

# Manual Product & Item Relations COS PIM

version L7.1

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# Contents

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1	Int	roduction	4
	1.1	Concepts	4
2	Ту	pes of relations	6
	2.1	Opvolger - Successor (OPV – SUC)	7
	2.2	Voorganger - Predecessor (VOO – PRE)	7
	2.3	Alternatief - Comparable (ALT – COM)	7
	2.4	Technisch passend – Fits to (TEP -FI2)	7
	2.5	Onderdeel van – Is part of (ONV – IPO)	7
	2.6	Bevat onderdeel – Contains (BEO – PAR)	8
	2.7	Hoort bij – Belongs to (HOB – BE2)	8
	2.8	Kan niet zonder – Cannot without (KNZ -CNW)	8
	2.9	Reserve – Spare (RES – SPA)	8
	2.10	Gespiegeld – Mirrored (GSP – MIR)	8
	2.11	Ingesloten artikel – Enclosed item (ENC)	8
3	Se	tting relations	10
	3.1	Reciprocal relations	10
	3.2	Manually setting a single relation	10
	3.3	Manually setting multiple relations	12
	3.4	(Re)set relation type	14
	3.5	Sequence number (Order and 'Exploded View')	14
	3.6	Grouping relations	16
	3.7	Quantity	17
	3.8	Archiving / Deleting relations	18
4	Pro	oduct - Product relations	21
	4.1	Predecessor – Successor (PRE / SUC)	21
	4.1	I.1 Multiple Predecessors / Successors	22
5	Ite	m - Item relations	23
	5.1	Predecessor/Successor (PRE / SUC)	23
	5.2	Enclosed items (ENC)	24
6	Ch	oice Products/Items	26
	6.1	Create selection list	26
	6.2	Add selection list to Item	29
	6.3	Add selection list to Product	30
7	Im	port of product/item relations	33
	7.1	Industry standard import	33
	7.1	I.1 DICO/SALES	33
	7.1	I.2 BMEcat	34
	7.2	Excel import	34
	7.2	2.1 Product-Product relations	34
	7.2	2.2 Import-Item relations	35

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7.	2.3	Import layouts	
7.3	Choi	ice products/items selections list	
7.	3.1	Import choice products/items	
7.	3.2	Import selection lists	41
7.	3.3	Choice items	
8 In	heritai	nce of accessories and parts	43
9 Ar	rchive/	/Delete relations	
9.1	View	varchived relations	
10 Fi	Iter & S	Search	
10.1	Fi	ind products with relations	45
11 Ex	kport c	of Product/Item Relations	
11.1	PA	AB export	
11.2	IN	ISBOU004 export	
11.3	D	ICO/SALES005 export	
11.4	D	ICO/SALES export limitations	47
11.5	Rı	ules of thumb	47
11	1.5.1	Manufacturer	47
11	1.5.2	Wholesale	
11	1.5.3	Inherit	
11	1.5.4	Linking by product and item	

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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

<u>Note</u>: 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 productproduct 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

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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.

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# 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	$ID1 \rightarrow ID 2$	$ID 2 \rightarrow ID1$				
PRE	VOO	Preceed	•	•	Predecessor	Successor				
COM	ALT	Comparable	•	•	Comparable and Alternative					
CNO	-	Comparable Norm	•		Meets requirements for standard					
		Product			pro	duct				
BE2	HOB/KNZ	Belongs to	elongs to    Belongs to, fro							
					patible) (specific)					
FI2	TEP	Fits to	•	٠	Fits to / Conne	cts to (generic)				

P-P: Product-product relation

I-I: Item-item relation

ID 1  $\rightarrow$  ID 2: Relation from 1 to 2

ID 2  $\rightarrow$  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 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).

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.

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

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<u>Important</u>: 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**.

<u>Note</u>: 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.

<u>Important</u>: Own alternatives have been integrated into the new Product/Item Relations system with relation type **COM**.

### 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.

<u>Note</u>: 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**.

<u>Note</u>: 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.

<u>Note</u>: 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 implemented<sup>1</sup> in COS, however different options-for instance, two different sets of feet can used for this bath tub-can grouped together with the Group Code.

### 2.9 Reserve – Spare (RES – SPA)

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

<u>Note</u>: 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**.

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**.

<sup>1</sup> 20 July 2023

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### 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 established<sup>2</sup>.

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

<u>Note</u>: 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*.

<sup>&</sup>lt;sup>2</sup> 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)*:

Products Menu View	Edit •	) ( Se	Func	tions Print Import / Expo All Details Screen Layout	rt   🕜 🗸 Help					
Navigation 🛞	•	•	x	Manufacturer Description	Product code	GTIN	F	Т	Product description Aquaberg ABS kunststof vloerput inclusief	Brand (product)
Product - Product relations (parent) (0)				Aquaberg vloerputten	<u>4015146FA</u>	08717775934073	A		klaar bezand 146x146 mm onderaansluiting diameter 50 mm RVS304 rooster verticaal/horizontaal verstelbaar	AQUABERG
(child) (0)									Aquaberg ABS kunststof	

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



4. In the pop-up window:

Product - Product relation		
Туре	COM - Compares with - Alternative	~
Manufacturer 1	Duco (5425037150002)	
Product 1	0000-4366 Le DucoBox Energy est un appareil de ventilati	on équilibrée
Product code 1	0000-4366	
GTIN Product 1	05425037152846	
Manufacturer 2	Duco (5425037150002)	
Product 2	0000-4109 Duco 05425037150040	
Product code 2	0000-4109	
GTIN Product 2	05425037150040	
Sequence number	1	
Grouping code		
Quantity	1.00	
Valid from	27/09/2023	

- 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 product.
- e. Product 2: Select the child product.
- f. Fill out any other necessary fields. <u>Note</u>: For detailed instructions on each relation type, see the relevant section under Chapters 4 and 5.

Add next record

Save record

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Cancel

5. Save the record.

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#### 3.3 Manually setting multiple relations

To set relations for multiple product or item pairs:

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



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

1

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ilter	Sea	arch All	Details Screen Layout	Help -					
lavigation  🛞	÷ •	X Man	ufacturer Description	Product code	GTIN	F	т	Product description	Brand (product)
Items (1) Product - Product relations (parent) (0)		Aqua	berg vioerputten	4015146FA	08717775934073	đ		Aquaberg ABS kunststof vloerput inclusief membraanflens kant-en- klaar bezand 146x146 mm onderaansluiting diameter 50 mm RVS304 rooster verticaal/horizontaal	AQUABERG

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

💊 Product - Pro	oduct re	lations	Menu	View	Edit	Fun	ctions	
⅀ .			•	Q		1		
Including archive				Search	All	Details	ProdRel	ĺ
Navigation		$\otimes$	🔺 х т	уре			Manufac	cti
Product:283665	540yttry							
~								
Edit		۲						
Add								
Add product- pr	roduct rela	tion						

4. On the next screen:

Pro	duct selection View				_				
$\gg$	siphon	• 🔍 🔲	<b>()</b>					4	2.
Filter		Search All	Details Manage screen layouts	Select Proc	duct Deselect	Clear	Transfer	Stop	Help
<b>▲ x</b>	Manufacturer Description	Product code	GTIN A	F T	Short descri	ption (p	roduct)		Brand (product)
	Duco	0000-4376	05425037152945		Siphon flat (E	nergy &	Eco)		DUCO
	Duco	0000-4421	05425037153638	<u> </u>	Mounting chai	ir standir	ng Energy	,	DUCO
	Duco	0000-4422	05425037153645	2	Chair hanging	Energy	& Eco		DUCO
	Duco	0000-4546	05425037154789	2	Chair standing	g Energy	Comfort		DUCO
	Vaillant	000376	04024074001387						
	Vaillant	0010032022	04024074873328						
	Vaillant	0010039106	04024074902318						
	Vaillant	0010046851	04024074939123						
	Vaillant	0020029024	04024074511855						
	Vaillant	0020038571	04024074522349						
	Vaillant	0020058858	04024074543481						
	Vaillant	0020069075	04024074559628						
Nu	mber of Manufacturer Des	cription Produc	t cod : GTIN	A	F Short de	escriptio	on (prod	uct)	
	1.00 Duco	0000-43	<u>376</u> 05425037152945		🗟 Siphon fl	at (Energ	gy & Eco)	Sh	opping basket

- a. Use the Filter and Search options to find all the child products that have a relation with the parent product.
- b. Click on *Select Product* (1) to add child products to the Shopping Basket<sup>3</sup> (bottom part of the screen).
- c. Next, click on *Transfer* (2) to transfer the selected child products to the parent product, thus establishing a (FI2) relation<sup>4</sup>.

<sup>&</sup>lt;sup>3</sup><u>Note</u>: The shopping cart is limited to 1000 records.

<sup>&</sup>lt;sup>4</sup>Important: All relations added this way will, by default, be of relation type **FI2 / TEP**, as this is the most common relationship type. Should you need to reset the relationship type, please see the next paragraph.

## 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:

Edit - Product - Product relation	n							
Product - Product relation								
Type Manufacturer 1		<ol> <li>Compares with</li> <li>Compares with</li> <li>Contains part</li> </ol>	h - Alternative I - Alternative		▼			
Product 1	MIR BE2 CNW	- Mirrored - Belongs to / - Can not withou	ıt		<u> </u>			
Product code 1	IPO -	- Is part of						
GTIN Product 1	PRE	- Predecessor						
anufacturer 2 SUC - Successor								
Product 2 SPA - Spare								
Product code 2	J							
GTIN Product 2	0871	2058100138						
Sequence number	2							
GroupingCode								
Quantity	1.00							
Valid from	21/07	/2023						
	L							
	Edit previous		Save re	cord	Cancel			

- 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:

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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:

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Type       #COM         Manufacturer 1       Heering Kunststof Profielen BV (871205800001)         Product 1       28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108(*)         GTIN Product 1       08712058108097         Manufacturer 2       Heering Kunststof Profielen BV (871205800001)         Product 2       28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108097         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	- Product relation		
Manufacturer 1       Heering Kunststof Profielen BV (871205800001))         Product 1       28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108(*)         Product code 1       28210460         STIN Product 1       08712058108097         Manufacturer 2       Heering Kunststof Profielen BV 08712058108097         Product 2       28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108097         Product 2       28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108097         Sequence number       5         GroupingCode       Heering group         Quantity       1.00         Valid from       24/08/2023		#COM <b>v</b>	
Peroduct 1     28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108(*) *       Product code 1     28210460       STIN Product 1     08712058108097       Manufacturer 2     Heering Kunststof Profielen BV 08712058108097       Product 2     28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108097       Product 2     28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108097       Stin Product 2     08712058108097       Sequence number     5       SoroupingCode     Heering group       Quantity     1.00       Valid from     24/08/2023	rer 1	Heering Kunststof Profielen BV (8712058000001) 🔹 🗱	
Product code 1       28210460         STIN Product 1       08712058108097         Manufacturer 2       Heering Kunststof Profielen BV (871205800001)         Product 2       28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108097         Product code 2       28210460         STIN Product 2       08712058108097         Sequence number       5         GroupingCode       Heering group         Quantity       1.00         /alid from       24/08/2023		28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108( 🕶 🗱	
STIN 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       STIN Product 2     08712058108097       Sequence number     5       GroupingCode     Heering group       Quantity     1.00       /alid from     24/08/2023	de 1	28210460	
Manufacturer 2     Heering Kunststof Profielen BV (8712058000001)       Product 2     28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108097       Product 2     28210460       STIN Product 2     08712058108097       Sequence number     5       GroupingCode     Heering group       Quantity     1.00       /alid from     24/08/2023	ict 1	08712058108097	
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	rer 2	Heering Kunststof Profielen BV (8712058000001)	
Product code 228210460GTIN Product 208712058108097Sequence number5SroupingCodeHeering groupQuantity1.00/alid from24/08/2023		28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108097	
STIN Product 2     08712058108097       Sequence number     5       GroupingCode     Heering group       Quantity     1.00       /alid from     24/08/2023	de 2	28210460	
Sequence number     5       GroupingCode     Heering group       Quantity     1.00       /alid from     24/08/2023	ict 2	08712058108097	
GroupingCode     Heering group       Quantity     1.00       /alid from     24/08/2023	number	5	
Quantity         1.00           /alid from         24/08/2023	ode	Heering group	
/alid from 24/08/2023		1.00	
		24/08/2023	

- 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):

6201351	Anna talah dangki maging 11 K	Additional and a second s						
I oduct Clas	sification \ Model \ Attachmen	ts Certificates Commercial description (product) Tech	nical description (product)	Additional	\ Items	Product -	product relati	ons 🕨
Туре	Manufacturer 2 Product code 2	Short description (product)	Quantity					<b>^</b>
PAR - Contains part	<u>6222205</u>	XPress C/S O-ring EPDM LBP 12	1					
Connection 1								- 1
FI2 - Fits to	<u>6212646</u>	XPress C/S insert depth marker 12-108	1					
FI2 - Fits to	<u>6211898</u>	Deburrer for carbon and stainless steel tube 12-54	1					
FI2 - Fits to	<u>6205144</u>	SudoXPress Carbon galvanized tube 12x1.2 (I=6m)	1					
Connection 2								- 1
FI2 - Fits to	<u>6209929</u>	SudoXPress Carbon galvanized tube 12x1.2 (I=6m) small bund	le 1					
FI2 - Fits to	<u>6222205</u>	XPress C/S O-ring EPDM LBP 12	1					
FI2 - Fits to	<u>6206266</u>	SudoXPress Carbon galv. tube 12x1.2 (I=3m)	1					•
			Show previous	Show next	Mo	dify	Cance	el

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:

Product - Product relation		
Туре	#COM 🗸	
Manufacturer 1	Heering Kunststof Profielen BV (8712058000001) 🔹 🗱	
Product 1	28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108( 🕶 🗱	
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	
	Edit and Edit and Carried Const	

- 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:* 

Product - Product relations	Menu View Edit Func	tions Import / Export > I	Product:
		. 0.	
Including archive	Search All Details	ProdRei   Help	
Navigation 🛞	🔺 Х Туре	Manufacturer 1 Product	t code 1
Product:0000-4366 Le	COM - Compares with - Alternative	Duco <u>0000-43</u>	66
Edit 🛞	COM - Compares with - Alternative	Duco <u>0000-43</u>	66
- Add			
Add product- product relation			
Modify			
Pelete record(s)			

2. In the pop-up window:

Product - Product relation	
Туре	#COM V
Manufacturer 1	Heering Kunststof Profielen BV (8712058000001) - 🗸
Product 1	28210460 Keralit dakrandpaneel 200mm Heering Kunststof Profielen BV 08712058108( 🔻 🗱
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
	Edit previous Edit peyt Save record Cancel

- 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:

=		×
	Are you sure you want to archive 1 product - product relation?	
	OK Cancel	

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)*.

A Product - Product relations	Menu View Edit Functions Import /	Export » Product:0
Including archive	Search All Details ProdRel + Help	
Navigation  🛞	A X Type Manufacturer 1	Product code 1
Product:0000-4366 Le	COM - Compares with - Duco Alternative	<u>0000-4366</u>
Edit	COM - Compares with - Duco	<u>0000-4366</u>
Add product- product relation Modify Delete record(s)		

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



3. The relation will now be irretrievably deleted.

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# 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 <u>3 SETTING RELATIONS</u>.

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.

<u>Note</u>: 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:

Revealed the product relations	Menu	View Edit Fund	tions \ Import / Export	» Product: 1400438	98 Montagebalk T5		
» . I		- 🤍 📃 🚺	. 💿 .				
Including archive		Search All Details	ProdRel Help				
Navigation 🛞 🖌	<b>^ X</b>	Туре	Manufacturer 1	Product code 1	Short description (product)	Manufacturer 2	Product code 2
		Successor	Opple	<u>140043898</u>		Opple	<u>140044096</u>
Product:140043898 Mon							

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 D	etails Screen Layout	elp	
Navigation	8	<ul> <li>Archived</li> </ul>	Manufacturer Description	Code	GTIN
Edit			Opple	140043898	06956712666215
			Opple	140043899	06956712666222
			Opple	<u>140043900</u>	06956712666239
Modify		-	Opple	<u>140043901</u>	06956712666246
Delete record(s)			Opple	140043902	06956712666253
Line edit on			Opple	140042002	06056712666260

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

🥰 🌮 🛴

(product) (en) Technical	description (product) (en)	Additional	User-defined fields	Translations
Status				
Available	<li>None</li>		~	
BIM Status	None		🔿 🗖 Ready	
	🔿 🗖 Under c	onstruction	🔿 🗖 Test	
Predecessor code	(i)			
Code successor	140044096			
GTIN Predecessor	(i)			
GTIN Successor	0695632184     0695632184	3786		
ADR				
Hazardous Material	🔾 Yes 🔍 No			
Batteries included	🚺 🔾 Yes 🔾 No	🖲 Unknown		
RoHS Indicator	Unknown	~		
Has CE marking	🚺 🔾 Yes 🔾 No	🔍 Unknown		
Has safety datasheet	○ Yes ○ No	🖲 Unknown		
Dimension				
Height	100.00			
Length	50.00			

- a. Code successor<sup>5</sup>: 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.

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

<sup>&</sup>lt;sup>5</sup> 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 <u>3 SETTING RELATIONS</u>.

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

Multiple suppliers with same GLN

Item-Item relations can only be created when the supplier GLN(s) are filled out, as GLN is a key data field. The GLN can either be a real GLN or a dummy-GLN (333#####13).

However, sometime multiple suppliers of your organization use the *same GLN*. This has the advantage if you create a relationship under Supplier 1, the relation will also appear under the other suppliers with the same GLN

<u>Note</u>: On the general item relations overview, only one of the suppliers with that GLN is shown. Which supplier is shown is determined more or less at random.

### 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*.

Items Menu View Edit	Functions Print Import / Exp	ort		
<b>&gt;</b> .		•	9	3.
Including archive	Search   All   Details S	creen Layout Price R	eference date   He	elp
Navigation 😵	Supplier	A Item no.	Abbreviation	Short description
- 11	and applied	140043898	pce	LED E T5 batten 600 9W 3000K CT
	<ul> <li>anna sightee</li> </ul>	140043899	pce	LED E T5 batten 600 9W 4000K CT
Add	and define	<u>140043900</u>	pce	LED E T5 batten 1200 18W 3000K CT
Purchase item	server a spiniture	<u>140043901</u>	pce	LED E T5 batten 1200 18W 4000K CT
	and a station	<u>140043902</u>	pce	LED E T5 batten 900 11W S 3000K BL
+ Purchase Assortment		<u>140043903</u>	pce	LED E T5 batten 600 9W S 3000K BL
Item <- Product	a significa	<u>140043904</u>	pce	LED E T5 batten 300 4.5W S 3000K BL
An se	internet algèbries	<u>140043968</u>	pce	LEDPanelRc-G Sq598-33W-4000-WH-CT
Modity	server a significant	<u>140043971</u>	pce	LEDPanelRc-G Re298-33W-3000-WH-CT
	and a sighting	W 140044054	nce	LEDPanelRc-G So598-Surface Module-CT

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

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🕢 Workflow - Jan 🔪 Item	Gross price	Additional	Commercial	description (en)	Technical descripti
Publication	(j	☐ On internet ☐ On webshop ✔ Datapool		☐ In catalog ☐ ERP ☐ Calculation	
Commodity code		94051190			
Country of provenance		China			- 💥
Status					
Stock item	í	🔘 Yes 🔿 No			
Can be ordered	(1)	🔍 Yes 🔿 No			
Refurbished		🔾 Yes 🔾 No 🧕	Unknown		
Reused		🔾 Yes 🔾 No 🧕	Unknown		
is cuttable	1	No			
Max cuttable length					
Max cuttable length unit	ĺ				- 🗙
Status code	1	None		~	
Code predecessor	(i)				
Code successor	1	140043901			
GTIN Predecessor	(1)				
GTIN Successor	(i)				
Logistics					
Delivery time	(1)	2.00	days		

- 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.

Accessories item Translatio	ns		
ode	_		
ain item code	140043899		
ne type	🔍 🏈 Item	🔘 🗖 Optional item	
/pe	ENC - Enclosed item	~	
ccessories item	140043967 LEC	DPanelRc-G Sq598-36W-3000-WH-CT	- 💥
equence	3		
ccessories type			
escription	LEDPanelRc-G Sq598-36W	/-3000-WH-CT	Automatic
umber of	1.00		
nit			- 💥
equired	O Yes 🔍 No		
roup attribute			

#### 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 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.

<u>Note</u>: 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*.

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ซ– ซ–	Item choice list	Choice items selection list
<b>%</b>	Condition classifications	Division, Paired condition group
%	Conditiontype	Central purchase condition, Purchasing Condition
	Conversion tables	Conversion Value, ETIM Product class feature
	Countries	Address, Item, Assortment land, Product
	Currencies	Supplier
2	Customer groups	Purchasing contract, Contact, Item surveillance, Salescontract
	<u>Email template</u>	
	Field chaoters	User-defined field
•	Item accessories	Item
- 🔒	Item.groups	Attachment, Item, Item group, Publication
	Languages	Attachment, Contact, Country, Environment, Translation field, Layout la Synonym, Visitor
	Memos	
1	Packing forms	Central purchase condition, Item, Purchasing Condition
**	Periodic tasks	
3	Product accessories	Product
	Product choice list	Choice product selection list

3. On the next screen, first create a Selection List<sup>6</sup>, by clicking on +Add.



4. In the pop-up window:

Add - New choice item			
Choice item			
Supplier		ļ.	- ×+
Code	TAP		
Description	Choice taps se	lection list	
	Add next record	Save record	Cancel

a. Supplier: Select the supplier of the choice items.

<sup>&</sup>lt;sup>6</sup> 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.

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- 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:

Choice items Menu View	Edit Functio	ons 🔪 Impo	rt / Export	
▶	- 🔍 🔲	<b>①</b>	📝 🛛 🖓 🗸	
Filter	Search All	Details Man	age screen layouts Help	
Navigation 🛞	Supplier	Code	Description	
Choice items selection list (2)	SCHNEIDER	<u>TAP</u>	Choice taps selection lis	t
Configuration				
Fdit 🔊				

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

🔦 Choice items selection list	Menu Viev	/ Edit Functi	ons 🔪 Import / E	Export > Choice item:Schneider Electric T	
▶	- 🤍 🔲				
Filter	Search All	Details Manage scr	een layouts Help		
Navigation  🛞	▲ LC	Item no.	Sequence	Number of Item	
Choice item:Schneider	SCHNEIDER	<u>VB200R-15BS</u>	1	1 2-WEG BOLKRAAN, DN15, KVS 8	.7, DRAAD
Edit 🛞	SCHNEIDER	<u>VB300R-15BS</u>	2	1 3-WEG BOLKRAAN, DN15, KVS 8	.7, DRAAD
Modify					

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:

▶		• •			[	1					4		÷		2	•	
er		Search	All	Details	Manage s	creen la	youts	Select Item	De	select	Clear	Transfer	Stop	Price Compare	Help		
Archived	Supplier			C A	cessorie	15 I	<b>\</b> I	tem no.	Im	age	T Abb	reviation	S	hort description	on		
	Schneider Electric						1	58508			pce		3	WEG BOLKRAA	N, DN15	, KVS 4, DF	RAAD
	Schneider Electric						<u>V</u> 1	B310R- 5B509			ple		3	WEG BOLKRAA	N, DN15	, KVS 6.3,	DRAAD
	Schneider Electric						<u>V</u> 2	B310R- 0BS04			pce		3	WEG BOLKRAA	N, DN20	, KVS 0.86	, DRAAD
	Schneider Electric						<u>V</u> 2	B310R- 0BS08		/	pce		3	WEG BOLKRAA	N, DN20	, KVS 4, DP	RAAD
	Schneider Electric						<u>V</u> 2	B310R- 0BS09	1		pce		3	WEG BOLKRAA	N, DN20	, KVS 6.3,	DRAAD
	Schneider Electric						<u>V</u> 1	F208W- 00NS		<u>a</u>	pce		V	LINDERKRAAN,	DN100,	KV 760, VL	INDER RVS
	Schneider Electric						<u> </u>	F208W-25	5		pce		V	LINDERKRAAN ,	DN25,	KV 26, VLIN	IDER INOX
	Schneider Electric						/ v	F208W-40N	s 8	4	pce		V	LINDERKRAAN ,	DN40, I	KV 50, VLIM	IDER INOX
	Schneider Electric					_/	v	F208 N-50N	5	2	pce		V	LINDERKRAAN,	DN50, K	V 115, VLI	NDER INOX
Number	of Supplier	C Cond	lition	Item n	<b>o.</b>	Albrevi	iation	Short	descrip	tion							
1.	00 SCHNEIDER	BD		VB200F	-20BS	pce		2-WEG	BOLKR	AAN, D	N20, KV	S 8.7, DR	AAD				
1.	00 SCHNEIDER	BD		VB310F 15BS05	• 🖌	pce	/	3-WEG	BOLKR	AAN, D	N15, KV	S 1.6, DR	AAD	'shopp	in ba	sket'	
1.	00 SCHNEIDER	BD		VF208V	-25NS	pce 🧹		VLINDE	RKRAA	N, DN	25, KV 2	6, VLINDE	R INO	x			

- 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:

Filter	Search Al	Details Manage scre	en layouts Help	•	
lavigation	🛞 🔺 LC	Item no.	Sequence	Number of	Item
Choice item:		VB200R-15B5	1	1.00	2-WEG BOLKRAAN, DN15, KVS 8.7, DRAAD
dit	8	VB310R- 158504	2	1.00	3-WEG BOLKRAAN, DN15, KVS 0.86, DRAAD
Modify		VF208W- 100NS	3	1.00	VLINDERKRAAN, DN100, KV 760, VLINDER RV

### 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:

Items Menu View Edit	Functions Print Impor	t / Export		
2.				. ⊙
Including archive	Search All De	tails Screen Layout	Price Reference date	Help
Navigation  🛞 📤	Supplier	A Iten	no. Abbreviat	ion Short description
Brice Information (3)	and states	<u>1400</u>	43898 pce	LED E T5 batten 600 9W 3000K CT
	<ul> <li>Annu sighting</li> </ul>	1400	43899 pce	LED E T5 batten 600 9W 4000K CT
Item - Item relations	and a state of	1400	43900 pce	LED E T5 batten 1200 18W 3000K CT
(parent) (2)	areas adding	1400	4 <u>3901</u> pce	LED E T5 batten 1200 18W 4000K CT
Item - Item relations (child)	and the second second	1400	43902 pce	LED E T5 batten 900 11W S 3000K BL
Surcharges (1)	and sold the	<u>1400</u>	43903 pce	LED E T5 batten 600 9W S 3000K BL
	areas defining	1400	43904 pce	LED E T5 batten 300 4.5W S 3000K BL
Accessories (0)	areas defining	<u>¥ 1400</u>	43968 pce	LEDPanelRc-G Sq598-33W-4000-WH-CT
Attachments (0)	areas debited	¥¥ 1400	43971 pce	LEDPanelRc-G Re298-33W-3000-WH-CT

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

🔦 Item accessories	Menu	View	Edit Funct	ions Impor	t / Export	» Item
▶.	•	- 🤍			(	2.
Filter		Search	All Details	Manage screen	layouts	Help
Navigation	$\otimes$	<b>^</b>	V Accessorie	s item code	KA	Acce
Items					F	ilters c
Item: 140043899 Monta	ag					
Edit	۲					
ofChoice item						
Modify						

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:

Choice item selection	View
▶.	
Filter	Search All Details Manage screen layouts Select Choice item Deselect Clear Transfer Stop Help
Supplier Code	Description
SCHNEIDER TAP	Choice taps selection list
l `	
	$\mathbf{A}$
Number of Supplier	Code Description
1.00 SCHNEIDER	TAP Choice taps selection list

- 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:

🔦 Item accessories	Menu View	Edit	Funct	ions 🗌 Import / Expo	ort » Item:	Schneider	r Electric 5197755	
N .	- 🤍		1		?.			
Filter	Search	All	Details	Manage screen layouts	Help			
Navigation		8	<u> </u>	V Accessories ite	m code	KA	Accessories item	Description
Items				1		<u>TAP</u>		Optional taps selection 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 <u>6.1 CREATE SELECTION LIST</u>.

To add an Product choice selection list to a Product:

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1. Through the Menu, to Products > Products:

![](_page_30_Picture_2.jpeg)

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

Products Menu View Edit Functi	ons	1	Print	Import / Export		
▶			1	. 🕗 .		
Filter Search	All	D	etails	Screen Layout Help		
Navigation 🛞	-	^	X	Manufacturer Description	Product code	GTIN
Hems (1)				facts .	<u>140043898</u>	06956712666215
Product - Product relations (parent) (0)		•		-lank	140043899	06956712666222
Product - Product relations (child) (0)		-		ligen.	<u>140043900</u>	06956712666239
Product accessories (0)				1910	<u>140043901</u>	06956712666246
Product certificates (1)						

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

![](_page_30_Picture_6.jpeg)

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:

🔷 Choi	ce product sele	ction Viev	v		6						
۶.		•					Sec.		÷	?	
Filter		Sea	arch All Det	ails Manage screen layouts	Select Choice product	Deselect	Clear	Transfer	Stop	Help	
🔺 Manuf	acturer	Code	Description								
<u>69563</u>	21800000	OPT	Example choice	products							
69563	21800000	OPT2	Choice products	import example							
Ni	umber of Manufac	turer	Code	Description							
	1.00 6956321	800000	OPT	Example choice products							

- 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:

Product accessories	Menu	View Edit Functions	Import / Ex	port » Product:0200004 V	Valraven Schilde
▶.	•		. 🕜 .		
Filter		Search All Details Compano	Help		
Navigation	۲	Seq. Manufacturer	Product	Description	Accessories pro
Products	Þ	1 <u>8712993000005</u>	<u>0200004</u>	Example choice products	
Product:0200004 Walra					
c.la					

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# 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 file<sup>7</sup>)

🗐 Import			×
Import			
Summary	ORE DirectBrofile use The Desiderer (SA ME) 20220004 142118 briez vie		
with impactreport: Full Delta import of manufacturers from file productd Delta import of products from file productdata.xn Delta import of etim product features from file pr	ata.xml nl oductdata.xml		
Delta import of certificates from file productdata. Delta import of product certificates from file prod Delta import of attachments from file procecata full import of items from file pricecatalogue.xml Delta import of attachments from file pricecatalogue. Delta import of item - item relations from file pri Delta import of item - item relations from file price Delta import of product - product relations from file	xmi uctdata.xml a.xml Iogue.xml gue.xml secatalogue.xml nrelations.xml ile itemrelations.xml		
Settings			
Reporting level	Full 🗸		
Is checkrun	● Yes ○ No		
Selected Files	<ul> <li>Delta import of manufacturers (product)</li> <li>Delta import of products</li> <li>Delta import of etim product features</li> </ul>		
	Colta 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 relations		
	Delta import of Product - Product relations		
	Previous Next Clo	ose	

<sup>&</sup>lt;sup>7</sup> <u>Note</u>: 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

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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 (Hoort 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.

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

#### 7.2.1 Product-Product relations

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

Layout Properties Field	ds Memo					
Available fields	<u> </u>	] [	-Selected fields			
· · · · · · · · · · · · · · · · · · ·	*		Field	Header	Pos	
by category			Manufacturer 1	Manufacturer 1	1	
Standard fields			Manufacturer 2	Manufacturer 2	2	
Broduct code 1			Product code 1	Product code 1	3	1
Product code 1		<	Product code 2	Product code 2	4	•
Quantity			Sequence number	Sequence number	5	
Sequence number			Туре	Туре	6	
Туре			Valid from	Valid from	7	
Valid from	-					
Properties						
			Add next record	Save record	Cancel	

- 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.

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- 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.

<u>Note</u>: 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:

Lav-out Figenschannen Velder	Memo		in our species there.	and a standards		
Beschikbare velden		Г	Geselecteerde velden			1
* Alle velden			Veld	Koptekst	Pos	
🗐 – Alfabetisch per letter			Leverancier 1	Leverancier 1	1	
Per categorie			Leverancier 2	Leverancier 2	2	
			Artikel 1 nummer	Artikel 1 nummer	3	
Aantal			Artikel 2 nummer	Artikel 2 nummer	4	
Artikel 1 nummer			Volgnummer	Volgnummer	5	
····· Artikel 2 nummer			Туре	Туре	6	
····· Gearchiveerd			Geldig vanaf	Geldig vanaf	7	
Geldig vanaf						
Туре						
Volgnummer						
Eigenschappen						1
optekst	Leverancier	1		🗹 Automatisch		
eld positie	1		Automatisch			
aste waarde						
andhaven	🚺 🔾 Ja 🖲 Nee					
oorgaan hii fout					-	
	V	oriae l	bewerken Volgende bewe	rken 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.

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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 Product 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 <u>Compano Help website</u>:\

```
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 <u>6.1 CREATE SELECTION LIST</u>.

<u>Note</u>: 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:

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Layout Properties Fields Memo				
- Available fields		-Selected fields		
All fields		Field	Header	Pos
Alphabetically by letter		Manufacturer code (gln)	Manufacturer	1
+ by category		Product code	Product code	2
* 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 choice product(s)
- Choice product manufacturer code (gIn): 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:

		uae. Na aomenie ao da	nied add worthy little use
Add - New layout			X
Layout Properties Fields	Memo		
Туре	Excel import	~	
Name	Example import choice pro-	duct into choice product sele	ction list
Application	🔿 🎟 Within the company	🖲 🗳 For user	
		Save record	Cancel
			1

- a. Name: Enter a name for the layout.
- 5. Switch to the Properties tab:

		use. As some ne so	denied add worthy little use
Add - New layout			6
Layout Properties	Fields Memo		
lumber of header rows	1		
Continue import on errors	⊖ Yes ● No		
		Save rec	ord Cancel

![](_page_37_Picture_0.jpeg)

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- 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:

Layout Properties Fields Men	no					
- Available fields		1 1	-Selected fields			7
All fields			Field	Header	Pos	
Image: Alphabetically by letter	- 1		Manufacturer code (GLN)	Manufacturer	1	
■ by category	- 1		Product code	Product code	2	
Choice product	. 1		Choice product manufacturer code (gln)	Manufacturer	3	
Code	- 1		Choice product code	Choice product	4	
Manufacturer code (gln)	- 1	>	Number of	Number of	5	
Choice product selection list	- 1	<	Sequence	Sequence	6	
Product code     Product code     Texte     Manufacturer	ł					
∃ Standard fields						
Manufacturer code (GLN)	•					
Header	Pr Au	oduct co tomatic	de	•	4	
Field position	7		Automatic			
Fixed value						
Conversion table				- *	净	
Maintain	0	Var O	Ma			<u> </u>

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:

Configuration Menu	View
ፇ.	
Filter	Search All Details Manage screen layouts Help
	▲ Image overview Description ▼
	S Units
	Transfer rules
	Optional products
	1 1

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

![](_page_38_Picture_1.jpeg)

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

🗟 Optional product sele	ction li	sts	Menu \	View	Edit	Import / Export	» Optional product:	Optional proc
Filter	•	Search	Jmport	Relp	•			_
Navigation	۲	Prod	uct code	nep	Sequen	ice Number of	Optional product	Manufa
Optional product:Opti						Filter	s can be selecte	d on the

5. In the pop-up window:

Import			
Import			
mport File	Excel-Optional-Pro	ducts-Lis Select	

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

Import			
Summary			
Test Importof file Excel-Optional-Produc with impactreport: Full Import van Optional product selection I Manufacturer code (gln), met terugv Product code Optional product manufacturer code Optional product code Number of Sequence	cts-List (1).xlsx ists met layout Example import op al waarde: 6956321800000 (gln)	tional product list en v	elden:
Layout1			
Title	Products		
Import entity	Optional product select	tion list	- 🕺
Import layout	Excel import lay-out 'Ex	ample import optional	product lis 🛪 🕸 🖊
Archive not imported records	🔿 Yes 💿 No		

- a. Import entity: Select the Choice product selection list
- b. Import layout: Select the correct import layout

c. 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			
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 optiona terugval waarde: 6956321800000 - code (gln)	l product list en velden:	
Settings			
Reporting level	Full		~
Is testrun	O Yes  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.

📰 Re	sults Checkrun Products (Example import optional product list)	×
	The import has been started as a <u>background task</u> . You will receive an email as soon as the has finished. Then the import report will also be availanble in the logs.	e job
	OK	

- 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 seled	ction lis	ts Menu Vi	ew Edit	Import / Export 1	» Optional product:	Optional product
ፇ.	•	] ا 😓 ا	3.			
Filter	S	Search Import He	elp			
Navigation	8	Product code	Sequer	nce Number o	f Optional product	Manufacturer
Optional product:Opti		140044055		1 2.00	Optional product	6956321800000
Edit	۲	<u>140044054</u>		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. <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:

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

Layout (Troperates					
Available fields		-Selected fields			1
- All fields		Field	Header	Pos	
- Alphabetically by letter		Product manufacturer code (gin)	Manufacturer	1	
- by category		Product code	Product	2	
∃ Standard fields	<	Optional product manufacturer code (gln)	Manufacturer	3	v
		Optional product list code	KPC	4	
		Product GTIN	GTIN	0	
Properties		Mandato	ry fields 🚃		

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:

Summary				
Importof file Optional-product-list-impo with impactreport: Full	ort.xlsx			
Import van Product accessories met lay Product manufacturer code (gln), m Product code Optional product manufacturer code Optional product code Product GTIN	rout Example import optional products en vel et terugval waarde: 6956321800000 (gln), met terugval waarde: 6956321800000	den:		
Layout1				
Title	Blad1			
Import entity	Product accessories		- 🗶	
Import layout	Excel import lay-out 'Example impo	ort optional products	i' on Scr 🔻 🗱 🗭	/
Archive not imported records	🔾 Yes 💿 No			

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#### 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 <u>7.3.1 IMPORT CHOICE PRODUCTS/ITEMS</u> and <u>7.3.2 IMPORT SELECTION LISTS</u>.

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.

![](_page_41_Picture_11.jpeg)

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# 8 Inheritance of accessories and parts

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

![](_page_42_Figure_3.jpeg)

<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

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

Item	Gross price	Additional	Image	Drawing	Alternatives	Accessories	Order information	Price histor
т	Required	Number of	3	Supplier	#Code	Description		
Group 1								
Item	No	1	FI2		140043898			
Item	No	1	FI2		140043904	LED E T5 batte	n 300 4.5W S 3000K BL	
Item	No	1	FI2		140043967	LEDPanelRc-G	Sq598-36W-3000-WH-C	т
Group 2								
Item	No	1	FI2		140043968	LEDPanelRc-G	Sq598-36W-4000-WH-C	т
Item	No	1	FI2	1.000	140043969	LEDPanelRc-G	Sq298-11W-3000-WH-C	т
Item	No	1	FI2		140043970	LEDPanelRc-G	Sq298-11W-4000-WH-C	т
Product acc	essories							
Item					<u>6956712631046</u>	LED E T5 batte	n 1200 18W 1600lm 400	оок ст
Item				-	140043901	LED E T5 batte	n 1200 18W 1600lm 400	оок ст
Item					140043901	LED E T5 batte	n 1200 18W 1600lm 400	DOK CT X

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# 9 Archive/Delete relations

Product (or Item) relations can be archived or deleted by using the *Delete record(s)* function:

To archive a relation:

- 1. Navigate to the relations of a Product.
- 2. On the Product Product relations overview, select a relation and, under Edit, click on *Delete record(s)*.

A Product - Product relation	s Menu View Edit	Functions Import / Export > Produ	Ict:0491436 Threaded end
Including archive	Search All De	tails Product relations	
Navigation 🛞	🔺 Х Туре	Manufacturer 1 Product code	1 Manufacturer 2 Product code 2
Product:0491436	FI2 - Fits to	0491436	0452045
Edit	FI2 - Fits to	0491436	<u>0491964</u>
add and a second	FI2 - Fits to	0491436	<u>0491480</u>
Modify	PAR - Contains part	0491436	0452045
Delete record(s)	PAR - Contains part	0491436	<u>0491964</u>
Functions	PAR - Contains part	0491436	0491480

3. In the pop-up message confirm that you wish to *archive* the relation:

	×	
Are you sure you want to <b>archive</b> 1 product - product relation?		
		J

### 9.1 View archived relations

To view which relations have been archived, set the Filter set to Including archive:

# **10 Filter & Search**

The Filter and Search options can be used to find product or items with relations and/or a specific type of relation.

Note: Examples will be given for filtering and search for Product relations, however the same options are available for filtering and searching for Item relations.

![](_page_44_Picture_0.jpeg)

### **10.1 Find products with relations**

Products with product relations can be found through the filter options:

- Product Product relations (parent) •
- Product Product relations (child) ٠

To find Products that have a Product – Product relations:

- 1. Through the Menu, go to *Products > Products.*
- 2. Click on the *Filter* button and go to the *Additional* tab.

Filter	te te la l'il					×
Product Classification Mo	del Additional	User-defined fields	Translations Co	untry-specific fields		
Manufacturer	= value 🗸 🗸				•	^
Special						
Items	all 🗸					
Number of items	= value 🗸 🗸					
Certificates	all 🗸					
CertificateCount	= value 🗸 🗸					
Attachments	all 🗸					
Amount of attachments	= value 🗸 🗸		]			
Product - Product relations (parent)	all 🗸					
Product - Product relations (child)	all 🗸					
Suppliers	has product - produ does not have produ	ct relations (child) uct - product relations (	child)			
	has unarchived proc	duct - product relations	(child)			
	has no unarchived produc	product - product relations (cl	ind) ins (child)			
	aii	Apply	Empty	Empty and close	Save as	
ring Ø	F 15x12					

- 3. Under Special, use either the Product Product (parent) or (child) option to filter on:
  - a. Has product product relations: Find products with any relations (active and/or archived) product - product relations.
  - b. Does not have product product relations: Find products with without relations (no relations at all) product – product relations.
  - c. Has unarchived product product relations: Find products which have *active* product relations (may also have archived relations).
  - d. Has archived product product relations: Find products which have archived product relations (may also have active relations).
  - e. Has no unarchived product product relations: Find products which have only archived relations or no relations at all.
  - f. All: Find all products, both with or without product relations and regardless of the archive status of the relation.
- 4. Then click the *Apply* button to activate the Filter.

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# **11 Export of Product/Item Relations**

## 11.1 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.

### 11.2 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.

### 11.3 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 <u>Ketenstandard Semantic Treehouse</u> > 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*.

Assortment Menu View	Edit Functions Import / Export
⋟.	⊸♀  🌲 🎍 💽 🖳 100.
Filter	Search Export assortments Import Item exports Export images Help
Navigation	🔊 🔺 Logo Code Description
Huns (1078)	The sector field
	UPDPA Independent
Logs (5)	25300 mm is the where the tests
Item groups (0)	CONTRACTOR INC.
07	Including Plans
Purchase Contracts	Intel and have there have
Transfer rules	Intel No. And New Yorks Server
	Intel Intel Annu Party States
Memo (0)	(14.1.10) And any opposition 1 (Performance)
Edit	A set of
	CLARING LANCES IN AN ADDRESS
Add	STATE STATES
Modify	OPPLE OPP NL OPPLE Lighting
	Cardination Selection (In Mar Select
	Schwider manage them but

3. In the pop-up window:

Item exports				×
Item exports				
Send export to	my-email@company.co	om		
Software package	Other			~
Free text export	🔾 Yes 🔘 No			
Item Format	DICO/SALES005			~
Country			- 💥	
Languages (item)	✓ de German ✓ en English ✓ fr French	□nl Dutch ✓nl-NL		
Prices	Gross prices			~
Future Prices	🔾 Yes 🖲 No			
Including archived items	🔾 Yes 🖲 No			
Products (product data + class)	🔘 Yes 🔾 No			
features (technical product specifications)	🔾 Yes 🔘 No			
Classification system	ETIM Dynamic			~
Item relations (item - item)	🔘 Yes 🔾 No			
Item relations (product - product)	🔘 Yes 🔾 No			
Changes since:	01/01/0001			
Price reference date:	08/09/2023	<b>H</b>		
		Export	Close	

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

#### **11.4 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.

#### 11.5 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:

#### 11.5.1 Manufacturer

Manufacturers usually link parts or accessories to a main Product.

#### 11.5.2 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.

#### 11.5.3 Inherit

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

#### 11.5.4 Linking by product and item

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