Delta L03/L04 PIM
Compano Online Software

Version 1.8

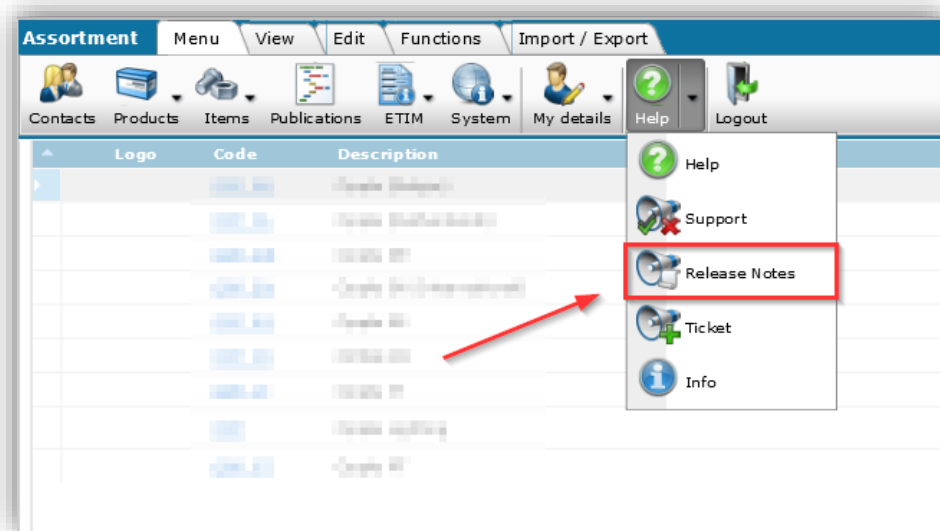| File	Delta_L03_L04_PIM_EN.docx
Date	29-1-2024

Contents

1 Introduction

Compano's online software (COS) has been updated from version L03 to version L04. This document describes the most relevant changes and innovations.

A complete overview of the differences between these two versions can be found in the Release Notes of the L04 version. These notes are available in the main menu under *Help*.

Note: The Release Notes are only available in English.

1.1 Concepts
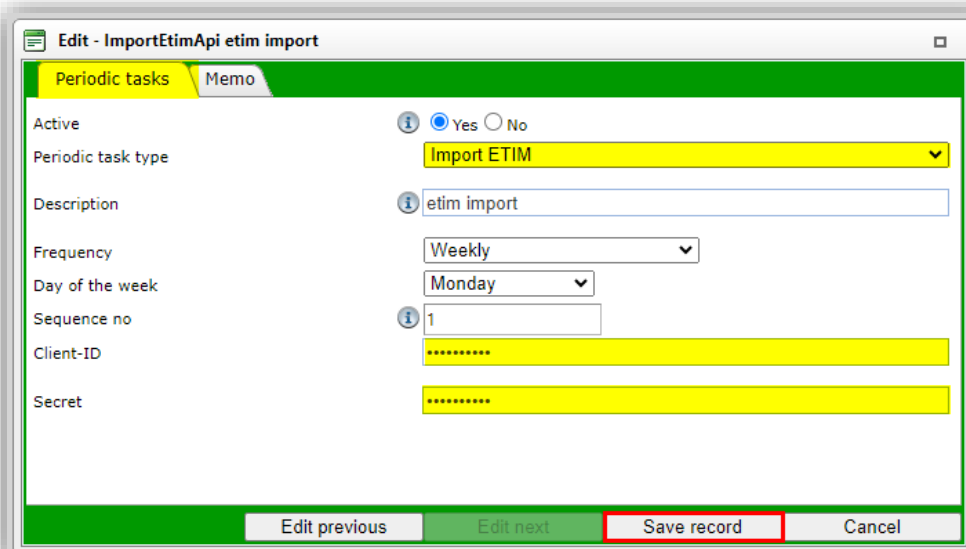
COS   Compano online software.
L-version   Lion version of Compano online software.
UDF   User-defined fields are additional data fields that can be added and
                       customized by the user.

2 Important changes

2.1 Replacing ETIM import IXF with customer API (PRIVATE)

For Compano customers with a *dedicated (private) application* , from L04 onwards, the import of updates to the ETIM Dynamic standard must be arranged by the customer himself:

1. Customer becomes a participant of the ETIM standard: https://ketenstandaard.nl/word-deelnemer/
2. Customer receives login details from Ketenstandaard (`ClientId` and `Secret`).
3. Customer creates *Periodic task* of type `Import ETIM API` via *System > Configuration > Periodic tasks*.

3

a. Active: Set this option to **Yes**.
b. Periodic task type: Select **Import ETIM API.**
c. Description: Enter a description for the task.
d. Frequency: Choose a frequency, such as **Weekly**.
e. Day of the week: Choose a day of the week.
f. Sequence number: Will be set automatically, but you can also set it yourself. The sequence number determines the order in which periodic tasks are performed.
g. ClientId: Enter the **ClientId** that you received from Ketenstandaard.
h. Secret: Enter the **Secret** code that you received from Ketenstandaard.

4. Save the record.

The ETIM Dynamic update is now handled automatically. These updates include:

- All changes to the ETIM Dynamic standard (new/changed classes, attributes, and values)
- ETIM translations for Dutch (**nl-NL)**
- ETIM translations for the other 'free' languages: English (**EN**), German (de-DE), Flemish (nl-BE), Belgian French **(fr-BE),** Suomi/Finnish **(fi-FI), Italian (**it-IT), **Norwegian (**no-NO**)**

Note: Other ETIM translations need to be paid for. These languages must always be downloaded from the ETIM website of the corresponding country. See the Manual Multilingual Data.
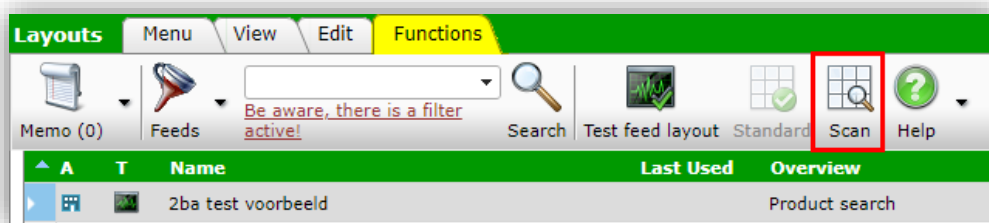
2.2 New Excel import layouts / templates L04

For the L04 release, new standard import layouts have been added; this is made clear in the name of the layouts, which are labeled 'L04'.

Note: The import layouts for Product and Item Information are now specifically suitable for import of *Dutch* Descriptions and Brand, Series, Type. To import other languages, the import layout will have to be adjusted; Language-dependent fields should then be replaced with the language-specific fields of the language to be imported.

Corresponding Excel import templates are available via the Compano Help website.
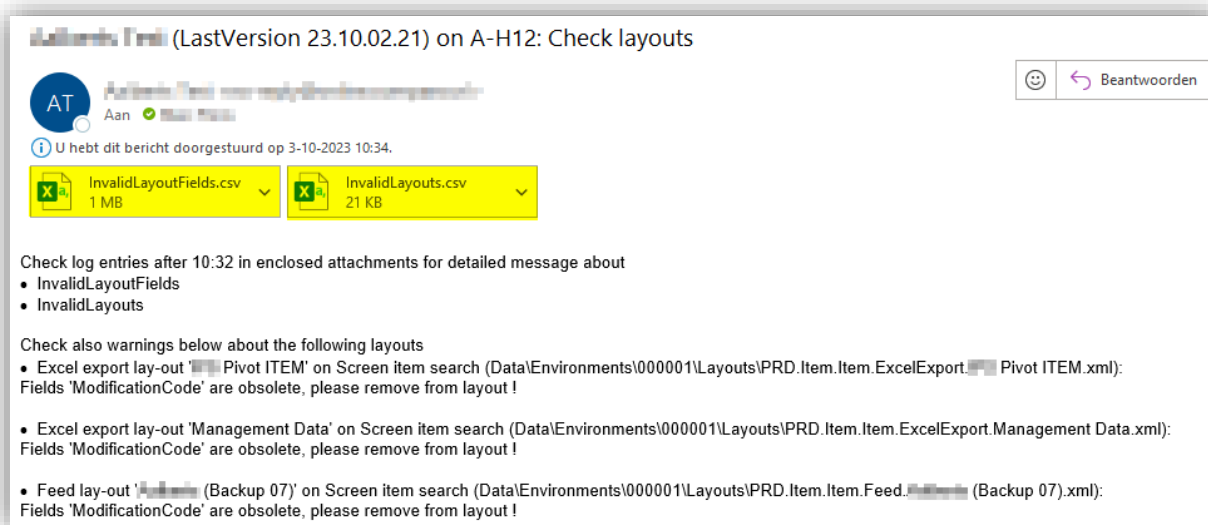
2.2.1 Scan invalid data fields (PIM, MDM)

A *Scan function* has been added to the Compano software. The feature can be found on the *Layouts* overview and scans all layouts for invalid fields, including calculated fields, duplicate key fields, or missing key data fields.

All layouts that are corrupt (duplicate or missing key data fields) are removed immediately[1].

For all layouts that contain invalid fields, an error message/warning is displayed on the screen. This warning is also displayed when attempting to import data with an invalid layout. Invalid layouts are not removed, so they can still be corrected or recreated by the user with the correct fields.

Corrupt and invalid layouts are reported in a *scan report* after the scan. This scan report contains separate CSV files for layouts with invalid fields `(InvalidLayoutFields.csv`) and for corrupt layouts (`InvalidLayouts.csv`). The scan report is available via *System > Logs* and is also sent to the user performing the scan.

Note: Invalid fields have also been removed from the *Field Picker* for creating import layouts.

2.3 User rights on Help-function (private)

For private applications (not shared) that make use of user rights, please note that user rights have been added to the Help-function. Thus, make sure to check the access rights for the Help-function, as otherwise your users will no longer be able to access the Compano help-website from your application.

---

[1] Compano consultants will still have access to layouts that have been removed.

3 New in L04

3.1 Login timeout

In the L04 release you will be automatically logged out after 60 minutes of inactivity; This is a security measure.

3.2 DQR9.0/Industry Standard Update

3.2.1 Import accessories

Accessories from a DQR 8 or DQR 9 file (ItemSets) are imported into COS as Item relationships of type **BE2**.

Example
```
<sItem>7733701686</sItem>

<ItemSets>
  <sAssignedItem>7733701635</sAssignedItem>
  <nQuantity>1.0</nQuantity>
</ItemSets>
<ItemSets>
  <sAssignedItem>7733701636</sAssignedItem>
  <nQuantity>1.0</nQuantity>
</ItemSets>
```

Note: The exception is an *Eichgebühren* accessory. This is imported on the basis of "Attribute tags" as an accessory of type **BE2**, set to `mandatory` and with the grouping text `Eichgebuhren`.

Note: *Itemset subtags* now also lead to accessories, type `ENC` (enclosed item), `not mandatory`, and as grouping text `ItemSet`.

3.2.2 DQR 9 export

The DQR export has been updated to version 9.0. Compared to the previous version of DQR, there are small differences. Relevant modifications and instructions for correctly filling in the data in COS are described in the Manual DQR.

3.3 Country-specific fields

On products and items, country-specific fields for exports and certain *industry formats* (for example, for *BMEcat 2005*) can be enabled, such as *UBA Positiv Liste* (Germany) or *LIV-number* (Finland).

3.3.1 Enable/disable country-specific fields

Country-specific fields can now *be enabled or disabled* by the application manager per country *via the Country table* in the Configuration overview, such as LVI-*number,* SEG-number, etc.:

Note: Country-specific fields are hard-coded and are added by Compano per country. A request to add a country-specific field can be made via support@compano.com.

3.3.2 Metric/imperial system fields

The conversion of Imperiale to Metric measures and vice versa is done via user-defined fields and their *mapping* to ETIM attributes. See also the Manual Metric/Imperial.

However, the `Height, Length, Width, Weight, Volume` system fields and their units, such as `Meter`, `Kilo` and `Cubic Meter`, are listed as USA country-specific fields *and* are available when enabled at the USA country. When a system field is filled in, its Metric or Imperial counterpart is calculated and filled in.

Note: Calculation of Metric or Imperial values is automatic as soon as one of the two fields is filled in. By removing the checkmark next to 'automatic', the automatic value can be overwritten with a self-filled value. This can be useful, for example, for nominal values, where a calculated value of `50.8` is equal to the nominal connection size `50`.

Note: The metric value is leading in the conversion. However, the Imperial value for each product/item can be manually 'overruled' by removing the checkmark from 'Automatic'.

7

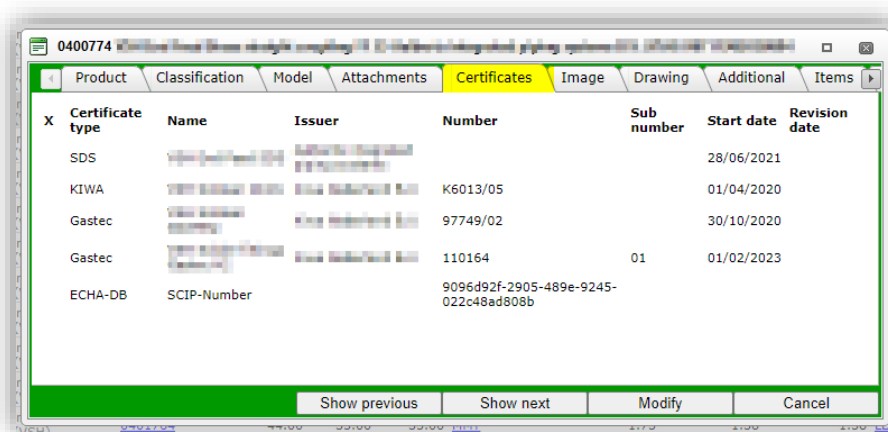### 3.3.3 Imperial conversion for UDF type Table value

For user-defined fields of type *Table* value, a Imperial value can now also be filled in (extra field). This value is converted from the Metric value and cannot be adjusted. Associated ETIM attributes are provided with an additional field for an Imperial value; This too cannot be changed.

3.4 Certificates

For Certificates at Products, a number of adjustments have been made:

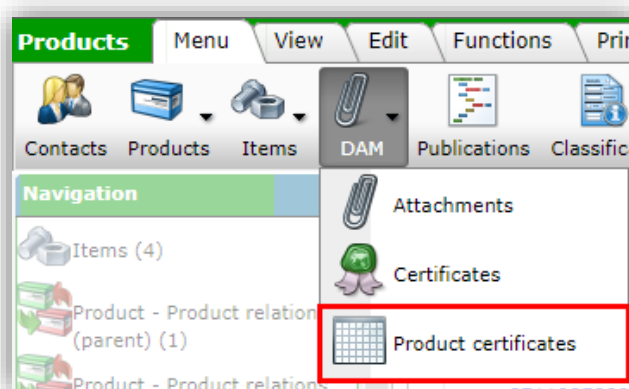### 3.4.1 Overview of certificates per product

An additional Certificates tab is included in the *Product Information.* The tab shows which certificates are linked to the product:

3.4.2 All product certificates overview

An overview of all Product Certificates has been added to the DAM menu. This overview shows a list of all certificates with the associated products. This list can be exported as an Excel file.

3.4.3 Import option certificates

The links between Certificates and Products can also be made via an Excel import. Key fields for this import are: `Type`, `Number, Sub-number, Issuer`, `Start date`, `Manufacturer (GLN),` `Product code`. A standard import template and a corresponding import layout are available for this import. The data field `name` has also been added as a key field so that *certificates can also be identified as unique* by 'name'.

8

3.4.4 New Certificate types

In COS, the certificate types as used in the DICO/SALES industry standard are available by default. In addition, the table of certificate types can be expanded with common types from the BMEcat, DQR and FAB-DIS standards. These certificate types can then be used to generate complete and correct exports in these industry standards. It is also possible to add your own certificate types to the table.

More information about using Certificate Types for industry standard export can be found in the manuals available for each of these standards from the Compano Help website. This method is also explained in the Manual Attachments and Certificates.

Note: After migration from L03 to L04, the new Certificate Types should be available for Compano customers with an PIM International license.

3.4.5 Filter by Certificates under Product

It is now possible to filter products by linked certificates with the following options:

- Has certificates
- Has no certificates
- Has unarchived certificates
- Has archived certificates
- Has no unarchived certificates
- All

3.5 Product and Item relations

Relations between products and items are now handled with one universal method that covers all types of relations, including:

1. Predecessor and successor
2. Accessories
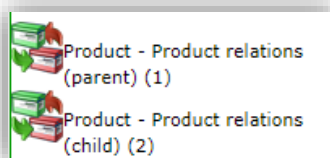3. (Spare) parts
4. Alternatives

Note: *No changes* have been made to the *Choice Products* and *Choice Items* interface; these will be handled according to the existing method.

Product and Item relations can be set up between:
- A `product` (parent) and `product` (child)
- A `item` (parent) and `item` (child)

9

The **parent** is the main product or item, the **child** is then the Successor, Predecessor, Alternative, Part or Accessory.

A new interface has been developed for setting up these relations[2]. If the relation between parent and child is *reciprocal*, then this relation should *be established in both directions*. The interface therefore offers 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 relations from child to parent, where the selected product (child) is **product 2**, and the parent product is **product 1**

Note: All relations existing in L03 will be converted to parent-child relations during the transition to L04, with the exception of choice products and choice items. The parent-child relations can be edited and supplemented according to the new method after conversion.

3.5.1   Changes to feeds

Important: The new setup of *Product and Item Relations* will have a marked impact upon JSON and XML data feeds that include these relations. Please inform your IT-department and/or third party website or web shop company about these changes to the feeds.

Changed:
- Any feed containing product parts or accessories
- Any feed containing item accessories, (own) alternatives or enclosed items
- Any feed containing product or item predecessor and successor

Not changed:
- Feeds containing choice products
- Feeds containing choice items

More information about the changes to the feeds can be found in the Manual JSON Feeds.

3.6   Multi-pass import

A new option when importing data is the *multi-pass import*. This option allows multiple, sequential imports of data with different import layouts. This method can be used for:

- Import of interdependent data sources, such as:
  o   Product and item.
  o   Item and multiple attachments.
  o   Item with current and future price.
- Import column-based data files, such as items with different packaging data, organized into consecutive Excel columns.

---

[2] For *choice products* and *choice items*, the interface has not changed.

Note: To import these types of "variants" of items, the term variant must appear in the name of the import layout. Item codes are then supplemented with _01, _02, _03 to _04.

- One Periodic Task instead of multiple, interdependent periodic tasks, for example, for importing product and associated item data.
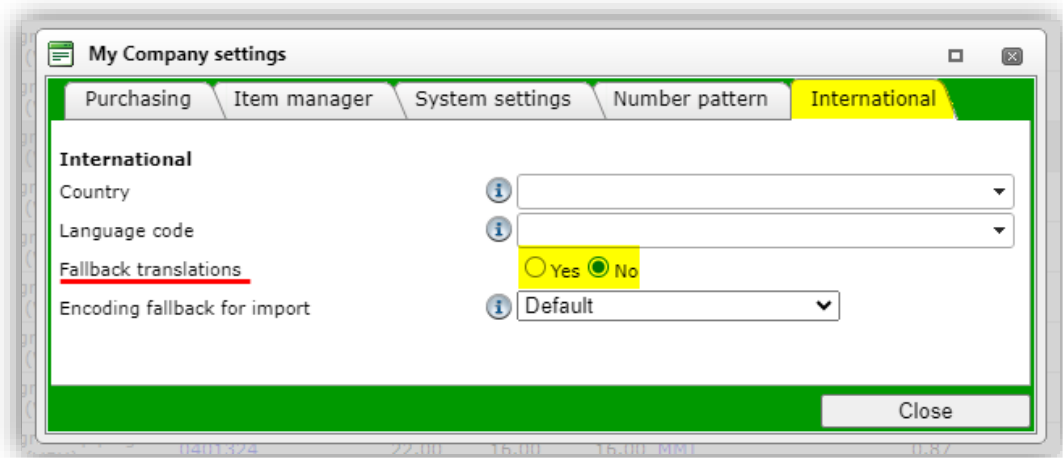
Important: A maximum of *5 consecutive imports* can be handled in this way.

More information about the Multi-pass import can be found in the Manual Universal Import/Export.
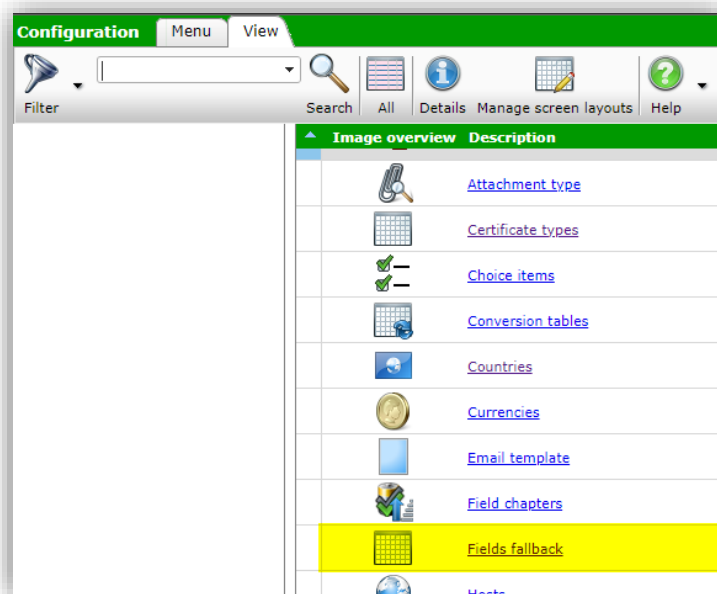
3.7   Field Fallback

A Fields Fallback System has been added to the application, as a manual alternative for the default Automatic Fallback System. This new system is available for text fields of the entities Product, Product group, Item and Item group and allows for manually setting the 'fall back' to the value of *any another* text data field of the entities Product, Product group, Item and Item group. This way, whenever a data field is not filled out, its value will be read from the field it falls back to. **When required, an entire 'fallback chain' can be set, where a data field can be set to fallback upon** several consecutive text fields (max. 4).

To activate the *Field Fallback System*, the default fallback of translations must first be disabled, via *My Company Settings > International tab*:

Setting the Field Fallback per Field is available via the Configuration Panel:

More information can be found in the Manual Multilingual Data.

Important: If you want to start using the Fields Fallback, make an appointment with your Compano Consultant; who can help you set up the fallback correctly.

Note: The following fields had a *hard-coded fallback* to *Purchase Item*, however this fallback has been removed in favor of the new Fields Fallback system:

- Commercial description (item)
- Technical description (item)

In addition, for a number of language-based fields, the following *Manipulation options* have been removed:

- From purchase item
- From product
- From preferred item
- From description 1 and 2

4   Other changes

Some other import changes in the L04 release are:

4.1   New set-up help page Compano

The Compano help page has been redesigned: each version of the software now has its own Help-page on which the manuals for that version can be found. For the L04-version of the software, manuals can be found through this URL: https://help.compano.nl/compano-manuals/Manuals-l.html?style=L04

4.2 New reporting level

A new level can be set for reports: `All except the Product Features`. This is now the default setting for all reporting.

This also allows the reporting of changed Product Class Features when adjusting ETIM classification, by setting the level to `Full`.

Note: By setting a less complete reporting level, for example for transfer actions, the action can be completed faster.