WHITE PAPER

TRIMIT ADVANCED SALES INTEGRATION 22.1

This document contains information about the Advanced Sales Integration 22.1 for Microsoft Dynamics 365 Business Central 2022 release wave 1 (W1) (BC20) in combination with the Portals Package JAN22-003 for the TRIMIT Portals.

Version: 22.1
Date: 31-05-2022

CONTENTS

Introduction 1
Components 1
Advanced Sales Integration Setup 2
Portal Profile 2
Description of the Fields 2
Order Type 3
Description of the Fields 3
Automatic Posting by Job Queue Entry 3
ConnectPortal Setup 4
Description of the Field 4
Description of the Field 5
Portal Sales Documents 6
Portal Sales Documents 6
Description of the Fields 7
FastTab Invoicing 8
FastTab Shipping 8
FastTab Portal 8
Header Actions 8
Header Related 9
Lines Actions 10
Handling Posting Errors 11
Action, Functions, Test Order 11
Dialog Log 12
Description of the Fields 12
Lines with Errors 12
Portal Sales Document Templates 13
Posted Portal Sales Documents 14
Deleting the Posted Portal Sales Documents 15
Advanced Sales Integration on Portals 16
Finalizing a Web Order 17

INTRODUCTION

Advanced Sales Integration covers a method for receiving Sales Orders or Sales Quotes in TRIMIT from the Sales Agent Portal or the Business to Business (B2B) Webshop.
This method has been introduced to support buffering when working with large Orders e.g., in presales timeframes. Processing large Orders can in peak hours stress the system and leave web users in a situation where they experience poor performance or errors due to database locks.
The **Advanced Sales Integration** divides the normal process where Web Orders are delivered and created directly in the backend system (TRIMIT) into two steps ensuring better performance and user experience.

The functionality described is the functionality in **TRIMIT 22.1 for Business Central W1 BC20.X** in combination with the **Portals Package JAN22-003**.
The pictures in this White Paper are based on the demo database for **TRIMIT 22.1,** which is based on Microsoft Dynamics 365 Business Central 2022 release wave 1, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT Advanced Sales Integration contains the following objects:

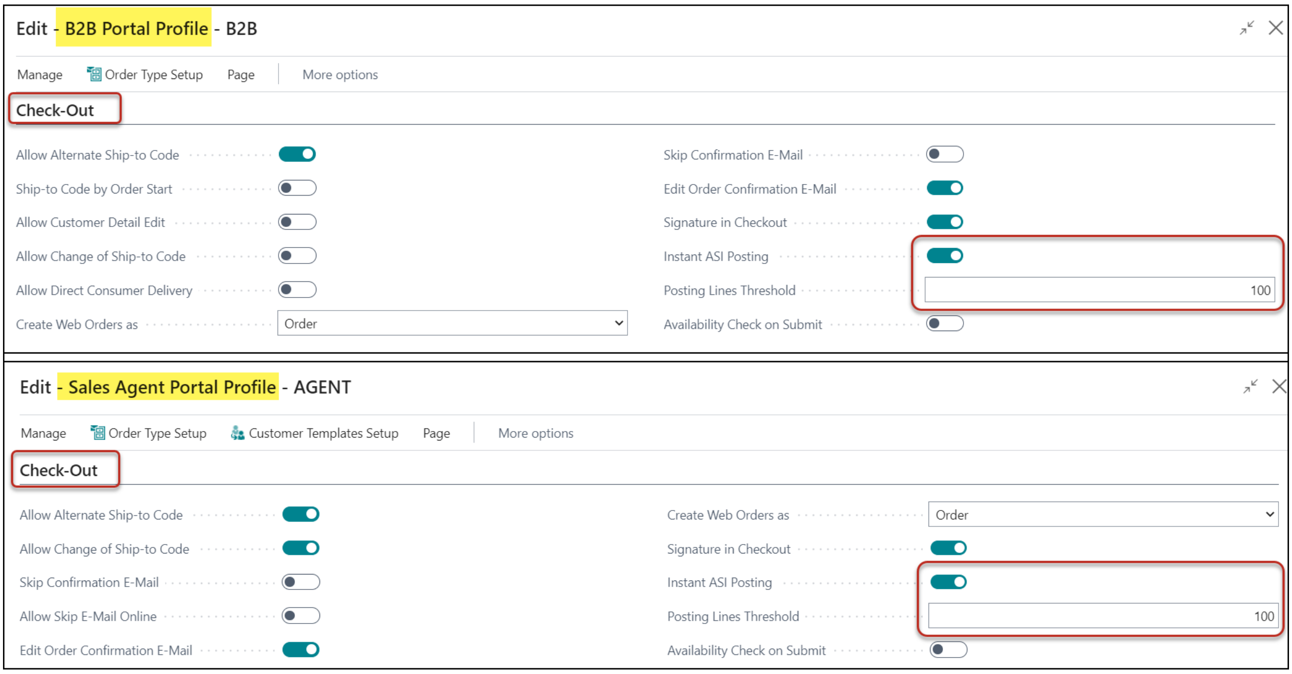
The tables	***6037028***	***trm Sales Import Journal Line***
	6037029	***trm Sales Import Jnl Header***
	6037049	***trm Sales Comment Import***
	6037050	***trm VarDim Order Import***
	6037051	***trm Dimension Set Entry Import***
The pages	***6037013***	***trm Portal Sales Doc Errors***
	6037015	***trm Dimension Set Entry Import***
	6037016	***trm VarDim Orders Import***
	6037017	***trm Sales Comment Import List***
	6037018	***trm Portal Sales Documents***
	6037019	***trm Portal Sales Doc Subpage***
	6037020	***trm Posted Portal Sales Doc***
	6037150	***trm Portal Sales Document List***
	6037151	***trm Portal Sale Doc Error List***
	6037152	***trm Posted Port Sale Doc List***
The Codeunits	***6038119***	***trm Adv.Sales Int. Handling***
	6038120	***trm NAS ASI Posting Template***
	6038121	***trm NAS Post ASI Doc Template***
The reports	***6038102***	***trm Batch Delete ASI Documents***

ADVANCED SALES INTEGRATION SETUP

Activating Advanced Sales Integration can be done on different levels either per **Portal Profile** or per specific **Order Types.**

PORTAL PROFILE

In the Role Center ***TRIMIT Portal Administrator,*** you can click ***Portal Profiles*** or use **Tell me** *Portal Profiles.* Choose a Portal Profile for the Sales Agent Portal or the B2B Webshop, can double click the **Code** to open the Card.



DESCRIPTION OF THE FIELDS

INSTANT ASI POSTING

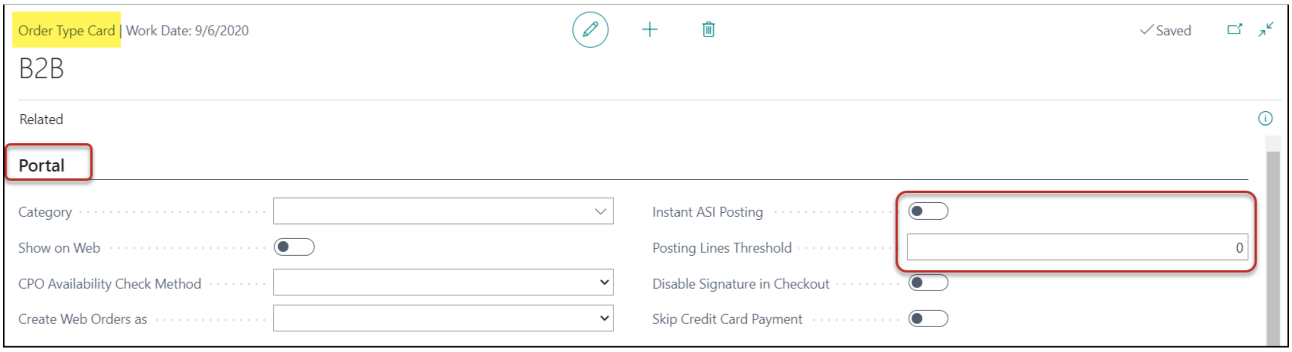
Setting this field to *TRUE* activates Instant Posting of Portals Sales Documents in Advanced Sales Integration – meaning that an Order on the Portal will immediately be created as a Sales Quote or Sales Order when finalizing the Order on the Portal.
Setting this field to *FALSE* means, that when finalizing the Order on the Portal, it will be written in the Portal Sales Document, from where it needs to be promoted (posted) to an actual Sales Quote or -Order.
This field can also be overruled by the corresponding field in an Order Type.

POSTING LINES THRESHOLD

Specify the maximum number of Sales Lines in the Portals Sales Document, which allows Instant Posting.
This works in combination with field **Instant ASI Posting** (ASI = Advanced Sales Integration).
This field can also be overruled by the corresponding field in an Order Type.

ORDER TYPE

Via **Tell me** *Order Type,* you can setup usage of Advanced Sales Integration for an Order Type:



DESCRIPTION OF THE FIELDS

INSTANT ASI POSTING

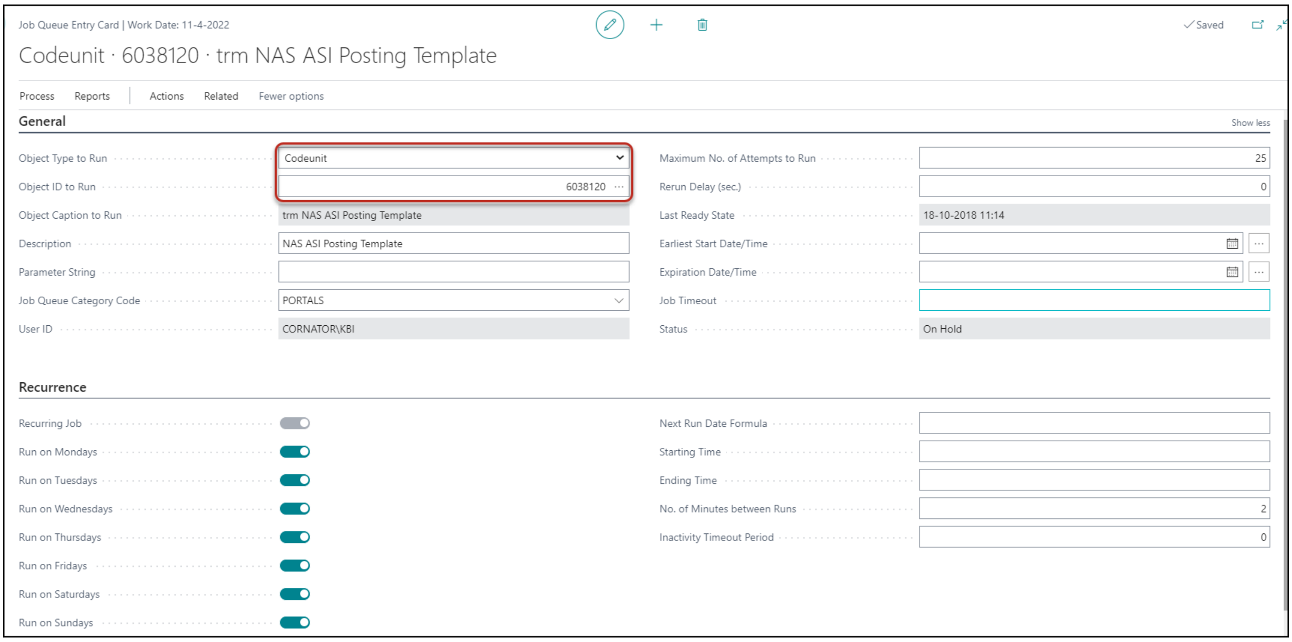
If the **Instant ASI Posting** in the Portal Profile is set to *FALSE,* the field in the Order Type can overrule this if set to *TRUE.*

POSTING LINES THRESHOLD

If the **Instant ASI Posting** in the Order Type is set to *TRUE,* the **Posting Lines Threshold** of the Portal Profile will be overruled by this field in the Order Type.

AUTOMATIC POSTING BY JOB QUEUE ENTRY

Via **Tell me** *Job Queue Entries*, you can set up a Job Queue Entry which can post your Portal Sales Document automatically.



NOTE

Job Queue is standard Business Central functionality. For more information on setting up Job Queue entries please consult documentation delivered by Microsoft.

- ✓ Set **Object Type to Run** to *Codeunit.*
- ✓ Set **Object ID to Run** to *6038120*

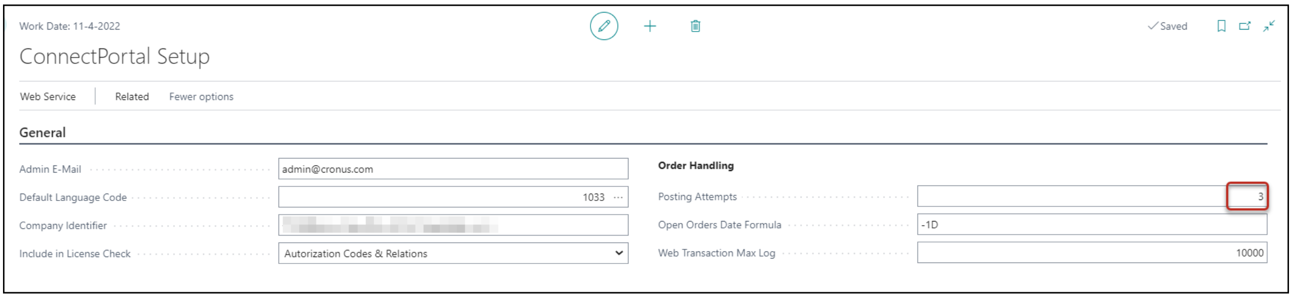
THE NAS ASI POSTING TEMPLATE CODEUNIT

NAS = Navision Application Server, ASI = Advanced Sales Integration

This Codeunit will execute posting of Portal Sales Documents and handle error situations. If a Document cannot be posted for any number of reasons, the Codeunit will detect this and flag that the Portal Sales Document contains errors.
Errors can differ and can be divided into two groups: Data errors or Locking errors.
The difference is that a Data error must be fixed before the posting can be completed whereas the Locking error is raised at the point of posting. A document blocked by a Locking error will be posted as soon as the lock is passed. So, to handle that situation, you can set up several retries so that, if a posting did not complete, the NAS can try again on the next Job Queue schedule.

CONNECTPORTAL SETUP

In the Role Center ***TRIMIT Portal Administrator,*** you can click ***Setup, ConnectPortal Setup*** or via **Tell me** *ConnectPortal Setup* you can set the number of posting attempts before flagging a Portal Sales Document with an error indication.



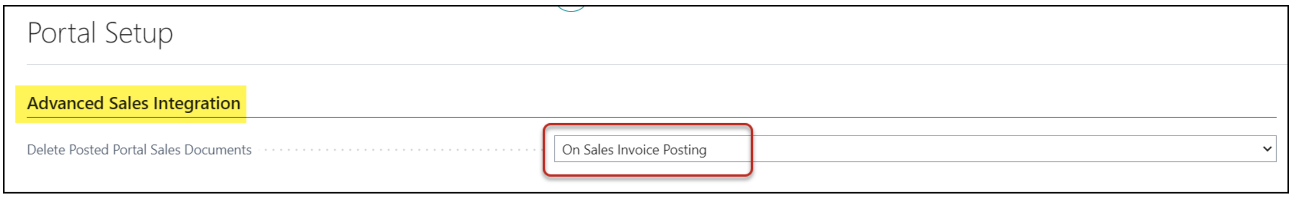
DESCRIPTION OF THE FIELD

POSTING ATTEMPTS

In this field you can enter the number of times to retry posting before the automatic posting will flag a document with containing errors.

PORTAL SETUP

In the Role Center ***TRIMIT Portal Administrator,*** you can click ***Setup, Portal Setup*** or via **Tell me** *Portal Setup* you can set the way the Posted Portal Sales Documents should be deleted



DESCRIPTION OF THE FIELD

DELETE POSTED PORTAL SALES DOCUMENTS

The parameter **Delete Posted Portal Sales Documents** determines when and how the **Posted Portal Sales Documents** will be deleted: Automatically or Manually.

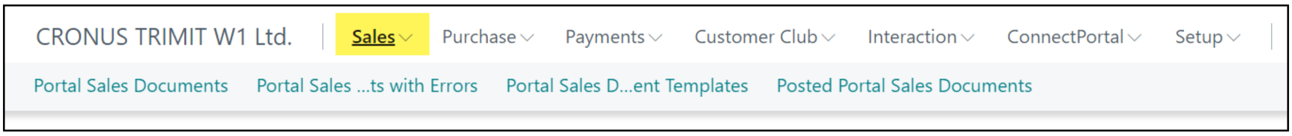
You can choose between the following two options:

On Sales Order Deletion	Automatically, when deleting a regular Sales Order (I.e., when posting the Invoice), the corresponding **Posted Portal Sales Document** will be deleted.
By Batch	Manually, you can run the report **Batch Delete ASI Documents** to determine – by using the Filters – which **Posted Portal Sales Documents** you want to delete but only if the regular Sales Order already has been deleted.

PORTAL SALES DOCUMENTS

Portal Sales Documents are representing the received Web Orders from the Sales Agent Portal or the B2B Webshop. You cannot change the **Portal Sales Documents**; only perform various actions before they end up being promoted.
The **Portal Sales Documents** are the responsibility of the Sales Agent or Sales Department until released / ready for posting. Altering the **Portal Sales Document** in the process could create data inconsistency.

When using the Role Center of **TRIMIT Portal Administrator**, it is possible to find 3 Pages for Advanced Sales Integration Documents, by clicking ***Sales***:

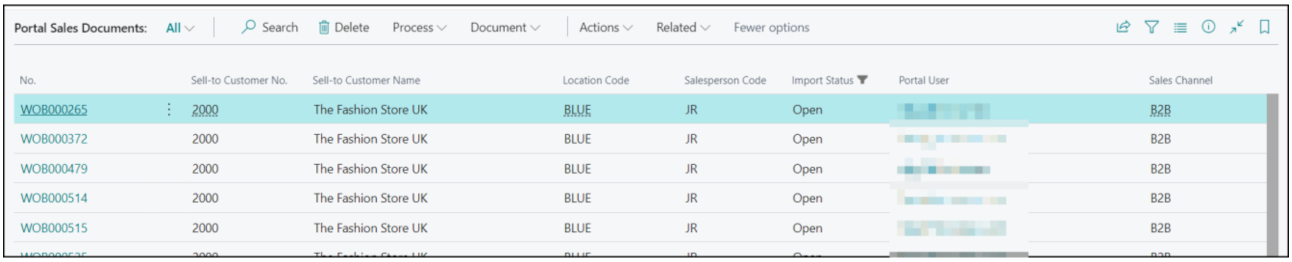


The Pages are

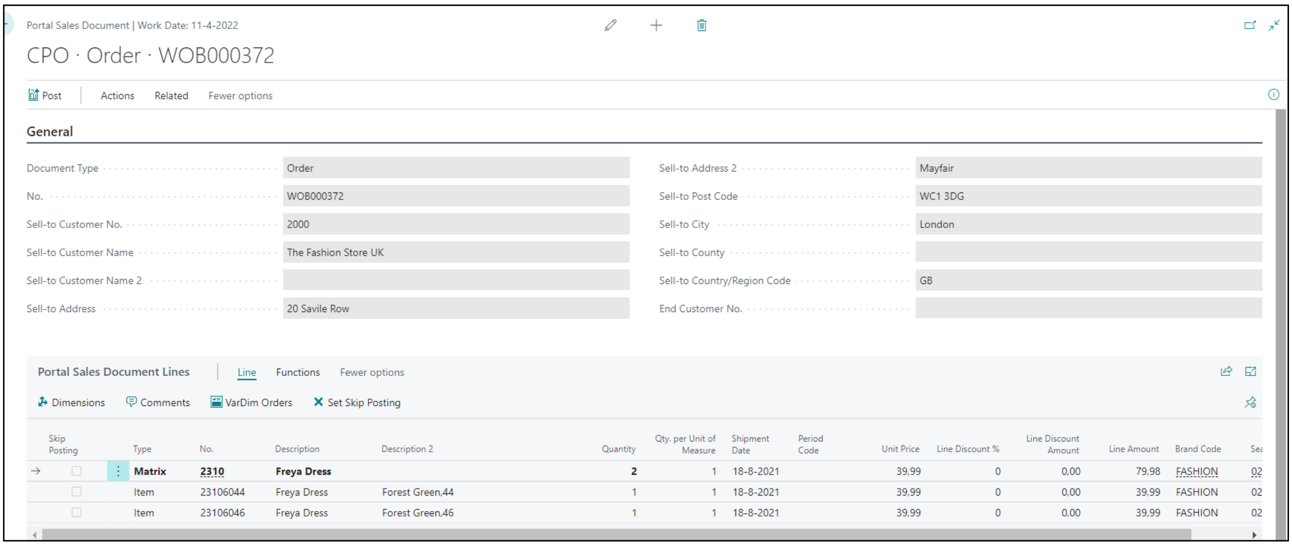
1. **Portal Sales Documents** – Documents received from SA or B2B.
2. **Portal Sales Documents with Errors** – Documents containing errors after attempt to promote (Post) to a standard Sales Quote or -Order.
3. **Portal Sales Document Templates**
4. **Posted Portal Sales Documents** – Documents promoted to standard Sales Quote or -Order are saved to this page.

PORTAL SALES DOCUMENTS

In this Page, you can find Sales Documents not yet Posted.
To open this Page, click ***Sales, Portal Sales Documents*** in the Role Center ***TRIMIT Portal Administrator*** or use **Tell me** *Portal Sales Documents*.



By clicking on the **No.** (or clicking ***Related, Card***) it is possible to open the card of the Portal Sales Document:



DESCRIPTION OF THE FIELDS

DOCUMENT TYPE

This field indicates the **Document Type** that the Portal Sales Document will get by posting: *Quote* or *Order*. So, if the **Document Type** is *Quote*, you can find the finalized Portal Sales Document in the standard Sales Quotes.

NO.

This is the number which the posted Portal Sales Document will get. It is also the reference point when calling the Portal Sales Document for editing or printing.

SELL-TO …..

Detailed information of the Customer **No.** for which the Portal Sales Document is created.

END CUSTOMER NO.

Customer No. of a new registered Customer on the B2C Webshop. Therefore, only applicable for a Portal Sales Document bases on the B2C Webshop or InStore Webshop.

FASTTAB INVOICING

On this FastTab the detailed information of the **Bill-to Customer** of the Portal Sales Document.

FASTTAB SHIPPING

On this FastTab the detailed information of the **Ship-to Customer** of the Portal Sales Document and other fields regarding Shipping a Sales Quote/Order.

FASTTAB PORTAL

PROFILE TYPE

The **Profile Type** from the Portal Profile for which the Portal Sales Document was created.

PORTAL PROFILE

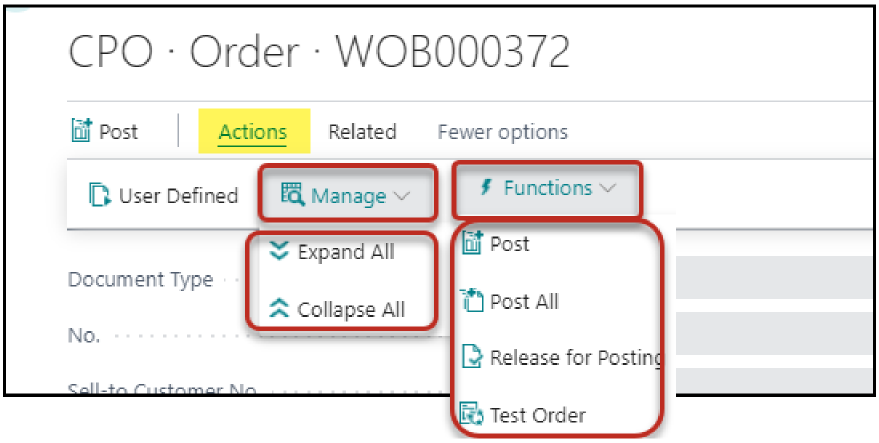
The **Portal Profile** for which the Portal Sales Document was created.

PORTAL USER

The **Portal User** that created the Portal Sales Document.

NOTE
The Portal Sales Document Lines content is 1:1 with a standard Sales Line.

HEADER ACTIONS



MANAGE, COLLAPSE ALL

This action will collapse all the Matrix Lines, so only the Matrix Lines will be shown, and not the underlying Item Lines.

MANAGE, EXPAND ALL

This action will expand all the Matrix Lines, so Matrix Lines and underlying Item Lines will be shown.

FUNCTIONS, POST

This function will Post (promote) the current Portal Sales Document. Posting will create a Sales Document in TRIMIT based on the **Document Type** of the Portal Sales Document (*Sales Quote* or *Sales Order*).

FUNCTIONS, POST ALL

This function will Post (promote) all Portal Sales Documents to regular Sales Documents in TRIMIT based on the **Document Type** of the Portal Sales Document (*Sales Quote* or *Sales Order*).

FUNCTIONS, RELEASE FOR POSTING

A Portal Sales Document can be in a stage where posting is not allowed. If, for some reason, you wish to force a manual posting of the Portal Sales Document, you can release it for posting.

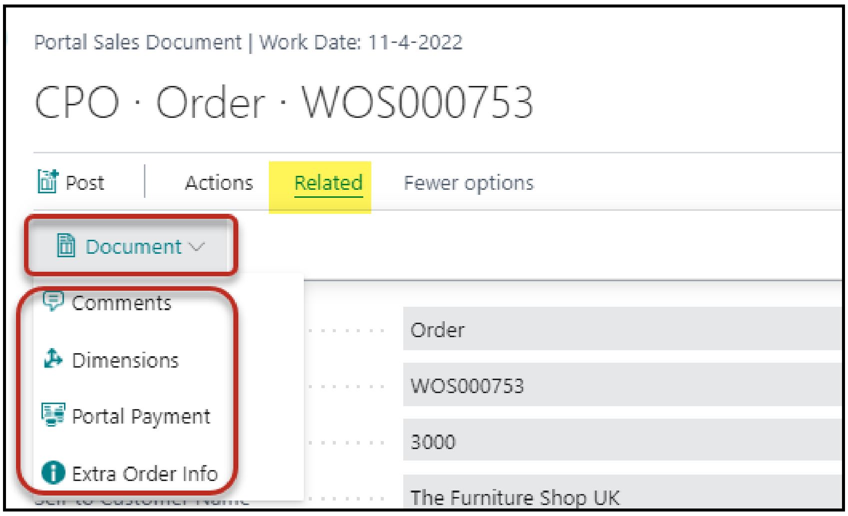
Posting is not allowed under the following Conditions:

Editing mode	The Portal Sales Document can be opened for editing on the SA or B2B. In such case, the Portal Sales Document is internally marked as being edited.
Posting mode	The Portal Sales Document can be in posting mode because another user or a Job Queue process has started a posting of the same Portal Sales Document.
Error mode	The Portal Sales Document cannot be posted if it is marked with Errors. Errors must be handled and then the Portal Sales Document can be released for posting.

FUNCTIONS, TEST ORDER

You can choose this Function to run a test for errors. Please see the subject Handling Posting Errors later in this document for detailed explanation of usage.

HEADER RELATED



DOCUMENT, COMMENTS

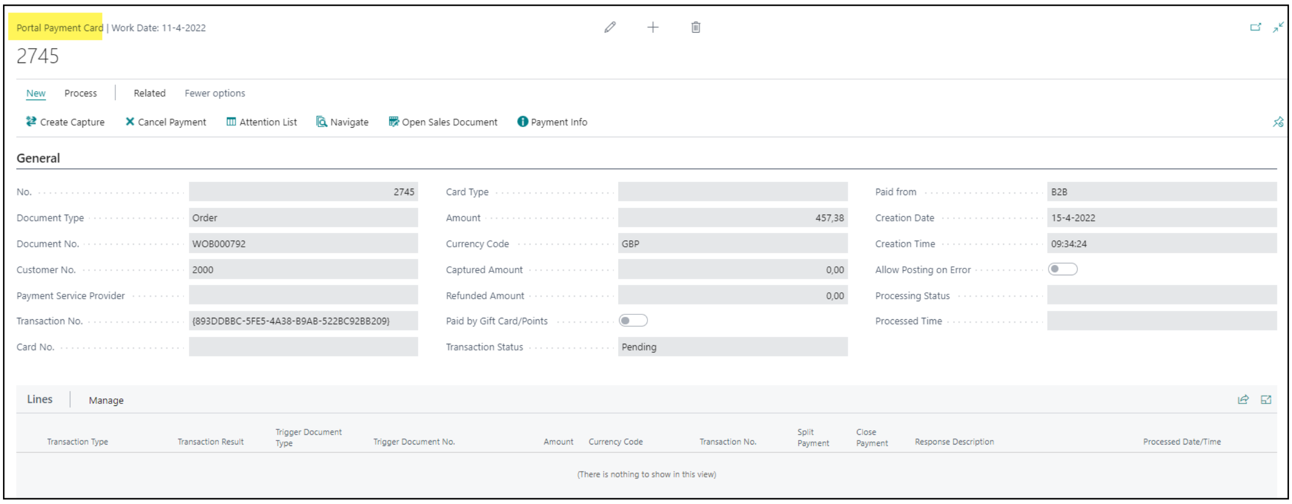
This will show the Order Comments that were entered on the SA/B2B for this Portal Sales Document.

DOCUMENT, DIMENSIONS

This will show the Dimensions that are related to the Portal Sales Document.

PORTAL PAYMENT

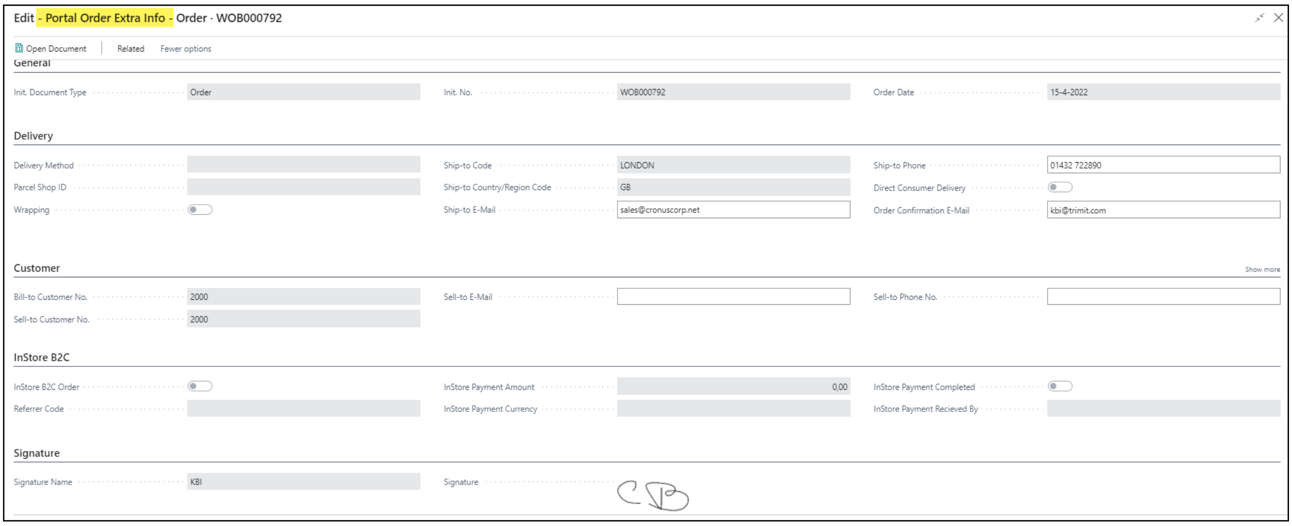
If the Customer on the SA/B2B also had to pay the Web Order upfront, you can see the details of the Payment for this Portal Sales Document.



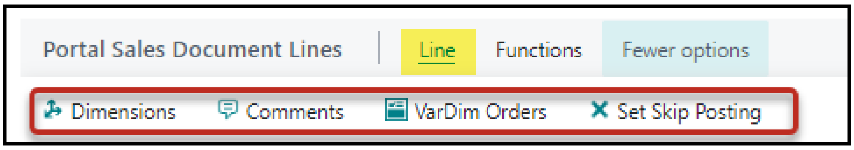
See ***White Paper – Portal Payment Setup*** for more details regarding this Card.

EXTRA ORDER INFO

This will show extra information regarding the Portal Sales Document.



LINES ACTIONS



LINE, DIMENSIONS

Opens the imported Dimensions related to the Portal Sales Document Lines.

LINE, COMMENTS

Opens any comments related to the Portal Sales Document Line.

LINE, VARDIM ORDERS

This action opens the **VarDim Order** page, displaying the configuration related to the Item on the Portals Sales Document Line.

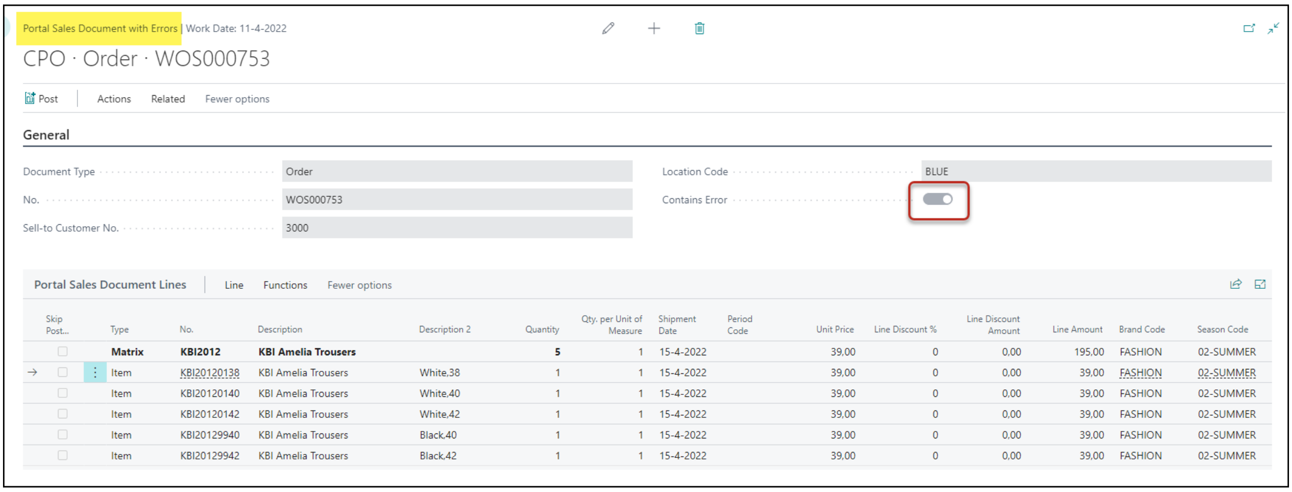
LINE, SET SKIP POSTING

Use this function to exclude Portal Sales Document Lines from posting, which cannot be posted due to errors. Please see the subject Handling Posting Errors later in this document for detailed explanation of usage.

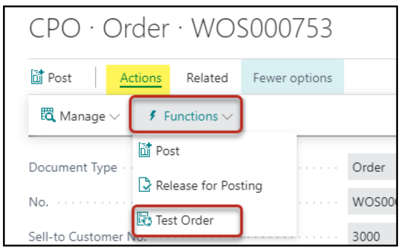
HANDLING POSTING ERRORS

Web Orders coming in through the system can become invalid in the process because conditions change. This often requires a Sale Responsible to evaluate faulty orders during the day.
Therefore, the Advanced Sales Integration methodology also considers handling of situations where Portal Sales Documents cannot be posted because of errors. To help the process, TRIMIT provides detailed error logging.

In the Role Tailored Client, you can open all Portal Sales Documents which have been marked with errors. Content and functionality are as described in the previous section about Portal Sales Documents.
The Page is filtering on **Contains Error.**
To open this Page, click ***Sales, Portal Sales Documents with Errors*** in the Role Center ***TRIMIT Portal Administrator*** or use **Tell me** *Portal Sales Documents with Errors*.

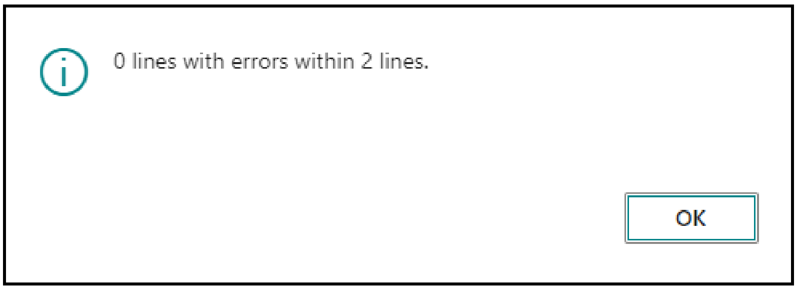


ACTION, FUNCTIONS, TEST ORDER



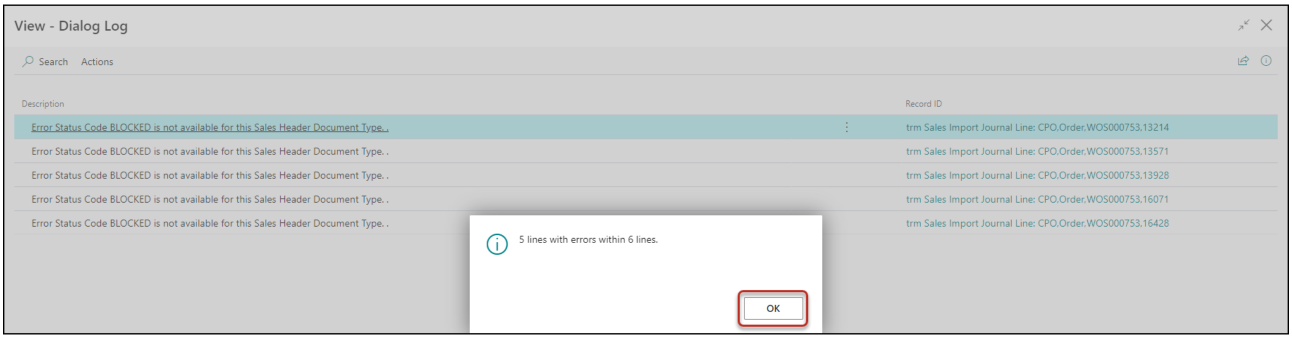
Test Order will simulate a posting (promote Portal Sales Document to regular Sales Quote or -Order) which will reveal any potential errors that the Portal Sales Document may have.
If Errors are encountered, they are logged with error description and a reference to the record that contains the error.

A **Dialog Log** page will open automatically after the Action ***Test Order***.
If the Portal Sales Document does not contain errors during ***Test Order***, a simple confirmation is provided:



DIALOG LOG

The Dialog Log page is a general message logging tool. It is used in various areas of TRIMIT to show result lists from test runs, error checking's etc.



Click **OK**.

DESCRIPTION OF THE FIELDS

DESCRIPTION

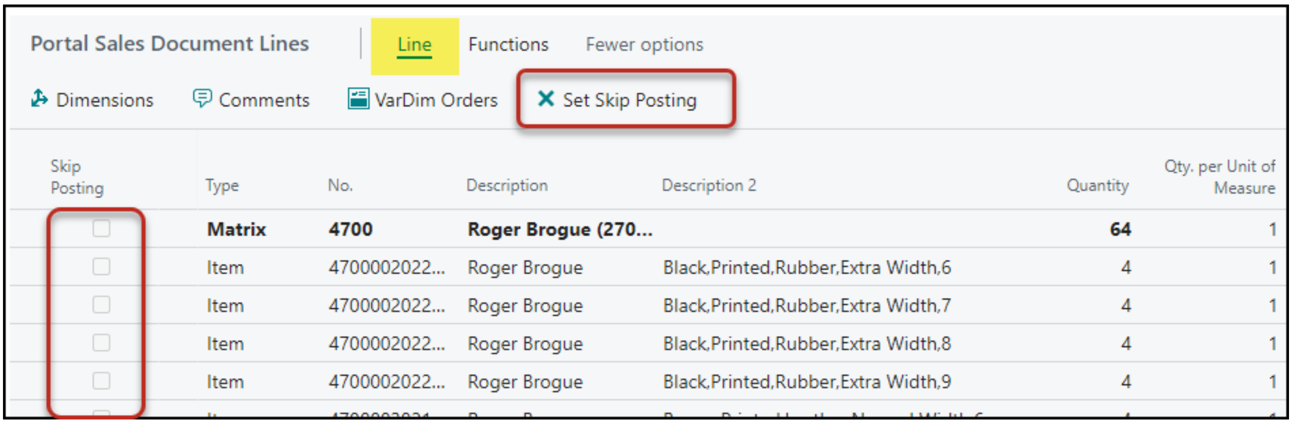
Contains the error message.

RECORD ID

This field contains a reference to the Record that has the error.
The reference is always the full key description.

LINES WITH ERRORS

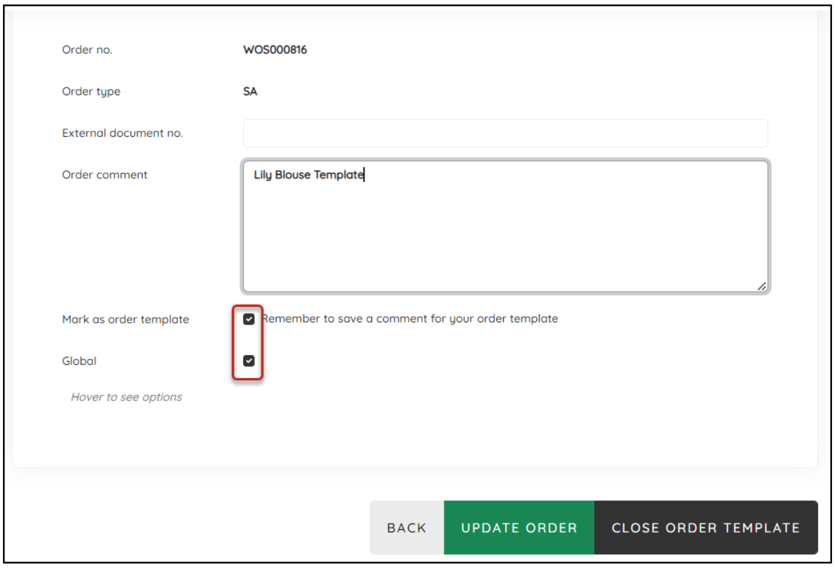
Based on the **Dialog Log**, you can determine if you need to change data in the system to make sure that the Portal Sales Document can be posted.
Another possibility is to use the **Set Skip Posting** Action.
Any Portal Sales Document is non-editable. However, using **Skip Posting** (on the **Line *Actions, Line, Set Skip Posting***), you can checkmark individual Lines thus excluding them from the posting.
Simply checkmark a Line for exclusion by clicking the Action and the Line will be skipped by next posting.
Using **Set Skip Posting** for an already skipped Line will remove the checkmark and re-include the Line for posting.



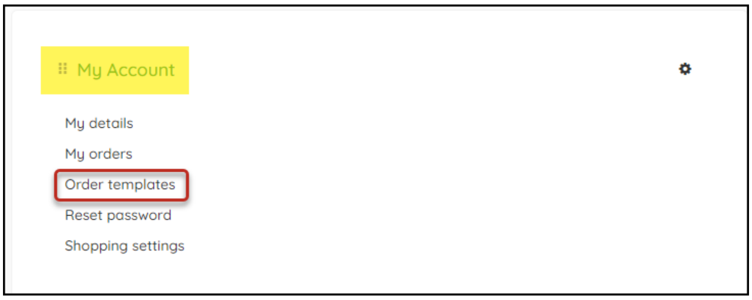
PORTAL SALES DOCUMENT TEMPLATES

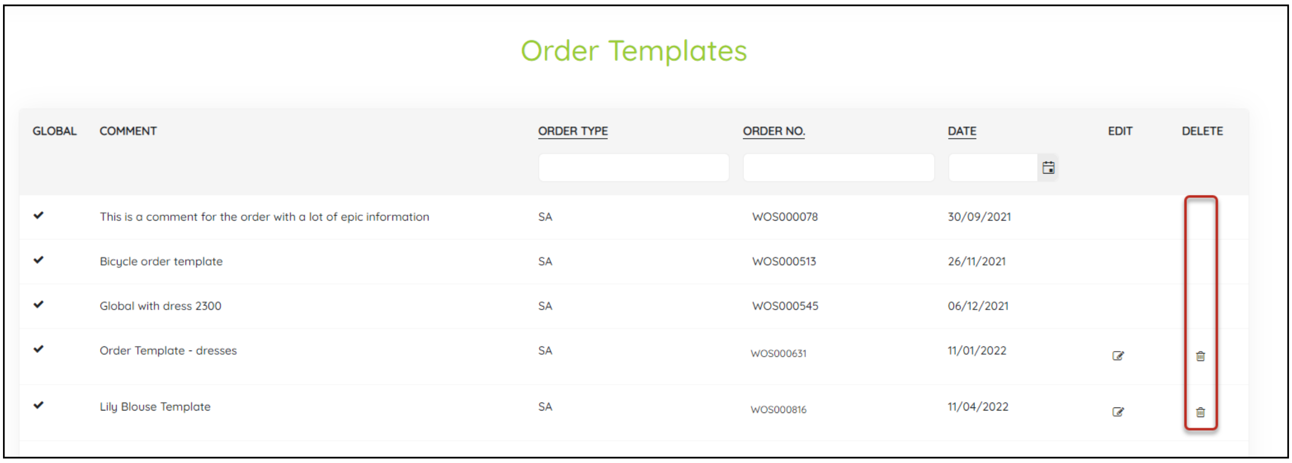
In Role Center ***TRIMIT Portal Administrator*** clicking ***Sales, Portal Sales Document Templates*** or via **Tell me** *Portal Sales Document Templates,* you can find the Order Templates that have been created on the B2B Webshop or Sales Agent Portal.

In the **Order details** page of a Sales Order on the Sales Agent Portal, you can determine that the entered Sales Order can also be used as a **order template**:



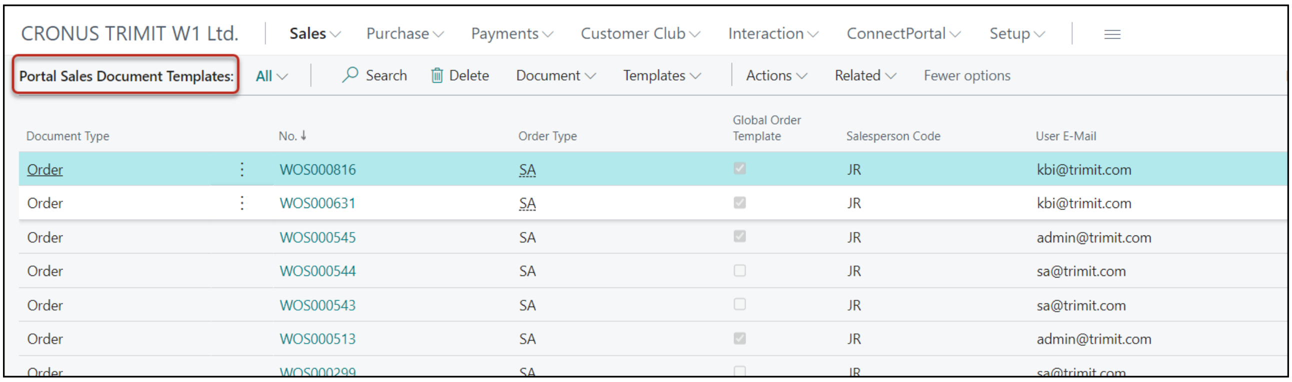
If you do enter a checkmark in **Mark as order template** you are also able to choose if this Template is a Global template or not – meaning that it can be used by all users of the Sales Agent Portal or only the user that created the template.
After clicking **CLOSE ORDER TEMPLATE**, you can see the Template Order on the Home page of the Sales Agent Portal in the dock **My Account** under the **Order templates.**



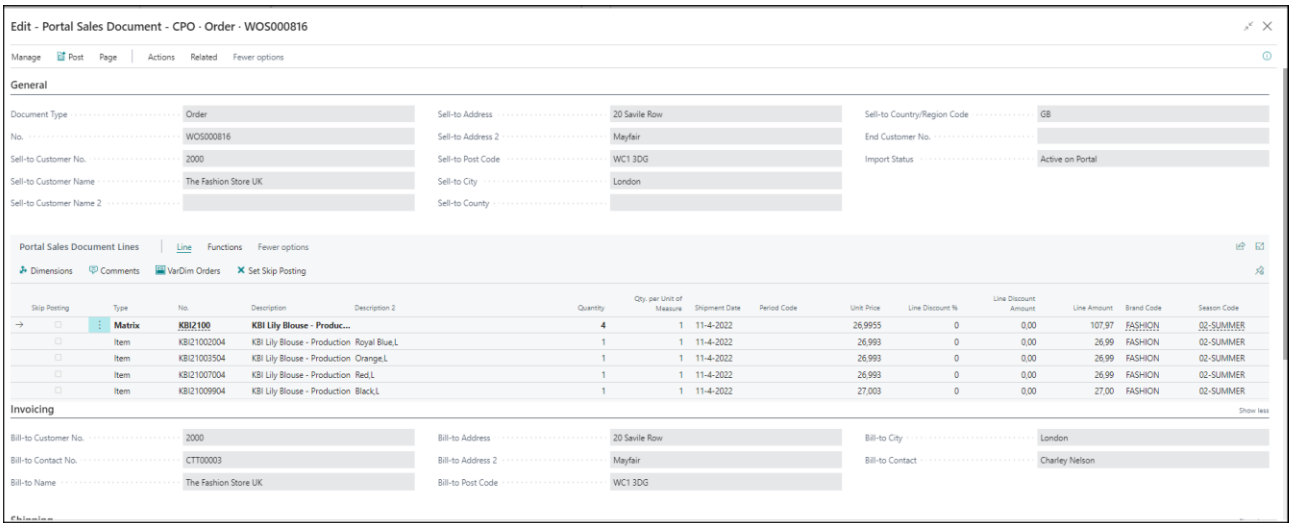


Only the **Order Templates** that have been created by the current user can be edited or deleted.

The details of these Order Templates can also be seen in the ERP via **Portal Sales Document Templates**.



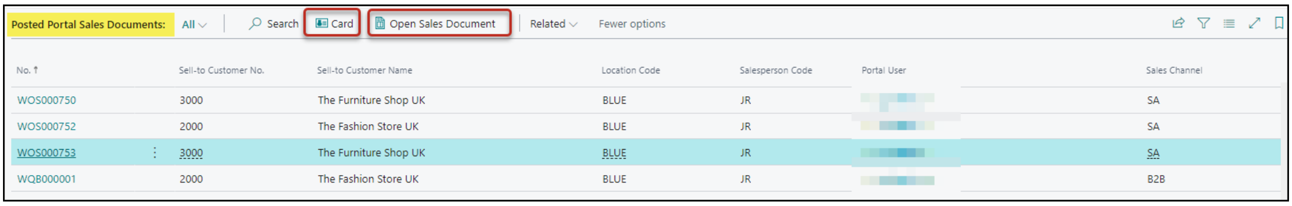
By clicking ***Document, Card*** you can see the details of this Template Order.



POSTED PORTAL SALES DOCUMENTS

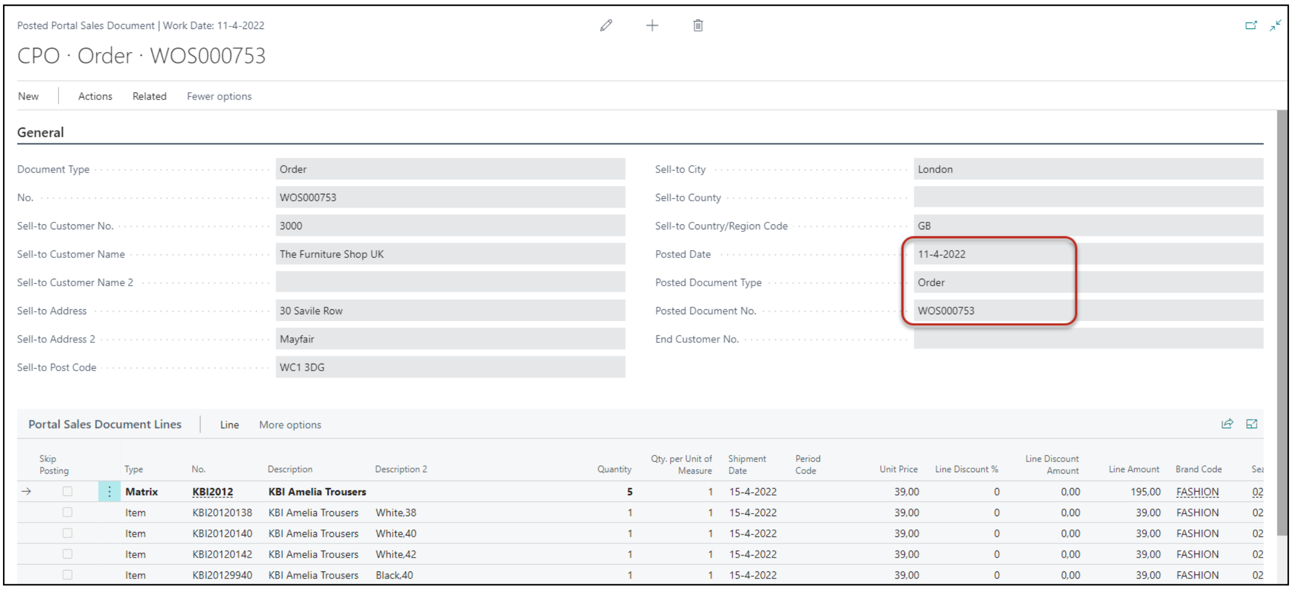
For statistics and documentation, the Posted Portal Sales Documents are kept.

In Role Center ***TRIMIT Portal Administrator*** clicking ***Sales, Posted Portal Sales Document*** or via **Tell me** *Posted Portal Sales Documents,* you can find the history log for all incoming Portal Sales Documents that have been posted (promoted).



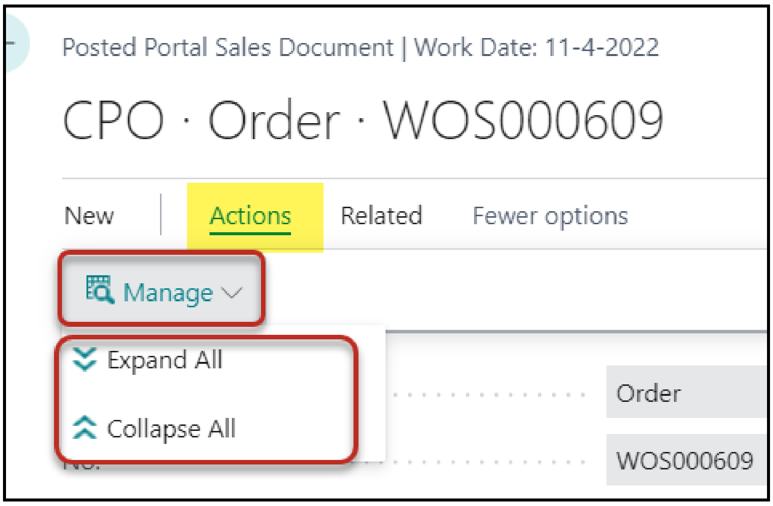
By clicking ***Open Sales Document***, you can open the regular created Sales Order or Sales Quote.

By clicking ***Card***, you can open the Card:



On the Posted Portal Sales Document header, you can find the reference to the Sales Document created in TRIMIT

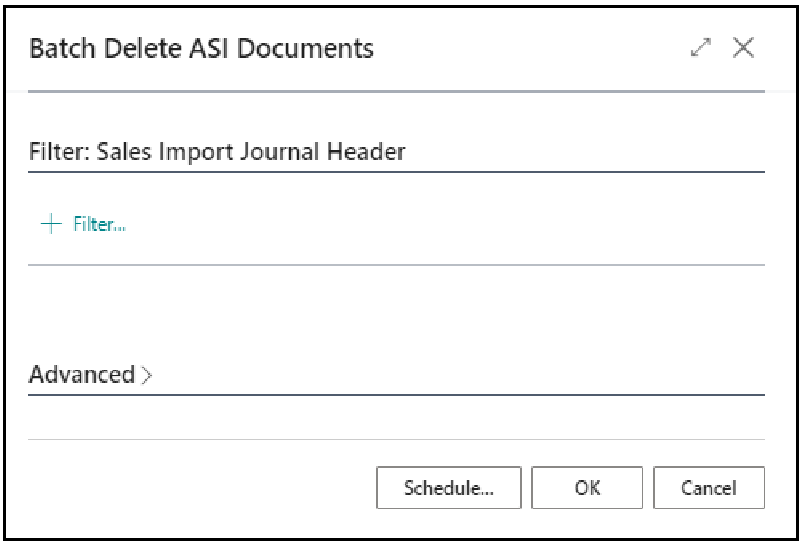
Via ***Actions, Manage*** you can Expand/Collapse all the Matrix Lines of the Posted Portal Sales Document.



DELETING THE POSTED PORTAL SALES DOCUMENTS

Based on the parameter **Delete Posted Portal Sales Documents** in the Portal Setup, the **Posted Portal Sales Document** will be deleted automatically when posting and deleting the regular Sales Order or by using the report **Batch Delete ASI Documents**.

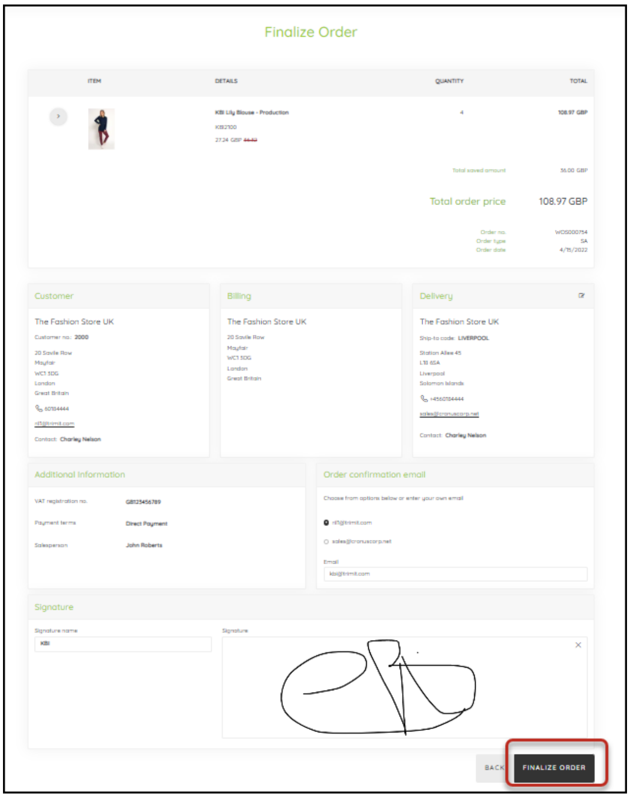
In this report you can set your own filters, but only the Posted Portal Sales Documents for which the regular Sales Order has been posted and deleted, will be deleted from the Posted Portal Sales Documents.



ADVANCED SALES INTEGRATION ON PORTALS

If the Advanced Sales Integration is selected (in the **Portal Profile** or the **Order Type** setting **Instant ASI Posting** to *FALSE*), the Sales Agent Portal and the Business to Business (B2B) Webshop do not allow creation of Sales Quotes/Orders directly.
All Web Orders which are saved will then be stored in the Portal Sales Documents.
Portal Sales Documents can be posted as Sales Quotes or -Orders. From the Sales Agent's/Sales Departments point of view the difference is minor but notable in the Solution.
This topic will go through the specifics of Web Orders going through the Advanced Sales Integration system.

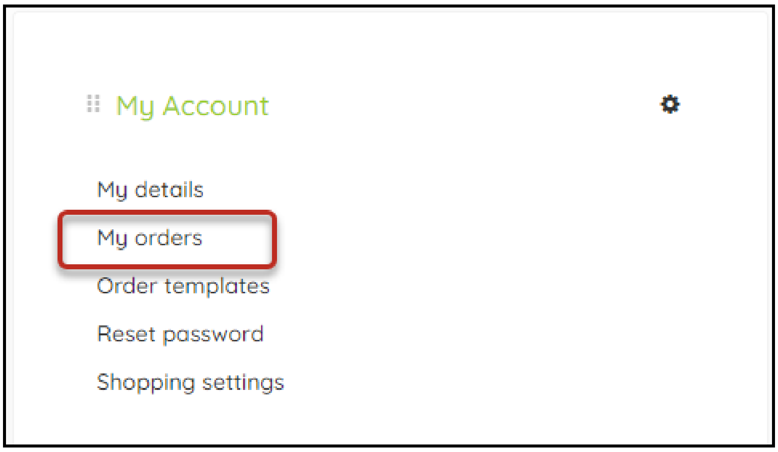
FINALIZING A WEB ORDER

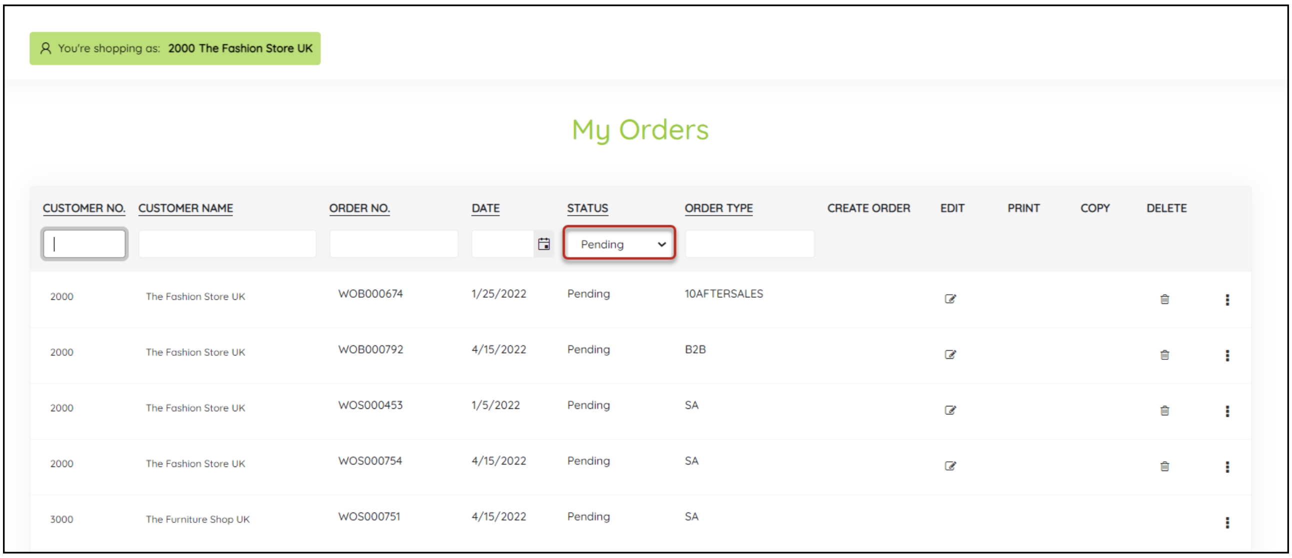


After Finalizing a Web Order in the Sales Agent Portal or B2B Webshop, the Sales Agent/Customer can go to the Orders page and find the newly saved order.

If the Web Order is going through the Advanced Sales Integration system, it can be found by using the Status filter. All Web Orders/Portal Sales Documents not yet posted can be found using the filter **Pending.**

A Web Order/Portal Sales Document will have the status **Pending** if it has not been promoted (posted) to a regular Sales Quote- or Order in TRIMIT.



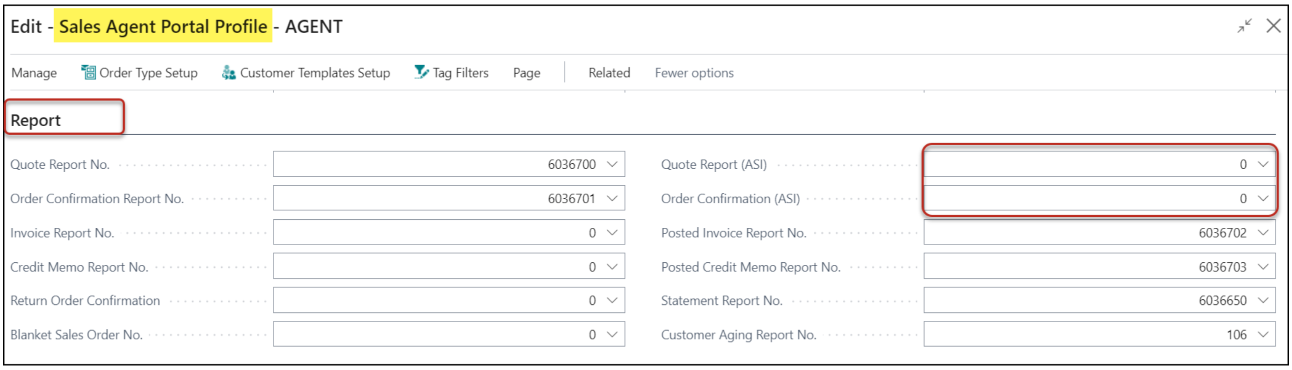


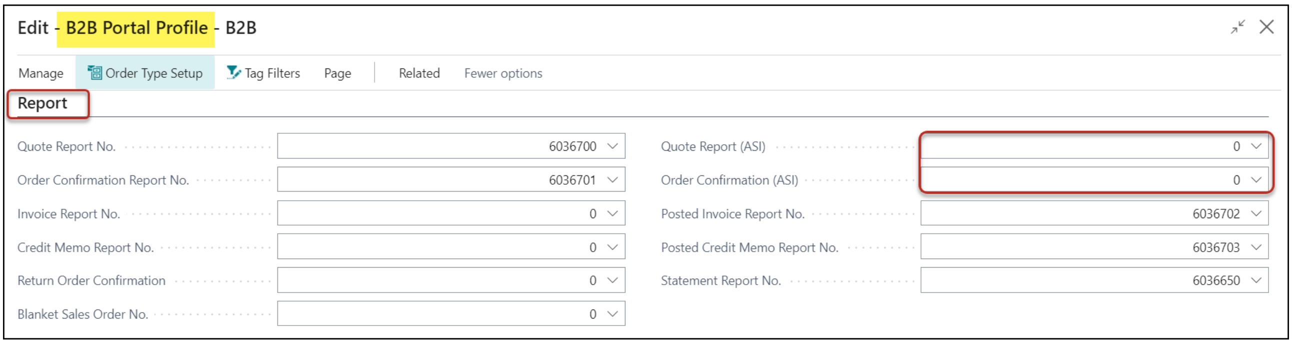
All activities are available for Pending Sales Documents

PRINTING PENDING ORDERS

The Advanced Sales Integration supports printing of Web Orders/Portal Sales Documents. This is beneficial since the timeframe from pending to being posted is a decision set up on the Job Queue. In a company it can be decided to run posting at off-peak hours in which case a preliminary print for the customer could be relevant.

In the Portal Profile, you can set the Report Numbers for the reports when using the Advanced sales Integration.





NOTE

TRIMIT does not deliver reports for the Pending Documents, since the purpose of a document from Portal Sales Documents can vary from being a preliminary sales list to a full Quote/confirmation depending on how the system is used. Portal Sales Documents are non-validated orders so the legality of making a Quote/Order Confirmation could vary depending on local rules and regulations.