

TRIMIT B2C Customer Club

White Paper

This Document contains information about the functionality regarding the Customer Club in TRIMIT B2C Shop

Information shown in this document is based on:

- TRIMIT ConnectPortal 4.9 (CPO)
- TRIMIT Portals 2015 (PORTALS)
- TRIMIT 2015 (TRIMIT)

Date: February 2015

TABLE OF CONTENTS

Introduction	3
Customer Club Registration	3
Registration Process.....	3
Page B2C User Register Card.....	4
Description of Fields.....	4
Customer Reward/Appreciation	5
Permission to View Special Pages/Areas	5
Permission to View Specific Items	7
Vouchers only Available for Specific Customer Groups.....	9
Customer Point System.....	9
Portals Setup	9
Points Search Table Setup.....	10
Page Point Search Table.....	11
Description of Fields.....	11
Page Point Entries	12
Description of Fields.....	12
Points on B2C	14
My Page Information	14
Using Points.....	15
Points Used in TRIMIT	15
Appendix A	17

INTRODUCTION

This document goes through the Customer Club implementation for TRIMIT B2C Shop. The Customer Club influences functionality and behavior both on the B2C pages and in TRIMIT.

The functionality described is the functionality in **TRIMIT 2015 W1**

The pictures in this White Paper are based on the demo database for **TRIMIT 2015 W1** (based on Microsoft Dynamics NAV 2015) in the demo company **CRONUS TRIMIT 2015 W1** (based on CRONUS International Ltd. from Microsoft Dynamics NAV 2015)

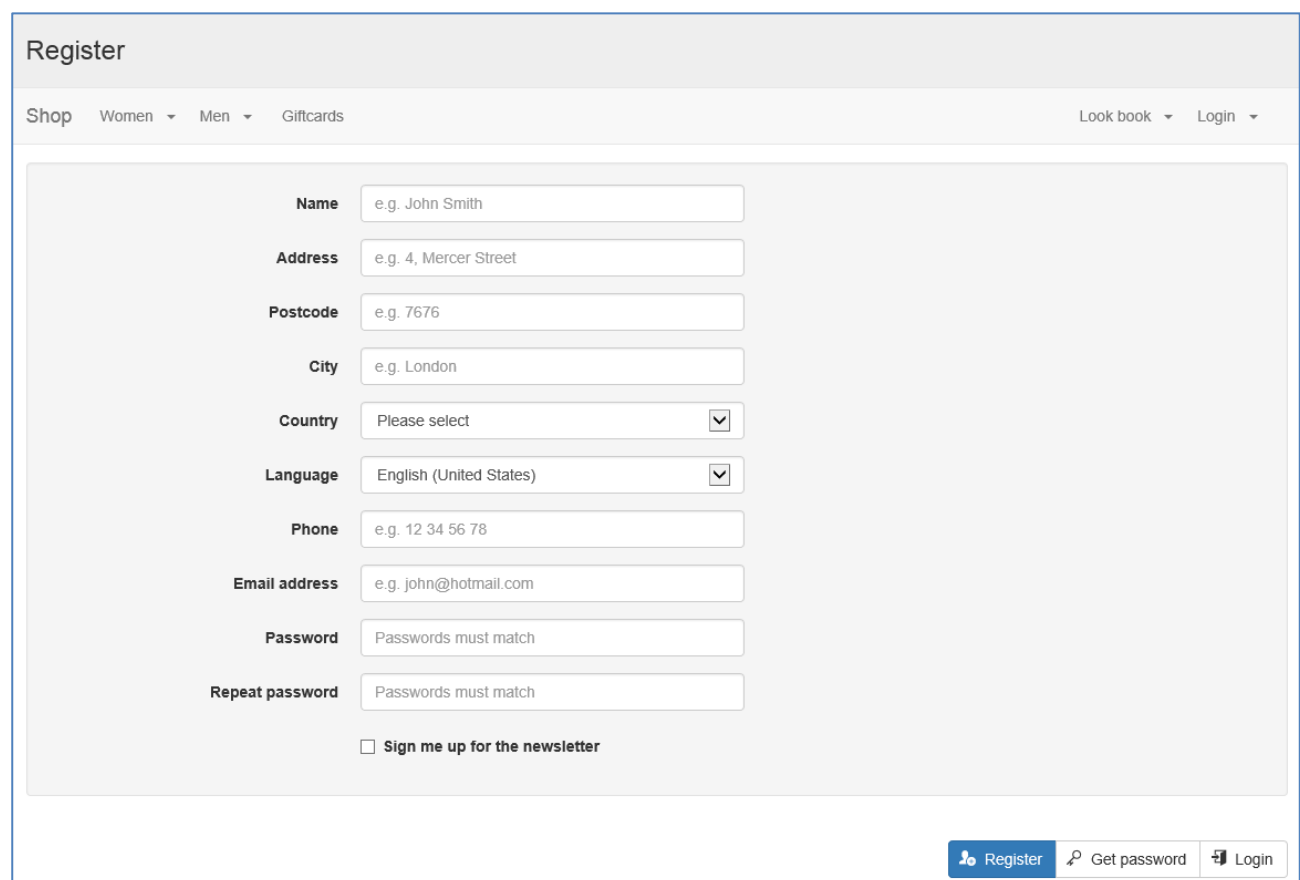
CUSTOMER CLUB REGISTRATION

When a user registers on the B2C Shop, the user information is stored in TRIMIT and in the ConnectPortal. The purpose of registering a user on B2C Shop is to get user data such as e-mail etc., but also to establish a closer relationship to the customer.

REGISTRATION PROCESS

To initiate registration user has to open **Register** page (shown below) on the B2C SHOP and enter credentials together with customer information.

Pushing a **Register** button will trigger the registration code both on the CPO and in TRIMIT.



The screenshot shows the 'Register' page of the TRIMIT B2C Shop. The page has a header with navigation links: 'Shop', 'Women', 'Men', 'Giftcards', 'Look book', and 'Login'. The main content area contains a registration form with the following fields:

- Name:** e.g. John Smith
- Address:** e.g. 4, Mercer Street
- Postcode:** e.g. 7676
- City:** e.g. London
- Country:** Please select (dropdown menu)
- Language:** English (United States) (dropdown menu)
- Phone:** e.g. 12 34 56 78
- Email address:** e.g. john@hotmail.com
- Password:** Passwords must match
- Repeat password:** Passwords must match

Below the form, there is a checkbox labeled 'Sign me up for the newsletter'. At the bottom right of the form, there are three buttons: 'Register', 'Get password', and 'Login'.

Result of the registration is multiple entries. The user is created in CPO (log in to CPO admin and go to **Users & Groups / Users**).

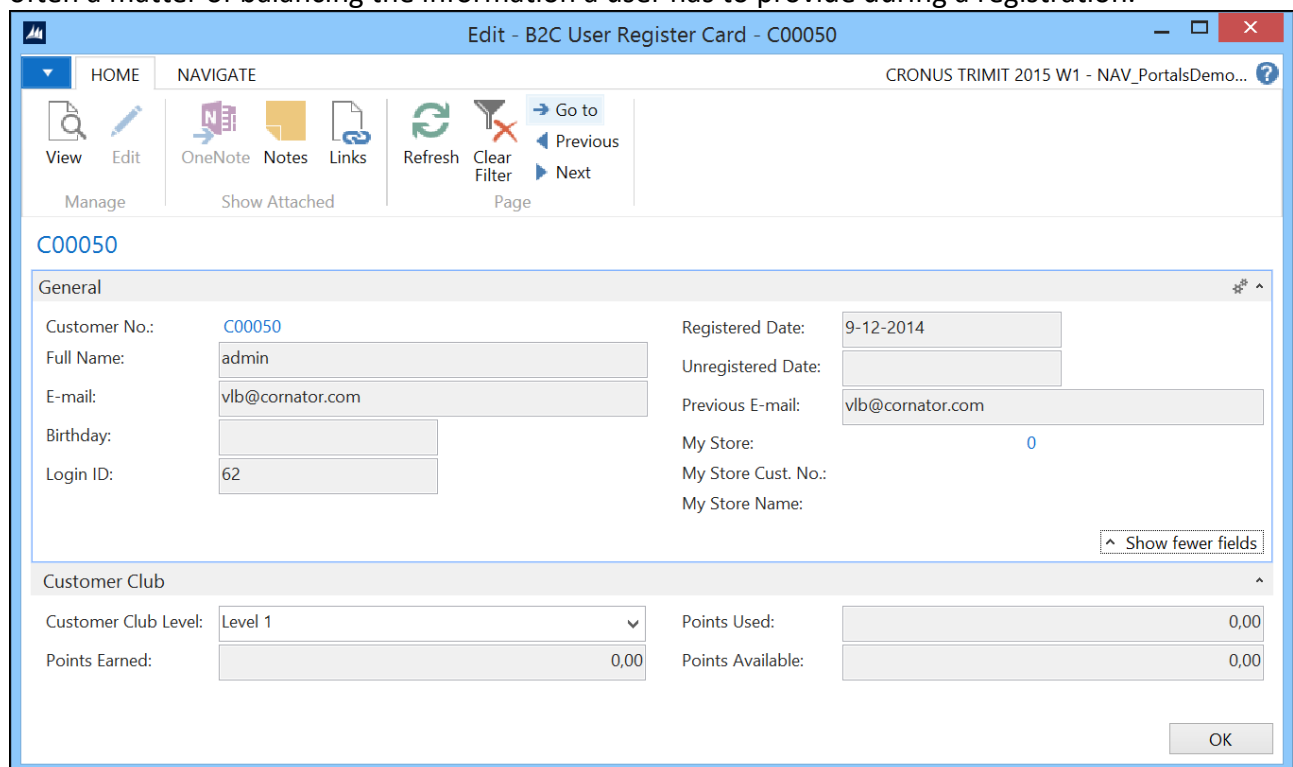
The default user group on registering is a “B2C” group (log in to CPO admin and go to **Users & Groups / User Groups / B2C**).

In TRIMIT a user has been created in table **6038149 B2C User Register** which can be accessed via Page **6038149 BC2 User Register List** and Page **6038150 B2C User Register Card** (the path is **Departments/TRIMIT Portals/B2C/User Register List**).

The reason for using the **User Register List**, among others, is to map the users between a customer and a login key on the B2C Shop.

PAGE B2C USER REGISTER CARD

The table behind this page is not new but has been partially revised for usage in the Customer Club setup. The content of the records depend on the implementation of the related B2C Shop. Some B2C Shop implementations will require the user to state more information than others. It is often a matter of balancing the information a user has to provide during a registration.



Description of Fields

Customer No.

Key field – this is the created **Customer No.** related to the user when creating orders

Full Name

Full name of the customer

E-Mail

The customer E-Mail

Birthday

This field states the customer birthday

Login ID

This is the unique ID of the user in the CPO. It serves a system purpose. The ID can be used as a visual trace on the user in the CPO

Registered Date

Date of registration

Unregistered Date

If the B2C supports unregister, this states the date

Previous E-mail

If the user changes E-Mail, the previous is stored in this field

My Store

The key of the store in TRIMIT

My Store Cust. No.

The TRIMIT store ID

My Store Name

The store name

Customer Club Level

This field states which level the customer has.

Options are: *Level 0, Level 1, Level 2, Level 3, Level 4, Level 5*

Points Earned

This field is updated via code on demand from page. The field shows the quantity of points customer has earned over time

Points Used

This field is updated via code on demand from page. The field shows the quantity of points customer has used over time

Points Available

This field is updated via code on demand from form/page. The field shows the quantity of points available for the customer at present time.

In addition, during registration a customer record is created in Table **18 Customer** based on the Customer template found in the B2C profile setup.

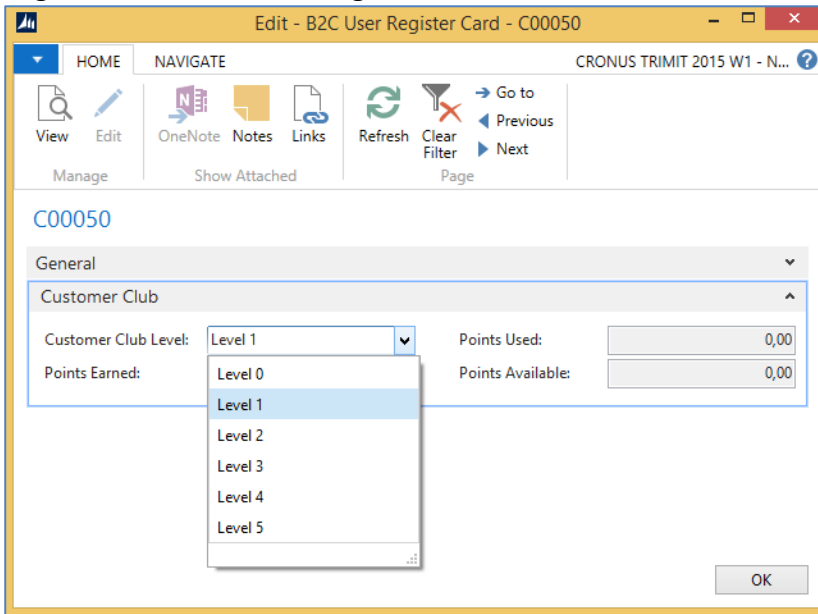
CUSTOMER REWARD/APPRECIATION

When Customer Club functionality is activated then, after registration, a customer gets a certain Customer Club Level. The Customer Club Level given to a user provides various abilities to reward appreciated customers. The possibilities and the technical elements can be divided into the following areas.

Permission to View Special Pages/Areas

The first thing possible is a natural consequence of having synchronized the **Customer Club Level** between the TRIMIT and the CPO.

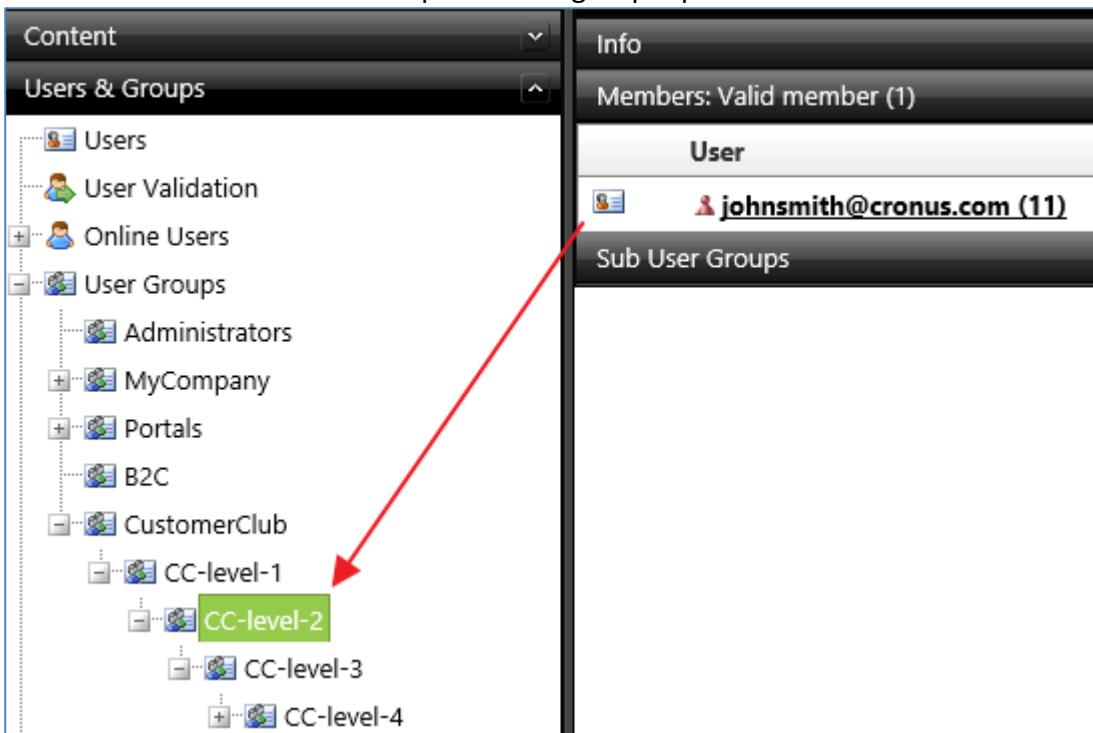
In TRIMIT it is possible to set a certain club level for a specific user. Setting a level can be done via Page **6038150 B2C User Register Card** on FastTab **Customer Club**.



When the level has been set, the status is synchronized to the CPO after run of schedule **CustomerClubSync**.

The schedule can be found in the B2C CPO admin: **Admin / Setup / Schedules** and is named **CustomerClubSync**.

The synchronization takes all user register records with a **Changed Date** different from **Last Synch. Date** and adds them to the CPO permission group equivalent to the **Customer Club Level**

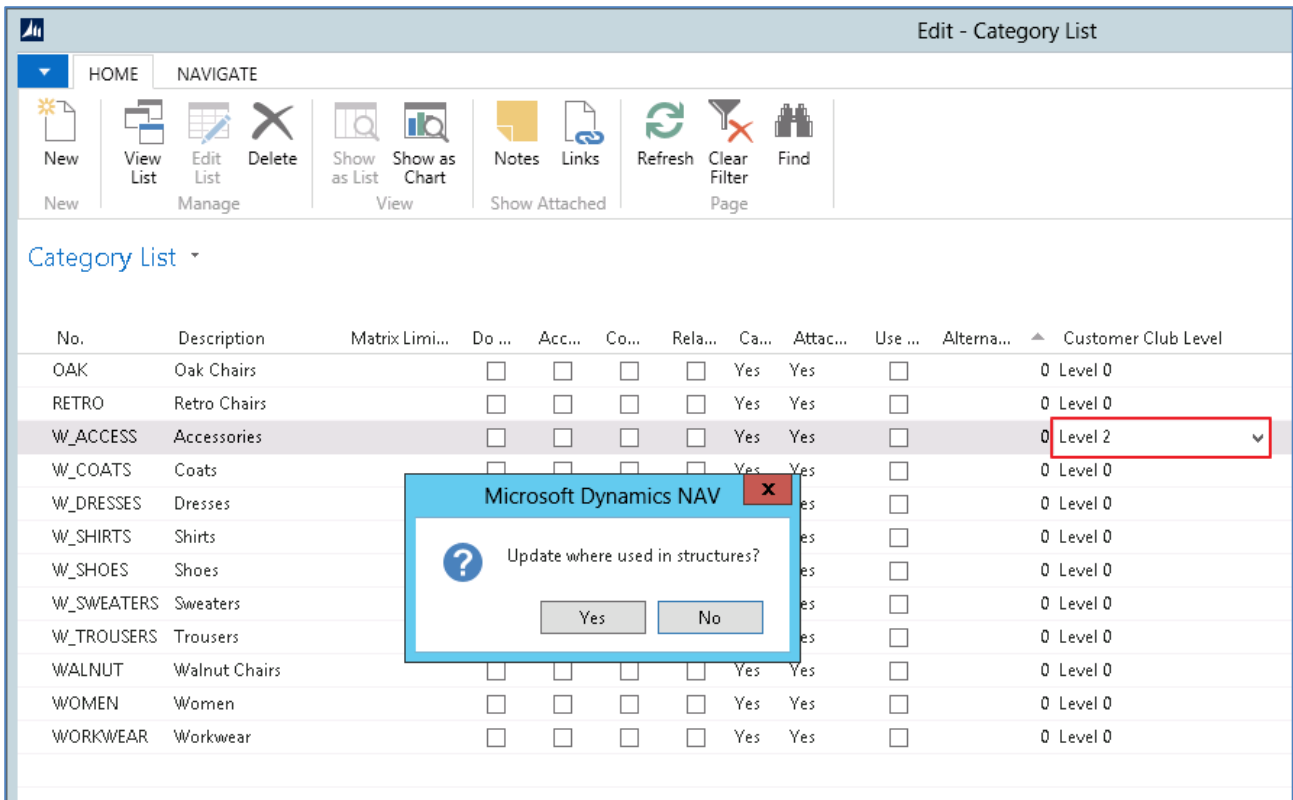


Having set a specific level in the permission group, the HTML developers can create pages or have segments on pages only visible for certain **Customer Club Level** groups. The standard B2C Shop does not out of the box have any pages responding to the Customer Club Levels.

Permission to View Specific Items

In TRIMIT the Category setup determines which Items are available for purchase on a B2C Shop. The Customer Club Level can also be applied here. This means that certain Items or even Categories can be exclusively viewed when having a specific Customer Club Level.

The setup is done in the Category structure either on a Category itself or on Sub-Levels. In the below, the Category has a **Customer Club Level 2** and this can be enforced on all underlying levels.



No.	Description	Matrix Limi...	Do ...	Acc...	Co...	Rela...	Ca...	Attac...	Use ...	Alterna...	Customer Club Level
OAK	Oak Chairs		☐	☐	☐	☐	Yes	Yes	☐		0 Level 0
RETRO	Retro Chairs		☐	☐	☐	☐	Yes	Yes	☐		0 Level 0
W_ACCESS	Accessories		☐	☐	☐	☐	Yes	Yes	☐		0 Level 2
W_COATS	Coats		☐	☐	☐	☐	Yes	Yes	☐		0 Level 0
W_DRESSES	Dresses		☐	☐	☐	☐	Yes	Yes	☐		0 Level 0
W_SHIRTS	Shirts		☐	☐	☐	☐	Yes	Yes	☐		0 Level 0
W_SHOES	Shoes		☐	☐	☐	☐	Yes	Yes	☐		0 Level 0
W_SWEATERS	Sweaters		☐	☐	☐	☐	Yes	Yes	☐		0 Level 0
W_TROUSERS	Trousers		☐	☐	☐	☐	Yes	Yes	☐		0 Level 0
WALNUT	Walnut Chairs		☐	☐	☐	☐	Yes	Yes	☐		0 Level 0
WOMEN	Women		☐	☐	☐	☐	Yes	Yes	☐		0 Level 0
WORKWEAR	Workwear		☐	☐	☐	☐	Yes	Yes	☐		0 Level 0

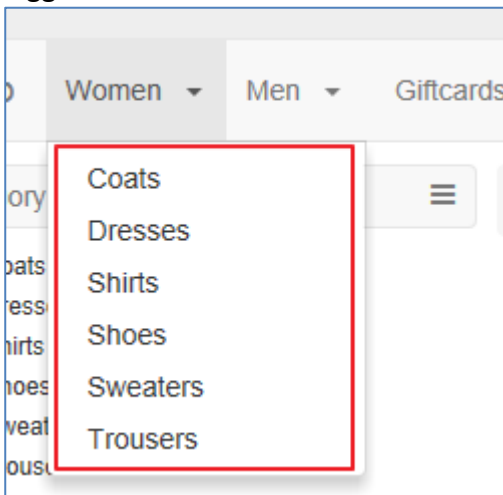
Setting a new level will prompt the user for updating Sub-Levels wherever the Category is used in a Category Structure.

Within the structure maintenance, it is possible to give specific Sub-Levels a Customer Club Level.

Edit - Category Lines - WOMEN										
Category Lines										
Type	No.	Expand on level	Matrix Limitation	Description	Filter Collection	Shipment Date Code	Category Lines 2	Gift Card	Customer Club Level	Alternative ...
Category	W_TROUSERS			Trousers			No	☐	Level 0	7
Category	W_SHIRTS			Shirts			No	☐	Level 0	4
Category	W_COATS			Coats			No	☐	Level 0	2
Category	W_SWEATERS			Sweaters			No	☐	Level 0	6
Category	W_DRESSES			Dresses			No	☐	Level 0	3
Category	W_SHOES			Shoes			No	☐	Level 0	5
Category	W_ACCESS			Accessories			No	☐	Level 2	1

The Customer Club Level set is part of the Item Data Synchronization (using schedules in CPO) which means that the HTML pages can respond quickly and set filters accordingly.

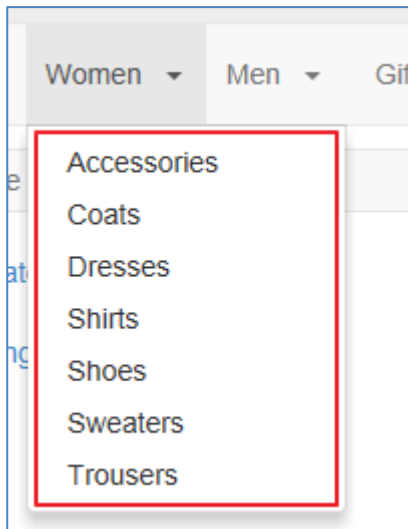
In this scenario, a user visits the standard B2C Shop and the menu will look like this when not logged in:



Under category WOMEN there is a Sub-Category only allowed for registered users in at least **Customer Club Level 2**.

Edit - Category Lines - WOMEN										
Category Lines										
Type	No.	Expand on level	Matrix Limitation	Description	Filter Collection	Shipment Date Code	Category Lines 2	Gift Card	Customer Club Level	Alternative ...
Category	W_TROUSERS			Trousers			No	☐	Level 0	7
Category	W_SHIRTS			Shirts			No	☐	Level 0	4
Category	W_COATS			Coats			No	☐	Level 0	2
Category	W_SWEATERS			Sweaters			No	☐	Level 0	6
Category	W_DRESSES			Dresses			No	☐	Level 0	3
Category	W_SHOES			Shoes			No	☐	Level 0	5
Category	W_ACCESS			Accessories			No	☐	Level 2	1

When a user with equivalent **Customer Club Level** logs in, the menu will display the following:



Vouchers only Available for Specific Customer Groups

The Promotion/Voucher setup in TRIMIT B2C Shop allows a backend to publish certain discounts by Vouchers. A Voucher has a code that can be used on the **Order confirmation** page in B2C Shop.

The Voucher setup is done in Page **6038144 B2C Promotions** (the path in TRIMIT is **Departments/TRIMIT Portals/B2C/Promotions**). In the scenario below there are 2 Vouchers, one is “public” and usable by anyone (*Level 0*) and another is assigned to *Level 2*.

Type	Description	Value	Start Date	Expiry Date	Once per Customer	Not on Campaign Items	Customer Club Level	Passcode
Discount Code	10 pct discount	10,00			☐	☐	Level 2	82EF25E1
Discount Code	5 pct discount	5,00			☐	☐	Level 0	95A880B6

Applying the Promotion/Voucher an authenticated user with **Customer Club Level 2** or above would get a discount of 10 %, whereas a non-registered user trying to use the same code would get a denial error.

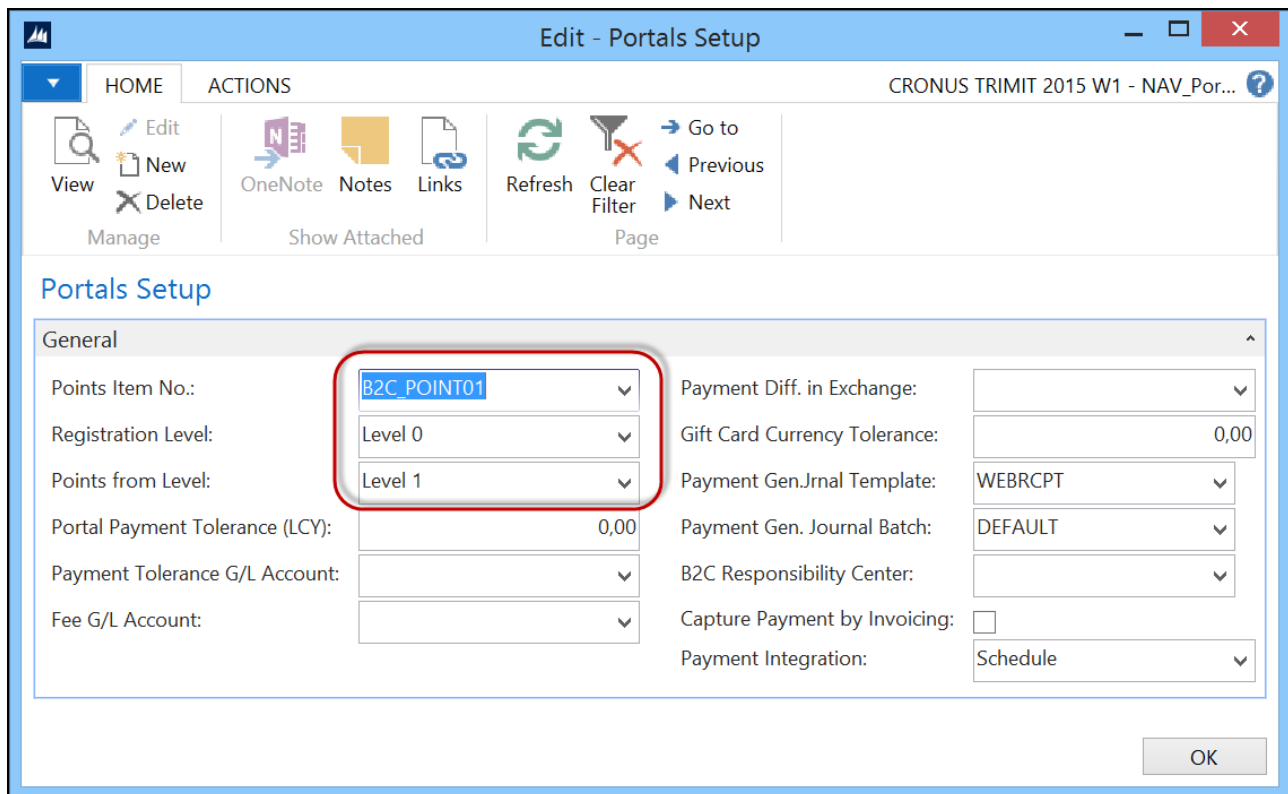
CUSTOMER POINT SYSTEM

For registered users standard TRIMIT provides a point system, which allows users to earn and use points when placing orders via the B2C Shop.

Customer Club Levels is part of the point system setup.

Portals Setup

In the **Portals Setup** (via **Departments/TRIMIT Portals/Administration/Portals Setup**) there are three fields that influences the **Customer Club** functionality:



For more details see **White Paper – TRIMIT B2C NAV Setup**

Points Search Table Setup

In order to calculate the value of points either at the time of earning/using them the backend needs to set up rules. This is done via Page **6038191 Cust. Club Point Search Table** which is based on Table **6038191 Cust. Club C Point Search Table** (the path in TRIMIT is **Departments/TRIMIT Portals/Customer Club/Point Search Table**).

The basic idea is to create rules that allow different earning/usage values depending on order amount, date or Customer Club Level. The search methodology is similar to the one known from the TRIMIT price search system.

In the scenario below, a number of rules have been applied for four currencies DKK, EUR, GBP and USD.

Point Search Table ▾										
Currency Code	Start Date	Minimum Amount	Customer Club Level	End Date	Active	Calculation Method	Earning Value	Use Value	Rounding	
DKK	01-01-2015	1.000,00	Level 1	31-12-2015	✓	Fixed Value	50,0	0,11	WHOLE	
DKK	01-01-2016	1.000,00	Level 1	31-12-2016	✓	Fixed Value	50,0	0,11	WHOLE	
EUR	01-01-2015	125,00	Level 1	31-12-2015	✓	Fixed Value	2,5	0,7	WHOLE	
EUR	01-01-2016	125,00	Level 1	31-12-2016	✓	Fixed Value	2,5	0,7	WHOLE	
GBP	01-01-2015	100,00	Level 1	31-12-2015	✓	Factor	0,05	1,0	WHOLE	
GBP	01-01-2016	100,00	Level 1	31-12-2016	✓	Factor	0,05	1,0	WHOLE	
USD	01-01-2015	200,00	Level 1	31-12-2015	✓	Factor	0,05	0,5	WHOLE	
USD	01-01-2016	200,00	Level 1	31-12-2016	✓	Factor	0,05	0,5	WHOLE	

PAGE POINT SEARCH TABLE

Description of Fields

Currency Code

Currency used by the search.

Start Date

This is the date from which the rule is valid

Minimum Amount

The rule is valid when the amount in the current currency including VAT is larger than or equal to the minimum amount specified

Customer Club Level

The rule is valid when the Customer Club Level is equal to or higher than the one set here.

Options are: *Level 0, Level 1, Level 2, Level 3, Level 4, Level 5*

End Date

This date specifies when the rule is no longer valid. It could be set as part of a campaign

Active

This field states whether a rule is Active. On a multiple user system it is important that the user creating the **Point Search Table** line, validates the content before activating the rule, otherwise many users could in a split second get a faulty calculation

Calculation Method

This field specifies how the field **Earning Value** must be interpreted. Options are: *Factor, Fixed Value*

If the calculation method is set to *Factor*, the **Earn Value** is a factor, which will be used in a calculation. E.g. if the amount on the order is 100 DKK, then with a Factor of *0,01* the user would get 1 point.

If the calculation method were *Fixed Value*, the user would get the **Earn Value** directly as points.

Earning Value

Specify a value with represents either a *Factor* value or a *Fixed Value* depending on the selection in the field **Calculation Method**

Use Value

This field will specify the value of a point when used in conjunction with the specified currency.

E.g. if the value is 1 and the currency is EUR, 1 point is equal to 1 EUR. If a point is supposed to be equal to a base value e.g. that 1 point is equal to 1 DKK, then the Factor for EUR could be *0,133* matching the currency relations of 7,49 DKK per EUR.

Rounding

The rounding is a code related to the standard Rounding Method setup also used in e.g. the currency table.

Select - Rounding Methods

HOME

CRONUS TRIMIT 2015...

Rounding Methods

Type to filter (F3)

Code

No filters applied

Code	Minimum Amount	Amount Added Before	Type	Precision	Amount Added After
HUNDRED	0	0	Nearest	100	0
TEN	0	0	Nearest	10	0
THOUSAND	0	0	Nearest	1,000	0
WHOLE	0	0	Nearest	1	0

OK

Cancel

PAGE POINT ENTRIES

The points earned or used are all registered in the Table **6038192 Customer Club Point Entry**. This enables the system to calculate available points at any given time. To open the page go to **Departments/TRIMIT Portals/Customer Club/Point Entries**

Point Entries

Type to filter (F3)

Entry No.

No filters applied

Entry No.	Type	Creation Date	Document Type	Document No.	Document Line No.	Item No.	Currency Code	Customer No.	Batch No.	Points	Point Factor	Calculation Base	Calculation Base (LCY)	Activated	End Date

Description of Fields

Entry No.

Key field and a running no

Type

Options are: *Increase*, *Decrease*

An *Increase* adds points to a specific customer account. *Decrease* deducts points from a customer account

Creation Date

Date of entry

Document Type

This field specifies the type of document this point entry is related to.

Options are: *Quote*, *Order*, *Invoice*, *Credit Memo*

Document No.

The document number to which this point entry is related

Document Line No.

Document line number for a point decrease

Item No.

The Item No. used to create a point decrease line

Currency Code

The currency in which the point entry was created

Customer No.

The customer number to which the point entry belongs

Batch No.

This is a code that is set if the backend runs a batch execution. E.g., a maintenance could create a forced decrease line as part of expiring points older than a certain date. Alternatively, all gold members could be assigned 100 points in a promotion/campaign

Points

Number of points added or deducted

Point Factor

The factor used for calculating the points added or deducted

Calculation Base

By earning points, this is the Order Amount in the Order Currency, which makes the basis for calculation of the number of points earned.

By use of points, this is the Order Line Amount including VAT in the Order Currency, which will be deducted from the total order amount

Calculation Base (LCY)

The **Calculation Base** shown in Local Currency

Activated

This specifies if some points are awaiting an Approval. It could be that an Order gave an increase of 100 Points but the user would have to type in a Code to activate the points (not standard)

End Date

This Date specifies the Date from which the entry will no longer be valid. This will expire points earned

POINTS ON B2C

MY PAGE INFORMATION

In the B2C Shop customers can access **My Page** which displays information about their current **Customer Club Level** and unused points they may have earned on purchases.

Customer Club Information

Points available

1,039

Customer Club Level

Bronze Member

Points available does not include earnings on open orders

In TRIMIT the Customer Club Levels have no real explanation on what they mean conceptually. They are simply Level 0 to Level 5. However, on the B2C Shop the administration allows to interpret the levels to something meaningful and in the required languages. This is done via the **Soft Admin** where the B2C Shop Administrator can enter a comma-separated string with a literal covering each level ranging 0 to 5 in an index.

Customer Club

Customer Club Level

Language	Value
Dansk	Member,Bronze Member,Silver Member,Gold Member,VIP,Super VIP
English	Member,Bronze Member,Silver Member,Gold Member,VIP,Super VIP

Update

On **My Page** the user also can see points earned and used by looking at previous Orders.

Finished orders

Invoice no.	Order date	Status	Total price	Points earned	Points used	PDF
205704	23.07.2013	Closed	886,10 DKK	9	3	
205703	23.07.2013	Closed	1 999,00 DKK			
205702	23.07.2013	Closed	3 299,00 DKK			

USING POINTS

On the **Confirmation order** page the user can enter earned points to reduce the **Total price incl. VAT**. In a small user dialog area the user can see how many points are available for use and, if entering and applying a number of points, the value they represent (after clicking on **Apply** button).

Confirm order

Shop Women Men Giftcards

Item	Description	Color	Size	Quantity	Price	Total
	T-Shirt Uni	Black	XL	1	13.00 EUR	13.00 EUR

Vouchers & gift cards

Customer Club Points available (46.7)

Point value 0.00 EUR

Wrapping Yes, I would like wrapping for 2.00 ☐

Shipping 6.50 EUR

Total price incl. VAT 19.50 EUR

☐ I accept [terms and conditions](#)

POINTS USED IN TRIMIT

When user applies points and proceeds to payment – the backend system creates a Deduction Line on the Sales Order representing order amount deduction by points.

The Item No. for this *Deduction Line* is determined by the field **Points Item No.** in the **Portal Setup**

				Order No. W000209	
				January 21, 2014 Page 1	
Customer No. C00020		Shipment Method		Order Date 01/21/14	
Your Reference		Payment Terms Net 14 days		Shipment Date 01/21/14	
		Salesperson		Currency Code EUR	
No.	Description	Quantity	List Price	Unit Price	Amount
2150	T-Shirt Uni	1	27.00	13.00	13.00
	XS S M L XL				
99 Black	1				
6830	Wrapping Webshop +	1		2.00	2.00
6820	Freight Webshop +	1		6.50	6.50
B2C_POINT01	Customer Point for the Webshop	5		-0.70	-3.50
				Total excl. VAT	14.40
				25 % VAT	3.60
				Total incl. VAT	18.00

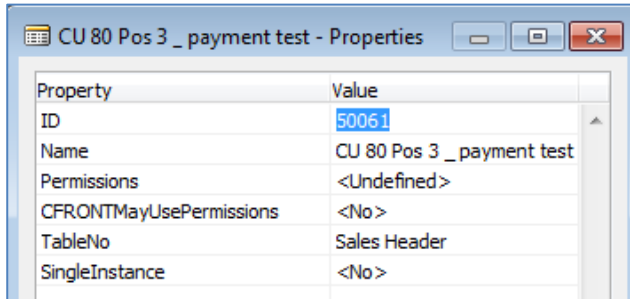
Customer can earn points by making a purchase on the B2C Shop. The first time a customer can see points being added to account is after the Sales Order is posted in TRIMIT and Posted Sales Invoice is created in TRIMIT. This is a normal scenario, which can vary depending on business rules. Taking this into account, increasing points after posting a Sales Order functionality is not implemented by default in TRIMIT. However, this can be done by using code unit call functionality (see example in appendix A).

By system design points cannot be earned on a Sales Order which solely consists of one or more Gift Cards. This prevents the concept of points from misusing.

APPENDIX A

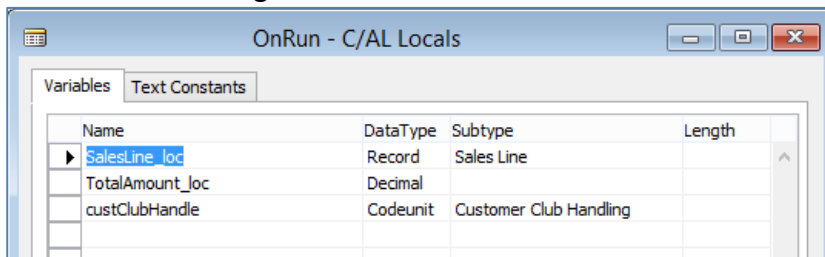
Here is shown an example of implementing the functionality that adds points to the customer after a sales order is posted in TRIMIT.

In this example we create a new Codeunit **50061 80 Pos 3_payment test**. It is needed to set the codeunit properties as follows:



Property	Value
ID	50061
Name	CU 80 Pos 3_payment test
Permissions	<Undefined>
CFRONTMayUsePermissions	<No>
TableNo	Sales Header
SingleInstance	<No>

Create the following local variables:



Name	DataType	Subtype	Length
SalesLine_loc	Record	Sales Line	
TotalAmount_loc	Decimal		
custClubHandle	Codeunit	Customer Club Handling	

Insert the following code under OnRun function:

```

Documentation()
OnRun(VAR Rec : Record "Sales Header")
IF Invoice THEN BEGIN
    SalesLine_loc.RESET;
    SalesLine_loc.SETRANGE("Document No.", Rec."No.");
    SalesLine_loc.SETRANGE(Type,SalesLine_loc.Type::"G/L Account",SalesLine_loc.Type::"Fixed Asset");
    SalesLine_loc.SETRANGE("Item Relation",SalesLine_loc."Item Relation"::Item);
    IF SalesLine_loc.FINDFIRST THEN REPEAT
        IF SalesLine_loc."Line Amount" <> 0 THEN
            TotalAmount_loc += (SalesLine_loc."Line Amount" / SalesLine_loc.Quantity) *
                SalesLine_loc."Qty. to Invoice";
    UNTIL SalesLine_loc.NEXT = 0;
    custClubHandle.CreatePointIncrease(
        "Sell-to Customer No.",
        "Document Type",
        "No.",
        ..,
        "Currency Code",
        TotalAmount_loc,
        TRUE);
    custClubHandle.SetPostedByOrderNo(
        "Document Type",
        "No.");
END;

```

The same code in copy format:

```

IF Invoice THEN BEGIN
    SalesLine_loc.RESET;
    SalesLine_loc.SETRANGE("Document No.", Rec."No.");
    SalesLine_loc.SETRANGE(Type,SalesLine_loc.Type::"G/L Account",SalesLine_loc.Type::"Fixed
Asset");
    SalesLine_loc.SETRANGE("Item Relation",SalesLine_loc."Item Relation"::Item);
    IF SalesLine_loc.FINDFIRST THEN REPEAT

```

```

IF SalesLine_loc."Line Amount" <> 0 THEN
    TotalAmount_loc += (SalesLine_loc."Line Amount" / SalesLine_loc.Quantity) *
        SalesLine_loc."Qty. to Invoice";
UNTIL SalesLine_loc.NEXT = 0;
custClubHandle.CreatePointIncrease(
    "Sell-to Customer No.",
    "Document Type",
    "No.",
    "",
    "Currency Code",
    TotalAmount_loc,
    TRUE);
custClubHandle.SetPostedByOrderNo(
    "Document Type",
    "No.");
END;

```

Open page **Codeunit Calls** (go to **Departments/Administration/IT Administration/Administration**) and insert the codeunit number as follows:

Codeunit Calls											
Object Type	Object ID	Object Name	Field No.	Field Name	Codeunit Call	Code Type	CU Call without Parameter	Codeunit	Codeunit Name	Formula	Comment
Codeunit	80	Sales-Post	0	Pos1	-	-	☐	0			Called by the new created...
Codeunit	80	Sales-Post	0	Pos2	-	-	☐	0			Called by the new created...
Codeunit	80	Sales-Post	0	Pos3	-	-	☐	50061	CU 80 Pos 3_payment test		Called by the Sales Head...
Codeunit	80	Sales-Post	0	Pos4	-	-	☐	0			Called with a temporary S...

After this is done – it will be possible to enable points increasing for customers after sales orders are posted.