

## 3.5.1. 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 Correspondence

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

The data, imported to 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

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

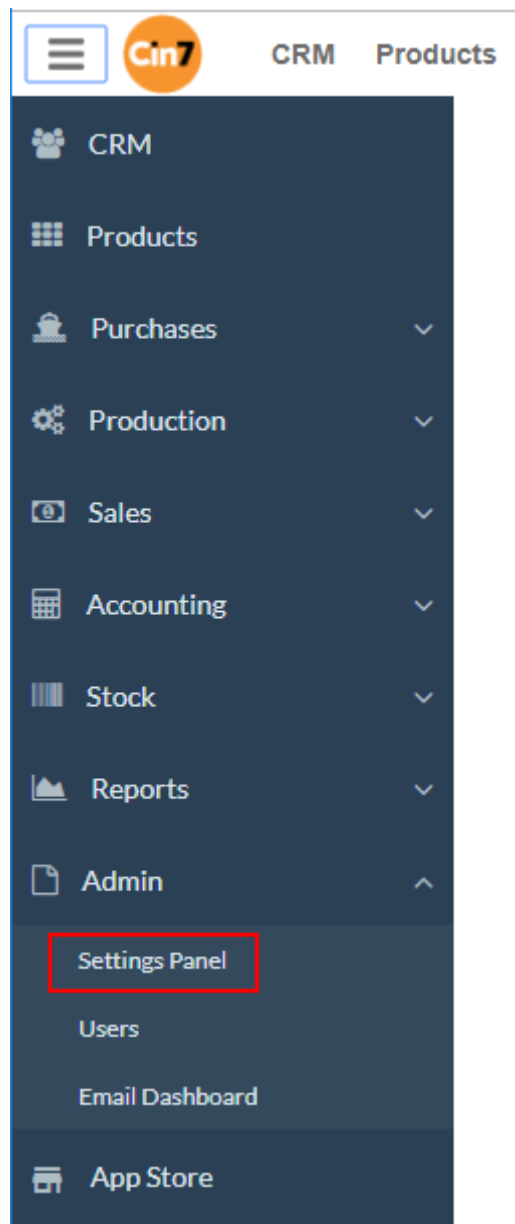
The data import includes two steps:

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

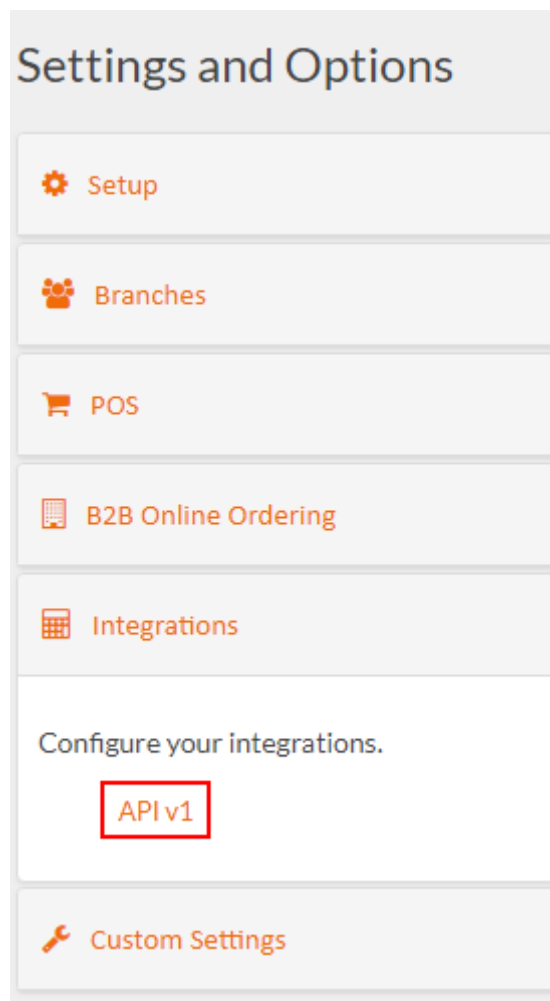
## Retrieving API Username and API Key

To retrieve the API username:

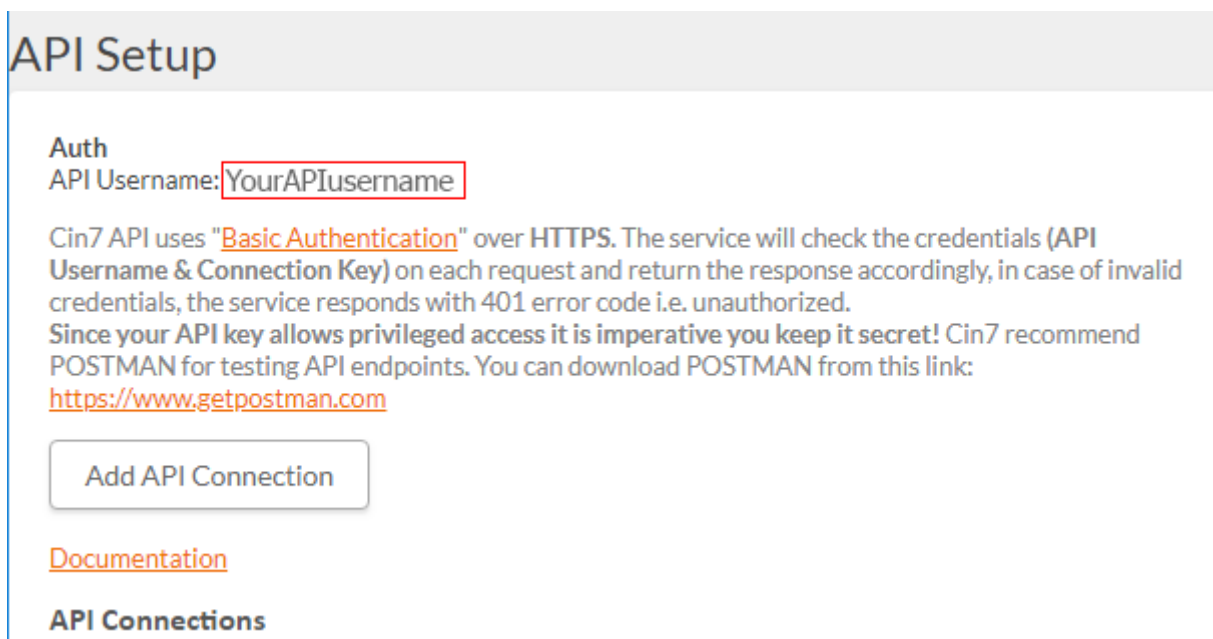
1. Log in to your Cin7 account.
2. Go to the menu **Admin > Settings Panel** (see figure below).



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

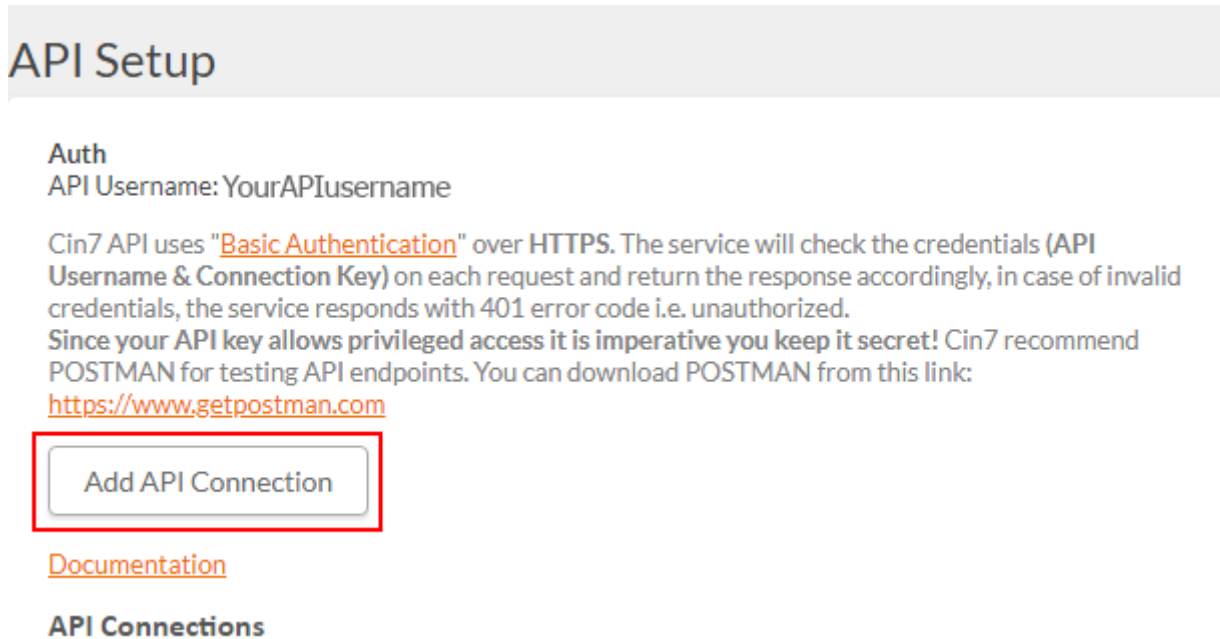


4. The API username is shown in the **Auth** section on the API Setup page (see figure below).

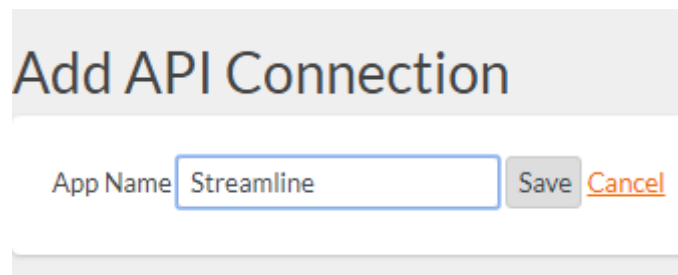


To get the API key, we need to create an API connection in Cin7. To do this:

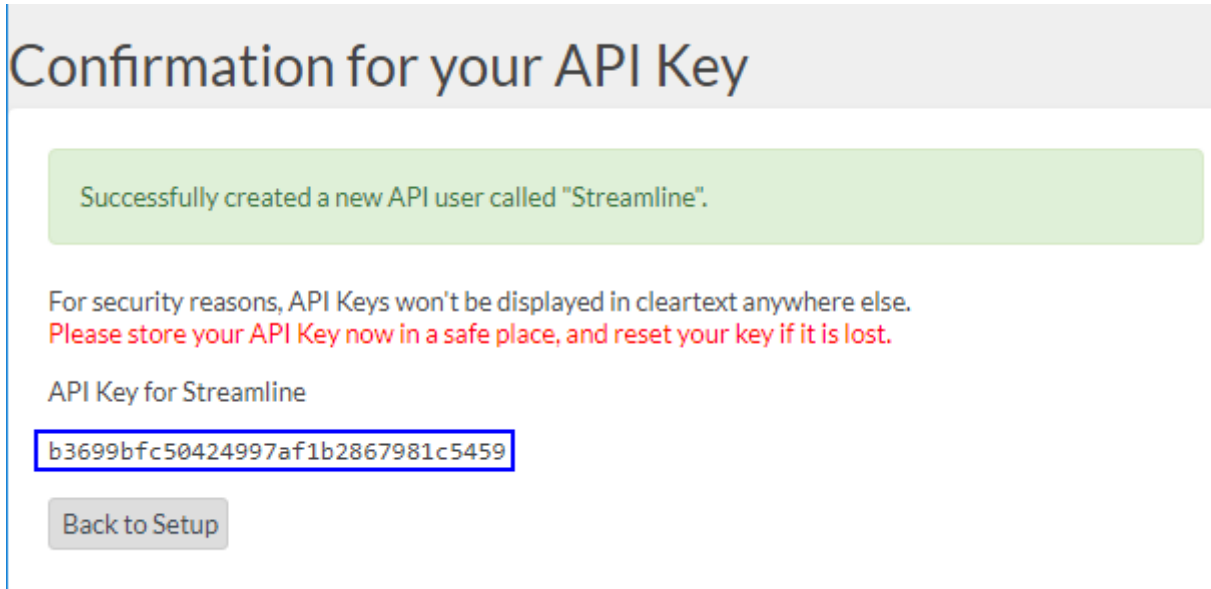
1. Click the **Add API Connection** button (see figure below).



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



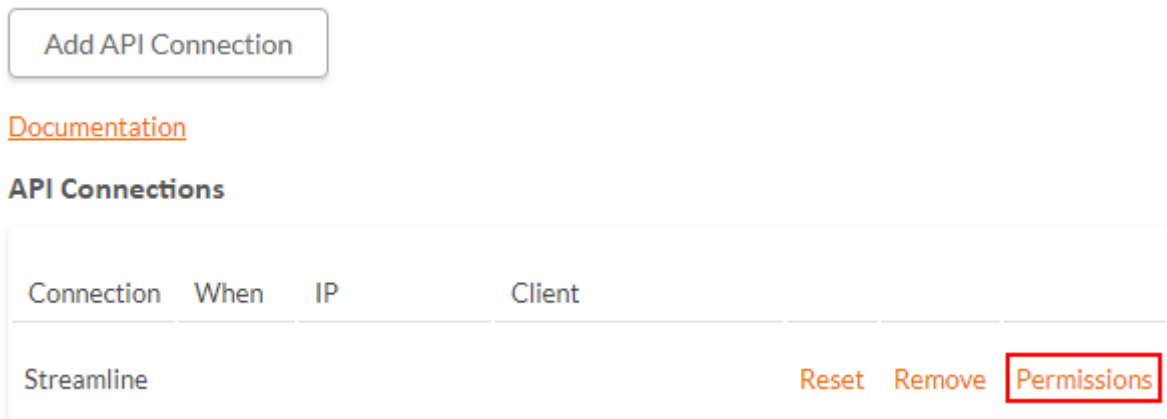
3. Now, the API key is generated (see figure below).



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

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"/>		
Adjustments		<input checked="" type="checkbox"/>		
Vouchers		<input type="checkbox"/>		
Sales Orders	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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"/>	<input type="checkbox"/>
Quotes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit Notes		<input checked="" type="checkbox"/>		
BOM Masters		<input checked="" type="checkbox"/>		
Production Jobs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Users		<input type="checkbox"/>		

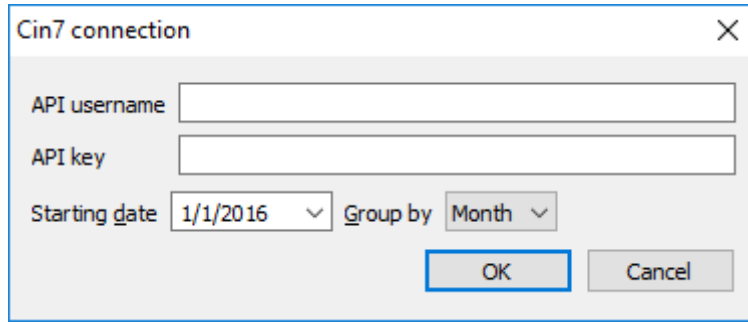
Save

[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).



2. Enter your API username and API key.

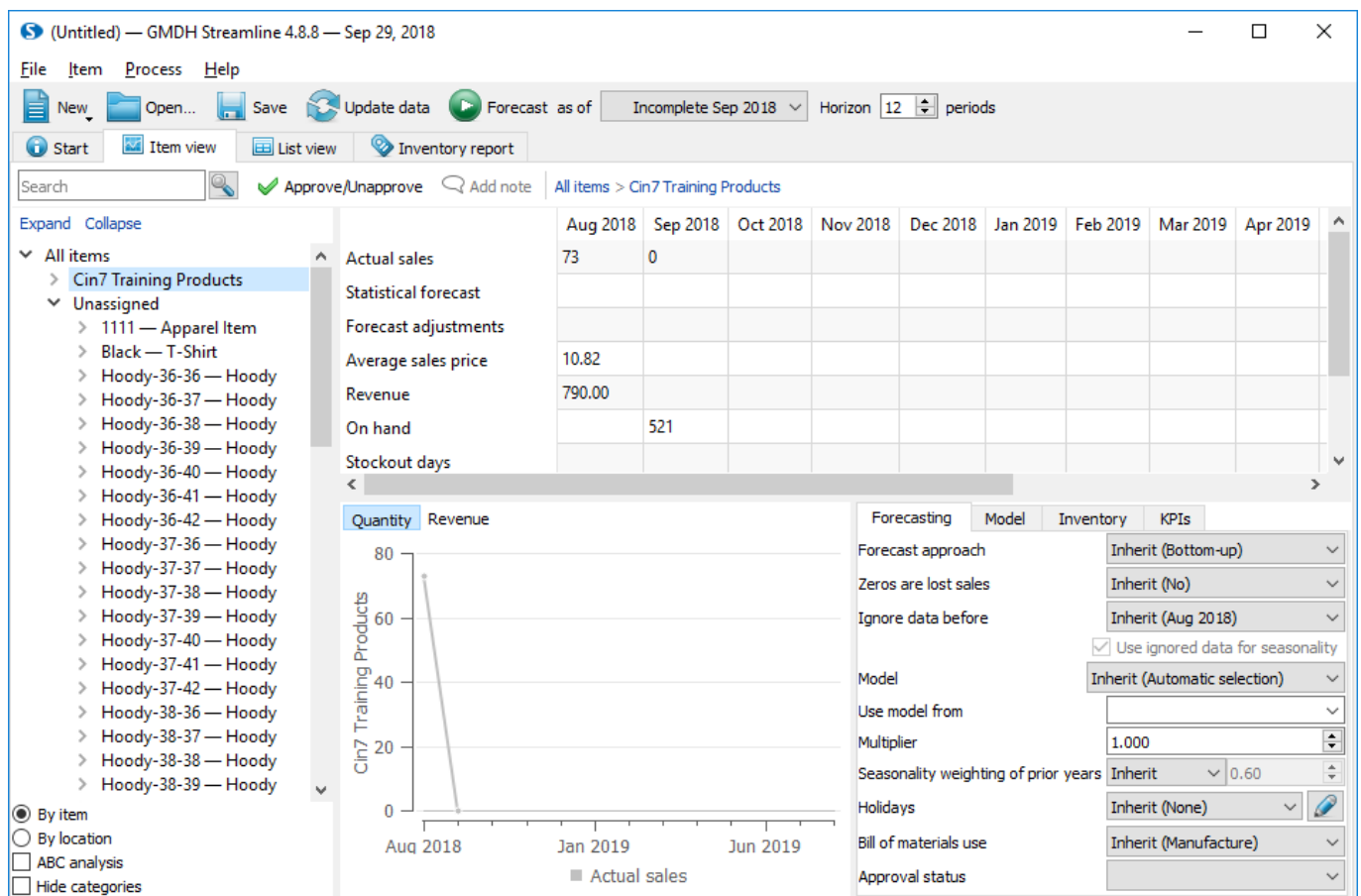
3. Enter or choose the date to start the import from in the **Starting date** control.

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, purchase/replenishment plans, and other reports in months, group the data by months.

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



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