# 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
Sales history	~	<b>~</b>
On-hand history	<ul> <li>✓</li> </ul>	

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).

Settings and Options				
🔅 Setup				
警 Branches				
🃜 POS				
B2B Online Ordering				
Integrations				
Configure your integrations.				
🔑 Custom Settings				

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).

Add Af	PI Connection	1	
App Name	Streamline	Save Cancel	

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

Confirmation for your API Key
Successfully created a new API user called "Streamline".
For security reasons, API Keys won't be displayed in cleartext anywhere else. Please store your API Key now in a safe place, and reset your key if it is lost.
API Key for Streamline
b3699bfc50424997af1b2867981c5459
Back to Setup

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).

Add API Co	onnection					
Documentation	1					
API Connecti	ons					
Connection	When	IP	Client			
Streamline				Reset	Remove	Permissions

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	$\Box$	<b>~</b>					
Branches			$\Box$				
Product Categories							
Products							
Product Options							
Stock							
Serial Numbers							
Branch Transfers	✓						
Adjustments							
Vouchers							
Sales Orders							
Payments							
Purchase Orders	<b>~</b>		$\Box$				
Quotes			$\Box$				
Credit Notes			$\Box$				
BOM Masters							
Production Jobs	<b>~</b>						
Users							
Save <u>Connection List</u>							

#### 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).

n7 connection	<
PI username	
PI key	
tarting date $1/1/2000 \sim Group by$ Month $\sim$	
Import subcategories	
Consider items with missing Qty Dispatch as shipped for dispatched orders	
Combine locations	
OK Cancel	

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. 2019/05/21 13:44

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.

	C 20, 2010										×
S (Untitled) — GMDH Streamline 4.8.8 —	- Sep 29, 2018								_		^
<u>File Item Process Help</u>	-										
New 📄 Open 🔚 Save 😂	Update data 🛛 💽 Forecast	as of 🛛 I	ncomplete Se	ep 2018 🗸	Horizon 1	2 韋 perio	ds				
🚯 Start 🔤 Item view 🔲 List view	Inventory report										
Search	e/Unapprove Q Add note	All items > C	- 7 Turinin - F	and other							
			-								
Expand Collapse		Aug 2018	Sep 2018	Oct 2018	Nov 2018	Dec 2018	Jan 2019	Feb 2019	Mar 2019	Apr 2019	^
✓ All items	Actual sales	73	0								
Cin7 Training Products     Unassigned	Statistical forecast										
> 1111 — Apparel Item	Forecast adjustments										
> Black — T-Shirt	Average sales price	10.82									
<ul> <li>Hoody-36-36 — Hoody</li> <li>Hoody-36-37 — Hoody</li> </ul>	Revenue	790.00									
> Hoody-36-38 — Hoody	On hand		521								-
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> Hoody-36-40 — Hoody	Stockout days									1	>
<ul> <li>Hoody-36-41 — Hoody</li> <li>Hoody-36-42 — Hoody</li> </ul>	Quantity Revenue				For	ecasting	Model 1	Inventory	KPIs		
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By location     ABC analysis	Aug 2018	Jan 2019		Jun 2019	Bill of	materials use	2	Inher	rit (Manufactu	ire)	~
Hide categories		Actual	sales		Appro	oval status					$\sim$

#### **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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