

4.5.1. How to Import Data from Cin7

In this article we describe:

- [correspondence between key terms in Cin7 and Streamline](#),
- [integration limitations](#),
- [imported data](#), and
- the [data import workflow](#).

Key Terms

The key entities that Cin7 handles are products (Style codes), product options (Codes or SKUs), and branches. Streamline treats product options as [items](#), product name as [item description](#), and branches as [locations](#).

Integration Limitations

Cin7 products can have size options that are only relevant to 'fashion products'. Let's call these as *sized items* and distinguish them from regular items. The table below shows the data that Streamline imports for regular and sized items.

Data	Regular item	Sized item
<i>Sales history</i>	✓	✓
<i>On-hand history</i>	✓	

The Cin7 API does not currently expose the on-hand history for sized items. Thus, Streamline is not able to:

- calculate inventory [turn-over](#),
- compute the number of days in the period you had run out of inventory ([Stockout days](#)), and
- automatically determine whether lost sales are caused by a stock-out or zero demand

for sized items.

Imported data

Data imported into Streamline is described in the [Inventory Management Systems](#) article.

Data Import Workflow

Streamline uses Cin7 API to import the [data](#). To authorize Streamline, Cin7 requires providing an API username and API key. The API username can be retrieved from Cin7 Integrations settings, whereas

the API key is generated when creating a Cin7 API connection. Below we describe how to get these credentials.

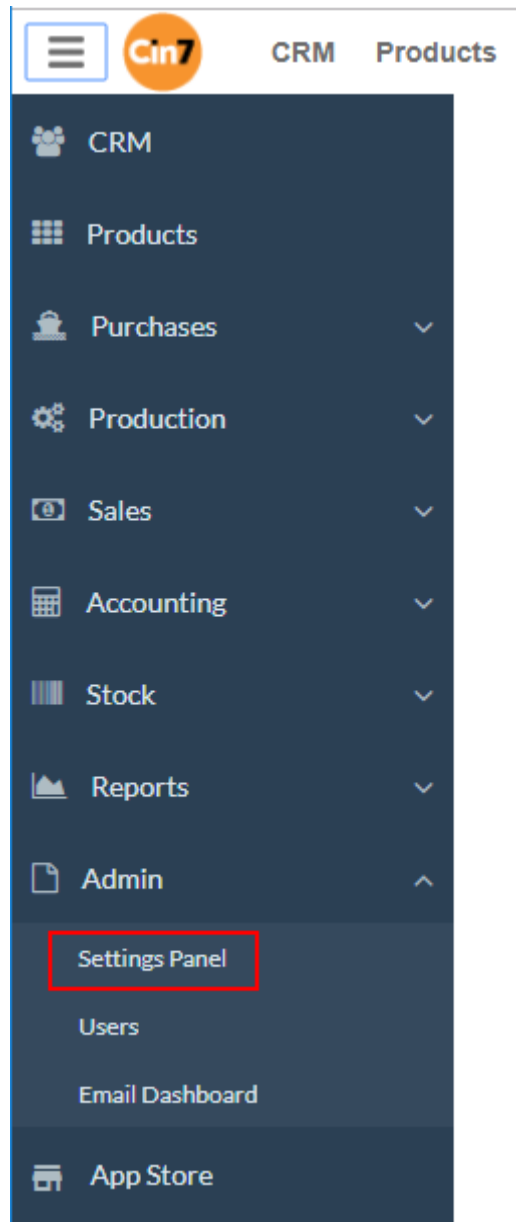
The data import includes two steps:

1. [Retrieving the API username and API key.](#)
2. [Importing the data into Streamline.](#)

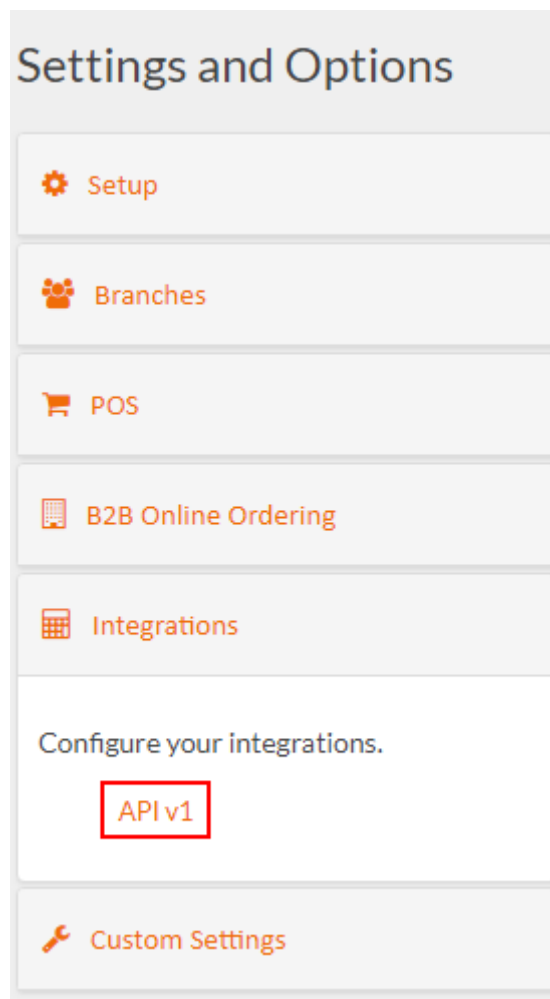
Retrieving API Username and API Key

To retrieve the API username:

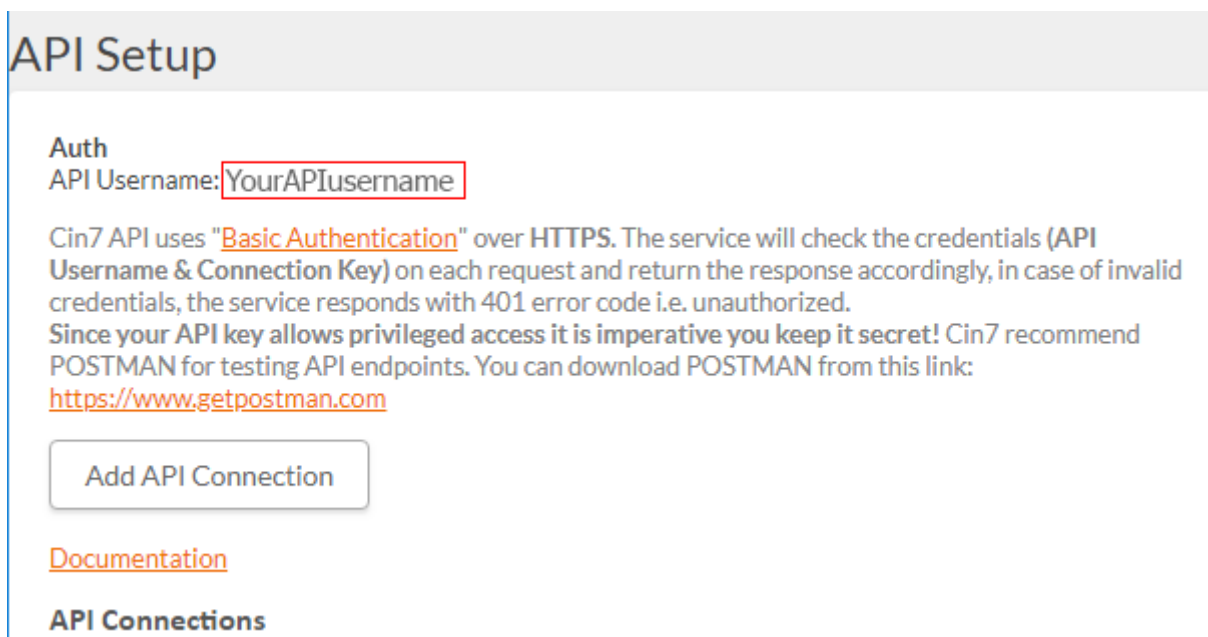
1. Log in to your Cin7 account.
2. Go to the menu **Admin > Settings Panel** (see figure below).



3. Expand the **Integrations** section and click the **API v1** link (see figure below).

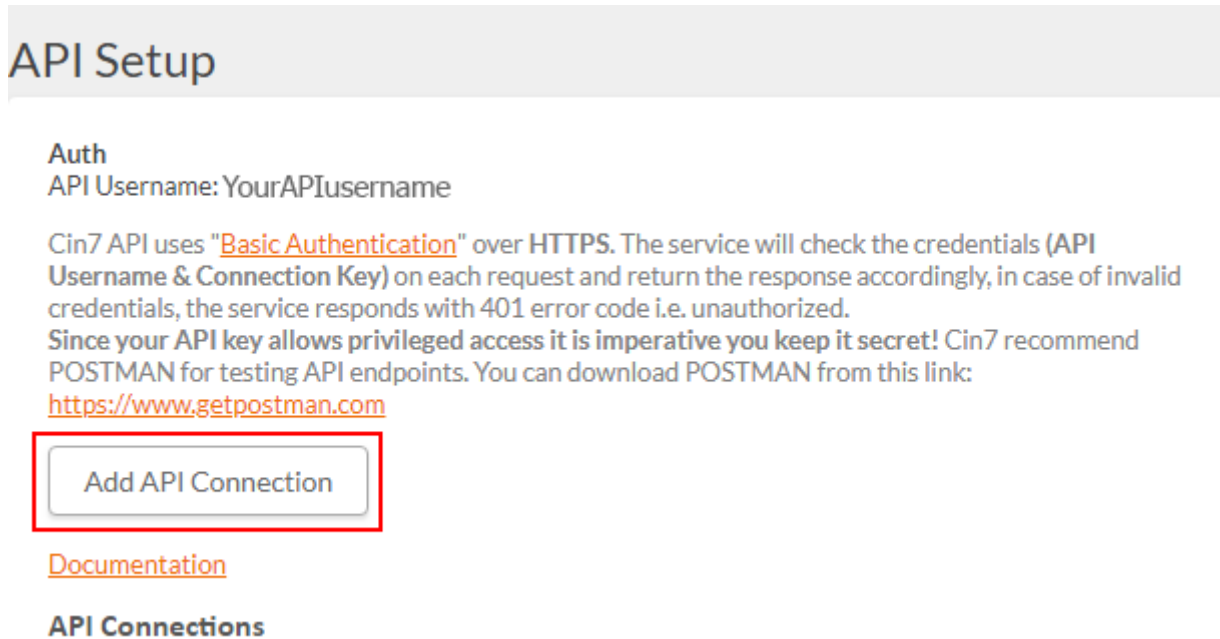


4. The API username is shown in the **Auth** section on the API Setup page (see figure below).

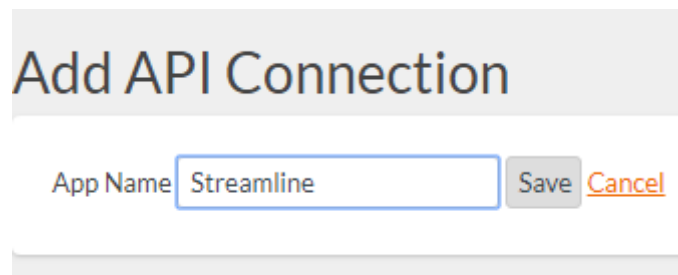


To get the API key, we need to create an API connection in Cin7. To do this:

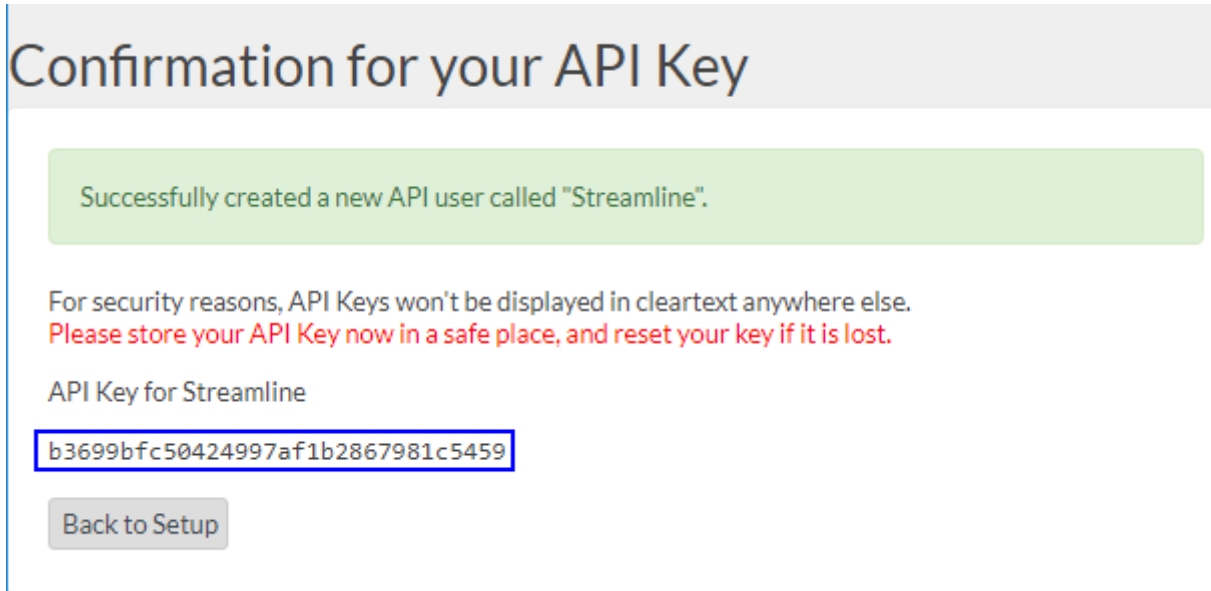
1. Click the **Add API Connection** button (see figure below).



2. Enter a name for the connection and click the **Save** button (see figure below).



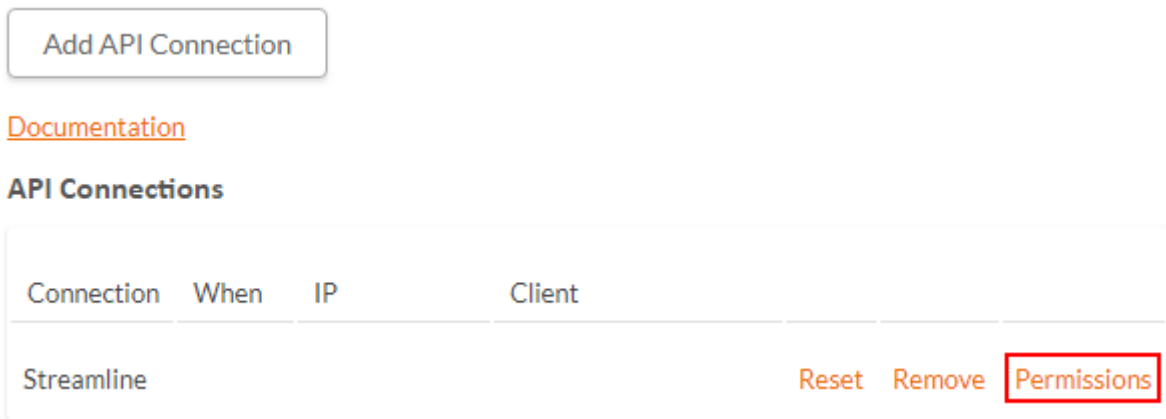
3. Now, the API key is generated (see figure below).



Store the generated key in a safe place. Cin7 displays it only once - now, on this page. If the key is lost, reset it.

The next step is to configure permissions for our API connection. This will ensure that Streamline has access only to the necessary data. To do this:

1. Go back to the API setup page by clicking the **Back to Setup** button.
2. Find your newly created connection in the API connections list and click the corresponding **Permissions** link (see figure below).



3. Set the permissions as shown in the figure below and click the **Save** button.

API Connection Permissions Streamline

Permissions have been saved.

RESOURCE	CREATE	READ	UPDATE	DELETE
Contacts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Branches	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Product Categories		<input type="checkbox"/>		
Products		<input checked="" type="checkbox"/>		
Product Options		<input checked="" type="checkbox"/>		
Stock		<input checked="" type="checkbox"/>		
Serial Numbers		<input type="checkbox"/>		
Branch Transfers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Adjustments		<input checked="" type="checkbox"/>		
Vouchers		<input type="checkbox"/>		
Sales Orders	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Quotes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Credit Notes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
BOM Masters		<input checked="" type="checkbox"/>		
Production Jobs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Users		<input type="checkbox"/>		

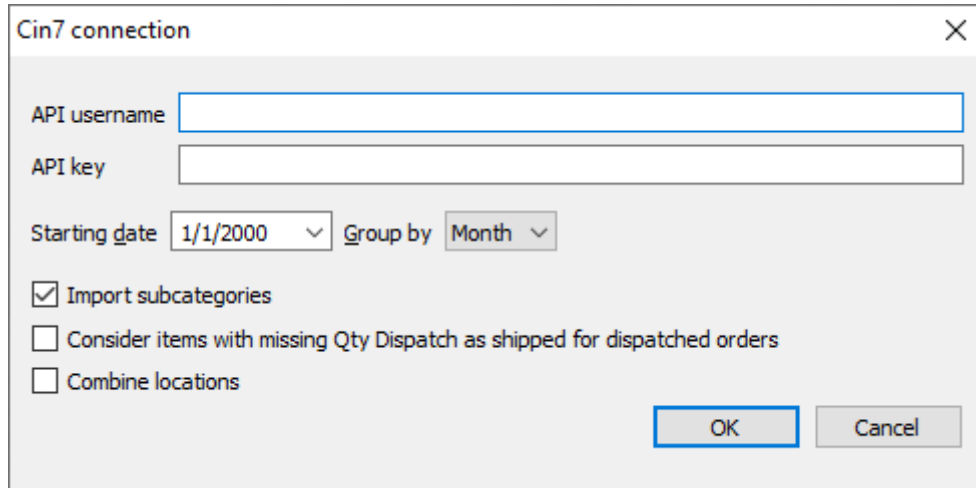
Save

[Connection List](#)

Importing the Data into Streamline

To create a new Streamline project based on Cin7 data:

1. Go to the menu **File > New > Cin7 connection**. The **Cin7 connection** dialog appears (see figure below).



Cin7 connection

API username

API key

Starting date Group by

Import subcategories

Consider items with missing Qty Dispatch as shipped for dispatched orders

Combine locations

2. Enter your API username and API key.

3. Enter or choose the date to start the import from in the **Starting date** control.

To get accurate forecasts, we recommend providing Streamline with at least 24 months of sales history.

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4. Choose the data aggregation period in the **Group by** control. Streamline automatically aggregates your data in the given periods (days, weeks, or months). For example, if you want to see the forecasts, replenishment plans, and other reports in months, group the data by month.

5. Click **OK** to start the import.

The screenshot shows the GMDH Streamline 4.8.8 interface. The top menu includes File, Item, Process, and Help. The main window displays a data table for 'Cin7 Training Products' with columns for months from Aug 2018 to Apr 2019. The table includes rows for Actual sales, Statistical forecast, Forecast adjustments, Average sales price, Revenue, On hand, and Stockout days. A chart below the table shows 'Actual sales' for Cin7 Training Products from Aug 2018 to Jun 2019. On the right, a forecasting configuration panel is visible with various settings like Forecast approach, Model, and Seasonality weighting.

	Aug 2018	Sep 2018	Oct 2018	Nov 2018	Dec 2018	Jan 2019	Feb 2019	Mar 2019	Apr 2019
Actual sales	73	0							
Statistical forecast									
Forecast adjustments									
Average sales price	10.82								
Revenue	790.00								
On hand		521							
Stockout days									

Import Options

- **Import subcategories** adds a new subcategory under the item category into the imported data hierarchy shown in the [Tree View](#).
- **Consider items with missing Qty Dispatch as shipped for dispatched orders.** This option impacts the sales history imported from Cin7. If a sales order has fully dispatched date and there are lines that were not shipped at all (the **Qty Dispatch** is empty in Cin7), this option makes Streamline to add them into the sales history as if they were fully shipped to the customer.
- **Combine locations** option merges all your locations into one virtual warehouse. This is useful when your warehouses are located next to each other, so they can be planned as a single aggregated warehouse.

Next: [DEAR](#)

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