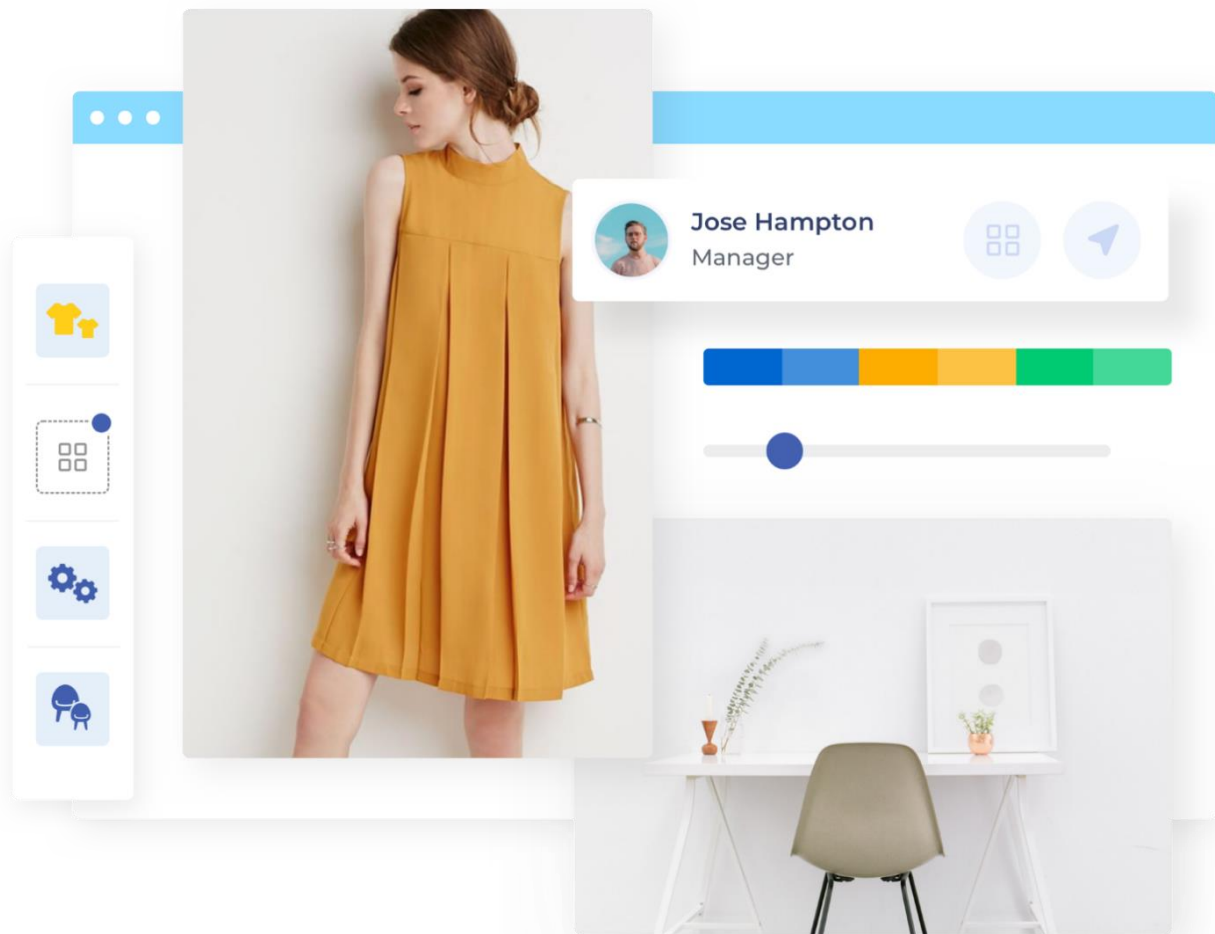


**WHITE PAPER**

TRIMIT B2C Webshop Setups in Business Central 21.2

This document contains information regarding the Setups for the B2C Webshop in Business Central for TRIMIT 21.2 for Business Central 2021 Release Wave 2 W1 (BC19) in combination with the Portals Package JAN22-003 for the TRIMIT Portals.

Version: 21.2
Date: 01-04-2022

CONTENTS

Introduction	1
Components	1
B2C Portal Profile.....	3
FastTab Customer	4
FastTab Order	6
FastTab Item	9
FastTab Fieldmapping.....	12
FastTab Report	14
FastTab Advanced.....	14
Actions in B2C Portal Profile	15
Customer Templates Setup	15
Currency Relations.....	15
Wrapping Expense Setup.....	16
Delivery Method	18
Delivery Fee Setup.....	20
Show Inventory Stores.....	22
Vouchers	24
Related, Voucher Log	25
Gift Card.....	25
Tag Filters	27
Page	28
Related.....	28
TRIMIT BC Web Integration	29
Sales Order Card.....	29
Process, Portal Payment.....	29
Extra Order Info	30
Master Card.....	32
Product Information (PIR)	32
Image Management	33
External Display	33
Enable Portal	33
Supplier Portal Messages	34

Users	35
User Registration.....	35
User Relationship	39
Portal Setup	40
FastTab General	40
Description of the Fields.....	40
FastTab Payment Processing.....	42
Description of the Fields.....	42
FastTab Advanced Sales Integration	42
FastTab Data Feed Setup.....	43
Description of the Fields.....	43
Actions, Create Data Feed Attributes.....	43
Related, Multiple Bank Accounts Setup	44
Miscellaneous Setups for B2C Webshop	45
Categories	45
Portals Newsletter.....	45
Gift Cards and Vouchers.....	45
Store Locator	45
Customer Club.....	45
E-Mail Queue.....	45
Delivery in B2C Webshop.....	45
Language Setup	46
Inventory setup	47

INTRODUCTION

This document contains information about the setups in TRIMIT regarding the B2C Webshop. It is based on the released version of TRIMIT 21.2 and will only discuss the functionality and fields in standard TRIMIT.

For information about standard Business Central fields, please see the documentation from Microsoft.

The audience for this document is the Consultant or very skilled User.

Be aware of not changing settings and parameters in a live database without consulting the implementing partner.

The functionality described is the functionality in **TRIMIT 21.2 for Business Central W1 BC19.X** in combination with the **Portals Package JAN22-003**.

The pictures in this White Paper are based on the demo database for **TRIMIT 21.2**, which is based on Microsoft Dynamics 365 Business Central 2021 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

NOTE

Layout in Pictures of portal pages might differ based on Theming selections and version of the installed portals.

COMPONENTS

TRIMIT B2C Setup in Business Central contains the following objects:

The tables	6038100	<i>trm ConnectPortal Setup</i>
	6038101	<i>trm User Relationship Mgt</i>
	6038103	<i>trm User Relationship</i>
	6038109	<i>trm File Repository</i>
	6038110	<i>trm Portal Control Setup</i>
	6038118	<i>trm Portal Message</i>
	6038120	<i>trm Category</i>
	6038124	<i>trm Instance Mapping</i>
	6038125	<i>trm Portal Profile</i>
	6038126	<i>trm Portal Newsletter</i>
	6038127	<i>trm Portal New Recipient</i>
	6038129	<i>trm Portal Customer Template</i>
	6038143	<i>trm Portal Fee Setup</i>
	6038148	<i>trm B2C Promotion</i>
	6038149	<i>trm B2C User Register</i>
	6038159	<i>trm Portal Locations</i>
	6038170	<i>trm Portal Currency Setup</i>
	6038173	<i>trm Gift Card</i>

6038175	<i>trm Portal Store Locator</i>
6038178	<i>trm Portal Delivery Method</i>
6038179	<i>trm Portal Order Extra Info</i>
6038180	<i>trm Portal Payment</i>
6038181	<i>trm Portal Payment Entry</i>
6038185	<i>trm Multiple Bank Acc Setup</i>
6038190	<i>trm Portal Setup</i>
6038212	<i>trm Tag Filter Setup</i>
6038190	<i>trm Portal Setup</i>

The pages	6038100	<i>trm Portal Instances</i>
	6038101	<i>trm User Relationship Man.</i>
	6038102	<i>trm ConnectPortal Setup</i>
	6038103	<i>trm User Relationship List</i>
	6038118	<i>trm Portal File Repository</i>
	6038126	<i>trm Portal Newsletter</i>
	6038127	<i>trm Portal Newsletter Recip</i>
	6038129	<i>trm Portal Customer Templates</i>
	6038130	<i>trm Portal Profiles List</i>
	6038132	<i>trm B2C Portal Profile</i>
	6038140	<i>trm Portal Control Setup</i>
	6038143	<i>trm Portals Wrapping Exp Setup</i>
	6038144	<i>trm B2C Promotions</i> (page will be called Vouchers)
	6038149	<i>trm B2C User Register List</i>
	6038151	<i>trm Portal Extra Order Info</i>
	6038159	<i>trm Portal Locations</i>
	6038163	<i>trm Portal Message List</i>
	6038170	<i>trm Portal Currency Relations</i>
	6038173	<i>trm Gift Cards</i>
	6038176	<i>trm Store Locator List</i>
	6038178	<i>trm Portal Delivery Method</i>
	6038181	<i>trm Portal Payment Card</i>
	6038182	<i>trm Portal Payment Subform</i>
	6038183	<i>trm Portal Payment Actions</i>
	6038184	<i>trm Portal Pay Attention List</i>
	6038185	<i>trm Multiple BankAcctSetup</i>
	6038212	<i>trm Tag Management</i>

The codeunits	6038109	<i>trm Portals Function Handler</i>
	6038129	<i>trm Batch Delete ASI Document</i>

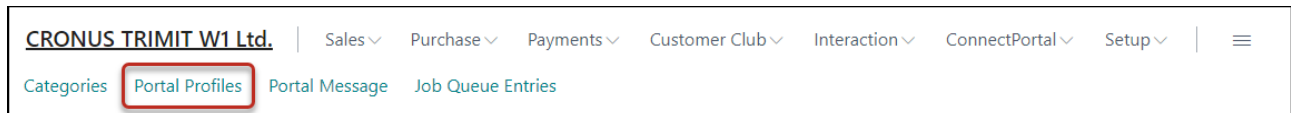
Many other objects are involved, but these are the most important TRIMIT objects.

B2C PORTAL PROFILE

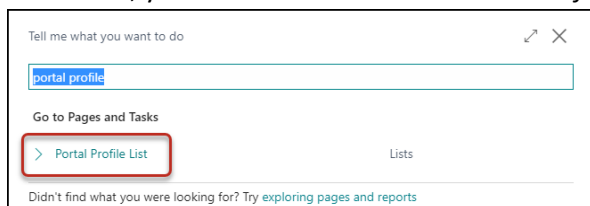
The B2C Webshop **Portal Profile** defines the dataset which comes from TRIMIT and will be utilized on the frontend and then displayed to the end user/Customer in a browser.

This dataset includes such Data as Categories with Items, Price lists, Usage of Currencies and other information.

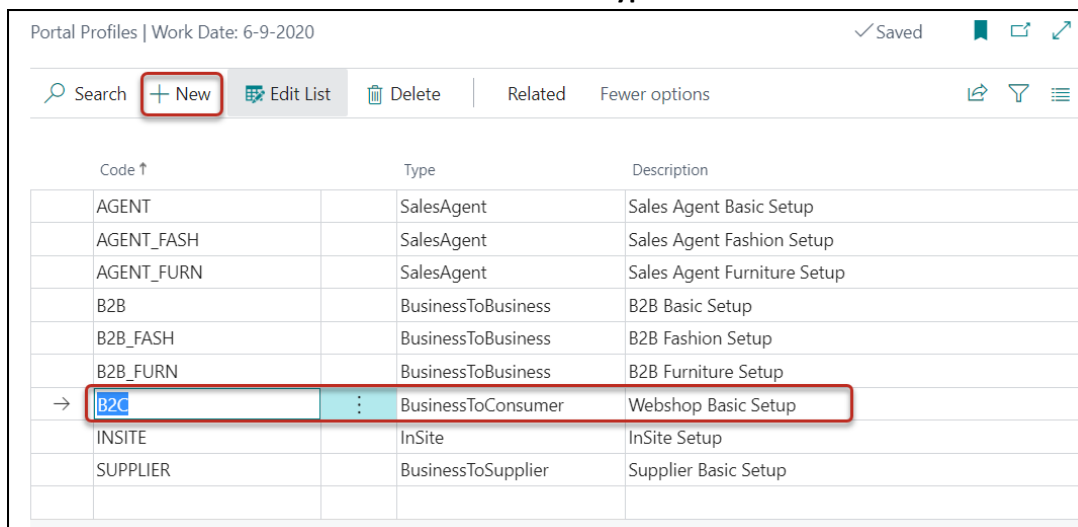
If you have opened the **Role TRIMIT Portal Administrator** (via **My Settings**), you can find the **Portal Profiles** via:



Otherwise, you can find it via **Tell me Portal Profile**:

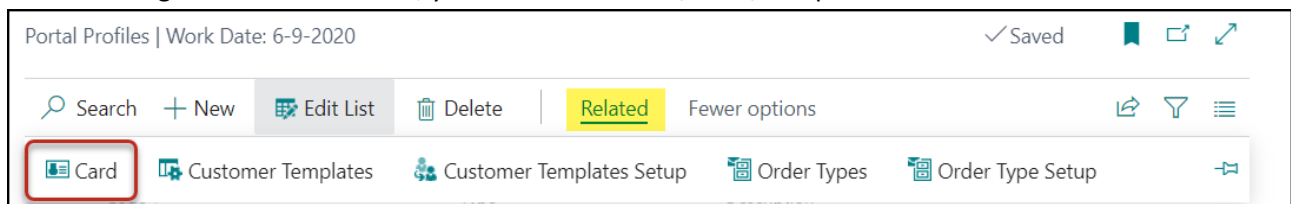


To open the B2C Webshop Portal Profile (called **B2C** in our Demo Company) page click on **Code B2C**. Or click **+ New** to create a new Portal Profile with **Type BusinessToConsumer**.



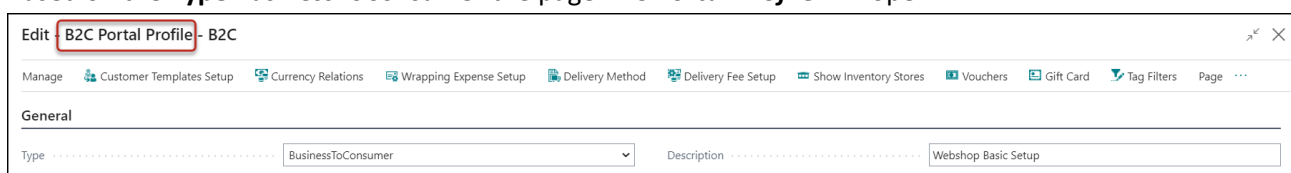
Code ↑	Type	Description
AGENT	SalesAgent	Sales Agent Basic Setup
AGENT_FASH	SalesAgent	Sales Agent Fashion Setup
AGENT_FURN	SalesAgent	Sales Agent Furniture Setup
B2B	BusinessToBusiness	B2B Basic Setup
B2B_FASH	BusinessToBusiness	B2B Fashion Setup
B2B_FURN	BusinessToBusiness	B2B Furniture Setup
→ B2C	BusinessToConsumer	Webshop Basic Setup
INSITE	InSite	InSite Setup
SUPPLIER	BusinessToSupplier	Supplier Basic Setup

After creating a new **Portal Profile**, you can click **Related, Card**, to open the Card:



The **Type** and **Description** were already filled in the **Portal Profiles**.

Based on the **Type BusinessToConsumer** the page **B2C Portal Profile** will open.



FASTTAB CUSTOMER

Customer	
Customer Newsletter	CONSUMER
Customer Template for Registry	CUSTB2C
Set Price Including VAT	Yes
Set Tax Liable	No
Customer Nos.	CUSTWEB
Default Customer No.	B2C
Anonymous Profile	☒
Sell-to Group	
Sell-to Type	
Sales Channel	B2C

CUSTOMER NEWSLETTER

If you send regular news updates to your B2C Customers, then you can specify a **Customer Newsletter** Code in this field.

If this field is filled and a Customer clicks on option “*I wish to receive newsletters*” in the *Join* or *My Account/Checkout* page on B2C Webshop, he will automatically be added as a **Recipient** to this specific **Customer Newsletter**.

CUSTOMER TEMPLATE FOR REGISTRY

This field is mandatory.

Value in this field defines a basis dataset which is applied for a newly created/registered Customer on B2C Webshop. **Customer Templates** per Country can be created or edited by clicking [Customer Template Setup](#):

Edit - B2C Portal Profile - B2C	
Manage	Customer Templates Setup Currency Setup Wrapping Expense Setup Delivery Method Delivery Setup Show Inventory Stores Promotion Gift Card

SET PRICE INCLUDING VAT

This field will fill/update the field **Prices Including VAT** on the Customer Card if a new Customer registers on the B2C Webshop (specifically for companies in Europe).

You can choose between the following three options:

Yes	The Customers Prices including VAT will be set to <i>Yes</i> .
No	The Customers Prices including VAT will be set to <i>No</i> .
From Template	The Customers Prices including VAT will be set based on the applicable Customer Template

SET TAX LIABLE

This field will fill/update the field **Tax Liable** on the Customer Card if a new Customer registers on the B2C Webshop (specifically for companies based in US/CA). You can choose between the following three options:

Yes	The Customers Tax Liable will be set to <i>Yes</i> .
No	The Customers Tax Liable will be set to <i>No</i> .
From Template	The Customers Tax Liable will be set based on the applicable Customer Template

CUSTOMER NOS.

Specify **No. Series** to be used when creating new Customers on B2C Webshop. If this field is left blank, then the **No. Series** value is taken from the field **Customer Nos.** in *Sales & Receivables Setup* (via **Tell me**)

Sales & Receivables Setup | Work Date: 6-9-2020

Sales & Receivables Setup

Number Series

Customer Nos.	CUST	Canceled Issued Reminder Nos.	
Quote Nos.	S-QUOTE	Fin. Chrg. Memo Nos.	S-FIN
Blanket Order Nos.	S-BLK	Issued Fin. Chrg. M. Nos.	S-FIN+
Order Nos.	S-ORDER	Canceled Issued Fin. Charge Memo N... ..	

DEFAULT CUSTOMER NO.

This field is mandatory. Fields of this **Default Customer No.** will be used as a base during anonymous browsing on the B2C Webshop. Consider the **Default Customer No.** information when creating a Customer Template for registration, because this can create a data difference on the B2C Webshop before and after Customer registration/login.

ANONYMOUS PROFILE

This field is mandatory. When set to *TRUE*, this B2C Portal Profile is used when Customer is visiting the B2C Webshop without registration/authentication.

When Customer is registered then, by default, the same Portal Profile is used until you change the **Profile** in the **User Relationship List** which can be found via **Tell me User Relationship List**.

Edit - User Relationship List - The Fashion Store UK

Search + New Edit List Delete More options

Type ↑	No.	Name	Profile ↑	Creation Date	Token Available	Token Created Date
→ Customer	2000	The Fashion Store UK	B2B	29-4-2021 09:28	☐	
Vendor	2300	Oriental Production Services	SUPPLIER	29-4-2021 09:28	☐	
Salesperson/Purchaser	JR	John Roberts	AGENT	29-4-2021 09:28	☐	

Otherwise, the Portal Profile can be changed by AL Code (for more information see **White Paper – TRIMIT Portals Customization by Codeunit call – which will be updated in time**). Changing Portal Profiles can be used if different Portal Profiles are to be applied for unregistered and registered users.

SELL-TO GROUP

The value in this field is transferred to the field **Sell-to Group** on the Customer card on Customer registration

SELL-TO TYPE

The value in this field is transferred to the field **Sell-to Type** on the Customer card on Customer registration

For the B2C Portal profile it is important to apply these two settings, so that the same user E-Mail Address can be on multiple Customers. I.e., two separate Websites are connected to the same Business Central company. This scenario should handle the situation when the same User registers on both Websites using the same E-Mail Address.

It works as follows: when searching for a Customer entity, values in these two fields (above) are included in the search, thus enabling the system to find the correct Entity. This though needs a customization, to find the correct B2C Portal Profile based on **Portal Database Id** for a specific Website. If these fields are empty, then the system searches only by E-Mail Address.

SALES CHANNEL

In this field you must choose a **Sales Channel**, that also will be copied into the Sales Orders that will be created based on the B2C Webshop.

This is because of the Intrastat 2022 rules, where the Direct Trade (to consumers) need to have a special **Transaction Type 12 Direct trade with/by private consumers (incl. distance selling)**.

We embedded this default **Transaction Type** into the **Sales Channel**.

Select - Group Codes - Sales Channel | 🔍 + New 📋 Edit List ... ⓘ ↗ ✕

Code ↑	Description	Transaction Type Direct Trade
AGENT	Agent Orders	
B2B	B2B Webshop Orders	
B2C	B2C Webshop Orders	12
EMAIL	Orders Via E-Mail	
IC	Intercompany Orders	
INSTORE	B2C in Store Orders	12
→ MAIL	Orders Via Mail	
PHONE	Orders Via Phone	
RETAIL	Orders From Our Own Shops	
SA	SA Portal Orders	

FASTTAB ORDER

Order

Allow Wrapping	☒	Default Price Group	RETAIL
Google Analytics Currency		Campaign Price Group	
Order Nos.	S-ORD-WC	Payment Terms Code	PAYNOW
Default Order Type	B2C	Disable Order Blocking	☐
Default Currency	GBP	Comments Code	B2C_ORDER
Lock Currency to Country/Region	☒		

ALLOW WRAPPING

This field is optional. Allows showing **Wrapping** option on the Sales Order **checkout** page. When activated on the B2C Portal Profile it looks as follows on the portal:

Review

Vouchers & gift cards

Enter voucher or giftcard

Comment

Write your message

☐ Yes, I would like wrapping for 1.50 GBP

☐ I accept terms and conditions

The setup takes place via the Action [Wrapping Expense Setup](#)

GOOGLE ANALYTICS CURRENCY

This field is optional and needs to have a value if B2C Webshop uses Google analytics. The currency value in this field should match the currency in Google Analytics Setup for the B2C Webshop

ORDER NOS.

This field is mandatory. Select the No. Series for the Sales Orders created in B2C Webshop.

DEFAULT ORDER TYPE

This field is optional. Select a default **Order Type** which will be used for Sales Orders from the B2C Webshop

DEFAULT CURRENCY

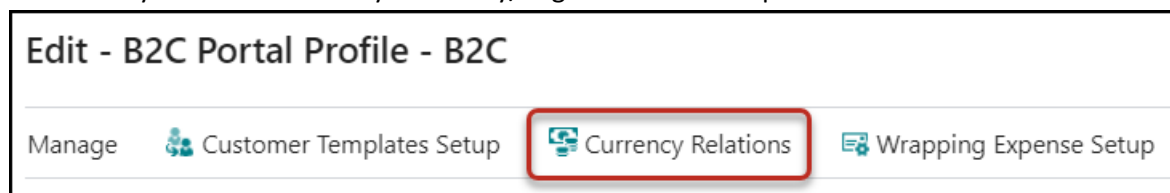
This field is mandatory. Select a **Default Currency** to be set automatically on the B2C Webshop

NOTE

This Currency is displayed by default on B2C Webshop for both non-/authorized Customer. Whereas the Language for non-authorized Customer is dictated by browser Language and for authorized Customers is defined under Customer registration. If browser Language is not the one from the enabled Modelyn Languages, then the default Modelyn Language is used.

LOCK CURRENCY TO COUNTRY/REGION

This field is optional. This option works in combination with the content of the [Currency Relations](#), where it is necessary to set the Currency – Country/Region Code lock dependencies.



If this field is *No*, the Customer can choose any Currency, regardless the Country he is situated.

DEFAULT PRICE GROUP

This field is mandatory. Select a default **Customer Price Group** code for the Retail Prices. The Prices related to this Customer Price Group will be shown on the B2C Webshop.

If **Customer Price Group** (specified on B2C Portal Profile as **Default Price Group**) does not have a Product related Price, then Product Price on portal will be "0". So, Price will not be taken from "All Customers" Price or from the **Unit Price** field on the Master or Item. This is because on B2C Price Synchronization, system takes the Customer Price Group values in B2C Portal Profile **Default Price Group** and **Campaign Price Group** – these are the only places where the system looks for prices in B2C.

But on B2B - the Retail Price is coming from parameter **Price Group Retail Unit Price** specified in **Sales & Receivables Setup** and Unit Price is coming according to the regular Price Search.

NOTE

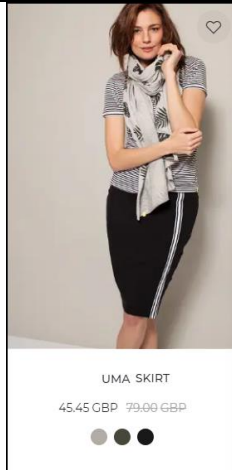
All Prices for the B2C Webshop should include VAT.

CAMPAIGN PRICE GROUP

This field is optional. Select the **Customer Price Group** code to specify the prices to be used during the Campaign. Here is an example on the B2C Webshop, where 45,45 is a Campaign price and 79,00 is an original Retail Price.

NOTE

The Price found via the **Campaign Price Group** will also overrule the Sales Prices that might be found via the Price Group Parameters for Campaigns. See *White Paper – TRIMIT Price Group Parameters and Campaigns* for more details.



PAYMENT TERMS CODE

This field is optional. Select the **Payment Terms Code** for the Sales Order created on B2C Webshop

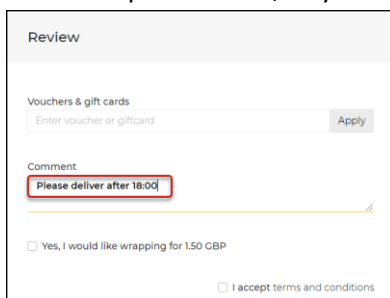
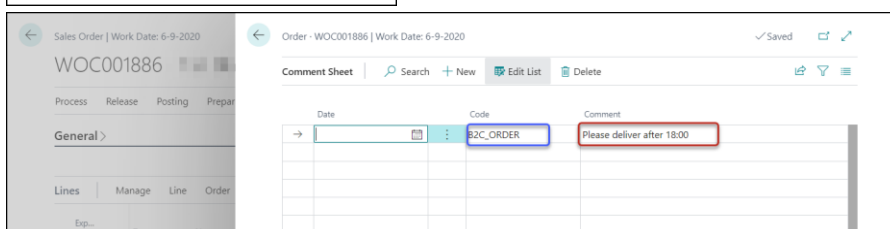
DISABLE ORDER BLOCKING

This field is optional. If set to *TRUE*, the order blocking, if relevant, will be ignored while posting it from Sales orders. If set to *FALSE*, then the order blocking will not be ignored during the posting.

COMMENTS CODE

This field is optional. You can enter a **Standard Text Code**.

If a Customer enters a **Comment** in the **checkout** page, it will be connected to the Sales Header in TRIMIT, with this specific **Code**, so you know where the **Comment** came from. I.e.:

Date	Code	Comment
	B2C_ORDER	Please deliver after 18:00

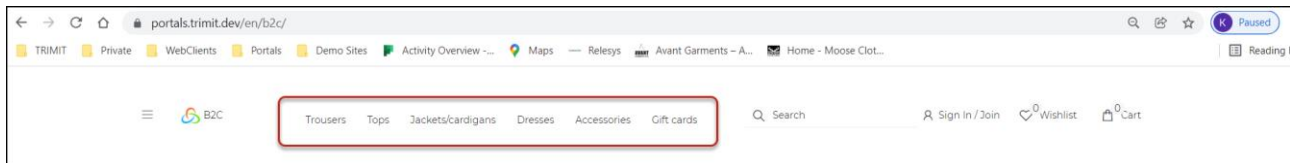
FASTTAB ITEM

Item	
Category Structure	B2C
Tag Filter Group	
No Sale	☐
Availability Check Method	Available
Inventory Profile Setup	B2C
Show Items Not On Inventory	☒
Show Where to Buy	☒
Where to Buy Horizon	-9M
Show Inventory in Stores	☒

CATEGORY STRUCTURE

This field is mandatory. Select the root **Category** for the B2C Webshop. The root **Category** will not be shown on the B2C Webshop, but all the Category Lines (subcategories) will be.

The Category structure in B2C Webshop:



The Category structure in TRIMIT can be displayed in a **Category Tree View**, via Role Center **TRIMIT Portal Administrator, Categories** or via Role Center **TRIMIT Small Business, Portals, Categories** or via **Tell me Categories**.

In the page of the **Categories**, click **Show Category**.

CRONUS TRIMIT W1 Ltd. Finance Sales Purchase Product Design Logistics Production Portals Posted Documents											
Categories: All Search + New Delete Edit List Category Lines Show Category Tag Filters Copy Wizard Card ...											
No.	Description	Matrix Limitation	Do not show on First Level	Alternative Sorting	Customer Club Level	Collection	Tag Filter Group	Expand On Overview	Google Product Taxonomy ID	Categ... Lines Attac...	Attach... to Categ... Lines
B2C	B2C Toplevel		☐	0	Level 0		Inherited		0	☒	☐
B2C_F_CABINETS	Cabinets		☐	0	Level 0		Inherited		0	☒	☒
B2C_F_CHAIRS	Chairs		☐	0	Level 0		Inherited		0	☒	☒

You can simply Expand a Category by clicking the ► and Collapse a Category by clicking the ▼

Edit - Category Tree View						
Related Record Category Line Related Fewer options						
Category Type	No.	Description	Description 2	Matrix Limitation	Alternative Sorting	
Category	B2C				0	
Category	B2C_W_TROUSERS	Trousers			0	
Master	2000	Olivia Trousers			0	
Accessories	2400	Nancy Scarf			0	
Complementary Items	2100	Lily Blouse			0	
Complementary Items	4710	Scarlett Shoe			0	
Bought by Other Users	2200	Grace Bomber			0	
Master	2010	Amelia Trousers			0	
Master	2020	Isla Trousers			0	
Master	2030	Ella Trousers			0	
Category	B2C_W_TOPS	Tops			0	
Category	B2C_W_JACKETS	Jackets/Cardigans			0	
Category	B2C_W_DRESSES	Dresses			0	
Category	B2C_W_ACCESS	Accessories			0	
Category	B2C_GIFTCARDS	Gift Cards			0	

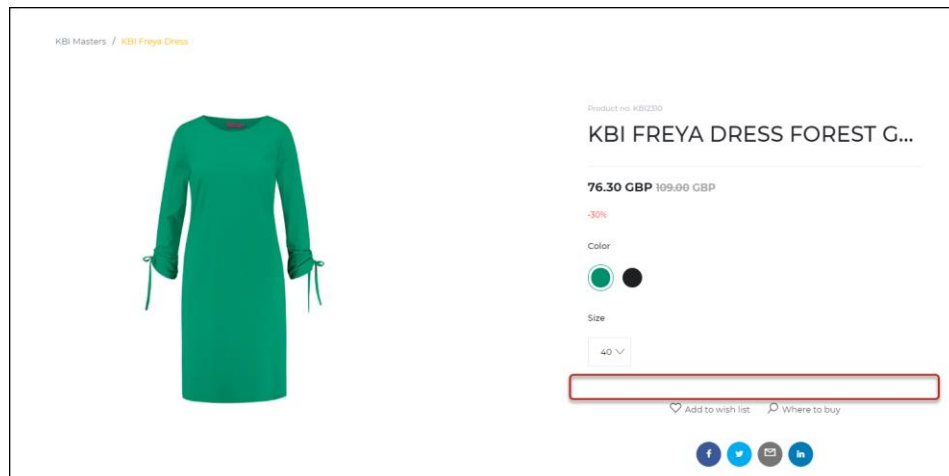
For more information about the Categories, see **White Paper – TRIMIT Portals Setups in Business Central** and **White Paper – TRIMIT Category Management**.

TAG FILTER GROUP

Not implemented yet.

NO SALE

When you use the B2C Webshop only as an overview of what Customers could buy in your stores, you could set this field to Yes. In that case, the Customer is not able to enter a **Quantity** or have button to **Add to cart** in the Product Page, but he can see the possible colors/sizes.



AVAILABILITY CHECK METHOD

This field is mandatory. Option in this field defines the way the Item Availability is calculated in the B2C Webshop.

You can choose between the following three options:

No	No availability method is used. All items will be set to unavailable.
Inventory	The Item Availability is calculated in accordance with the Inventory Profile Setup which is specified in field Inventory Profile Setup The system calculates Inventory “–” Deductions (1) “+” Increase (2) (1) All deductions are Sales Orders, Transfer Orders, Production Orders (depending on what has been chosen in the Inventory Profile Setup) – and is calculated with a date filter “... Horizon Date”. Horizon date is calculated from today (Work Date) based on the date formula in the field Horizon Availability Check from the Inventory Profile Setup. (2) Increase is Purchase Orders, Transfer Orders, Production Orders (depending on what has been chosen in the Inventory Profile Setup)– and is calculated with a date filter “... Requested Date”. Requested date is the date stamped on the relevant document (shipment date on a sales order etc.) It’s a static picture and only one calculation.
Available	This is a more dynamic method. The system creates a timeline with a date mark on Requested Date, and Horizon Date and on each date for an increase. On each of the dates, the above calculation (of the option Inventory) is done, and the one with the lowest Available Quantity is set as Available Quantity. By this, the system makes sure that every order is fulfilled taking in consideration whether there is an increase coming in that can fulfill some deductions from a later date. Note, that this option is also based on the Inventory Profile Setup so only the processes marked will be taken into consideration. This option should be used for B2C Portal Profile.

After changing a value in this field, it is required to run **Update Shop** in B2C Webshop Soft Admin

INVENTORY PROFILE SETUP

This field is mandatory if field **Available Method** is set to *Inventory* or *Available*.

Select required Inventory Profile Setup.

SHOW ITEMS NOT ON INVENTORY

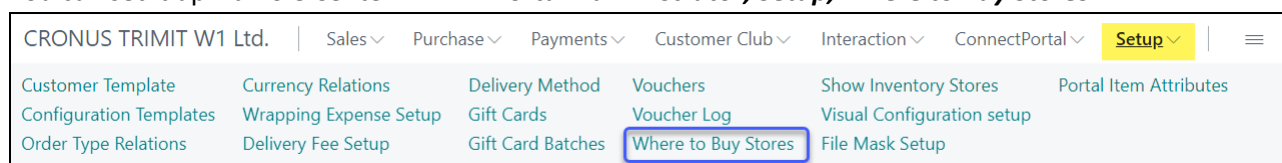
This field is optional. When selected, Items which are sold out or never had any Inventory, will still be shown on the B2C Webshop – if connected to the Categories - but marked with a label *Sold Out*.

SHOW WHERE TO BUY

This field is optional. If set to *TRUE*, then a *Where to Buy* link (see **red** marked in picture below) will be shown on the Product page on B2C Webshop (this requires selecting color variant).

If this option is activated then system searches for the **Where to Buy Stores** (Customers / Ship-to Codes or own Stores) where this specific product variant, including color and size, was sold.

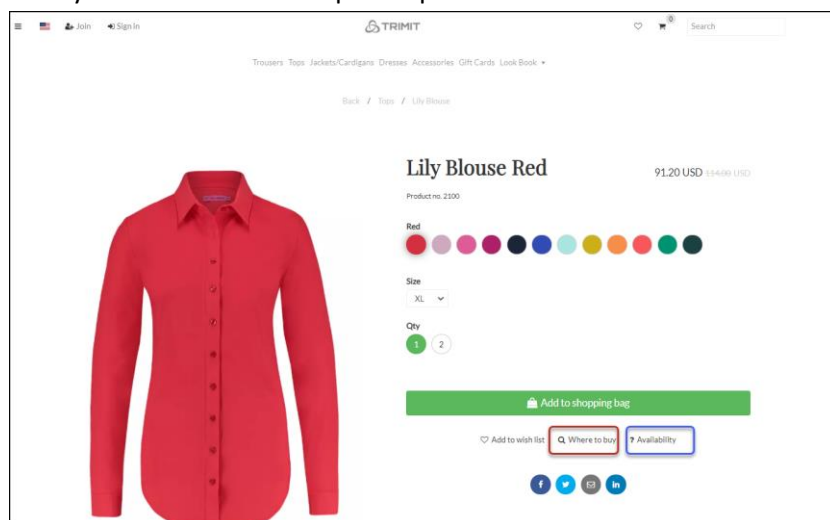
You can set it up via Role Center **TRIMIT Portal Administrator, Setup, Where to Buy Stores**:



See **White Paper - TRIMIT B2C Store Locator and Where to Buy Item for more details**.

The sale to those **Where to Buy Stores** should happen within a period in the past. This period should be specified in the field **Where to Buy Horizon** (described below).

The system searches for a specific product variant in the Sales Orders and Posted Sales Invoices.



WHERE TO BUY HORIZON

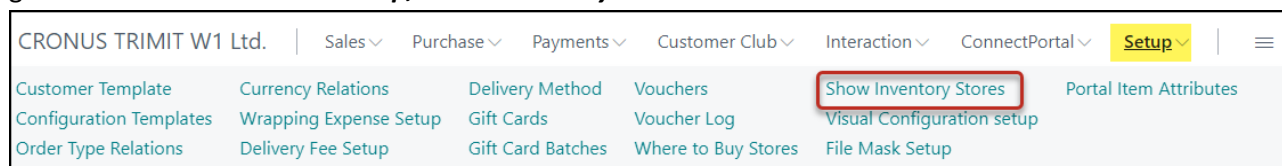
This field is optional. This is a Date Formula field where it is possible to specify a period, i.e., *-6M*, that is - investigate the Stores and find where this Item was sold during the last 6 months.

If **Show Where to Buy** is activated but **Where to Buy Horizon** field is blank then system sets a horizon to *-90D*, i.e., latest 90 days in the past.

SHOW INVENTORY IN STORES

This field is optional. If set to **TRUE**, then **Availability** link (see **blue** marked in above picture) will be shown on the Product page on B2C Webshop (this requires selecting Color variant).

A list of Stores for this feature can be set via **Actions, Show Inventory Stores** in this B2C Portal Profile or in general via the Role Center **Setup, Show Inventory Stores**.



Read more about this topic in chapter [Show Inventory Stores](#).

FASTTAB FIELDMAPPING

Field Mapping			
Delivery Method Code Field No.	0	Ship-to E-Mail Field No.	0
Parcel Shop ID Field No.	0	Ship-to Phone No. Field No.	0

This is a special section which holds references to customized fields in table **36 Sales Header**. This approach is used to accommodate Shipment functionality on B2C Webshop.

It connects necessary information for the Shipment functionality with customized fields in table **36 Sales Header**.

DELIVERY METHOD CODE FIELD NO.

If you want the **Delivery Method** that is chosen by the Customer on the B2C Webshop also in your table **36 Sales Header** as a field, you need to develop a special Extension, in which you create an extra field: **Delivery Method Code** (a Code field) with a Relation to Table **6038178 trm Portal Delivery Method**.

In that case, you can enter this field number from table **36** in this field.

Having set a reference to the field from table **36** in such a way, we store the **Delivery Method Code** which Customer chose for a Sales Order delivery on a B2C Webshop.

This Delivery Method is specific only for particular Sales Orders and is saved on a Sales Header in TRIMIT.

PARCEL SHOP ID FIELD NO.

If you want the **Parcel Shop ID** that is chosen by the Customer on the B2C Webshop also in your table **36 Sales Header** as a field, you need to develop a special Extension, in which you create an extra field:

Parcel Shop ID (a Code field) with a Relation to Table **6038175 trm Portal Store Locator** with **Parcel Shop** is Yes.

Having set a reference to the field from table **36** in such a way, we store the **Parcel Shop ID** which Customer chooses for a Sales Order delivery on a B2C Webshop.

This parcel shop ID is specific only for particular Sales Orders and is saved on a Sales Header in TRIMIT.

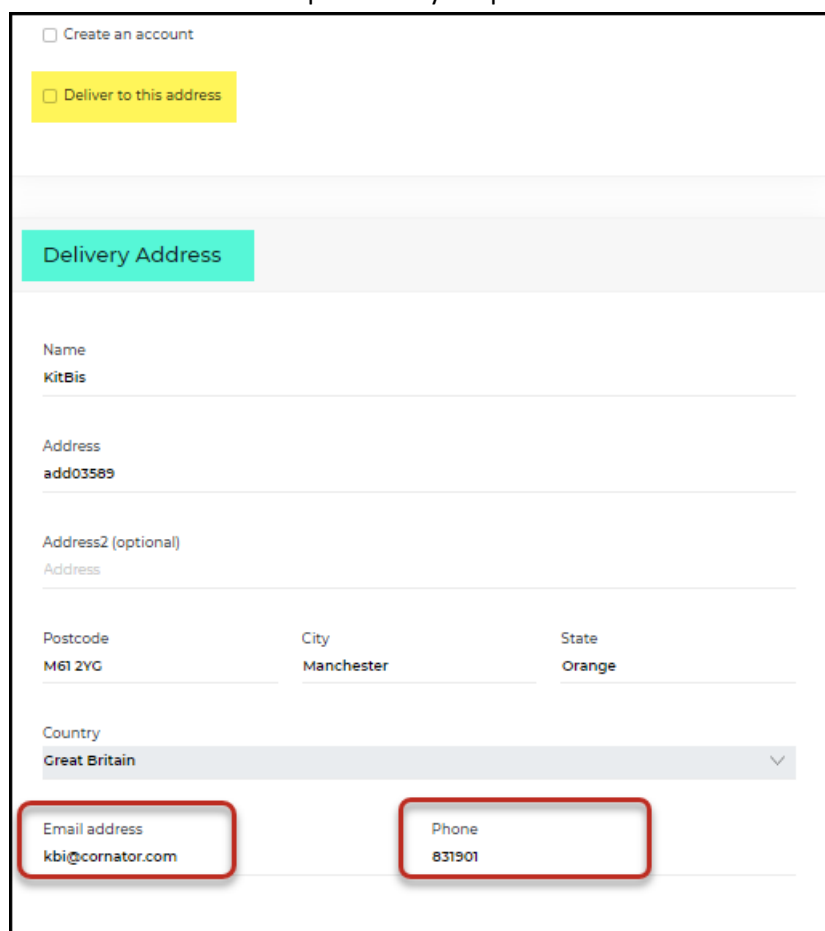
SHIP-TO E-MAIL FIELD NO.

If you want the **Delivery Email address** that is chosen by the Customer (if Delivery Address differs from the Invoice Address) on the B2C Webshop also in your table **36 Sales Header** as a field, you need to develop a special Extension, in which you create an extra field: **Ship-to E-Mail** (a Text field)

Having set a reference to the field from table **36** in such a way, we store the alternative recipient's E-Mail address which Customer chose for a Sales Order delivery on a B2C Webshop.

This **Ship-to Email** field becomes active only when Customer unmarks the **Deliver to this address** option on **checkout** page on the B2C Webshop.

The value of this field is specific only for particular Sales Orders and is saved on a Sales Header in TRIMIT.



☐ Create an account

☐ Deliver to this address

Delivery Address

Name
KitBis

Address
add03589

Address2 (optional)
Address

Postcode
M61 2YG

City
Manchester

State
Orange

Country
Great Britain

Email address
kbi@cornator.com

Phone
831901

NOTE

If there might be a different **Ship-to E-Mail**, keep in mind that the E-Mail with the Order Confirmation will only be send to the Customers **E-Mail**, unless you would add this also in your E-Mail Template for the Report of the Order Confirmation.

SHIP-TO PHONE NO. FIELD NO.

If you want the **Delivery Phone** that is chosen by the Customer (if Delivery Address differs from the Invoice Address) on the B2C Webshop also in your table **36 Sales Header** as a field, you need to develop a special Extension, in which you create an extra field: **Ship-to Phone** (a Text field)

Having set a reference to the field from table **36** in such a way, we store the alternative recipient's Phone which Customer chose for a Sales Order delivery on a B2C Webshop.

This **Ship-to Phone** field becomes active only when Customer unmarks the **Deliver to this address** option on **checkout** page on the B2C Webshop.

The value of this field is specific only for particular Sales Orders and is saved on a Sales Header in TRIMIT.

FASTTAB REPORT

Report			
Order Confirmation Report No.	6036701	Credit Memo Report No.	0
Posted Invoice Report No.	6036702	Posted Credit Memo Report No.	6036703

ORDER CONFIRMATION REPORT NO.

This field is mandatory. Select the Report which is used to print the Sales Order Confirmation after Customer payment is complete.

This is also the Report that will be attached to the E-Mail that will be send to the Customer.

POSTED INVOICE REPORT NO.

This field is mandatory. Select the Report which is used for Posted Sales Invoice

CREDIT MEMO REPORT NO.

This field is mandatory. Select the Report which is used to show the Credit Memo information

POSTED CREDIT MEMO REPORT NO.

This field is mandatory. Select the Report which is used to show a Posted Credit Memo information

FASTTAB ADVANCED

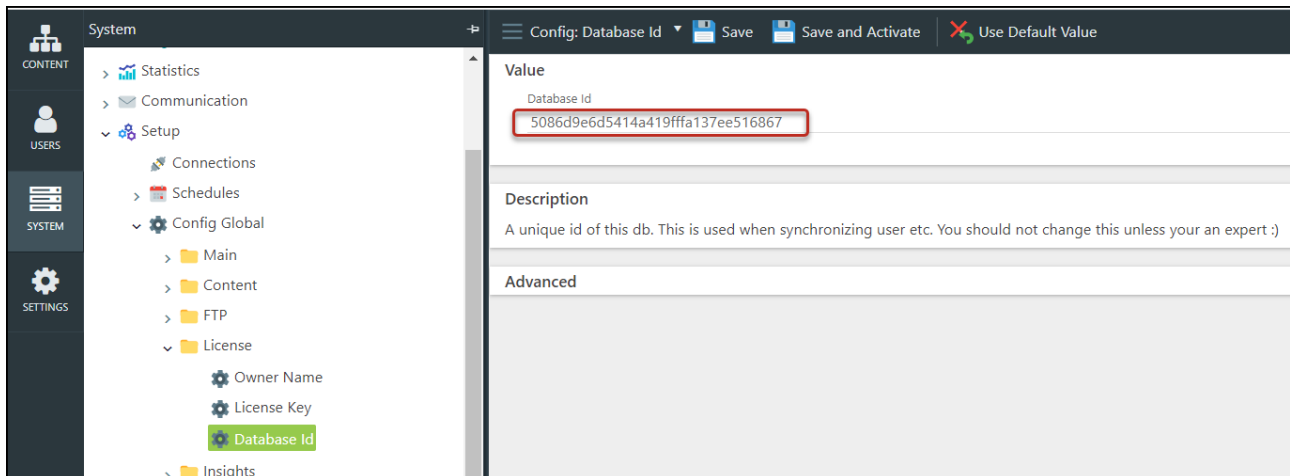
Advanced	
Portal Database Id	

PORTAL DATABASE ID

If you only have 1 B2C Webshop, this field is not mandatory.

However, if you have several B2C Webshops this field is mandatory to identify the right Portal Database with its unique **Database Id**.

The Portal Database Id can be taken from Modelyn **System/Setup/Config Global/License/Database Id**:



ACTIONS IN B2C PORTAL PROFILE

Edit
B2C Portal Profile
B2C

Manage
Customer Templates Setup
Currency Relations
Wrapping Expense Setup
Delivery Method
Delivery Fee Setup
Show Inventory Stores
Vouchers
Gift Card
Tag Filters
Page

CUSTOMER TEMPLATES SETUP

Specify which Customer Template to use for which Country. This will be used during Customer registration on B2C Webshop.

Country/Region Code ↑		Customer Template ↑
→		CUSTB2C
	BE	CUSTB2CEU
	DE	CUSTB2CEU
	DK	CUSTB2CEU
	FR	CUSTB2CEU
	GB	CUSTB2C
	NL	CUSTB2CEU
	NO	CUSTB2CEU
	SE	CUSTB2CEU
	US	CUSTB2CFOR

DESCRIPTION OF THE FIELDS

COUNTRY/REGION CODE

Select Country/Region code from available Country/Region Codes.

CUSTOMER TEMPLATE

Select Customer Template from available Configuration Templates related to the **Customer Table (18)** – this is automatically filtered in the lookup for possible values.

CURRENCY RELATIONS

Specify Currencies to be shown on B2C Webshop. The Currency can be chosen as follows:



United Kingdom (GBP)

Trousers

Tops

Language & Currency

Language
English

Currency
GBP

Save

Location

Current location
United Kingdom (GBP)

Change your location

Changing location will reset shipping address!

Profile Currency Relations Work Date: 6-9-2020				
✓ Saved 🔖 🔗 🔗				
🔍 Search + New ✎ Edit List 🗑 Delete 🔗 🔍 ☰				
Currency Code ↑		Lock to Country/Region Code ↑		Description
→ DKK	⋮	DK		Danish Krone
EUR				Euro
GBP		GB		Great British Pound
NOK		NO		Norwegian Krone
SEK		SE		Swedish Krona
USD				US dollar

DESCRIPTION OF THE FIELDS

CURRENCY CODE

Select Currency Code from available Currency Codes.

LOCK TO COUNTRY/REGION CODE

Select Country/Region Code from available Country/Region Codes.

This field is related to field **Lock Currency to Country/Region Code** on FastTab **Order** of the B2C Portal Profile and only works in combination with it (if the field is set to **TRUE**).

DESCRIPTION

Currency Code description

WRAPPING EXPENSE SETUP

Specify Item Gift Wrapping Rates here. This Setup works in combination with **Allow Wrapping** field on the FastTab **Order**. The Wrapping Expense Setup will be shown on B2C Webshop **checkout** page as follows:

Review

Vouchers & gift cards

Enter voucher or giftcard

Apply

Comment

Write your message

☐ Yes, I would like wrapping for 1.50 GBP

☐ I accept terms and conditions

The Wrapping Expense Setup must be created per Currency and not per Country.

Wrapping Expense Setup | Work Date: 6-9-2020

✓ Saved

Search

New

Edit List

Delete

Type	▼	Posting Account	Price incl. VAT	Currency Code ↑	No Charge Limit
→ Item	▼	⋮ WRAPPING	5,00	CHF	200,00
Account		6830	15,00	DKK	1.000,00
Account		6830	2,00	EUR	125,00
Account		6830	1,50	GBP	100,00
Account		6830	18,00	NOK	1.300,00
Account		6830	20,00	SEK	1.500,00
Account		6830	2,50	USD	200,00

DESCRIPTION OF THE FIELDS

TYPE

Select **Type** the Wrapping Expense must be handled as.

You can choose the following two options:

Account	The Price incl. VAT (Fee) for Wrapping will be handled as specified Posting Account (G/L Account) and will be shown as an extra G/L Account Sales Line in the Sales Order
Item	The Price incl. VAT (Fee) for Wrapping will be handled as specified Posting Account (Item) and will be shown as an extra Item Sales Line

POSTING ACCOUNT

Select G/L Account or Item depending on which value is set in field **Type**

PRICE INCL. VAT

Specify Item Wrapping charging Amount including VAT in the **Currency Code**.

CURRENCY CODE

Select Currency Code from the Currencies you have setup in the [Currency Relations](#) for this specific B2C Portal Profile.

NOTE

Per Currency Code, you can have only 1 Wrapping Expense Setup. Therefore, you need determine if you want to handle the Wrapping Expense as a G/L Account or as an Item per Currency.

NO CHARGE LIMIT

Specify a Free Wrapping Sales Order Amount. If this field contains "0" then **Price incl. VAT** is always charged, and the Order Amount is not considered.

This Amount must be entered based on the **Currency Code** of the previous field.

DELIVERY METHOD

Specify Delivery Methods by selecting Shipping Agents available on TRIMIT B2C Webshop.

Delivery Method | Work Date: 6-9-2020 ✓ Saved 🔍 🔗 🔧

🔍 Search + New 🔍 Edit List 🗑️ Delete 🔗 Related Fewer options 🔍 🔗 🔧

🔗 Translation Text 🔗

Code †	Country/Region Code †	Shipping Agent Code	Description	Description 2	Parcel Shop	Sort Order
→ GLSC	DK	GLS	GLS to Parcel Store		☒	2
GLSC	GB	GLS	GLS to Parcel Store		☒	0
GLSH	DK	GLS	GLS to Home Address		☐	1
GLSH	GB	GLS	GLS to Home Address		☐	0
GLSW	DK	GLS	GLS to Work Address		☐	3
GLSW	GB	GLS	GLS to Work Address		☐	0
OWNH		OWN LOG.	To Home Address		☐	6
PDK	DK	PD	PostNord Denmark to Home Address		☐	4
PDK	SE	PD	PostNord Denmark to Home Address		☐	0
PDKC	DK	PD	PostNord Denmark to Parcel Store		☒	5
PDKC	SE	PD	PostNord Denmark to Parcel Store		☒	0
STOR	DK	OWN LOG.	Pickup in Store		☒	7
STOR	GB	OWN LOG.	Pickup in Store		☒	0
STOR	NL	OWN LOG.	Pickup in Store		☒	0

Based on the Country/Region Code of the Customer and the Country/Region Code of the Delivery Methods, only specific **Delivery Methods** can be selected on the **checkout** page in the B2C Webshop.

DESCRIPTION OF THE FIELDS

CODE

Select a Delivery Method **Code** available by default within TRIMIT.

The default Delivery Method **Codes** are:

GLS Home (GLSH); GLS Parcel Shop (GLSC); GLS Work (GLSW); Store (STOR); Post Denmark (PDK) and Post Denmark Parcel Shop (PDKC).

These values are hardcoded and can be customized in accordance with values in **Shipping Agent Code** column.

Alternative Delivery Methods can be added as a Customization .

🔍

☒ GLS Home (GLSH)
 ☐ GLS Parcel Shop (GLSC)
 ☐ GLS Work (GLSW)
 ☐ Store (STOR)
 ☐ PostNord (PDK)
 ☐ PostNord Parcel Shop (PDKC)

OK
Cancel

COUNTRY/REGION CODE

Select a delivery Country/Region Code. If Country/Region Code is specified, then this Delivery Method will be shown for this specific Country/Region Code.

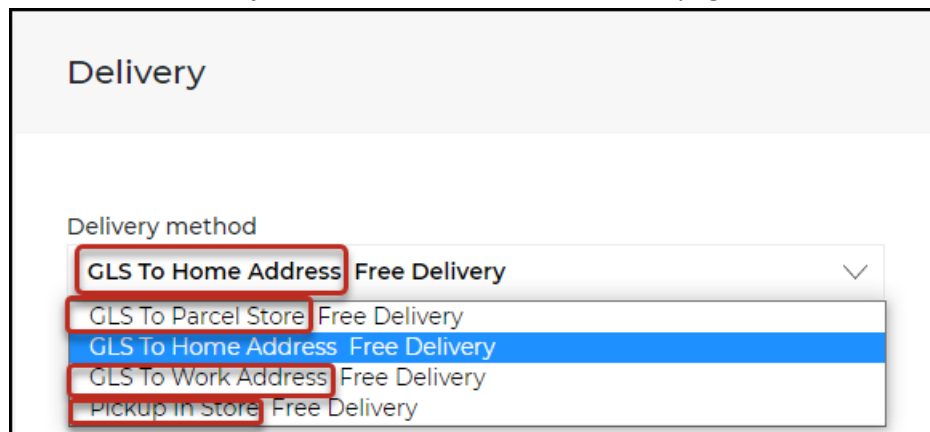
If no Country/Region Code is specified, then this Delivery Method will be shown for all Countries but not to the ones that have a specific Country/Region Code.

SHIPPING AGENT CODE

Select a Shipping Agent from available Shipping Agents that have been created (via **Tell me Shipping Agents**)

DESCRIPTION

Enter custom **Description**. It will be shown on **checkout** page on B2C Webshop in option field **Method**



DESCRIPTION 2

Enter custom Description 2

PARCEL SHOP

Put a check mark in this field of the Delivery Method if the **Shipping Agent Code** delivers goods to a parcel shop (pickup point) and not to a home address

SORT ORDER

It is possible to put an integer in this column and define a sorting in which Delivery Methods appear to B2C Webshop user. Delivery Methods with lower integer come first in the list.

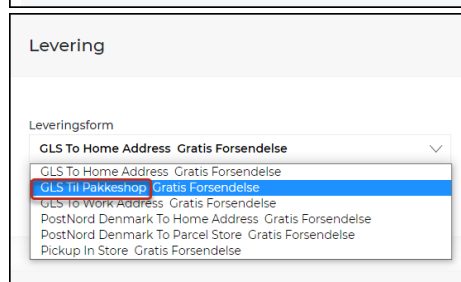
RELATED, TRANSLATION TEXT

Per Delivery Method, you can enter Translations Texts per Language Code for the **Description** and **Description 2**. Based on the **Language** of the Customer on the B2C Webshop, a specific **Description** will then be shown on the **checkout** page.

Translated Text Sheet | Work Date: 6-9-2020 ✓ Saved 🔗 🔗

🔍 Search ➕ New 📋 Edit List 🗑 Delete 🔗 🔍 ☰

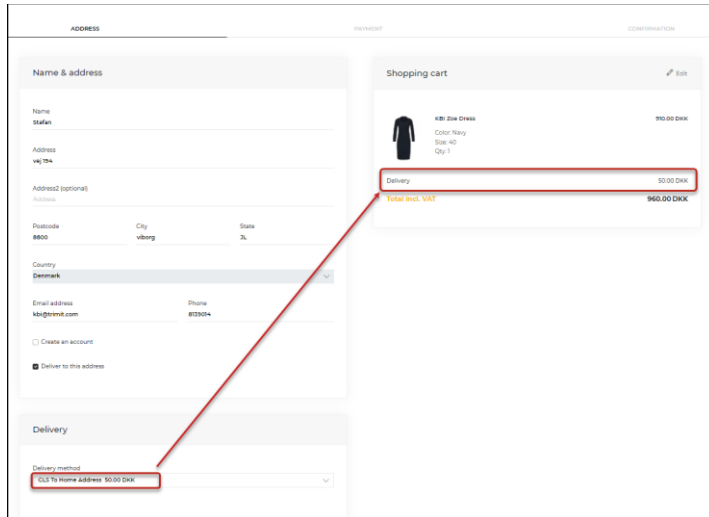
Language Code ↑	Description	Description 2
DEU	GLS zum Paketshop	
ENU	GLS to Parcel Shop	
NLD	GLS naar pakket afhaalpunt	
→ DAN	GLS til pakkeshop	



DELIVERY FEE SETUP

Specify **Delivery Fee Setups** (Portal Fee Setup) for each Country and Delivery Method.

The Delivery Fee (based on the field **Price incl. VAT** of the appropriate **Delivery Fee Setup**) will be shown on B2C Webshop **checkout** page as follows:



The **Delivery Fee Setup** must be filled per Country/Region Code, Delivery Method Code and Currency Code.

Country/Region Code *	Delivery Method Code *	Type	Posting Account	Price incl. VAT	Currency Code *	No Charge Limit	Default Delivery Fee
		Account	6820	50.00	DKK	1,000.00	☒
		Account	6820	6.50	EUR	125.00	☒
		Account	6820	5.00	GBP	100.00	☒
		Account	6820	60.00	NOK	1,300.00	☒
		Account	6820	70.00	SEK	1,500.00	☒
		Account	6820	10.00	USD	200.00	☒
	GLSC	Account	6820	5.00	EUR	125.00	☐
	GLSC	Account	6820	4.00	GBP	100.00	☐
	GLSC	Account	6820	50.00	NOK	1,300.00	☐
	GLSC	Account	6820	60.00	SEK	1,500.00	☐
	GLSC	Account	6820	8.00	USD	200.00	☐
	GLSH	Account	6820	6.50	EUR	125.00	☐
	GLSH	Account	6820	5.00	GBP	100.00	☐
	GLSH	Account	6820	60.00	NOK	1,300.00	☐
	GLSH	Account	6820	70.00	SEK	1,500.00	☐
	GLSH	Account	6820	10.00	USD	200.00	☐
	GLSW	Account	6820	6.50	EUR	125.00	☐
	GLSW	Account	6820	5.00	GBP	100.00	☐
	GLSW	Account	6820	60.00	NOK	1,300.00	☐
	GLSW	Account	6820	70.00	SEK	1,500.00	☐
→	GLSW	Account	6820	10.00	USD	200.00	☐
	OWNH	Account	6820	6.50	EUR	125.00	☐
DK		Account	6820	50.00	DKK	1,000.00	☐
DK	GLSC	Account	6820	40.00	DKK	1,000.00	☐
DK	GLSH	Account	6820	50.00	DKK	1,000.00	☐
DK	GLSW	Account	6820	50.00	DKK	1,000.00	☐
DK	PDIC	Account	6820	45.00	DKK	1,000.00	☐
DK	PDIC	Account	6820	35.00	DKK	1,000.00	☐
GB		Account	6820	6.00	GBP	100.00	☐
GB	GLSC	Account	6820	7.00	GBP	100.00	☐
GB	GLSH	Account	6820	8.00	GBP	100.00	☐
GB	GLSW	Account	6820	9.00	GBP	100.00	☐
GB	OWNH	Account	6820	5.00	GBP	100.00	☐
NL		Account	6820	6.50	EUR	125.00	☐
NL	OWNH	Account	6820	6.50	EUR	125.00	☐
NO		Account	6820	60.00	NOK	1,300.00	☐
NO	OWNH	Account	6820	60.00	NOK	1,300.00	☐
SE		Account	6820	70.00	SEK	1,500.00	☐
SE	OWNH	Account	6820	70.00	SEK	1,500.00	☐
SE	PDIC	Account	6820	50.00	SEK	1,500.00	☐
SE	PDIC	Account	6820	45.00	SEK	1,500.00	☐
US		Account	6820	10.00	USD	200.00	☐
US	OWNH	Account	6820	10.00	USD	200.00	☐

DESCRIPTION OF THE FIELDS

COUNTRY/REGION CODE

Select Country/Region code from available Country/Region Codes where shipping can go to.

DELIVERY METHOD CODE

Select Delivery Method Code from available ones made in the Setup above.

TYPE

Select **Type** the Delivery Fee must be handled as.

You can choose the following two options:

Account	The Price incl. VAT (Fee) for Wrapping will be handled as specified Posting Account (G/L Account) and will be shown as an extra G/L Account Sales Line in the Sales Order
Item	The Price incl. VAT (Fee) for Wrapping will be handled as specified Posting Account (Item) and will be shown as an extra Item Sales Line

POSTING ACCOUNT

Select G/L Account or Item depending on which value is set in field **Type**

PRICE INCL. VAT

Specify Delivery Fee Amount including VAT in the **Currency Code** of the next field.

CURRENCY CODE

Select Currency Code from the Currencies you have setup in the [Currency Relations](#) for this specific B2C Portal Profile.

NO CHARGE LIMIT

Specify a Free Delivery Sales Order Amount. If this field contains "0" then **Price incl. VAT** is always charged, and the Order Amount is not considered.

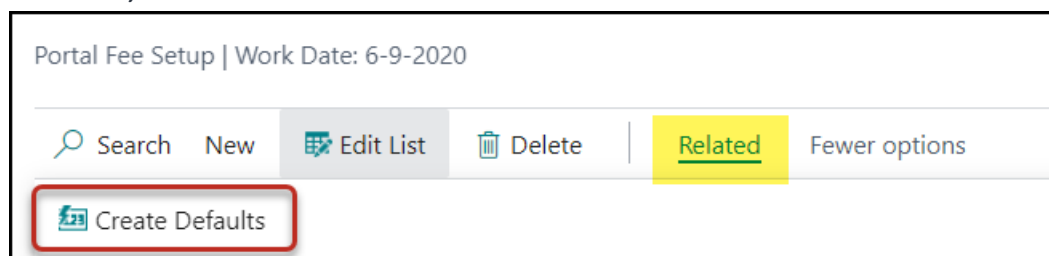
This Amount must be entered based on the **Currency Code** of the previous field.

DEFAULT DELIVERY FEE

Specify which of the **Delivery Fee Setups** will be used as default. Default Delivery Fee Setups are used if the Delivery Fee Setup for Country together with Delivery Method and Currency is missing or has not been set up.

The Delivery Fee Setup on the B2C Webshop will be set according to selected Currency.

RELATED, CREATE DEFAULTS



Portal Fee Setup | Work Date: 6-9-2020

Search New Edit List Delete Related Fewer options

Create Defaults

To create defaults, click **Related, Create Defaults**.

Default Delivery Fee Setups will be created depending on the Currencies that have been created in the [Currency Relations](#) for the current B2C Portal Profile.

It is then required to fill in additional fields manually like the **Posting Account**, **Price incl. VAT** and **No Charge Limit**.

I.e., if the [Currency Relations](#) has *DKK, EUR, GBP, NOK, SEK* and *USD* the following **Delivery Fee Setups** will be created:

Portal Fee Setup: All							
Search New Delete Edit List Related Fewer options							
Country/Region Code †	Delivery Method Code †	Type	Posting Account	Price incl. VAT	Currency Code †	No Charge Limit	Default Delivery Fee
⋮		Account		0.00	DKK	0.00	
		Account		0.00	EUR	0.00	
		Account		0.00	GBP	0.00	
		Account		0.00	NOK	0.00	
		Account		0.00	SEK	0.00	
		Account		0.00	USD	0.00	

NOTE

It is required by the system design that **Delivery Fee Setups** always have at least these Default setups per Currency.

SHOW INVENTORY STORES

The [Show Inventory in Stores](#) functionality relays on Location Codes that are assigned to Stores.

The Stores are in turn assigned to B2C Portal Profile via **Show Inventory Stores** Action on the **B2C Portal Profile** card.

Where to buy functionality is related to Sales Orders created within a certain Horizon back in time and shows the **Where to Buy Stores** where the Sale was created (Sales Order created).

The [Show Inventory in Stores](#) functionality is available on product details page in form of link **Availability** when set to *TRUE* on **B2C Portal Profile**.

Via Action **Show Inventory Stores** on **B2C Portal Profile** it is possible to set up a list of Locations which will be shown when the Customer clicks **Availability** link on the product page on B2C Webshop.

Edit - Show Inventory in Stores							
Search + New Edit List Delete							
Description	Location Filter	Store Locator Relation	Customer No.	Name	Name 2	Sorting	Profile Code †
Bristol Shop	S_BRISTOL	18	—	Bristol Shop	—	2	B2C
London Shop	S_LONDON	20	—	London Shop	—	1	B2C
Manchester Shop	S_MANCHESTER	19	—	Manchester Shop	—	3	B2C
→ London Fashion Shop	BLUE CW	2	2000	The Fashion Store UK - London	—	0	B2C

DESCRIPTION OF THE FIELDS

DESCRIPTON

Enter a **Description** for the Store. If **Name** field is empty, then the value from **Description** field will be shown on the B2C Webshop instead in the column Shop (see image below)

LOCATION FILTER

Select the Location Filter of the available Inventory.

In case this is one of your own Shops, it will be the **Location Code** of your own Shop.

In case this is a Shop of one of your (wholesale) Customers, this **Location Code** determines the Sales Order Lines and/or Posted Sales Invoice Lines that are applicable.

STORE LOCATOR RELATION

Select a Store (from the [Store Locator List](#)), eventually related to the Inventory Location

CUSTOMER NO.

If the Store is from a (wholesale) Customer, you can enter a **Customer No.** related to that Store

NAME

If you have chosen a **Store Locator Relation**, the **Name** will be filled by default by the Name of the Store Locator, but you can change it based on your **Customer No.** or **Location Code.**

NAME 2

Additional Name, not mandatory.

If you have chosen a **Store Locator Relation**, the **Name 2** will be filled by default by the Name 2 of the Store Locator.

SORTING

Sorting of the Shops, from “0” to “n” (Integer), where “0” is first and “n” is last in the list.

PROFILE CODE

Portal Profile code automatically populated by the system.

Depending on Inventory status, which is Items on Inventory minus Items on Sales Orders, there will be shown **red** and **green** markers (red for unavailable and green for available on Inventory) for each Shop (**Name** of the Store **Description**) when clicking the **Availability** link on Product Details page on B2C Webshop:

AVAILABILITY			
Shop	Contact	Address	In Stock
The Fashion Store UK - London	sales@cronuscorp.net	20 Savile Row Mayfair WC1 3DG London	
London Shop	sales@cronuscorp.net	The Ring 7-9 Westminster W2 8HG London	
Bristol Shop	sales@cronuscorp.net	Shakespeare Road 11-13 BS3 6KL Bristol	
Manchester Shop	sales@cronuscorp.net	Elisabeth Lane 15 M61 2YG Manchester	

VOUCHERS

Specify the Vouchers that can be used with this **B2C Portal Profile**.

Edit - Vouchers									
Search New Edit List Delete Related Fewer options Vouchers Log									
Type ↑	Description	Value	Start Date	Expiry Date	Once per Customer	Not on Campaign Items	Customer Club Level	Passcode	
→ Discount Code	10% off for Christmas	10.00	1-12-2021	31-12-2021	☒	☐	Level 0	C1C42C88	
Discount Code	5% off Summer Campaign	5.00	1-1-2022	31-3-2022	☐	☐	Level 0	4E4BB1CE	

On the B2B Website, on the checkout page, you can enter the Vouchers Passcode and press **Apply** after which you will see in the **Shopping cart** the details of that Voucher:

Review

Vouchers & gift cards

4E4BB1CE

Apply

Comment

Write your message

☐ Yes, I would like wrapping for 1.50 GBP

☐ I accept terms and conditions

Shopping cart

Lily Blouse

Color: Royal Blue

Size: XL

Qty: 1

52.44 GBP

Voucher 4E4BB1CE X

5.00 %

Delivery

5.00 GBP

Total saved amount

16.80 GBP

Total incl. VAT

57.44 GBP

Left bottom on the checkout page

Right top on the checkout Page

DESCRIPTION OF THE FIELDS

PROFILE

This field is only visible if you open the page via the Role Center and not via a specific Portal Profile. If you open it via a **Portal Profile**, you will only see the **Vouchers** connected to that specific **Portal Profile**.

TYPE

Select the Voucher Type.

You can choose the following two options:

Blank	The Line does not have any value/consequences. Reserved for Customization.
Discount Code	The Voucher is set to be as a Line Discount on a Sales Order Line.

DESCRIPTION

Specify the B2C Webshop Voucher **Description** here (will not be reflected on B2C Webshop)

VALUE

Specify Discount Percentage here

START DATE

Specify the Start Date for this Voucher (not mandatory)

EXPIRY DATE

Specify the Expire Date for this Voucher (not mandatory)

ONCE PER CUSTOMER

If set to *TRUE*, then system allows usage of the Voucher (Vouchers Passcode) only once per Customer.

If set to *FALSE*, then usage of the Voucher (Vouchers Passcode) by the same Customer is unlimited if other conditions regarding the regular Line Discounts allow this.

NOT ON CAMPAIGN ITEMS

If set to *TRUE*, then this Voucher cannot be applied to Items which Sales Price already has been decreased based on a Campaign.

If set to *FALSE*, then the Voucher can be applied to Items with reduced Sales Prices.

CUSTOMER CLUB LEVEL

Set a [Customer Club](#) Level from which the Voucher can be available.

Available options: *Level 0, Level 1, Level 2, Level 3, Level 4, Level 5*

PASSCODE

The Passcode will be auto generated after entering the Vouchers Value.

This Passcode can be used on B2C Webshop Order checkout page in order to get a Discount.

RELATED, VOUCHER LOG

In the **Voucher Log**, you will see every Voucher Password that has been used per Customer/Sales Order.

Vouchers Log Work Date: 1-1-2022					
Search					
Passcode	Customer No.	Item No.	Document Type	Document No. 4	
→ 4E4BB1CE	CW00512		Order	WOC001996	
JUL2018	CW00043		Order	WOC001967	
JUL2018	CW00049		Order	WOC001964	
404E1ECA	CW00531		Order	WOC001945	
JUL2018	CW00163		Order	WOC001928	
C1C42C88	CW00163		Order	WOC001892	

GIFT CARD

This option opens the Gift Cards transactions with detailed information. All values are set by the system and no values can be changed manually.

The Gift Card will be shown on B2C Webshop Order checkout page as follows:

Review

Vouchers & gift cards

1D1CCAE9

Apply

Comment

Write your message

☐ Yes, I would like wrapping for 1.50 GBP

☐ I accept terms and conditions

Shopping cart

Edit



Lily Blouse
Color: Royal Blue
Size: M
Qty: 1

55.20 GBP

Gift cards 1D1CCAE9 X

-10.00 GBP

Delivery

7.00 GBP

Total saved amount

13.80 GBP

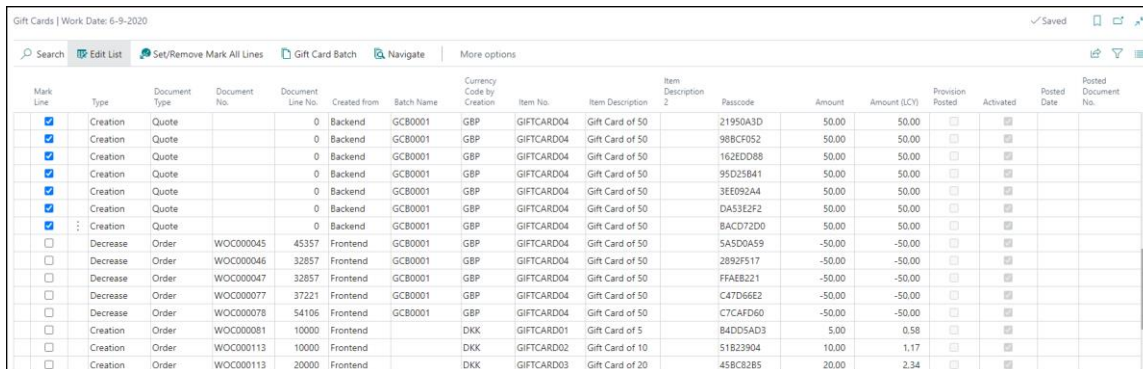
Total incl. VAT

52.20 GBP

Left bottom on the checkout page

Right top on the checkout Page

Gift Card page:



Mark Line	Type	Document Type	Document No.	Document Line No.	Created from	Batch Name	Currency Code by Creation	Item No.	Item Description	Item Description 2	Passcode	Amount	Amount (LCV)	Provision Posted	Activated	Posted Date	Posted Document No.
☒	Creation	Quote		0	Backend	GC80001	GBP	GIFTCARD04	Gift Card of 50		21950A3D	50.00	50.00	☐	☐		
☒	Creation	Quote		0	Backend	GC80001	GBP	GIFTCARD04	Gift Card of 50		988CF052	50.00	50.00	☐	☐		
☒	Creation	Quote		0	Backend	GC80001	GBP	GIFTCARD04	Gift Card of 50		162ED088	50.00	50.00	☐	☐		
☒	Creation	Quote		0	Backend	GC80001	GBP	GIFTCARD04	Gift Card of 50		95D25841	50.00	50.00	☐	☐		
☒	Creation	Quote		0	Backend	GC80001	GBP	GIFTCARD04	Gift Card of 50		3EE092A4	50.00	50.00	☐	☐		
☒	Creation	Quote		0	Backend	GC80001	GBP	GIFTCARD04	Gift Card of 50		DA53E2F2	50.00	50.00	☐	☐		
☒	Creation	Quote		0	Backend	GC80001	GBP	GIFTCARD04	Gift Card of 50		BACD72D0	50.00	50.00	☐	☐		
☐	Decrease	Order	WOC000045	45357	Frontend	GC80001	GBP	GIFTCARD04	Gift Card of 50		5ASD0A59	-50.00	-50.00	☐	☐		
☐	Decrease	Order	WOC000046	32857	Frontend	GC80001	GBP	GIFTCARD04	Gift Card of 50		2892F517	-50.00	-50.00	☐	☐		
☐	Decrease	Order	WOC000047	32857	Frontend	GC80001	GBP	GIFTCARD04	Gift Card of 50		FFA8E221	-50.00	-50.00	☐	☐		
☐	Decrease	Order	WOC000077	37221	Frontend	GC80001	GBP	GIFTCARD04	Gift Card of 50		C47D66E2	-50.00	-50.00	☐	☐		
☐	Decrease	Order	WOC000078	54106	Frontend	GC80001	GBP	GIFTCARD04	Gift Card of 50		C7CAF6D0	-50.00	-50.00	☐	☐		
☐	Creation	Order	WOC000081	10000	Frontend	DKK	GIFTCARD01	Gift Card of 5			B4DD5AD3	5.00	0.58	☐	☐		
☐	Creation	Order	WOC000113	10000	Frontend	DKK	GIFTCARD02	Gift Card of 10			51823904	10.00	1.17	☐	☐		
☐	Creation	Order	WOC000113	20000	Frontend	DKK	GIFTCARD03	Gift Card of 20			45BC82B5	20.00	2.34	☐	☐		

Read more information regarding using B2C Webshop Vouchers (Promotions) and Gift Cards in document **White Paper – TRIMIT B2C Gift Cards**.

DESCRIPTION OF THE FIELDS

MARK LINE

The Gift Card transactions can be set as marked for further actions.
This field is mainly used via Gift Card Batches.

TYPE

The type of the Gift Card transaction.

Creation	The Gift Card has been created via a Gift Card Batch or has been bought on the B2C Webshop
Decrease	The Gift Card has been used on the B2C Webshop

DOCUMENT TYPE

The Sales Document Type in which the Gift Card has been bought or used

DOCUMENT NO.

The Sales Document number where the Gift Card has been bought or used.

DOCUMENT LINE NO.

The Sales Line number where the Gift Card has been bought or used.

CREATED FROM

Identification of where the Gift Card was created.

Frontend	The Gift Card has been created via the B2C Webshop
Backend	The Gift Card has been created in TRIMIT via the Gift Card Batches, or by a Sales Order.

BATCH NO.

Number of a **Gift Card Batch** which created the Gift Card in TRIMIT

CURRENCY CODE BY CREATION

The Currency Code of the Gift Card

ITEM NO.

The Gift Card Item number (all Gift Cards are Items in TRIMIT)

ITEM DESCRIPTION

The Gift Card Item Description

ITEM DESCRIPTION 2

The Gift Card Item Description 2

PASSCODE

The Gift Card Passcode which is auto generated and is to be applied when the Gift Card must be used. The Gift Card can be used several times up to its total value

AMOUNT

The Amount on the Gift Card. If the value is with minus (-) then this is the value of the Gift Card's used Amount on a Sales Order in the B2C Webshop

AMOUNT (LCY)

The equivalent Amount in Local Currency of the Gift Card/used Gift Card Amount

PROVISION POSTED

Indicates whether the Sales Order with the Gift Card (Creation or Decrease) of the B2C Webshop has been posted to a Posted Sales Invoice. Provision Sales setup can be created (for more information refer to **White Paper – TRIMIT B2C Gift Cards** and **White Paper – TRIMIT Provision**)

ACTIVATED

Indicates whether a Gift Card Transaction has been approved.

POSTED DATE

The **Posting Date** of the Posted Sales Invoice based on an Order with a Gift Card (related to Provision posting)

POSTED DOCUMENT NO.

The Number of the Posted Sales Invoice with a Gift Card.

TAG FILTERS

Not implemented yet.

Tag Management Work Date: 6-9-2020					  
 Search	 New	 Edit List	 Delete	 Translations	  
Tag Group ↑ ▼	Type ↑	Code ↑	Description	Sorting	
→	Item Attribute			0	

DESCRIPTION OF THE FIELDS

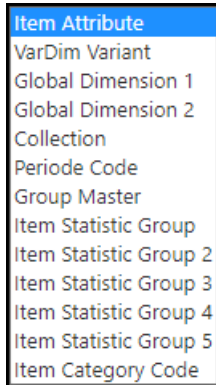
TAG GROUP

Select the name of the **Tag Group**

TYPE

You can choose the **Type** for filtering

You can choose between the following **Types**:



CODE

You can enter Filter for the **Type** *Item Attribute* and *VarDim Variant*.

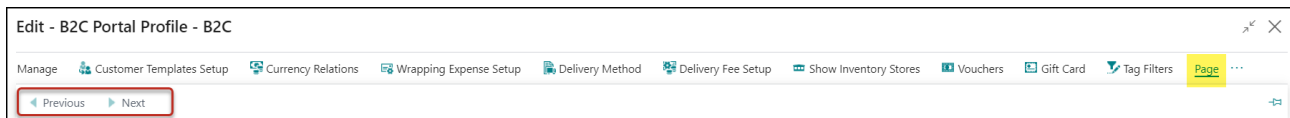
DESCRIPTION

The Description of the **Code** will be shown but can be changed.

SORTING

Sorting of the Tags, from “0” to “n” (Integer), where “0” is first and “n” is last in the list.

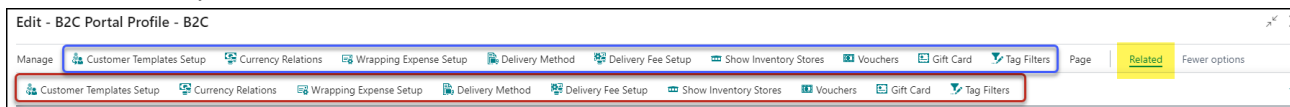
PAGE



If there are several **Portal Profiles** of the same **Type** *BusinessToConsumer*, you can see the *Next* Portal Profile Card and/or the *Previous* Portal Profile Card.

RELATED

Under **Related**, you see the same Actions as described earlier:



NOTE

To activate the setting of the B2C Portal Profile on the B2C Webshop - it is needed to run **Update Shop** in TRIMIT B2C Webshop Soft Admin. Reed more about **Update Shop** in document **White Paper – TRIMIT B2C Soft Admin**.

TRIMIT BC WEB INTEGRATION

SALES ORDER CARD

Sales Order | Work Date: 6-9-2020

WOC001892 · Kitty Bisseling

Process Release Posting Prepare Order Request Approval Print/Send Navigate

Create Inventory Put-away/Pick... Workflow Portal Payment Extra Order Info

PROCESS, PORTAL PAYMENT

Open **Portal Payment** card. Here you can find all Payment related information regarding the Sales Order.

Portal Payment Card | Work Date: 6-9-2020

2458

New Process Related Fewer options

Create Capture Cancel Payment Attention List Toggle Allow Posting on Error Payment Info Restore From Archive... Navigate Open Sales Document

General

No.	2458	Captured Amount	0,00
Document Type	Order	Refunded Amount	0,00
Document No.	WOC001892	Paid by Gift Card/Points	☐
Customer No.	CW00163	Transaction Status	Authorized
Payment Service Provider		Paid from	B2C
Transaction No.	999999999	Creation Date	24-12-2021
Card No.	XXXXXXXXXXXX0000	Creation Time	10:37:47
Card Type	V-DK	Allow Posting on Error	☐
Amount	353,80	Processing Status	
Currency Code	EUR	Processed Time	

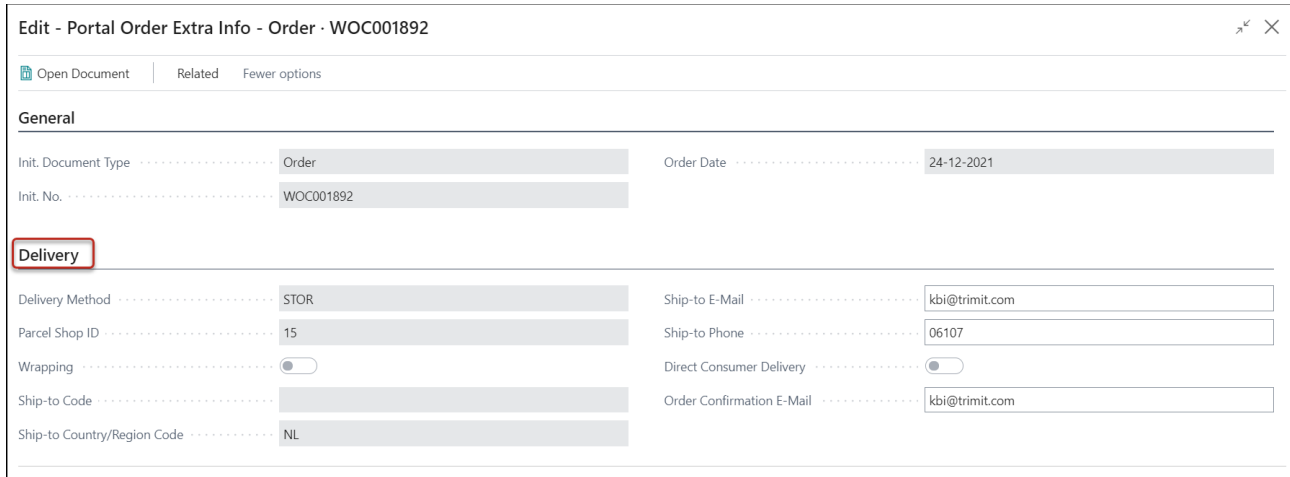
Lines Manage

Transaction Type	Transaction Result	Trigger Document Type	Trigger Document No.	Amount	Currency Code	Transaction No.	Split Paym...	Close Paym...	Response Description	Processed Date/Time
(There is nothing to show in this view)										

See **White Paper – Portal Payment Handling** for more details.

EXTRA ORDER INFO

Open **Portal Order Extra Info** page. This option is also available from **Posted Sales Invoice** card. **Portal Order Extra Info** page has a main purpose of providing an overview of portal related information for the Sales Order. Information in FastTabs **General** and **Customer** resemble data on the Sales Order card.



FASTTAB DELIVERY

DELIVERY METHOD

The value in this field is coming from the B2C Webshop and reflects the **Delivery Method** which Customer had chosen while creating the Sales Order.

PARCEL SHOP ID

The ID of the Parcel Shop, which had been chosen by the Customer on B2C Webshop on **checkout** page. The ID is either provided by the shipping company through the Modelyn or taken from field **Key** in **Store Locator** Card.

WRAPPING

This is a Boolean field and reflects whether the Customer on B2C Webshop choses to Wrap the item as a gift.

SHIP-TO CODE

Code from **Ship-to Address** Card in TRIMIT – it is set when Customer on B2C Webshop chooses alternative Delivery Address for the Sales Order.

SHIP-TO E-MAIL

This E-Mail Address is filled when the B2C Webshop Customer chooses an alternative Delivery Address then there is a need to specify an alternative E-Mail Address.

SHIP-TO PHONE

This field is filled when the B2C Webshop Customer chooses an alternative Delivery Address - then there is a need to specify an alternative Phone Number.

DIRECT CONSUMER DELIVERY

Not applicable for B2C Sales Orders.

ORDER CONFIRMATION E-MAIL

Reflects the E-Mail Address to which the Order Confirmation is send.

FASTTAB INSTORE B2C

Customer		Show more	
Bill-to Customer No.	CW00163	Sell-to E-Mail	kbi@trimit.com
Sell-to Customer No.	CW00163	Sell-to Phone No.	06107
InStore B2C			
InStore B2C Order	☒	InStore Payment Currency	EUR
Referrer Code		InStore Payment Completed	☐
InStore Payment Amount	353,80	InStore Payment Recieved By	

INSTORE B2C ORDER

Indicates if the Sales Order has been created within InStore B2C Webshop

REFERRER CODE

Not populated by default. Can be used for indicating a B2B Customer number in order to show in which Shop the Sales Order has been created

INSTORE PAYMENT AMOUNT

The Amount on the InStore Order

INSTORE PAYMENT CURRENCY

Currency of the InStore Order

INSTORE PAYMENT COMPLETED

Set automatically to *TRUE* when InStore Order has been released from pending on InStore B2C

INSTORE PAYMENT RECEIVED BY

Set automatically to the store assistants E-Mail if Order is released from pending and the setup specifies that Order should be paid at the register (**Disable Online Payment** is set to *TRUE* on **InStore Portal Profile** card). If **Disable Online Payment** is set to *FALSE* on **InStore Portal Profile** card, the Order will be handled as B2C Order and fields **InStore Payment Received By**, **InStore Payment Completed** and **InStore B2C Order** will not be populated.

FASTTAB SIGNATURE

Signature	
Signature Name	Signature +

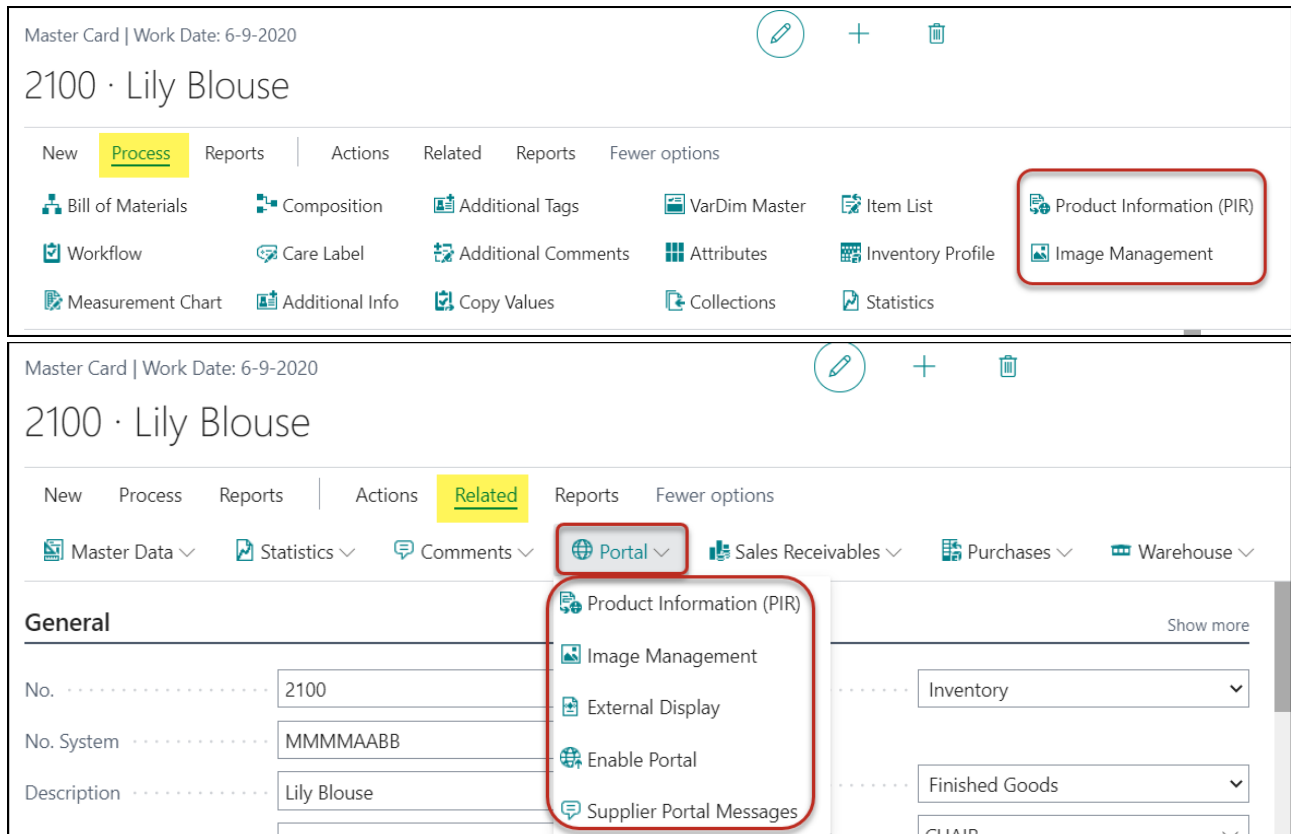
SIGNATURE NAME

This field is populated with a Customer Name in case field **Signature on Checkout** is set to *TRUE* on Sales Agent and/or B2B Portal Profile.

SIGNATURE

This field is populated with a Customer Signature in case field **Signature on Checkout** is set to *TRUE* on Sales Agent and/or B2B Portal Profile.

MASTER CARD



Master Card | Work Date: 6-9-2020

2100 · Lily Blouse

New **Process** Reports Actions Related Reports Fewer options

Bill of Materials Composition Additional Tags VarDim Master Item List Product Information (PIR) Image Management

Workflow Care Label Additional Comments Attributes Inventory Profile

Measurement Chart Additional Info Copy Values Collections Statistics

Master Card | Work Date: 6-9-2020

2100 · Lily Blouse

New Process Reports Actions **Related** Reports Fewer options

Master Data Statistics Comments **Portal** Sales Receivables Purchases Warehouse

General

No. 2100

No. System MMMMAABB

Description Lily Blouse

Product Information (PIR) Image Management External Display Enable Portal Supplier Portal Messages

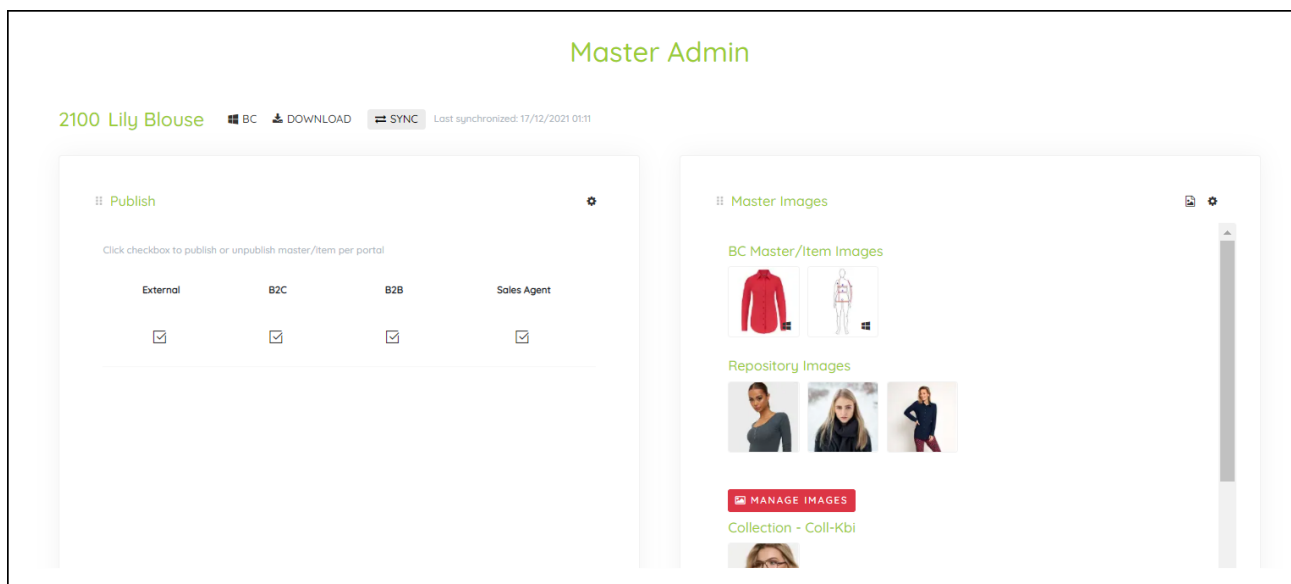
Inventory

Finished Goods

CHAIR

PRODUCT INFORMATION (PIR)

Opens imbedded browser page with Master Information in the Product Information Repository (PIR) for the selected Master.



Master Admin

2100 Lily Blouse BC DOWNLOAD SYNC Last synchronized: 17/12/2021 01:11

Publish

Click checkbox to publish or unpublish master/item per portal

External	B2C	B2B	Sales Agent
☒	☒	☒	☒

Master Images

BC Master/Item Images

Repository Images

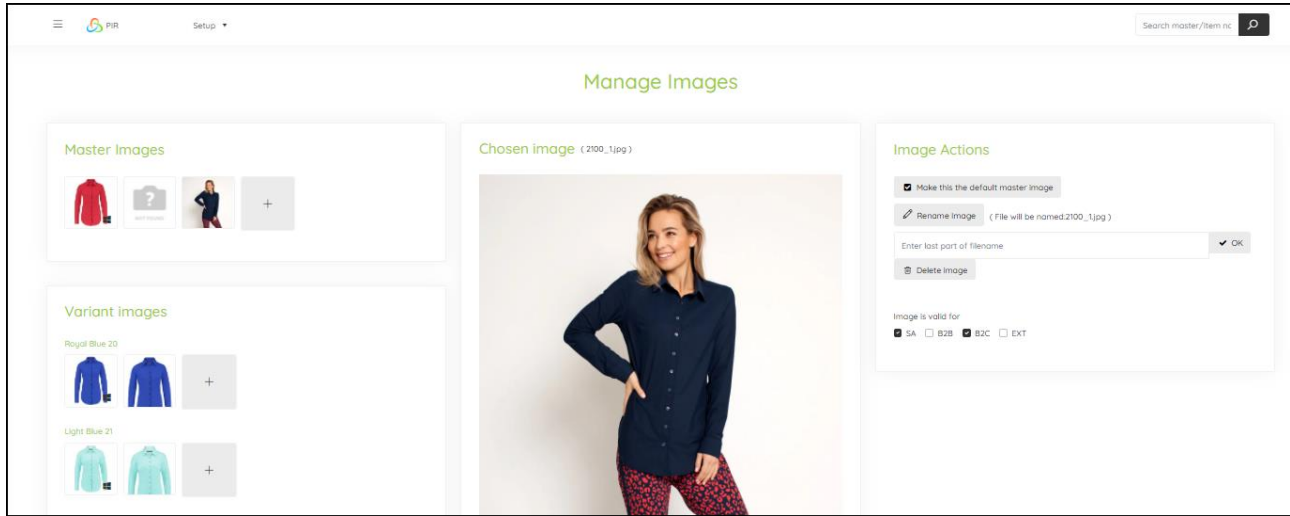
MANAGE IMAGES

Collection - Coll-Kbi

Precondition for this, is that the **Portal Instances** are created correctly – see *White Paper – ConnectPortal Instances* for the details.

IMAGE MANAGEMENT

Opens imbedded browser page with Image Management in the Product Information Repository (PIR) for the selected master.

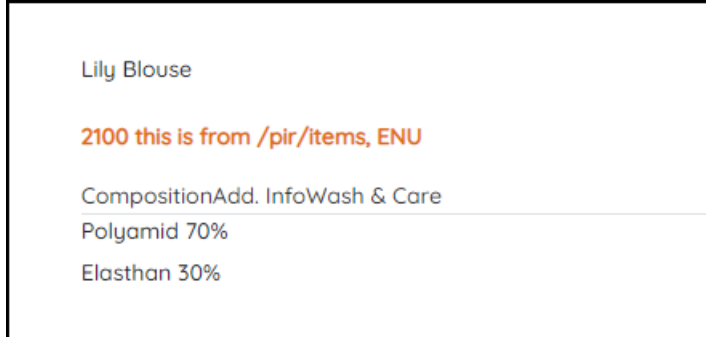


Precondition for this, is that the **Portal Instances** are created correctly – see **White Paper – ConnectPortal Instances** for the details.

EXTERNAL DISPLAY

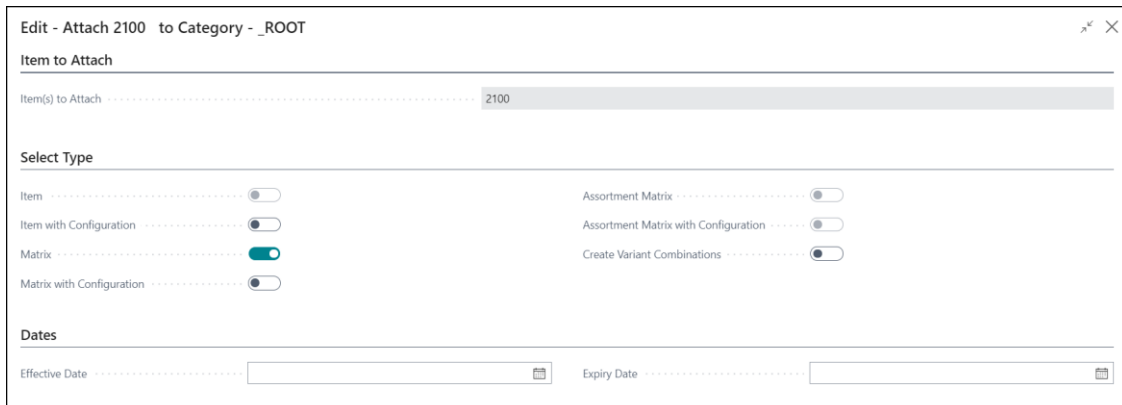
Opens imbedded browser page with a look of Master details page:

You can see the **Composition**, **Add Info** and **Wash & Care**.



ENABLE PORTAL

Opens **Attach XXXX to Category** page (XXXX stands for the Master) where it is possible to attach the selected Master to a Portal Category.



You need to choose **Select Type**, and you can enter the **Dates** for which this Master/Item is available in the Categories.

After that, you can connect the Master/Item to one or more Portal Categories:

Choose Category

Exist in Category	Attach	No. 1	Description	Description 2
☐	☐	AGENT_GIFTCARDS	Gift Cards	
☐	☐	AGENT_TEAM	Team Wear	
☐	☐	AGENT_W_ACCESS	Accessories	
☐	☐	AGENT_W_DRESSES	Dresses/Skirts	
☐	☐	AGENT_W_JACKETS	Blazers	
☒	☐	AGENT_W_TOPS	Tops	
☐	☐	AGENT_W_TROUSERS	Trousers	

In column **Exist in Category** you can see in which Categories the current Master is already connected. By a checkmark in the column **Attach**, you can attach the current Master to new/other Categories.

SUPPLIER PORTAL MESSAGES

Opens Portal Message List (only for B2B Webshop, Sales Agent Portal and Supplier Portal) where it is possible to create and edit portal related Messages which are shown in dock **Messages** on portals dashboards. You are able to enter a text via **Comments** and are able to attach Files to the Message via the **Portal Message Card, Attach File**.

Portal Messages | Work Date: 6-9-2020

Search

+ New

Manage

Supplier

Sales Agent

B2B

Comments

Show File Attachment

More options

Recipient Type	Recipient Business Central ID	Recipient Portal User	Subject	Read	Creation Date	Creation Time	Comment	File Attached	Created By
→ Supplier	2300		CMT Garments	☐			Yes	☐	
B2B	2000		The orders P0001 and P0004 will be deliv...	☐			No	☐	
B2B	2000		Welcome to the TRIMIT B2B Webshop	☒			Yes	☐	
Sales Agent	JR		Latest Sales Statistics now available for D...	☐			No	☒	
Sales Agent	JR		Welcome to the TRIMIT Sales Agent Portal	☐			Yes	☐	
Supplier	2300		Our brand label layout	☐			Yes	☒	
Supplier	2300		Quotes for Sea and Air	☐			Yes	☐	

Portal Message Card | Work Date: 7-3-2022

8

Attach File

Comments

Show File Attachment

Actions

Related

Fewer options

General

Recipient Type

Supplier

Recipient Portal User

Recipient Business Central ...

2300

Subject

CMT Garments

USERS

The detailed information regarding the User Setup and maintenance is described in the document **White Paper – TRIMIT Portals User Setup** and **White Paper – TRIMIT Portals Setups in Business Central**.

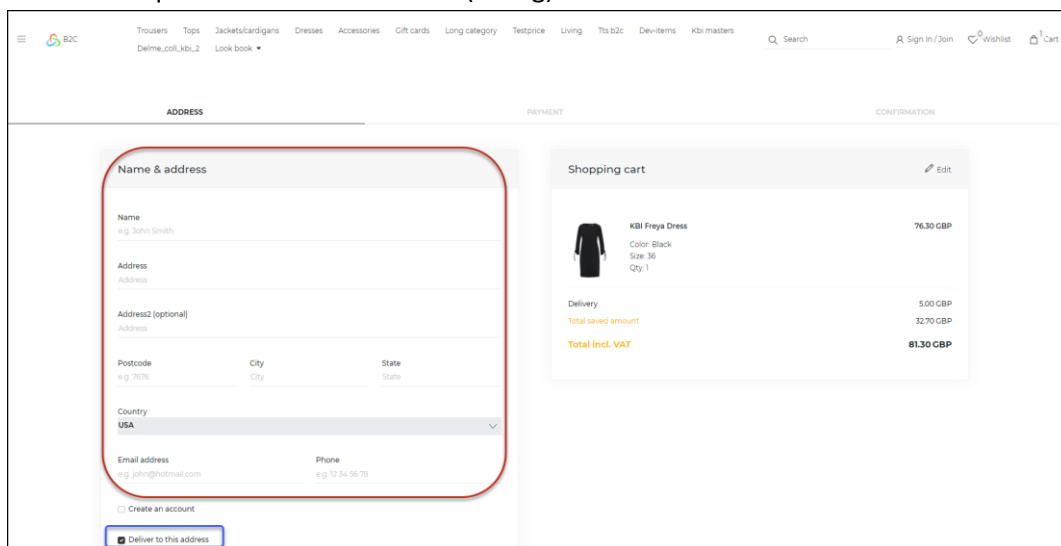
USER REGISTRATION

It is possible to navigate on the B2C Webshop without User Registration.

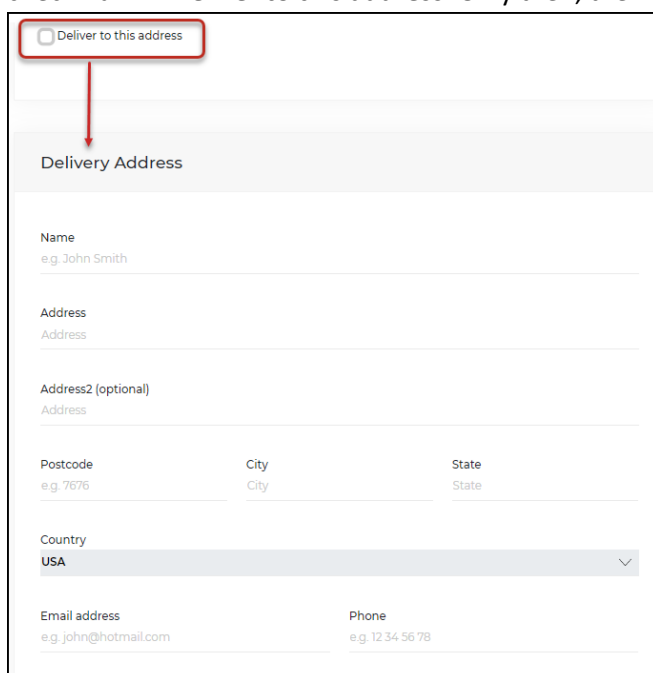
If a user wants to make an Order, then there are two ways to handle this concerning User Registration on the B2C Webshop.

One way is to proceed to the Order **checkout** page unregistered.

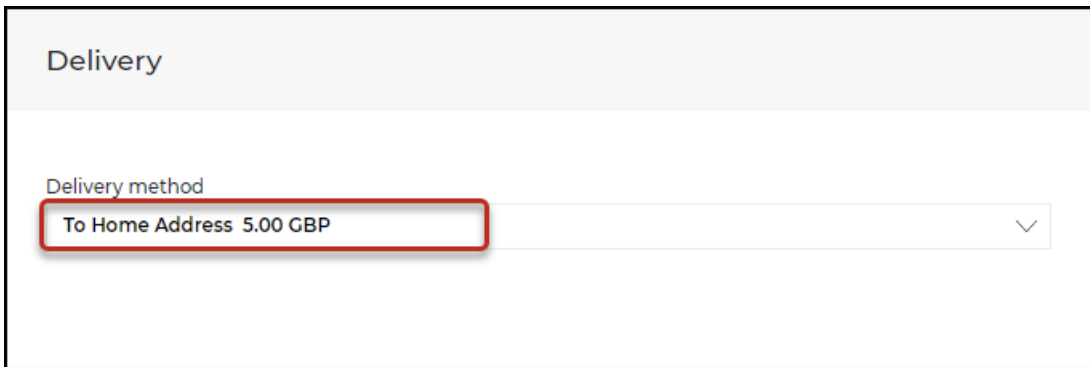
Then it is required to fill in the invoice (billing) **Name & address**.



After all fields are filled in correctly then the user needs to consider if the products should be delivered to another address. On **checkout** page, you can also use an alternative delivery address, by deleting the checkmark in **Deliver to this address**. Only then, the **Delivery Address** fields will become visible.

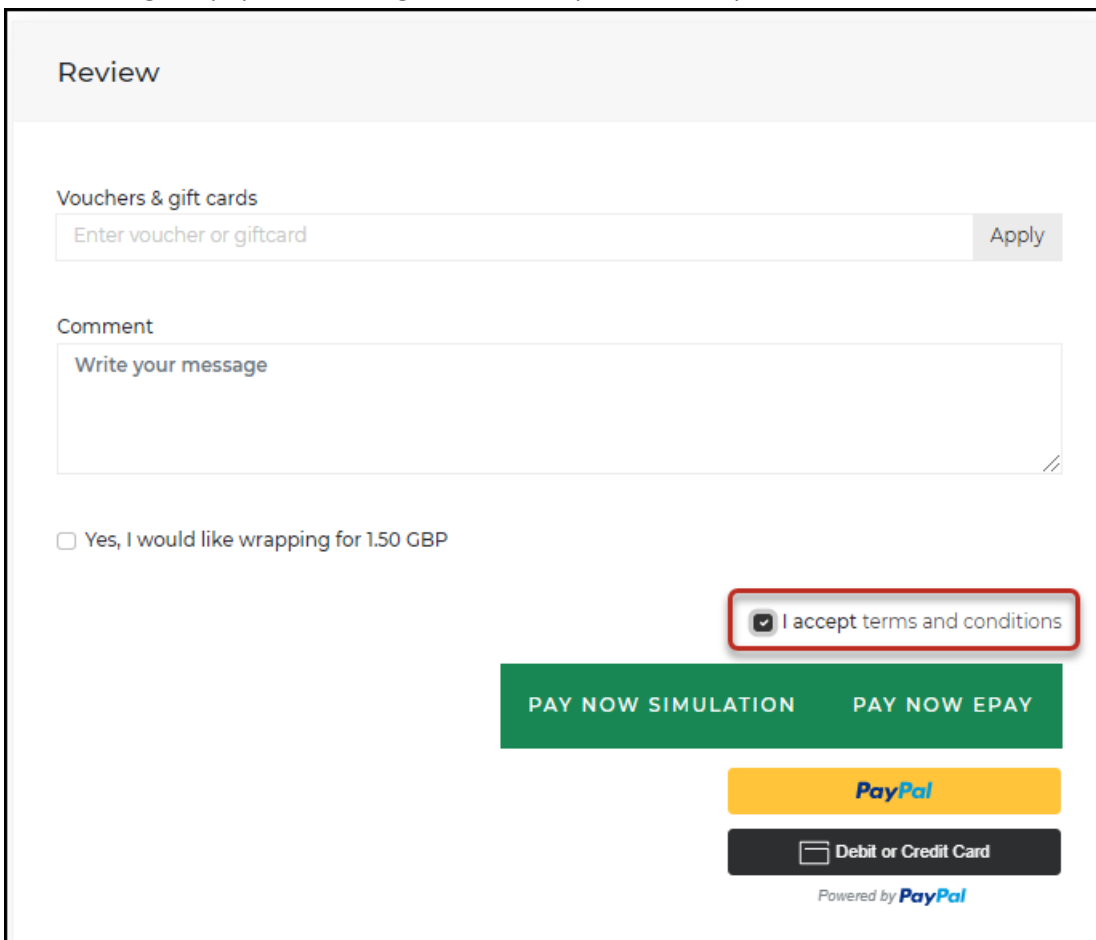


On **checkout** page, it is also necessary to select the required **Delivery method**:



The default shown **Delivery method** depends on the **Country**, **Currency** and **Sorting** of the [Delivery Methods](#) and [Delivery Fee Setups](#).

After all fields are filled correctly, it is mandatory to put a checkmark in **I accept terms and conditions** before doing the payment. No registration is required to complete the Order.



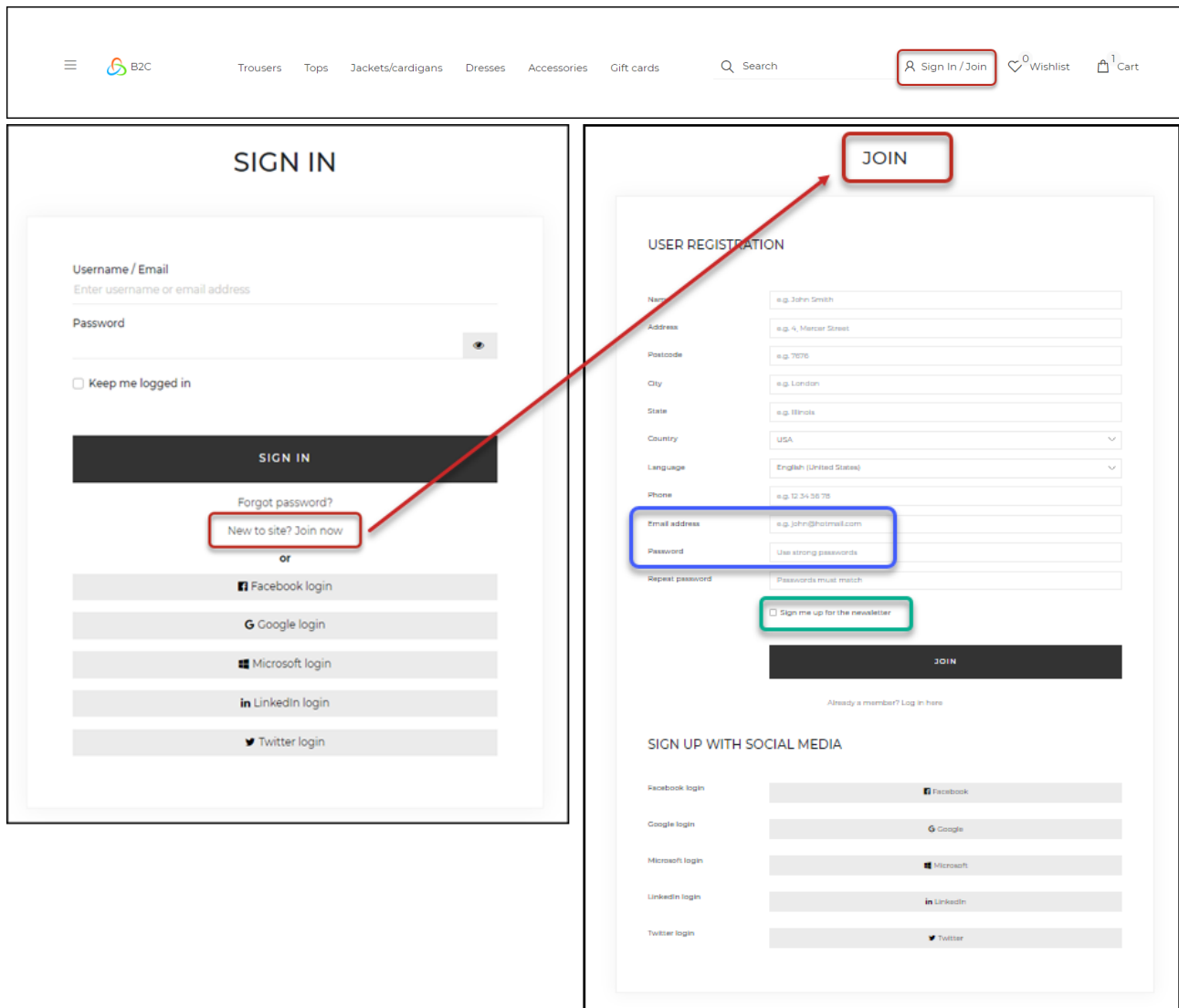
If this method is used, then the Customer is only created in TRIMIT in table **18 Customer**. User is not created on the portals frontend, i.e., Modelyn database.

The user is bound to his/her **Email address** and **Phone**. So, next time the same user is handled on the B2C Webshop the system (in this case the backend, i.e., TRIMIT) will recognize this user by the **Email address**. If user previously handled on B2C Webshop without registration and tries to register - then this user will be

matched by both **Email address** (field **Email** in the Customer Card of the backend - TRIMIT) and **Phone** (field **Phone No.** in the Customer Card of the backend – TRIMIT).

If during the checkout process, any of the newly typed **Name & address** data does not match with data previously stored in TRIMIT then the old data will be updated.

Another method to make an Order on the B2C Webshop is to register first before going to the Order **checkout** page. The registration process requires entering user data on the **JOIN** page such as: Name, Address, Postcode, City, State, Country, Language, Phone, Email address and Password.



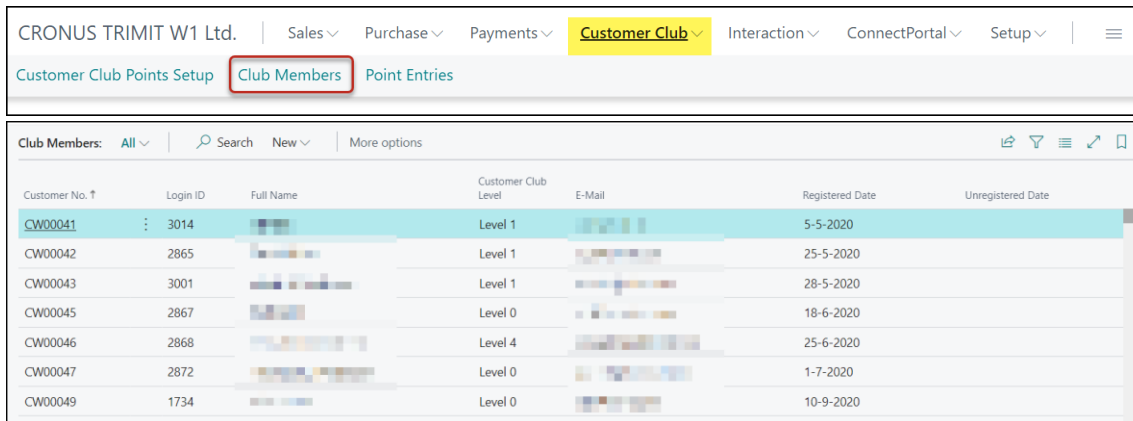
The password must be between 3 and 30 characters. The **Email address** and **Password** will then be used to Sign in (login) to the B2C Webshop. It is also possible to sign up for newsletters during the registration by entering a check mark on **Sign me up for the newsletter**. All user data can eventually be changed on **My page** after the login.

When the Customer is registered on the B2C Webshop then this user is created in the Modelyn database on the frontend and tables **18 Customer** and **6038149 trm B2C User Register** in the backend (TRIMIT).

Table **18 Customer** is a part of the standard TRIMIT and the detailed information about it can be taken from the standard help info.

Table **6038149 trm B2C User Register** is used in TRIMIT for the B2C Webshop Customers that have Joined (registered). The purpose of this table is to match a user created in Modelyn and a user created in TRIMIT as well as to store Customer Data regarding Customer Club Levels.

This table is represented by page **6038149 trm B2C User Register List** and can be opened via Role Center **TRIMIT Portal Administrator, Customer Club, Club Members** or via **Tell me Club Members**



Customer No. ↑	Login ID	Full Name	Customer Club Level	E-Mail	Registered Date	Unregistered Date
CW00041	3014	[REDACTED]	Level 1	[REDACTED]	5-5-2020	
CW00042	2865	[REDACTED]	Level 1	[REDACTED]	25-5-2020	
CW00043	3001	[REDACTED]	Level 1	[REDACTED]	28-5-2020	
CW00045	2867	[REDACTED]	Level 0	[REDACTED]	18-6-2020	
CW00046	2868	[REDACTED]	Level 4	[REDACTED]	25-6-2020	
CW00047	2872	[REDACTED]	Level 0	[REDACTED]	1-7-2020	
CW00049	1734	[REDACTED]	Level 0	[REDACTED]	10-9-2020	

Not all fields in above picture are shown by default; you might have to add them via Personalization.

DESCRIPTION OF THE FIELDS

CUSTOMER NO.

Internal backend (TRIMIT) Customer Number in table **18 Customer**

LOGIN ID

Internal frontend (Modelyn) Customer Number

FULL NAME

Full Name of the Customer

CUSTOMER CLUB LEVEL

Shows a Customer Club Level assigned to the current Customer No.

Available values are *Level 0, Level 1, Level 2, Level 3, Level 4, Level 5*.

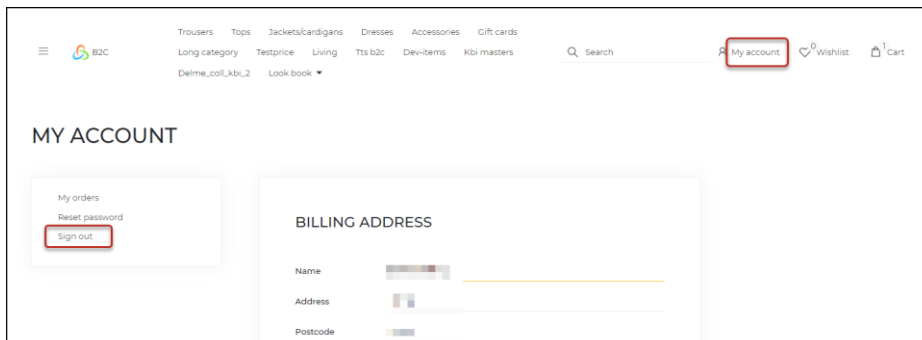
REGISTERED DATE

Date on which this Customer has signed up.

UNREGISTERED DATE

Date on which this Customer has **Signed out**.

After signing in, and clicking **My account** the Customer can click **Sign out**



MY ACCOUNT

My orders

Reset password

Sign out

BILLING ADDRESS

Name

Address

Postcode

USER RELATIONSHIP

After user sign up on the B2C Webshop - user record is created (apart from the tables mentioned above) in tables **6038103 trm User Relationship** and **6038101 trm User Relationship Mgt** where the Modelyn user is assigned to the TRIMIT User Information. At the same time, this user is assigned to a default Portal Profile. For the B2C users, this is all done automatically by the system logic and no synchronization between Modelyn and TRIMIT is needed.

User Relationship Management | Work Date: 6-9-2020

✓ Saved

Search

Edit List

Delete

Actions

Related

Fewer options

General

Status Filter

Related

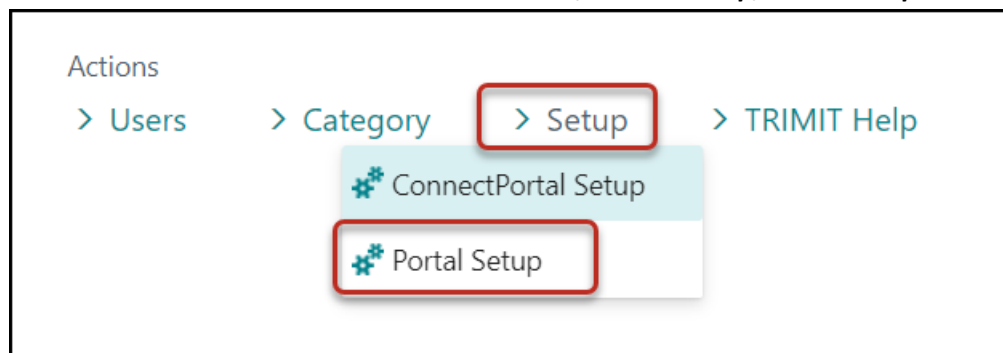
Status ▼	User information	Relationships	Profile	Last Login	Last Synchronized	ConnectPortal Domain
→ Related	</					

For more information about the User Relationship, see **White Paper - TRIMIT Portals Setups in Business Central**.

PORTAL SETUP

Portal Setup page allows setting up such Parameters as: Points applied on B2C Webshop as well as Payment and Gift Card Currency Tolerance and others, which are described below.

In the Role Center **TRIMIT Portal Administrator**, Actions **Setup, Portal Setup** or via **Tell me Portal Setup**.



FASTTAB GENERAL

General			
Points Item No.	B2C_POINT01	Gift Card Currency Tolerance	0,10
Registration Level	Level 0	Payment Gen. Journal Template	WEBRCPT
Points from Level	Level 0	Payment Gen. Journal Batch	DEFAULT
Portal Payment Tolerance (LCY)	0,10	B2C Responsibility Center	
Payment Tolerance G/L Account	9280	Capture Payment by Invoicing	☒
Fee G/L Account	6840	Payment Integration	Instant
Payment Difference in Exchange	9285	Payment Notification User ID	

DESCRIPTION OF THE FIELDS

POINTS ITEM NO.

This is the **Item No.** that will be used when creating the deduction Sale Line on a Sales Order where Customer Club Points are used to reduce the Order Amount

REGISTRATION LEVEL

When a user registers (signs in) on the B2C Webshop the Customer will get this **Customer Club Level** assigned.

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

POINTS FROM LEVEL

This field specifies from which **Customer Club Level** users begin to earn Customer Club Points and can use Customer Club Points.

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

PORTAL PAYMENT TOLERANCE (LCY)

Specify the Sales Order Amount which will be dismissed in case the Portal Payment Provider Fee is larger than the Sales Order Amount or similar.

PAYMENT TOLERANCE G/L ACCOUNT

This field is used in cooperation with the **Portal Payment Tolerance (LCY)**. Here you specify the **G/L Account** to be used for posting of Discount given to reduce Order Total to zero when the Order Total is smaller than the **Portal Payment Tolerance (LCY)**.

FEE G/L ACCOUNT

This field specifies the **G/L Account** to use for posting of the Portal Payment **Fee** Amount.

PAYMENT DIFFERENCE IN EXCHANGE

This field specifies the **G/L Account** to use for posting the Difference in Exchange caused by trade in Currencies differing from the Settlement Currency. The Settlement Currency is a Currency the sale has been created in or the Currency in which money coming on the Bank Account.

GIFT CARD CURRENCY TOLERANCE

When a Gift Card in one Currency is used to reduce a Sales Order in another Currency, a small Rounding Difference may remain on the Gift Card.

This field specifies the maximum Rounding Difference allowed to be considered as Currency Exchange Deviation in Local Currency.

PAYMENT GEN. JOURNAL TEMPLATE

This field specifies the **Name** of the **General Journal Template** to be used for the **Portal Payment Receipt** posting.

PAYMENT GEN. JOURNAL BATCH

This field specifies the **Name** of the **General Journal Batch** of the **Payment Gen. Journal Template** to be used for the **Portal Payment Receipt** posting.

B2C RESPONSIBILITY CENTER

Orders created will be “tagged” with the stated Responsibility Center. This enables an easy filtering of orders from the B2C Webshop appose to other orders.

CAPTURE PAYMENT BY INVOICING

This option indicates whether to capture the Payment from the Payment Provider when invoicing a Sales Order.

PAYMENT INTEGRATION

This field indicates how the payment capture is executed.

You can choose the following two options:

<empty>	No automatic Payment Integration. Payments needs to be handled manually based a bank mutation.
Instant	Capture of the funds from the Payment Provider is done instantly. This is handled in Codeunit 80 Sales-Post . This method is the only preferable as it allows detecting potential issues in capturing process and rolling the sales order posting process to initial state.

PAYMENT NOTIFICATION USER ID

You can choose a **User ID** for the user that will get a notification (on all Role Center Home page) if a Payment has been done.

FASTTAB PAYMENT PROCESSING

Payment Processing	
Order Cleanup Active	☒
Exclude Availability Threshold	2 minutes
Archive Order Threshold	4 minutes

DESCRIPTION OF THE FIELDS

ORDER CLEANUP ACTIVE

When a B2C Customer goes to Payment but never finishes it, the Sales Order created in the BC backend remains and takes Product Availability. Setting this option to **TRUE** cleans those “dead” Sales Orders (gone to Payment but never finished) after certain time and releases the Item Availability.

EXCLUDE AVAILABILITY THRESHOLD

If the Base Threshold (calculated: Work Date minus Payment creation DateTime) is greater than **Exclude Availability Threshold**, then this Sales Order will be set to **Exclude Availability Check = TRUE** (field in the Sales Header and in the Sales Lines). And **Processing Status = Exclude Availability** for the Payment Entry. In this case Availability Check will be excluded.

The entry of the **Exclude Availability Threshold** is a Duration: a Quantity and then “minutes”, “hours”, etc. depending on the Language in **My Settings**.

ARCHIVE ORDER THRESHOLD

If the Base Threshold (calculated: Work Date minus Payment creation DateTime) is greater than **Archive Order Threshold**, then Sales Order will be deleted. At the same time the corresponding Sales Order will be archived and in Payment list **Payment Service Provider = ORDER CANCELLED**. If the payment is created (Pending), but there is no Sales Order, then **Payment Service Provider = CANCELLED** for the corresponding Payment.

The entry of the **Archive Order Threshold** is a Duration: a Quantity and then “minutes”, “hours”, etc. depending on the Language in **My Settings**.

If the Sales Order is archived, then the Availability Schedule should run to release the Item Availability on B2C Webshop. Therefore, Availability Schedule should run relatively often (up to several times per day).

FASTTAB ADVANCED SALES INTEGRATION

Advanced Sales Integration	
Delete Adv. Sales Int. Doc.	Sales Posting

DELETE ADV. SALES INT. DOC.

Delete Advanced Sales Integration Document determines when the records will be deleted.

You can choose between the following two options:

Sales Posting	When an Sales Order is Posted or removed, the Advanced Sales Integration Document is also deleted if it is posted and not in error state.
Batch	You need to setup a Job Queue for Report 6038102 trm Batch Delete ASI Documents , which could be run daily or weekly.

FASTTAB DATA FEED SETUP

Data Feed Setup			
Brand Mapping	Global Dimension 1	Age Group Attribute Id	25
Gender Attribute Id	24	Age Group Attribute Name	Data-Feed-Age-Group
Gender Attribute Name	Data-Feed-Gender-Group		

The fields in this FastTab can be used for Google Analytics.

The **Attribute Id's**, **Attribute Names** and their options can be created via the [Actions, Create Data Feed Attributes](#)

DESCRIPTION OF THE FIELDS

BRAND MAPPING

You can choose the subject that represents the **Brand**.

You can choose the following options:

Global Dimension 1
Global Dimension 2
Statistics Group
Item Statistics Group 2
Item Statistics Group 3
Item Statistics Group 4
Item Statistics Group 5

GENDER ATTRIBUTE ID

You can choose the **Item Attribute** that represents the **Gender**.

GENDER ATTRIBUTE NAME

After choosing a **Gender Attribute ID**, the Name will be displayed automatically.

AGE GROUP ATTRIBUTE ID

You can choose the **Item Attribute** that represents the **Age Group**.

AGE GROUP ATTRIBUTE NAME

After choosing an **Age Group Attribute ID**, the Name will be displayed automatically.

ACTIONS, CREATE DATA FEED ATTRIBUTES

Actions	Related
 Create Data Feed Attributes	

This action will create for you the option **Item Attribute Data-Feed-Age-Group** with the options: *newborn, infant, toddler, kids, adult*.

This action will also create for you the option **Item Attribute Data-Feed-Gender-Group** with the options: *male, female, unisex*.

RELATED, MULTIPLE BANK ACCOUNTS SETUP

Actions
Related

 Multiple Bank Accounts Setup

Multiple Bank Accounts Setup | Work Date: 9/6/2020
✓ Saved  

 Search
 New
 Edit List
 Delete
  

	Currency Code ↑		Country/Region Code ↑		Portal Payment Service Provider ↑	Account Type	Account No.
→		⋮				G/L Account ▼ G/L Account Bank Account	

Per **Currency Code**, **Country/Region Code** and **Portal Payment Service Provider** you can enter a **G/L Account** or a **Bank Account** for the Payments.

MISCELLANEOUS SETUPS FOR B2C WEBSHOP

CATEGORIES

Setup of the **Categories** is a part of the B2C Webshop setup in TRIMIT. Detailed information regarding the **Categories** is available in separate documents:

White Paper – TRIMIT Portals Setups in Business Central and **White Paper – TRIMIT Category Management**.

PORTALS NEWSLETTER

Setup of the B2C Webshops **Newsletters** is a part of the B2C Webshop setup in TRIMIT.

Detailed information regarding the portals Newsletters setup is available in a separate document:

White Paper – TRIMIT Portals Setups in Business Central.

GIFT CARDS AND VOUCHERS

Setup of the B2C Webshop **Gift Cards** is a part of the B2C Webshop setup in TRIMIT.

Detailed information about the **Gift Cards** and **Vouchers** (Promotions) setup is available in a separate document:

White Paper – TRIMIT B2C Gift Cards.

STORE LOCATOR

Setup of the **Store Locator** is a part of the B2C Webshop setup in TRIMIT.

Detailed information about the Store Locator setup is available in a separate document:

White Paper – TRIMIT B2C Store Locator and Where to Buy Item.

CUSTOMER CLUB

Setup of the **Customer Club** is a part of the B2C Webshop setup in TRIMIT.

Detailed information about the Customer Club setup is available in a separate document:

White Paper -TRIMIT B2C Customer Club.

E-MAIL QUEUE

Setup of the **E-Mail Queue** is a part of the B2C Webshop setup in TRIMIT.

Detailed information about the E-Mail Queue setup is available in a separate document:

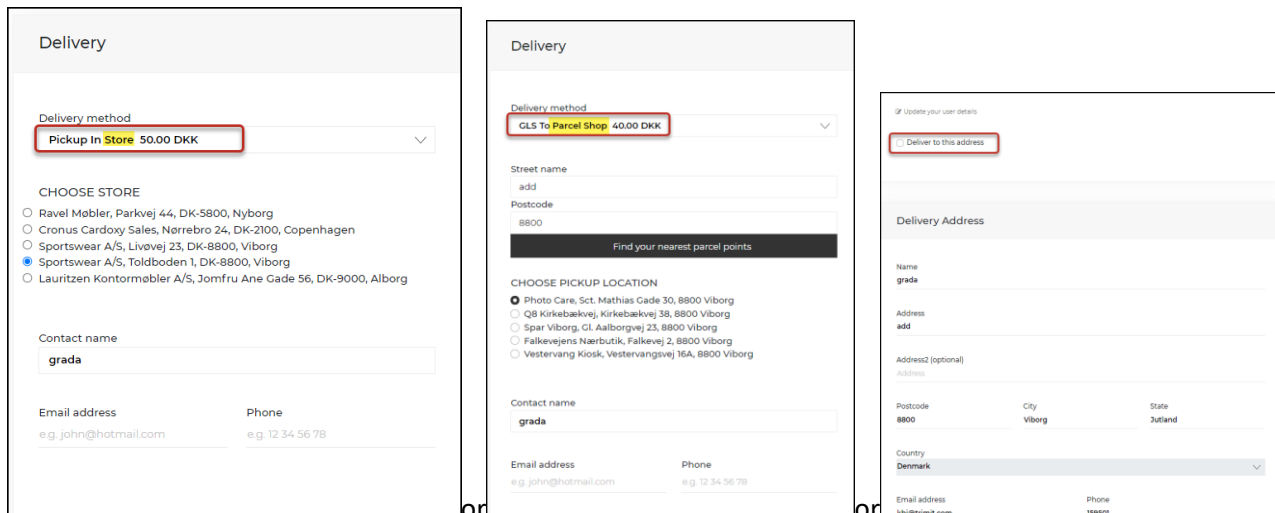
White Paper – TRIMIT E-Mail.

DELIVERY IN B2C WEBSHOP

During the Sales Order creation on the B2C Webshop, the Customer navigates to a **checkout** page.

If the Customer is registered on the B2C Webshop, the default Address on the **checkout** page comes from Customer information, which is available on Customer's **My page**.

If user is not registered in the B2C Webshop then it is needed to fill in the fields on the **checkout** page.



If the **Delivery Methods** of the Portal Profile are set so that product can be delivered to a Store or Parcel Shop, then the **Delivery** part will open with two options: **Choose Store** (from the **Store Locator List**) or **Choose Pickup Location** (for GLS and PostNord the five nearest Pickup Points based on a service of these Shipment Agents).

Find your nearest parcel points part depends on **Delivery Method**. If a **Delivery Method** is specified in TRIMIT as a Parcel Shop, then **Find your nearest parcel points** area becomes visible.

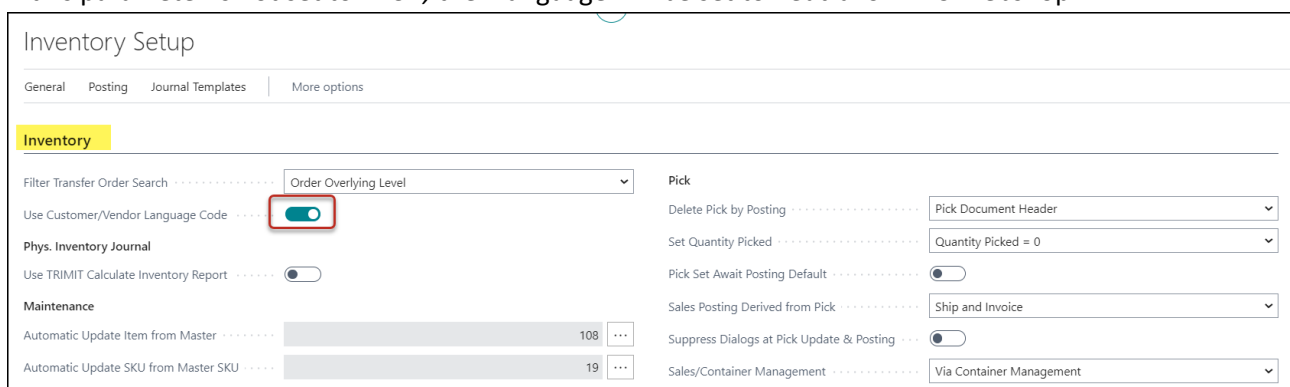
If shipping must be done to a Store or Parcel Shop, then it is needed to choose the right Store or Pickup Location.

If you choose a **Delivery Method** to you home/work address, you can unmark the **Delivery to this address** and then it is needed to fill all the Delivery Address fields provided on the page: Country, Method (delivery) and Address details (Name, Address, Postcode, City, State, Country).

LANGUAGE SETUP

In order to enable supporting multiple Languages on B2C Webshop it is important to make sure that the parameter **Use Customer/Vendor Language Code** field is set to **TRUE** in **Inventory Setup** in TRIMIT.

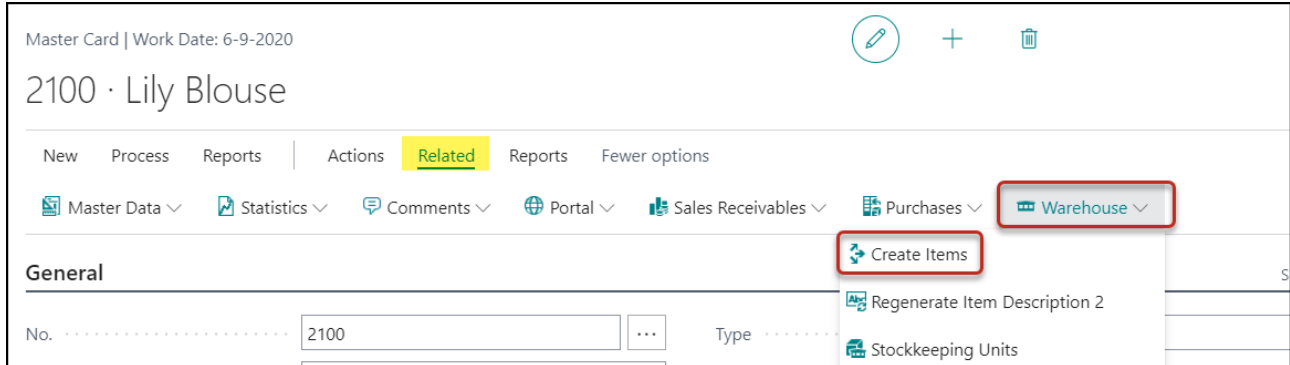
If this parameter is not set to **TRUE**, then language will be set to neutral on B2C Webshop.



After setting this option to **TRUE** – it is needed to run schedules via **Update Shop** button in Soft Admin.

INVENTORY SETUP

B2C Webshop relays on Item Inventory. In this regard, it is necessary to have/create Items for each Master, which will be presented on the B2C Webshop. This can be done manually by using **Create Items** function on **Masters** list or **Master** page.



Master Card | Work Date: 6-9-2020

2100 · Lily Blouse

New Process Reports Actions **Related** Reports Fewer options

Master Data Statistics Comments Portal Sales Receivables Purchases **Warehouse**

General

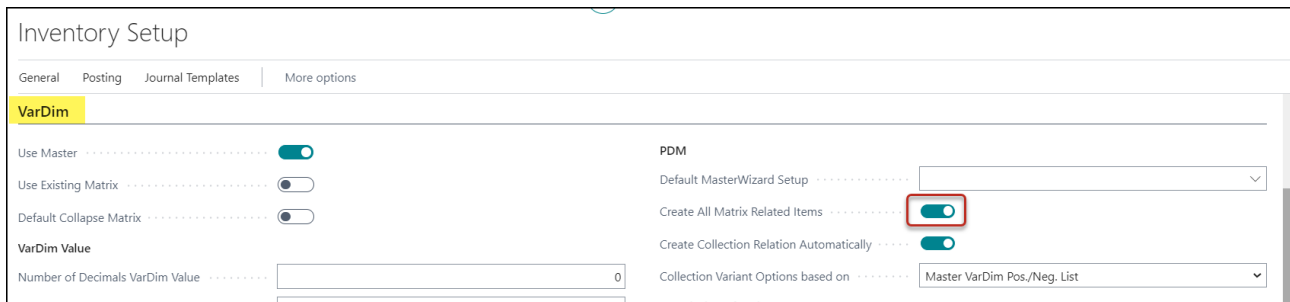
No. 2100 Type

Create Items

Regenerate Item Description 2

Stockkeeping Units

Otherwise, a parameter can be set in **Inventory setup**. This will affect only Masters created after this option was set, and only Masters with a Matrix.



Inventory Setup

General Posting Journal Templates More options

VarDim

Use Master ☒

Use Existing Matrix ☐

Default Collapse Matrix ☐

VarDim Value

Number of Decimals VarDim Value 0

PDM

Default MasterWizard Setup

Create All Matrix Related Items ☒

Create Collection Relation Automatically ☒

Collection Variant Options based on Master VarDim Pos./Neg. List