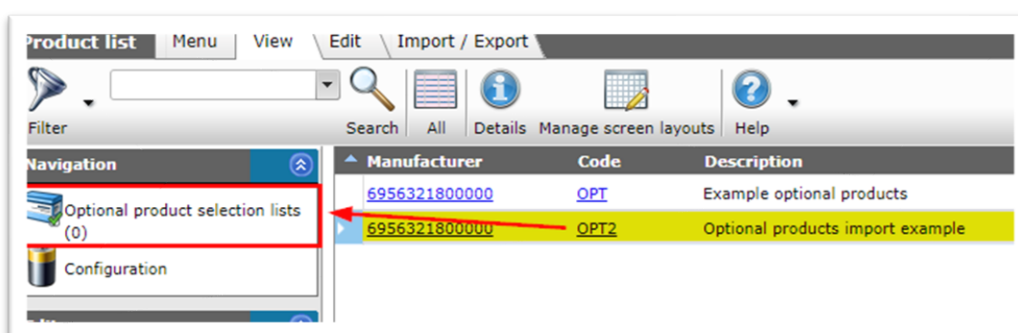
- a. Fields: Make sure to

Next, to populate the Choice Product list, import Choice Products into the list:

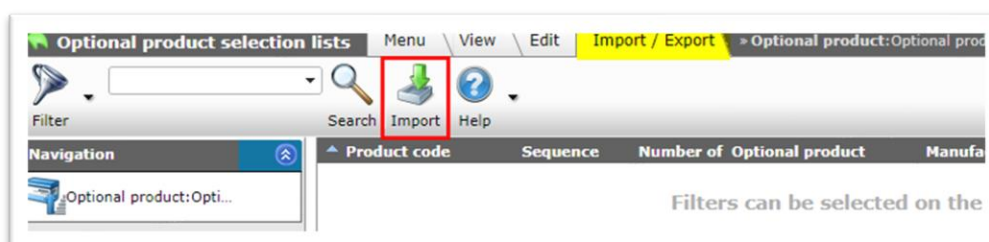
1. Through the Menu, go to *System > Configuration*.
2. In the Overview, click on the *Choice Products* link:



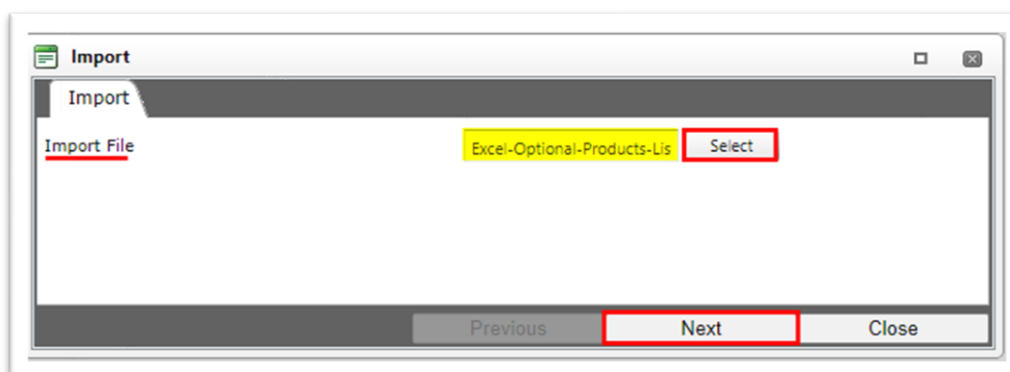
3. In the Overview, select a Product List and, under Navigation, click on *Choice product selection lists*.



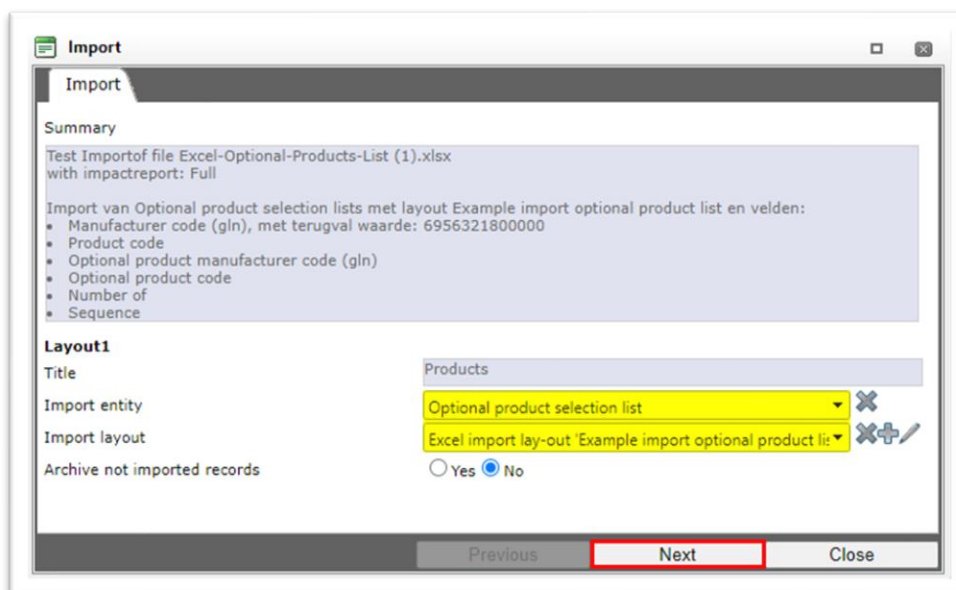
4. On the next screen, switch to the Import/Export tab and click on *Import*.



5. In the pop-up window:



- a. Import File: Select the import file containing the product list items.
6. Click on *Next*.



Import

Summary

Test Import of file Excel-Optional-Products-List (1).xlsx
with impactreport: Full

Import van Optional product selection lists met layout Example import optional product list en velden:

- Manufacturer code (gln), met terugval waarde: 6956321800000
- Product code
- Optional product manufacturer code (gln)
- Optional product code
- Number of
- Sequence

Layout1

Title: Products

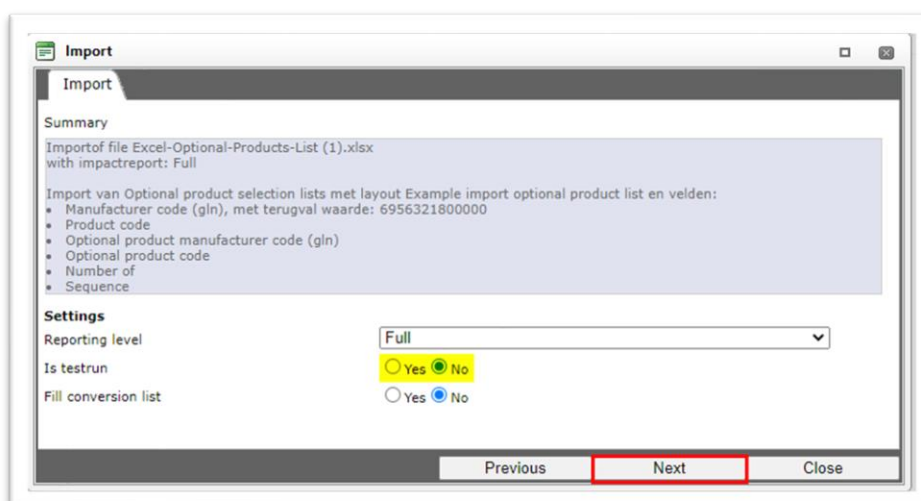
Import entity: Optional product selection list

Import layout: Excel import lay-out 'Example import optional product list'

Archive not imported records: ☐ Yes ☒ No

Previous **Next** Close

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



Import

Settings

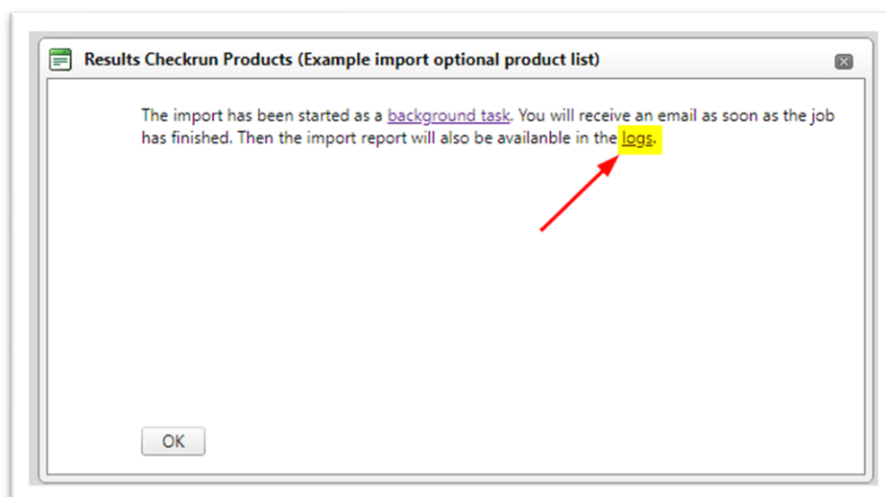
Reporting level: Full

Is testrun: ☐ Yes ☒ No

Fill conversion list: ☐ Yes ☒ No

Previous **Next** Close

- Reporting level: Leave this set to **Full** to receive a full import report including all warnings and errors.
 - 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!
 - 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 Choice products selection list, which will now contain the choice products that you imported:

Optional product selection lists					Menu	View	Edit	Import / Export	» Optional product:Optional product
Filter		Search	Import	Help					
Navigation		Product code	Sequence	Number of	Optional product	Manufacturer			
Optional product:Opti...		140044055	1	2.00	Optional product	6956321800000			
Edit		140044054	1	1.00	Optional product	6956321800000			

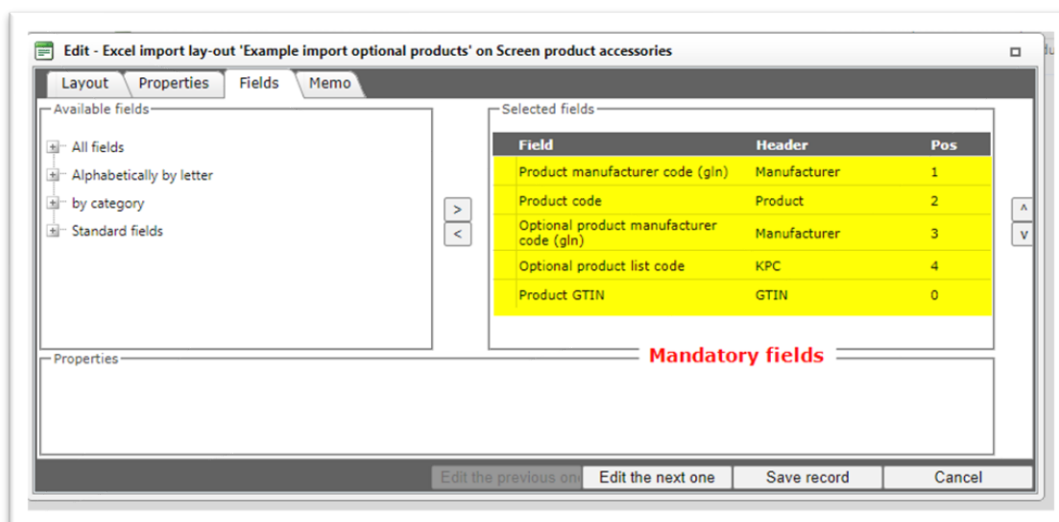
7.3.2 Import selection lists

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:

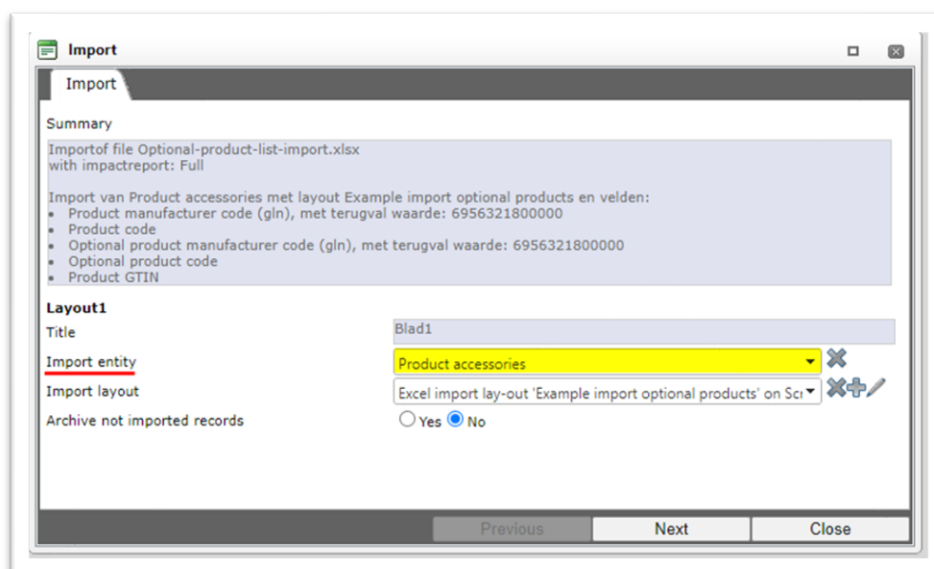
- Product manufacturer code (gln): Global Location Number of the manufacturer of the products to which the selection list is to be added.
- Product code and Product GTIN: Product number (or GTIN) of the products to which the selection list is to be added. Note: Both fields need to be present in your 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:

- Choice product manufacturer code (gln): Manufacturer code (GLN) of the choice product
- Choice product list code: Code of the choice product list.



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



7.3.3 Choice items

The procedure for adding Choice Items is similar to adding Choice Products, thus follow the instructions as outlined in paragraphs [7.3.1 IMPORT CHOICE PRODUCTS/ITEMS](#) and [7.3.2 IMPORT SELECTION LISTS](#).

However, there are some differences:

Import Choice Items into an Item List

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

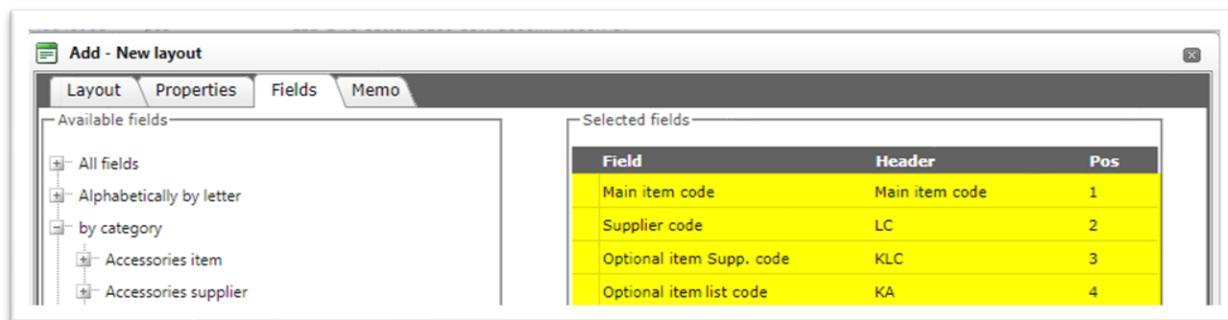
Import selection list

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.

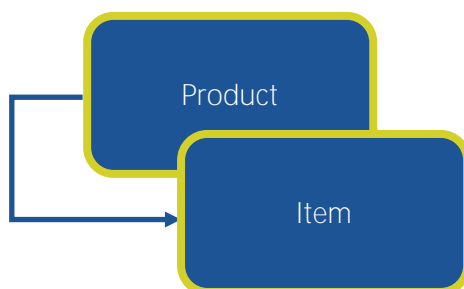
In addition to the mandatory Accessory fields, the following data fields also need to be present in the import file and import layout:

- Choice item Supplier code: Supplier code (GLN) of the choice item.
- Choice item list code: Code of the choice item list.



8 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

The item in this example inherits from the corresponding product the following accessories:

140043899 LEDPanelRc-G Sq598-36W-3000-WH-CT					
Item	Gross price	Additional	Image	Drawing	Alternatives
Accessories	Order information	Price history			
T	Required	Number of	Supplier	#Code	Description
Group 1					
Item	No	1	F12	140043898	
Item	No	1	F12	140043904	LED E T5 batten 300 4.5W S 3000K BL
Item	No	1	F12	140043967	LEDPanelRc-G Sq598-36W-3000-WH-CT
Group 2					
Item	No	1	F12	140043968	LEDPanelRc-G Sq598-36W-4000-WH-CT
Item	No	1	F12	140043969	LEDPanelRc-G Sq298-11W-3000-WH-CT
Item	No	1	F12	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

9 Search

9.1 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**:

The screenshot shows the 'Filter' dialog box with the 'Additional' tab selected. The 'Product accessories' filter is highlighted in yellow and set to 'has product acc'. Other filters include 'Attachments' (all), 'Amount of attachments' (= value), 'AddOnProductCount' (= value), 'IsAddOnProduct' (= value), 'Product parts' (all), and 'Sub product count' (= value). The 'User-defined fields' and 'Translations' tabs are also visible.

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

9.2 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*.

The screenshot shows the 'Filter' dialog box with the 'Overig' tab selected. The 'Product onderdelen' filter is highlighted in yellow and set to 'heeft product or'. Other filters include 'Normproduct' (gelijk), 'Code' (begint met), 'GTIN' (begint met), 'Fabrikant' (gelijk), 'Speciaal' (alle), 'Aantal artikelen' (= waarde), 'Bijlage' (alle), 'Aantal bijlagen' (= waarde), 'Toehoren producten' (alle), 'Aantal onderdelen' (= waarde), 'Is onderdeel' (Ja, Nee, Alles), and 'Assortimenten' (alle). The 'Toepassen' button is highlighted in red.



3. Then click the *Apply* button.

10 Export of Product/Item Relations

10.1 PAB export

In COS and SALES005, the Item Relations message is an update of the pre-existing **koppelingen.txt**. Thus, when exporting in the PAB-format, product-product relation will no longer be exported.

10.2 INSBOU004 export

In COS and SALES005, the Item Relations message is an update of the pre-existing **koppelingen.txt**. The INSBOU004 export will export an ItemRelations.xml containing product-product and item-item relations.

10.3 DICO/SALES005 export

Relations between products and items are exported in the **ItemRelations.xml** of the DICO/SALES005 message. For COS, this means that all product – product (PP) and item – item (AA) relations will be exported.

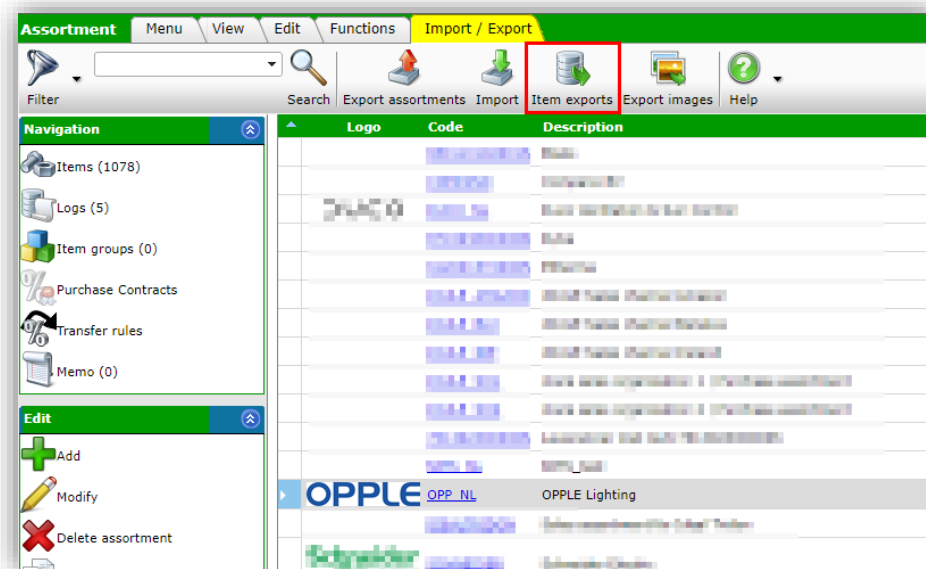
Important: Product/Item relations export to 2BA / InstallData

Product relations 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.

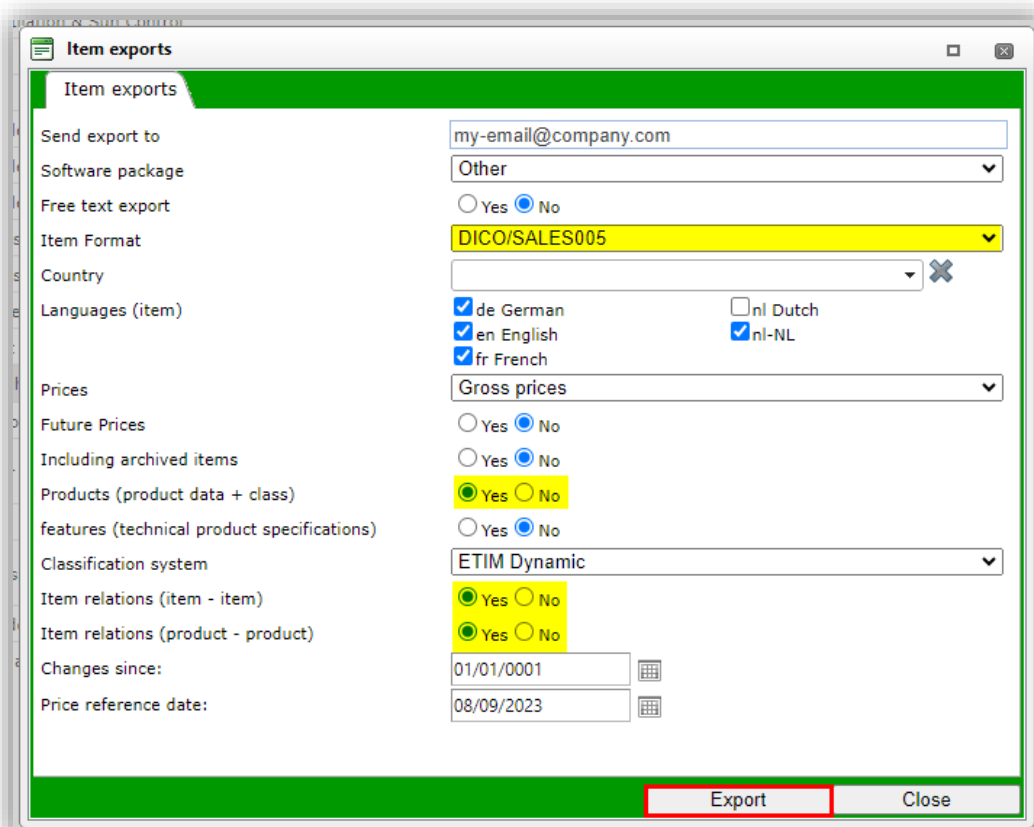
More information on item relations can be found at the [Ketenstandard Semantic Treehouse](#) > *Item Relations*.

To export Product and Item relations:

1. Through the Menu, go to *Items > Assortment*.
2. Select the assortment for which you need to export relations and, on the Import/Export tab, click on *Item export*.



3. In the pop-up window:



- Item format: Set the Item format to **DICO/SALES005**
 - Products (product data + class): Set this option to **Yes** if you need to export Product-Product relations.
 - Item relations (item-item): Set this option to **Yes** to export Item-Item relations.
 - Item relations (product – product): Set this option to **Yes** to export product-product relations.
4. Click on *Export*.



10.4 DICO/SALES export limitations

The following limitations apply to the export in DICO/SALES format:

- For any type of Item relation, the Quantity can be set to a *maximum of 9999*. Any relations with a quantity which is greater than 9999, will not be exported in the DICO/SALES export file.
- An 'Enclosed item (ENC)' relation will not be exported in the **ItemRelations.xml** message, however this relations will be exported in the **PriceCatalogue** message.
- Archived relations will *not* be exported.

10.5 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:

10.5.1 Manufacturer

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

10.5.2 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.

10.5.3 Inherit

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

10.5.4 Linking by product and item

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