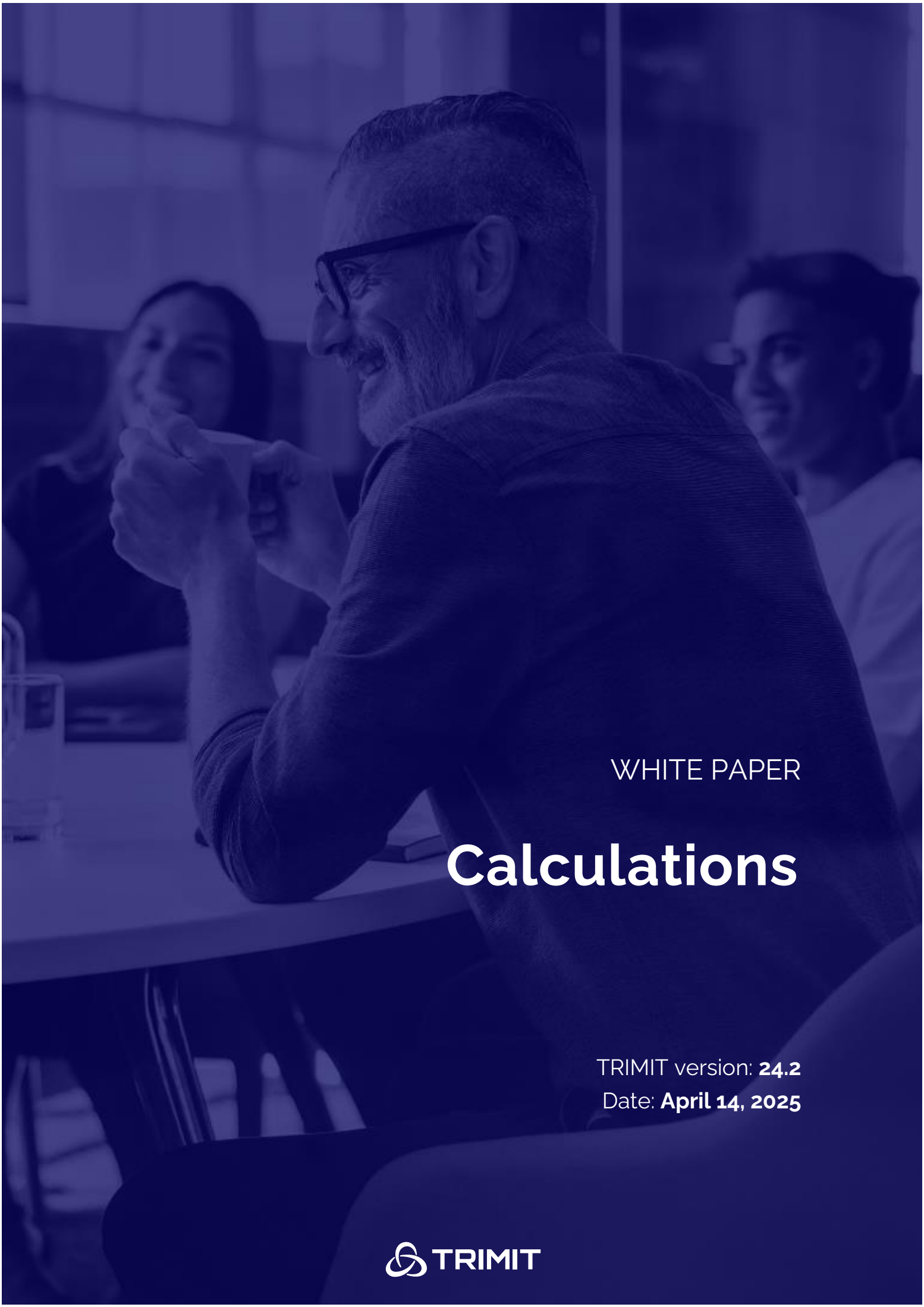

WHITE PAPER

Calculations

TRIMIT version: **24.2**

Date: **April 14, 2025**

TRIMIT

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Introduction

Calculating the Unit Cost of an Item is usually a simple matter of summarizing the costs of materials, time and overhead. When the production part is outsourced, even other costs become relevant to include in the calculation.

Those Costs could be:

- Purchase Price of the Manufacturer for the labor costs.
- Transport, both on Export of materials and Import of finished goods.
- Duty, Insurance, and other Charges, both on Export and Import.

Calculating Sales Prices is similar, including different parameters like:

- Market decided Retail Price
- Markup (Commission) for Retailer (shop), Sales Agents etc.
- Sales Costs

The persons that must decide what the Retail Price should become require a tool that can oversee all cost- and price parameters. They want to work in a way where they can decide what to call the parameters, and how to use them.
A typical solution for this is a spreadsheet. The only thing a spreadsheet cannot do is integrate the information into the ERP system. That means that using spreadsheets for this task imposes the risk of data not being up to date – both in the spreadsheet and in the ERP system.

TRIMIT Calculations is a tool to assist with the calculation of Costs and Sales Prices on Masters and/or Items.

- It is part of the ERP system but works similarly to a spreadsheet.
- It can get information regarding the Item or Master from i.e., the Item Card.
- It can post the Values of a calculation to i.e., a Sales Price List.

TRIMIT Calculations use **Calculation Templates** to increase re-usability. This means that a company can create a few Calculation Templates to create numerous Master- or Item related Calculations. The use of Calculation Templates makes the creation of Calculations amazingly fast.

Example:
A Calculation Template is created to handle T-Shirts. For each new Collection, this same Calculation Template can be used for all the different T-Shirts in the Collection.

TRIMIT Calculations uses **TRIMIT Formulas**, to create the calculated Values.
With TRIMIT Formulas, a vast area of data and functionality is available for the Calculations.
For more information see ***White Paper – TRIMIT Formulas***.

The audience for this document is the Consultant or very skilled User. It will only describe the TRIMIT fields/functionality and not the standard Business Central fields/functionality. Be aware of not changing settings and parameters in a live database without consulting the implementing partner.

The functionality described is the functionality as of **TRIMIT 24.2 for Business Central W1 BC25.X**.
The pictures in this White Paper are based on the demo data for **TRIMIT 24.2,** which is based on Microsoft Dynamics 365 Business Central 2024 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

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Components

TRIMIT Calculations contains the following objects:

The tables	***6036380***	***trm Call Formula Calculation***
	6037040	***trm Calculation Template Hdr***
	6037041	***trm Calculation Template Line***
	6037042	***trm Calculation Type***
	6037043	***trm Calculation Header***
	6037044	***trm Calculation Line***
	6037045	***trm Calculation Property***
	6037047	***trm Calculation Overview Setup***
	6037048	***trm Calculation Version No.***
	6037054	***trm Calculation Sales Price***
	6037055	***trm Calculation Purchase Price***
	6037056	***trm Calculation Overview Col***
	6037197	***trm API Parameters***
	6037199	***trm Calculation Column***
The pages	***6037047***	***trm Calculation Pre Post Form***
	6037048	***trm Calculation Overview Setup***
	6037049	***trm Calculation Formulas***
	6037050	***trm Calculation Types***
	6037051	***trm Calculation Template Hd***
	6037052	***trm Calculation Template Lines***
	6037053	***trm Calculation Header***
	6037054	***trm Calculation Lines***
	6037055	***trm Calculation Template List***
	6037056	***trm Calculation Overview Col***
	6037057	***trm Calculation Property***
	6037058	***trm Calculation Version Nos.***
	6037059	***trm Calculation List***
	6037070	***trm Calculation Sales Prices***
	6037071	***trm Calculation Purchase Prices***
	6037156	***trm Calculation Overview***
	6037211	***trm Calculation Columns***
	6037800	***trm API Parameters***
	6038026	***trm Dialog Calculation Tmpl***
The codeunits	***6037040***	***trm Calculation Handling***

Many other objects are involved because of the use of i.e., Formulas but they will not be listed here. The above-mentioned objects however, are directly related to the TRIMIT Calculations.

For the readability of this document, we will talk about the **Calculation** when the TRIMIT Calculation is meant, the **Template** when the TRIMIT Calculation Template is meant and the **Formula** when in fact TRIMIT Formula Lines are meant.

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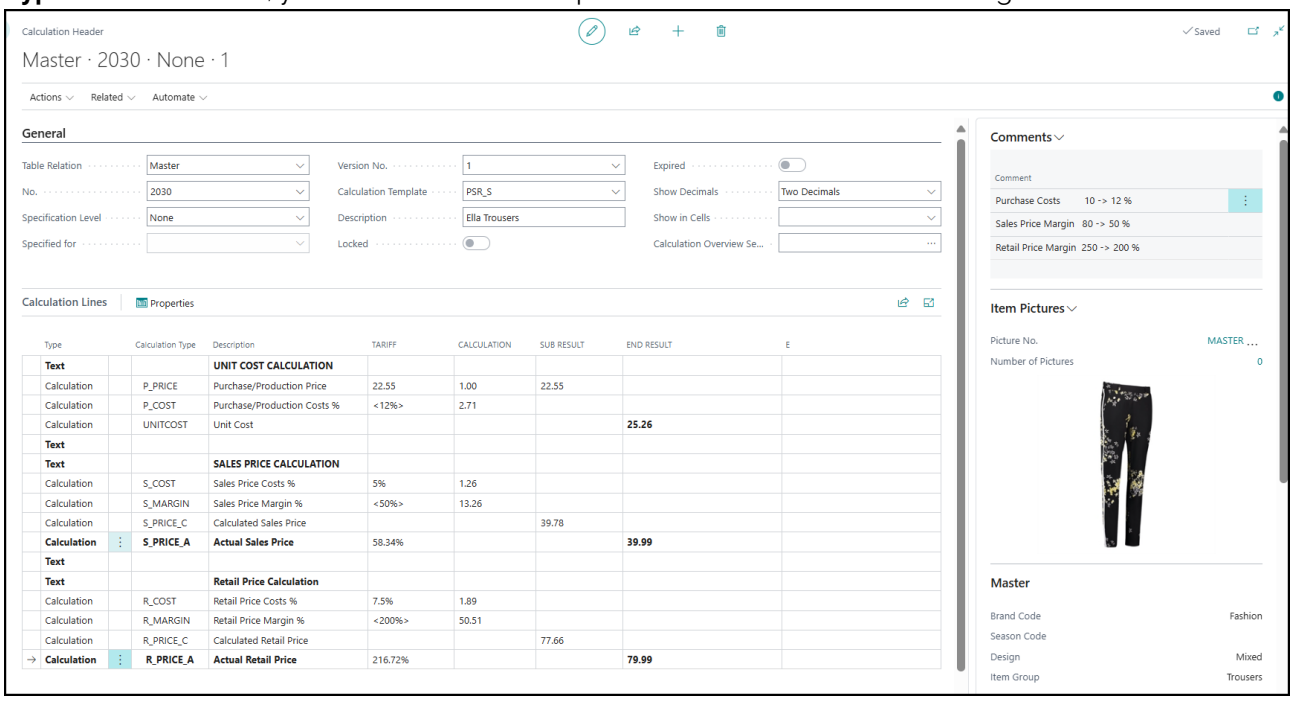
Setups

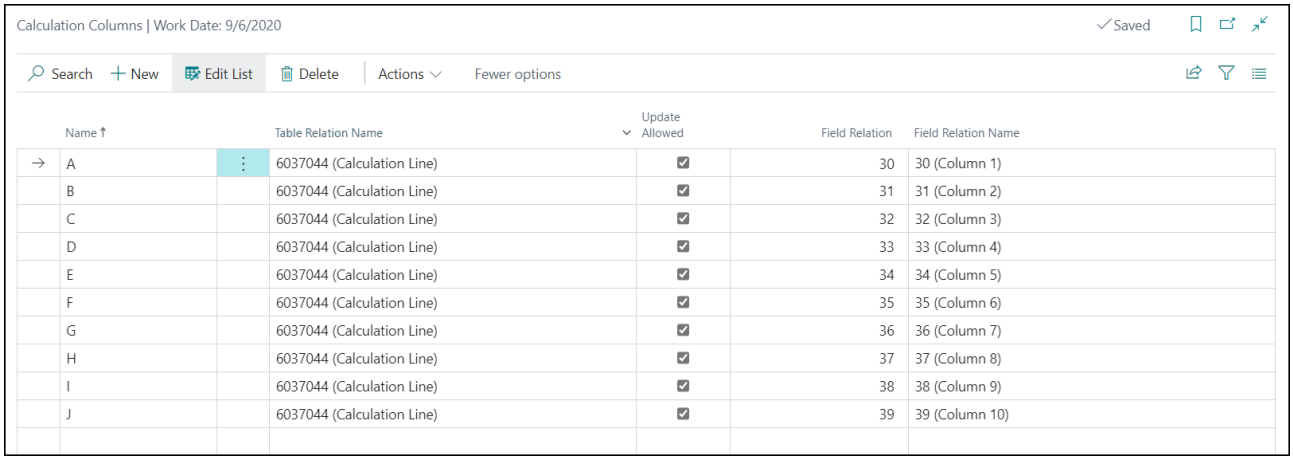
Before you can create Calculations, you need to create the **Calculation Columns** and the **Calculation Types.** Besides these, you need to create Templates that can be used for creating Calculations.



Calculation Columns

Before you can create a Calculation, you need to determine which Columns you would like to use in your Templates and how they should be called.
The **Calculation Columns** are shown in the Column Headings and can be used in the Calculation Formulas.

The **Calculation Columns** can be maintained via **Search** *Calculation Columns*, in which you can create the Names of the Columns and the connection to the Fields in the table **6037044 trm Calculation Line** where the actual information of the Calculation Cells will be stored.



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Description of the Fields:

NOTE
In ***Codeunit 6036550 trm General***, which is also executed when you create a Company from scratch, the **Calculation Columns** will automatically be filled with the Names *A to J* - as shown in the above picture – like the names of Columns in an Excel Sheet.

In the Template, it is possible to give these Calculation Columns a **Description**.
In the Formulas, however, you simply need to use the *A to J*, as you would do in a Formula in a Cell of an Excel Sheet.

Name
The mandatory **Name** for the Column that you want to use in the Formulas of the Templates.

Table Relation Name
This Field will automatically be filled with *6037044 (Calculation Line)* and should not be changed.
The Calculation Columns determine the **Names** of the Columns in the Templates and Calculations and the Fields of table *6037044* in which the data will be stored; do not change it!

Update Allowed
This Field will by default be filled with a checkmark, so you are able to create Calculations based on Templates and can change the Value of the specific column in your Templates and Calculations.

If you would remove this checkmark, you cannot create new Calculations (based on Templates) or change the Values in this specific column. It could only make sense to remove the checkmark temporary to prevent users from changing Calculations during an ongoing season.

NOTE
This Field is not stored in table ***6037199 trm Calculation Column*** but in table ***6037197 trm API Parameters.***
If you create a new Calculation Column, there will also be a record created in TRIMIT API Parameter automatically for the Table ***6037044 trm Calculation Column*** and the Field that you enter in **Field Relation.**

Field Relation
Here you need to enter the Field No. of the Table ***6037044 trm Calculation Line*** where the content of this **Calculation Column** should be stored. In other words, you choose the Field in which the content of this **Calculation Column** will be shown and can be changed in the Template and the Calculation.

By pressing **Alt+PageDown** you can see the list of Field Nos. that can be chosen.

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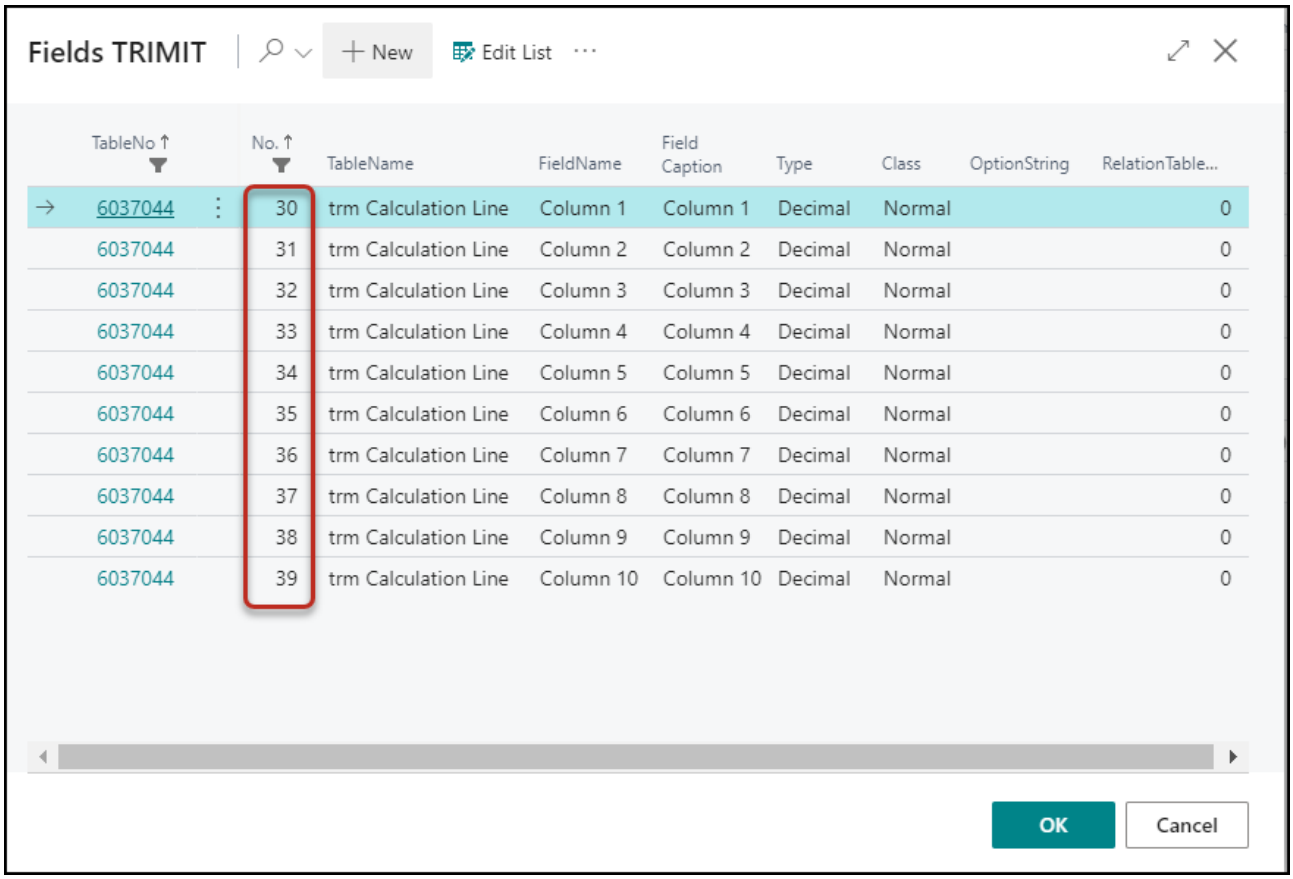
You can only choose the following Fields of table ***6037044 trm Calculation Line*** and a Field can only be chosen once in the list of Calculation Columns.



TableNo	No.	TableName	FieldName	Field Caption	Type	Class	OptionString	RelationTable...
6037044	30	trm Calculation Line	Column 1	Column 1	Decimal	Normal		0
6037044	31	trm Calculation Line	Column 2	Column 2	Decimal	Normal		0
6037044	32	trm Calculation Line	Column 3	Column 3	Decimal	Normal		0
6037044	33	trm Calculation Line	Column 4	Column 4	Decimal	Normal		0
6037044	34	trm Calculation Line	Column 5	Column 5	Decimal	Normal		0
6037044	35	trm Calculation Line	Column 6	Column 6	Decimal	Normal		0
6037044	36	trm Calculation Line	Column 7	Column 7	Decimal	Normal		0
6037044	37	trm Calculation Line	Column 8	Column 8	Decimal	Normal		0
6037044	38	trm Calculation Line	Column 9	Column 9	Decimal	Normal		0
6037044	39	trm Calculation Line	Column 10	Column 10	Decimal	Normal		0

Field Relation Name

This Field will automatically be filled by the system based on **Field Relation**: do not change it!

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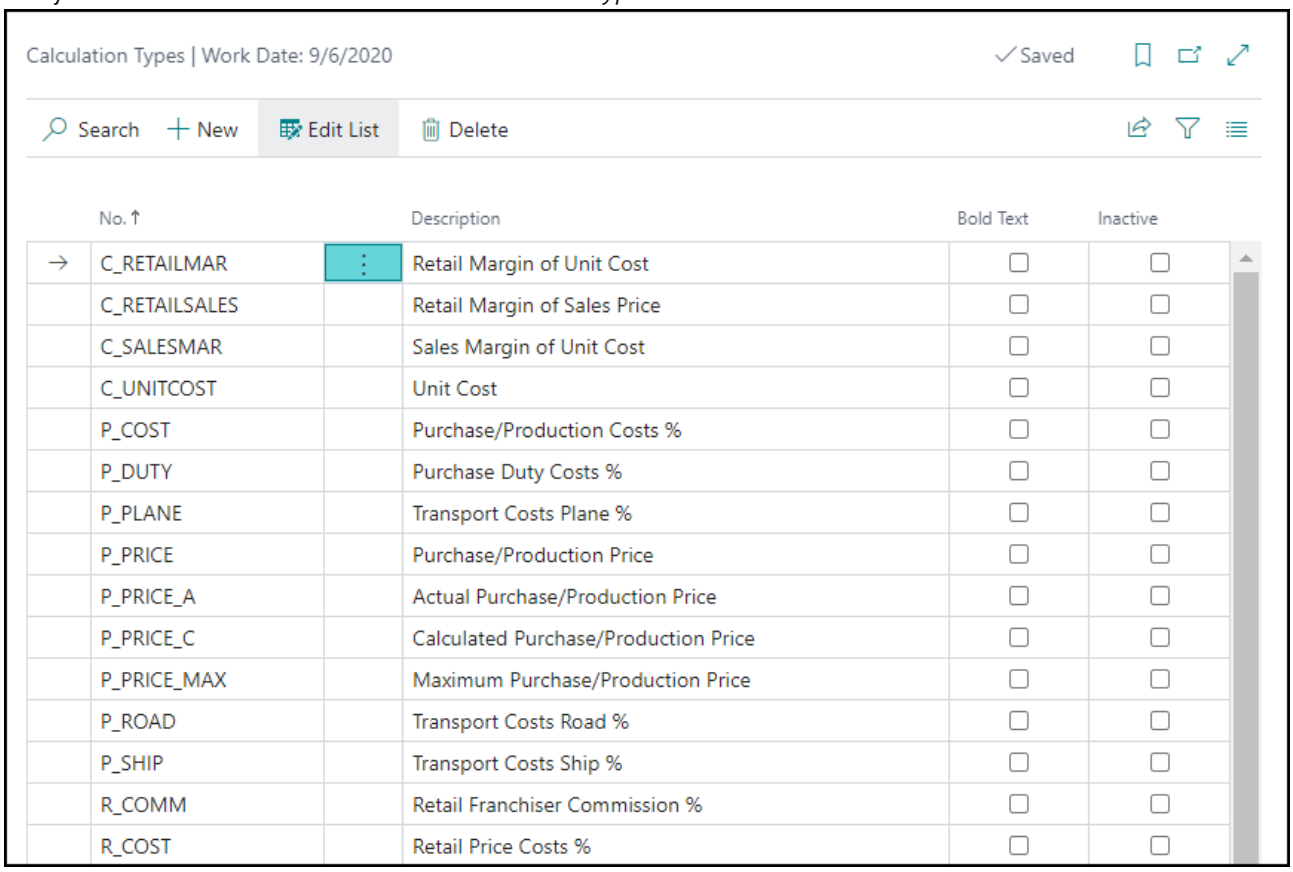
Calculation Types

The **Calculation Types** are the Types of Costs or Prices that can be used in the Lines of your Templates and Calculations.
They can be maintained via **Search** *Calculation Types.*



No.	Description	Bold Text	Inactive
C_RETAILMAR	Retail Margin of Unit Cost	☐	☐
C_RETAILSALES	Retail Margin of Sales Price	☐	☐
C_SALESMAR	Sales Margin of Unit Cost	☐	☐
C_UNITCOST	Unit Cost	☐	☐
P_COST	Purchase/Production Costs %	☐	☐
P_DUTY	Purchase Duty Costs %	☐	☐
P_PLANE	Transport Costs Plane %	☐	☐
P_PRICE	Purchase/Production Price	☐	☐
P_PRICE_A	Actual Purchase/Production Price	☐	☐
P_PRICE_C	Calculated Purchase/Production Price	☐	☐
P_PRICE_MAX	Maximum Purchase/Production Price	☐	☐
P_ROAD	Transport Costs Road %	☐	☐
P_SHIP	Transport Costs Ship %	☐	☐
R_COMM	Retail Franchiser Commission %	☐	☐
R_COST	Retail Price Costs %	☐	☐

Description of the Fields:

Name

The mandatory **Name** for the **Calculation Type.**
The **Name** cannot contain spaces or the characters - + / [ ] , . | & { } # ! ^ ~ @

Description

Description for this **Calculation Type** that will be shown on the Lines of a Template or Calculation.

Bold Text

A checkmark in this Field will show the complete Line in the Template **Bold**.
In a Calculation only the **Type**, **Calculation Type** and **Description** will be shown **Bold** – the Columns will only be shown **Bold** if that is mentioned in the properties of the Column, see Properties (Shift+F7)

NOTE
It is also possible to create new **Calculation Types** directly when you need them in a Template.
If you enter a **Type** in a Line of a Template, which is not in the Table **Calculation Types** yet, the system will ask you if you want to create this Type.
Therefore, it is easier to create new Calculation Types while you are creating a new Template.

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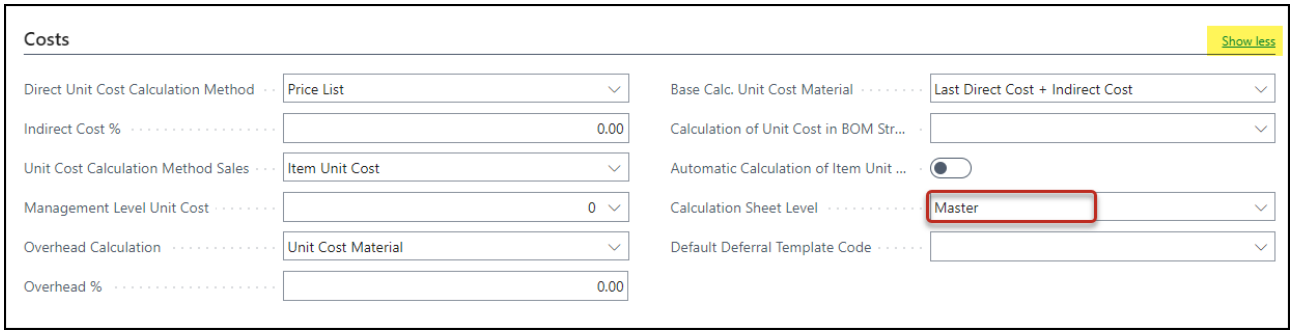
Master

In the Master Card, you can set the **Calculation Sheet Level** in the FastTab ***Costs*** (after clicking ***Show more***):

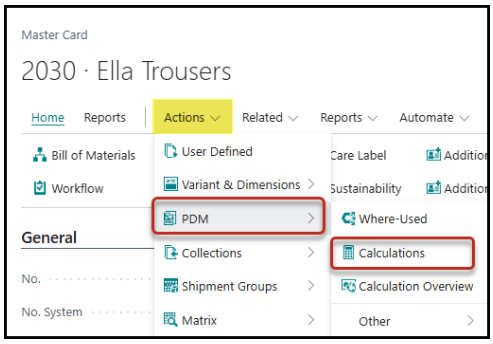


This Field determines if the Calculation(s) for this Master will be on Master- or Item level.
Default is *Master*.

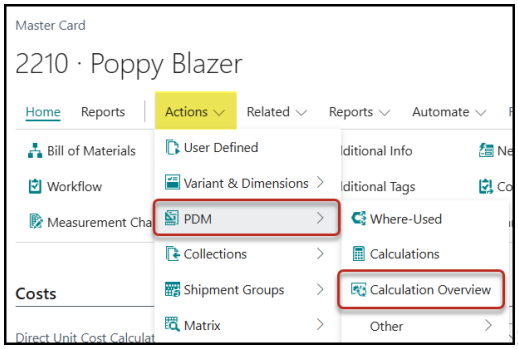
If set to *Item* – when viewing the ***Calculation Overview*** in the Master List or Master Card, it will only show the Calculations of **Relation Type** *Items* that are related to the Master.
If set to *Master* – when viewing the ***Calculation Overview*** in the Master List or Master Card, it will only show the Calculations of **Relation Type** *Master*.

If the **Calculation Overview** is called via a Collection, only the Masters/Items that are active in the Collection will be shown.
If the **Calculation Overview** is called via a Shipment Group, only the Masters/Items that are active in the Shipment Group will be shown.
If the **Calculation Overview** is called via a Category, only the Masters/Items that are active in the Category will be shown.

Also, when viewing the ***Calculations*** (via ***Actions, PDM, Calculations***) it will show all Calculations related to the Master and/or related to the Items that are based on the Master.



However, the ***Actions, PDM, Calculation Overview*** will make a difference.



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I.e., based on the following Calculations:

Calculation List

+ New | Manage | More options

Locked	Expired	No. ↑	Version No.	Description	Calculation Template
No	☐	2210	1	Poppy Blazer	PSR_S
No	☐	22102010	1	Poppy Blazer Blue Stripe,10	PSR_S
No	☐	22102504	1	Poppy Blazer Navy,4	PSR_S

The **Calculation Overview** (via Master Card of *2210*) with **Calculation Sheet Level** = *Item*

Calculation Overview

Calculation Sheet Level = Item

Calculation | Next Overview Setup | More options

General

Called from: Master
Specified for:
More Templates Used: ◉

Calculation Template Filter: PSR_S
Overview Setup: ALL

Exist	No. ↑	Specification Level ↑	Specified for ↑	Version No. ↑	Description	Status Code	Brand Code	Season Code	Design
☑	22102010	None		1	Poppy Blazer Blue Stripe,10		FASHION	03-FALL	5
☑	22102504	None		1	Poppy Blazer Navy,4		FASHION	03-FALL	5

The **Calculation Overview** (via Master Card of *2210*) with **Calculation Sheet Level** = *Master*

Calculation Overview

Calculation Sheet Level = Master

Calculation | Next Overview Setup | More options

General

Called from: Master
Specified for:
More Templates Used: ○

Calculation Template Filter: PSR_S
Overview Setup: ALL

Exist	No. ↑	Specification Level ↑	Specified for ↑	Version No. ↑	Description	Status Code	Brand Code	Season Code	Design	Item Group	Gen
☑	2210	None		1	Poppy Blazer		FASHIO...	03-FALL	5	140	1

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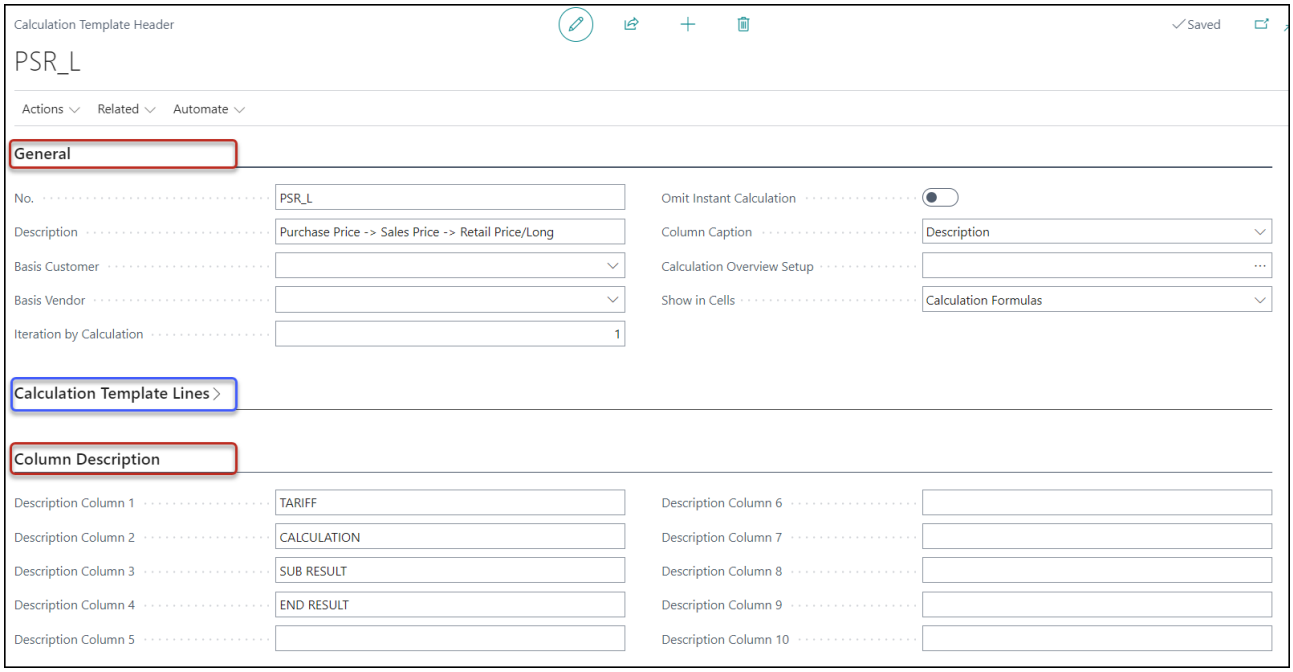
Templates

The **Template** is the basis for a Calculation. Therefore, you need to create the Template as the first step in building your Calculations. Once the Template has been created, it is quite easy to create numerous Calculations based on the Template.
You can find the Templates via **Search** *Calculation Templates*
The Header of the Template has two FastTabs; the ***General*** FastTab containing the No. of the Template etc. and the ***Column Description*** FastTab where you can set up Descriptions for the Columns that you can use in this Template.



FastTab General

Description of the Fields:

No.

The mandatory number (code) for the Template.

Description

Description of this Template.

Basis Customer

Here you can enter a **Customer No.** This Customer No. will be used in the related Calculations if it runs a function (Formula) that can be called by a specific Customer No., for instance if you want the program to calculate a specific Customer specific Sales Price.

Basis Vendor

Here you can enter a **Vendor No.** This Vendor No. will be used in the related Calculations if it runs a function (Formula) that can be called by a specific Vendor No., for instance if you want the program to calculate a Vendor specific Purchase Price.

Iteration Formula Calculation

Here you can set up the number of times you want a Calculation (based on the current Template) to be iterated. If the Value is set to *1*, the calculation will be performed twice.

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Omit Instant Calculation

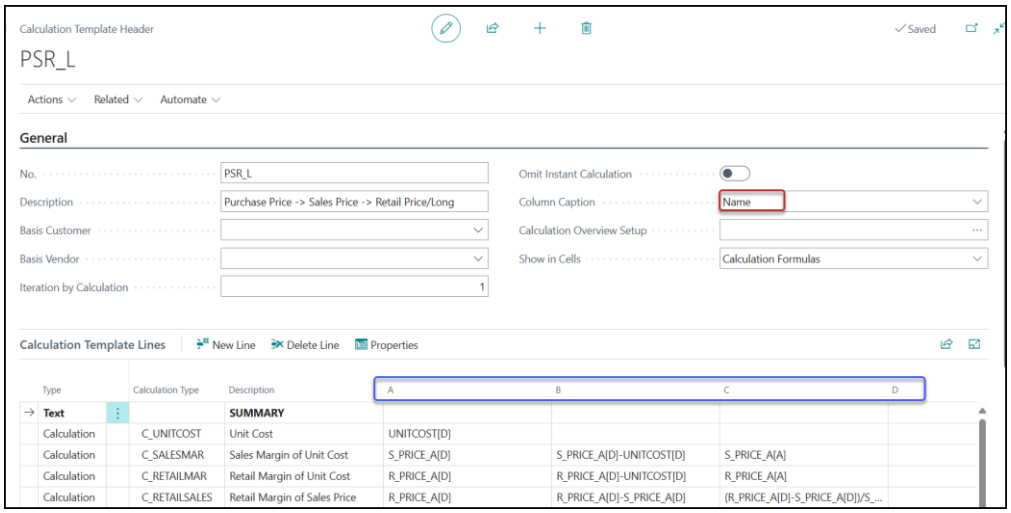
If you change the Lines in a Template, all the Calculations based on the Template will be recalculated automatically.
This can cause a problem if you have blocked Calculations so nothing can be changed anymore.
A checkmark in this Field makes sure that if you change the Lines of the Template, not all the related Calculations will be recalculated automatically.
Keep in mind that you then might have to recalculate the Calculations manually.

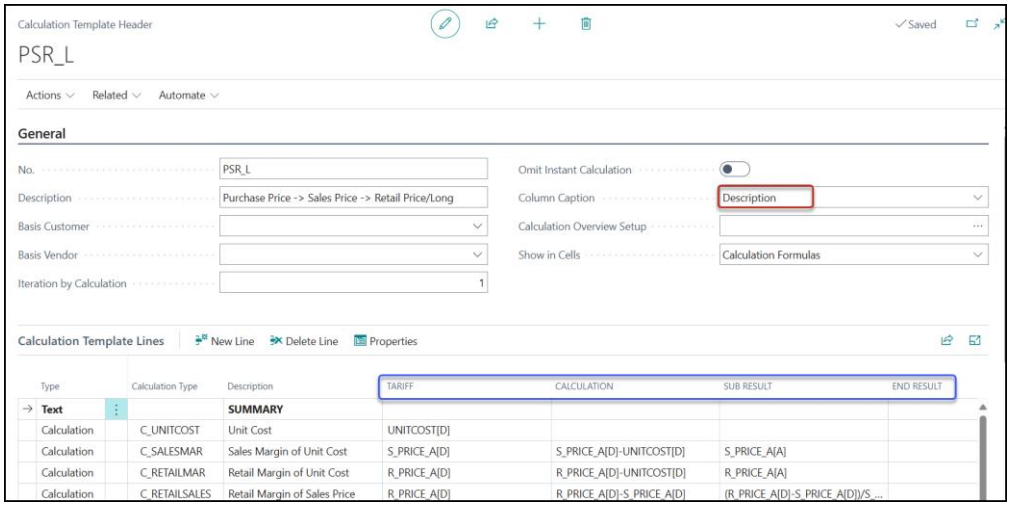
Column Caption

The content of this Field determines what is shown above the columns of the Template and the related Calculations.
You can choose between the following two options:

Name	This will show the Names above the Columns as you have entered in the Calculation Columns
Description	This will show the Description above the Columns as you have entered in the FastTab Column Description. If no Column Description has been filled, the Names of the Columns will be shown.

I.e.: Name vs. Description





NOTE
Even if you set the **Column Caption** to *Description,* you still need to use the **Name** of the columns, which was set in Calculation Columns, in the Formulas of the Template Cells.

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Calculation Overview Setup

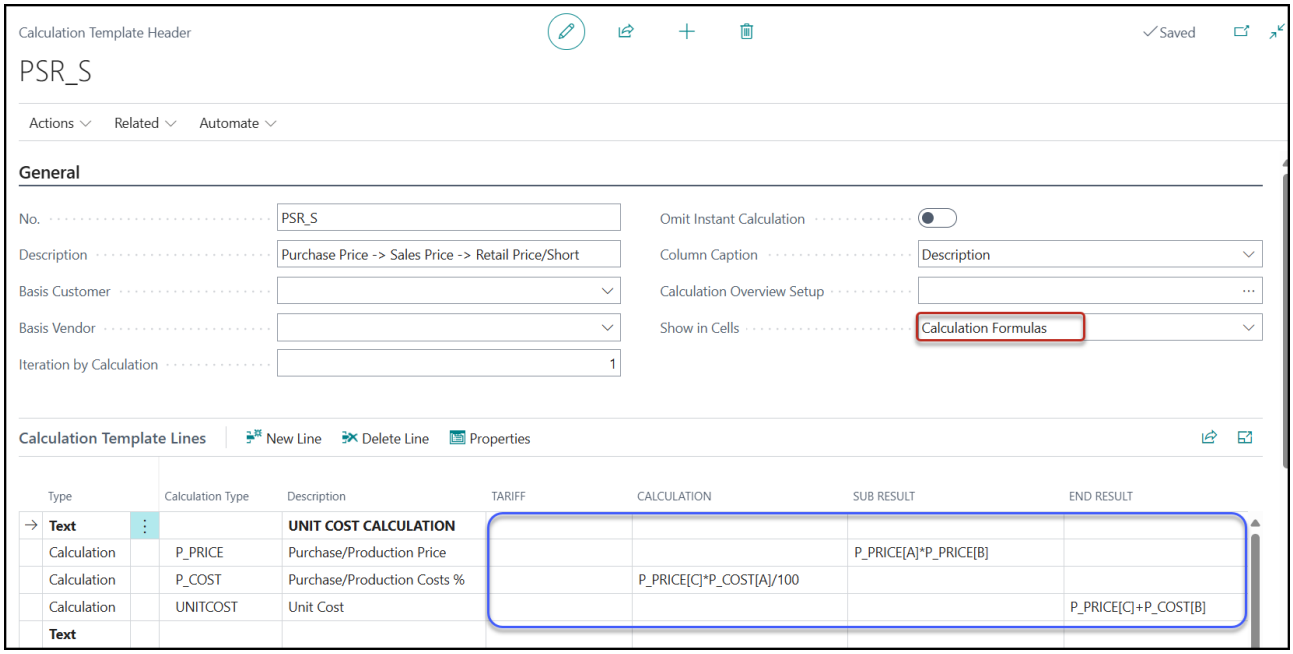
Here you can select a **Calculation Overview Setup** for which you want to enter the Column Numbers and Descriptions for a Calculation Overview if you select **Show in Cells** *Overview Columns.*
See Calculation Overview Setup for more details.

Show in Cells

The content of this Field determines what you will see in the Cells of the Template.
You can choose between the following three options:

Calculate Formulas	With this option, the content you enter/see in a Cell will be the Formulas for that specific Cell.
Get Value Formulas	With this option, the content you enter/see in a Cell will be the Formulas that will fill defaults in a new Calculation when created with this Template.
Overview Columns	With this option, the content you enter/see in a Cell will be the Columns for the specific Calculation Overview Setup that you have selected in **Calculation Overview Setup.**

I.e.: **Calculate Formula** shows the actual Formulas of the Cells.
More details in FastTab Calculation Template Lines (Lines)



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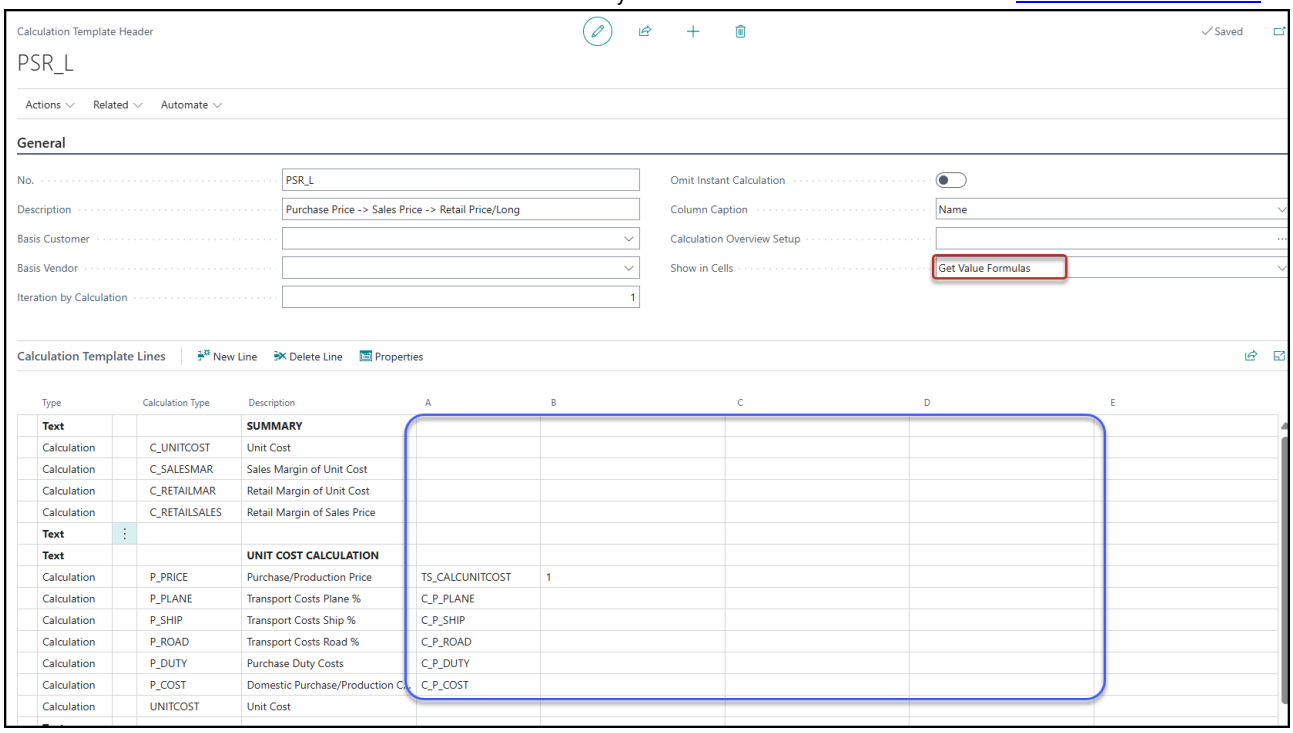
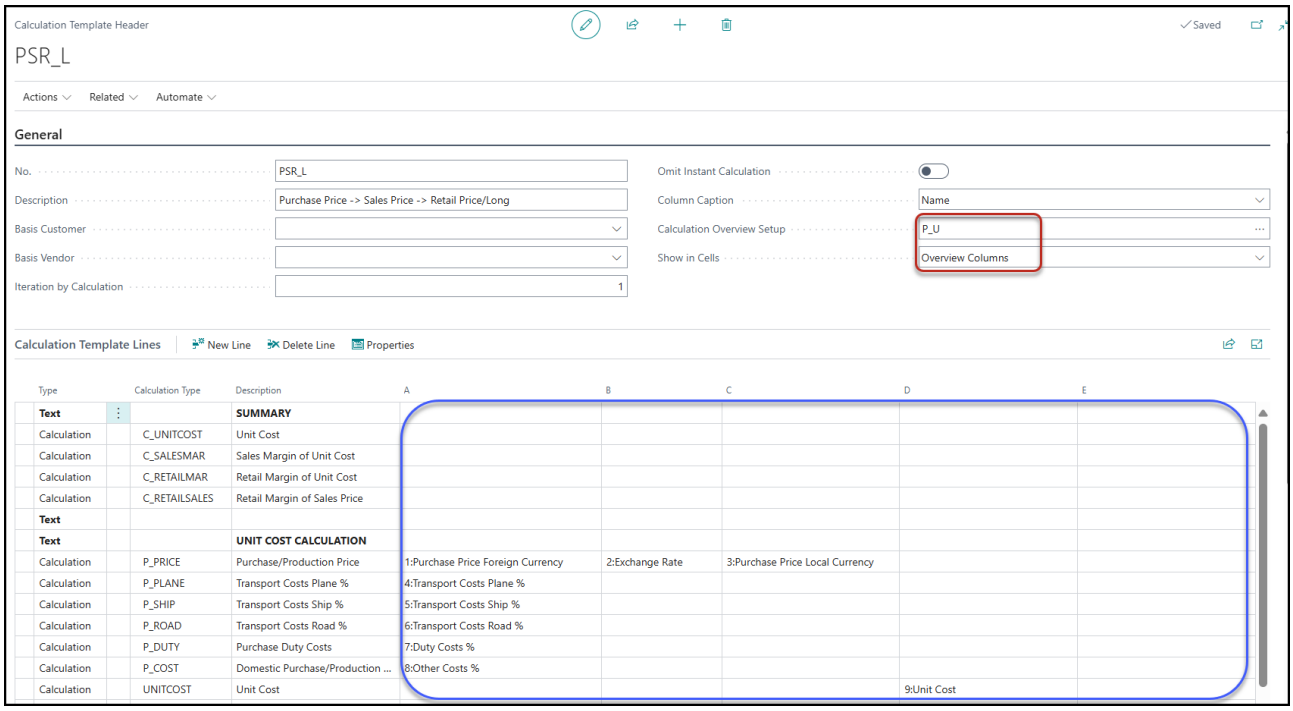
Get Value Formulas shows the Formulas that will automatically be executed when you create a new Calculation and therefore it can fill the defaults in your Calculation. More details in [Get Value Formulas]



Overview Columns will show you the Column Numbers and Names for a specific **Calculation Overview Setup.** More details in [Calculation Overview]



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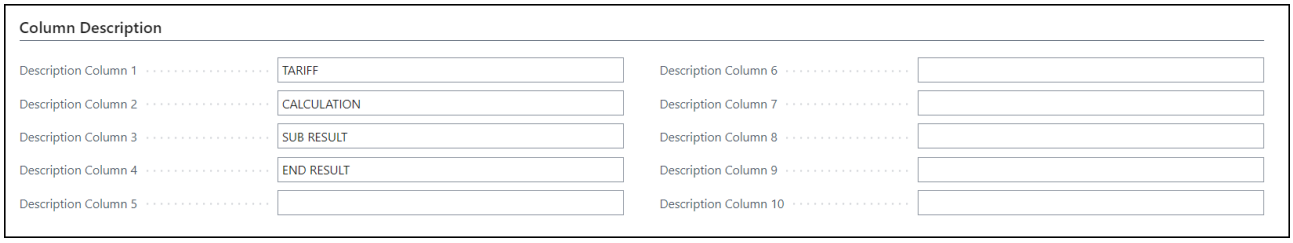
FastTab Column Description



Description of the Fields:

Description Column 1 – 10

Here you can enter a Description for the columns in your Template that will be shown if you select **Column Caption** *Description* in the Header of the Template.
I.e.: instead of seeing: *A, B, C, D* above the columns you could see *RATE, CALCULATION, SUB RESULT and END RESULT.*

NOTE
If you would delete a **Description Column 1 – 10** from a Template, it does not delete the content of the related Field in Table ***6037044 Calculation Line.*** It will only change the name of the Column in the FastTab ***Calculation Template Lines.***

FastTab Lines

The Lines are built similarly to an Excel Sheet.

When you have entered the **Description Column 1 – 10** into the FastTab ***Column Captions*** and filled the **Types**, **Calculation Types** and **Descriptions** on the Lines, the Columns (up to 10) and Lines of the Template will form a matrix of Cells in which you can create your Formulas.

You can make a lookup (press **Alt+PageDown**) from the Cell to open the **Calculation Formulas** page.
When a Cell contains connected Formulas, it will show the first Formula Line including both Expression and Condition.
In case of more than one Formula Lines, the message <*more formula lines*> will also appear.
In case the Formula Lines contain Conditions, the message <*condition*> will also appear.

For each Line, it is possible to open the Line **Properties** where you can set several Properties for the Line.

If you want to create a new Formula Line, the Field of **Result** will by default contain the Name of the Cell from which you opened the **Calculation Formulas** page.

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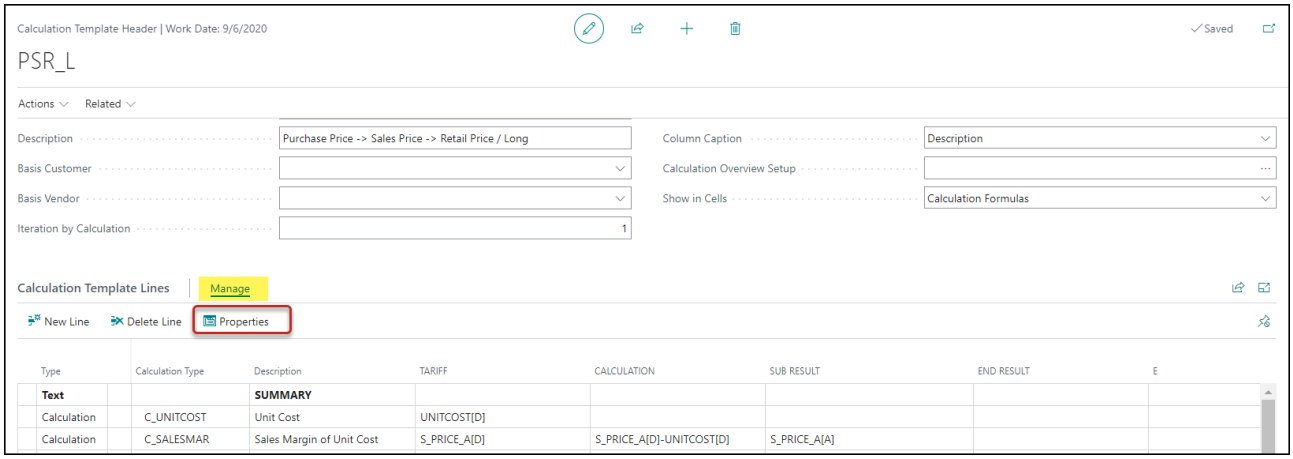


Description of the Fields:

Type

In this Field, you can choose what kind of Line it will be:
You can choose between the following two options:

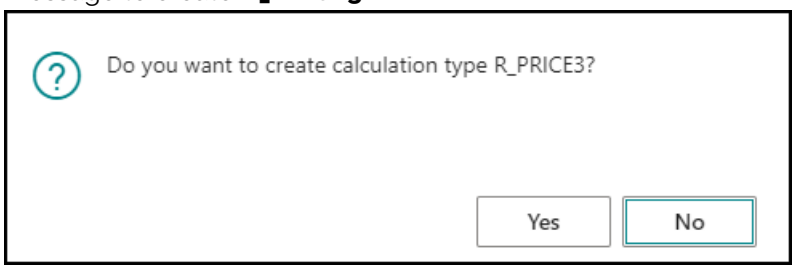
Text	You can use the *Text* Type as a Headline or break in all the Lines. If the Value is *Text*, you can simply enter a **Description** for the Headline.
Calculation	If the Value is ***Calculation***, the **Calculation Type** is linked to the Table ***6037042 - Calculation Type***. This means that the Calculation Type can be filled with a Value from the Calculation Type table. The **Description** will then automatically be filled with the **Description** from the Calculation Type table.

Calculation Type

Based on the content of **Type** you can enter a **Calculation Type** as mentioned in Calculation Types or you can keep this Field empty when the **Type** is set to *Text*.

If you enter a **Calculation Type** that is not yet created in the underlying Table, the system will ask you if you want to create it. This makes creating new Templates much easier and quicker.

I.e., if you enter **R_PRICE3,** which is not available in the **Calculation Types** Table**,** you get the following message to create **R_PRICE3:**



NOTE
Be aware that if you enter a wrong Calculation Type, you will also get this message!

Description

The Description of the **Calculation Type** Field will be shown, but you can change the Description.

1. – 10. Column

Ten columns are available per Line.

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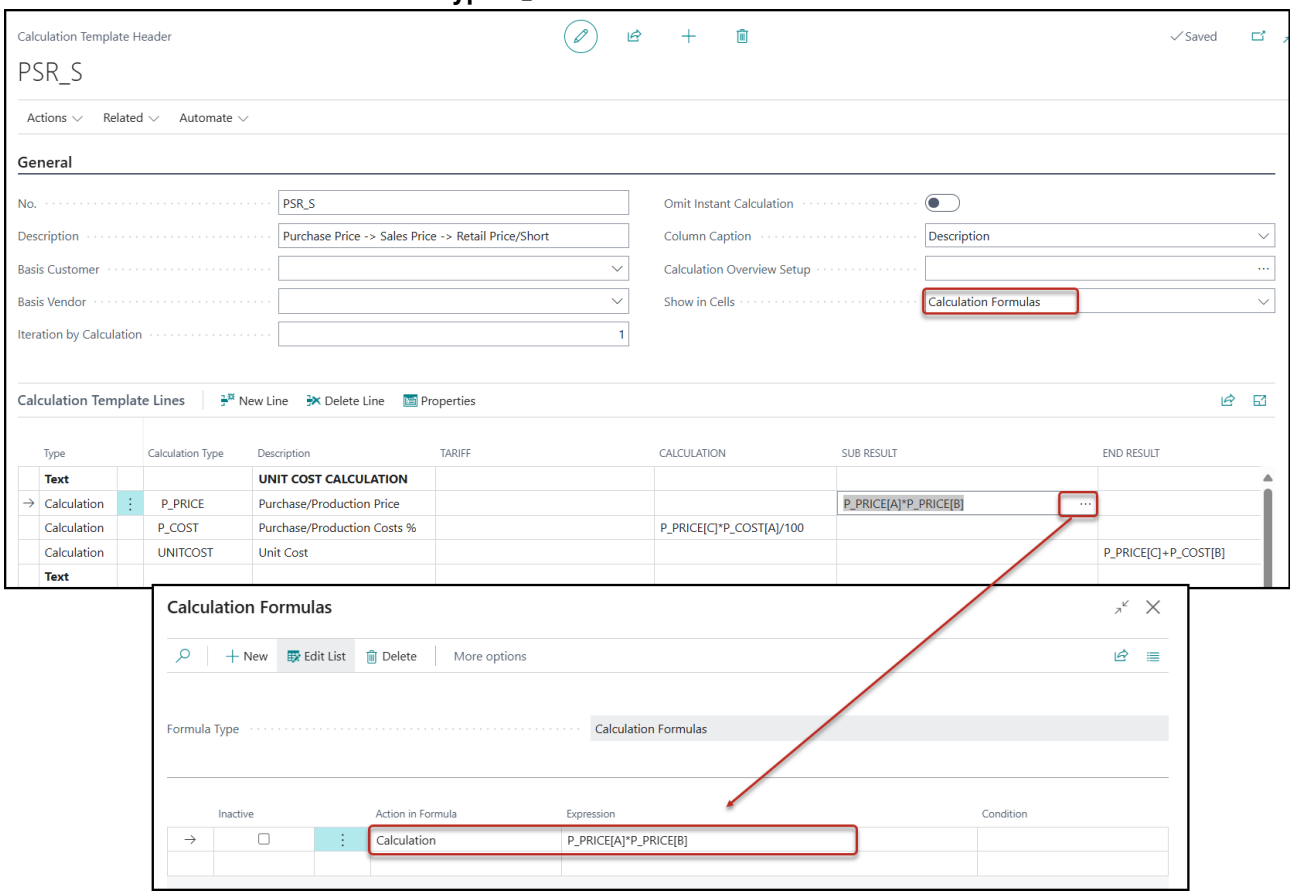
Five are shown by default. The Headline of each Column is defined based on the **Column Description** in the FastTab ***General*** and the **Description Column 1 – 10** in the FastTab ***Column Description***.
In the Columns, you can enter the Formulas (via a lookup in the **Calculation Formulas**) to determine how a Value must be calculated in a Calculation Cell. You can make use of the **Calculation Type** codes of the different Lines and the Names of the Columns that you entered in the **Calculation Columns**.

I.e., *P_PRICE[A]*P+PRICE[B]:*
The Column *C (SUB RESULT)* of the **Calculation Type** *P_PRICE* is calculated based on the content of the Column *A (TARIFF)* of the **Calculation Type** *P_PRICE* multiplied by the content of the Column *B (CALCULATION)* of the **Calculation Type** *P_PRICE*.



NOTE
Keep in mind that if you use Formulas you need to use the original **Names** of the Columns as you entered in the Table described in Calculation Columns.
Do not use the **Column Descriptions 1 – 10** of the Formulas! They are only Captions.

How to create Formulas and all its possibilities can be read in the ***White Paper – Formulas*** and will not be explained in this White Paper.
You cannot simply enter a Formula in the Cell, you need to drill-down to the **Calculation Formulas** page to create the Formula for that specific Cell.

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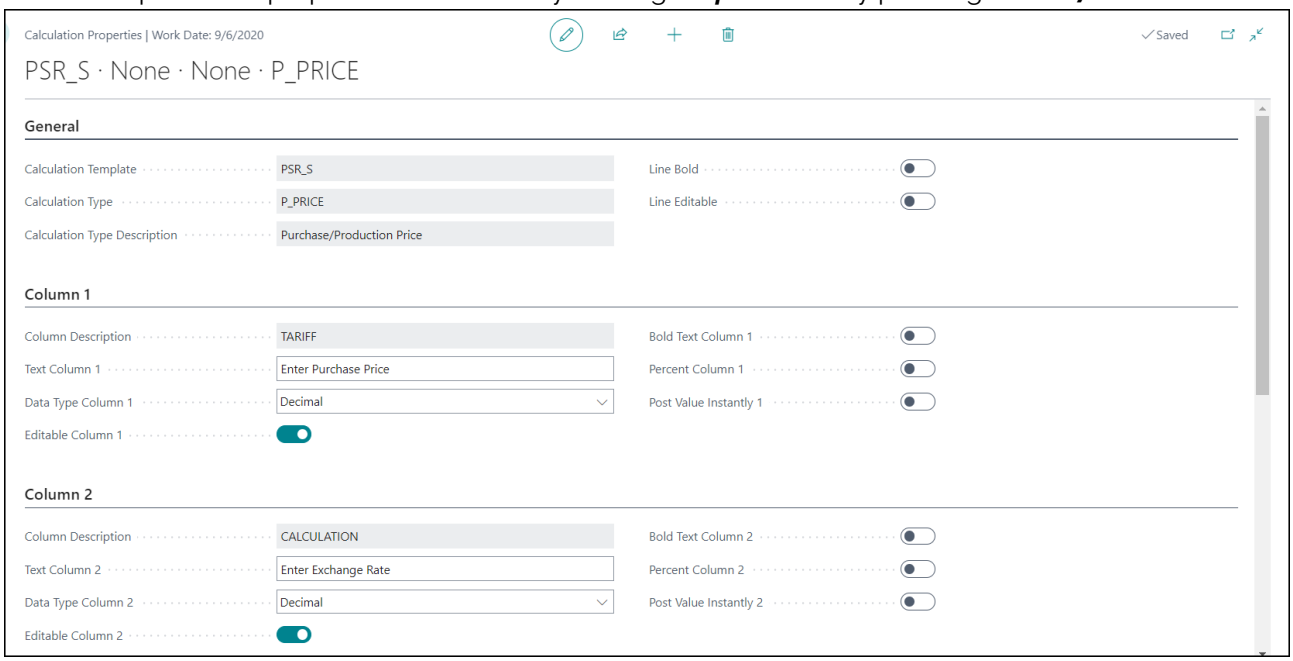
Properties of the Lines (Shift+F7)

For each Template Line of **Type** *Calculation,* it is possible to select **Properties**, to enhance the usability of the Template. The properties are shown by clicking ***Properties*** or by pressing **Shift+F7**.



There are also FastTabs for the *Column 3 - 10*

Description of the Fields FastTab General

Calculation Template

This is the **No.** of the Template for which you can change the Properties.

Calculation Type

This is the **Calculation Type** for which you can change the Properties.

Calculation Type Description

This is the **Description** of the Template Line.

Line Bold

With a checkmark in this Field, you can decide that all the Columns of the Line will be shown **Bold.**

Line Editable

With a checkmark in this Field, you can decide that all the Columns of this Line will be **Editable.**

NOTE
You can also set **Bold** or **Editable** for the specific Columns of this specific Line in the Fields of the FastTabs ***Column 1 – 10***

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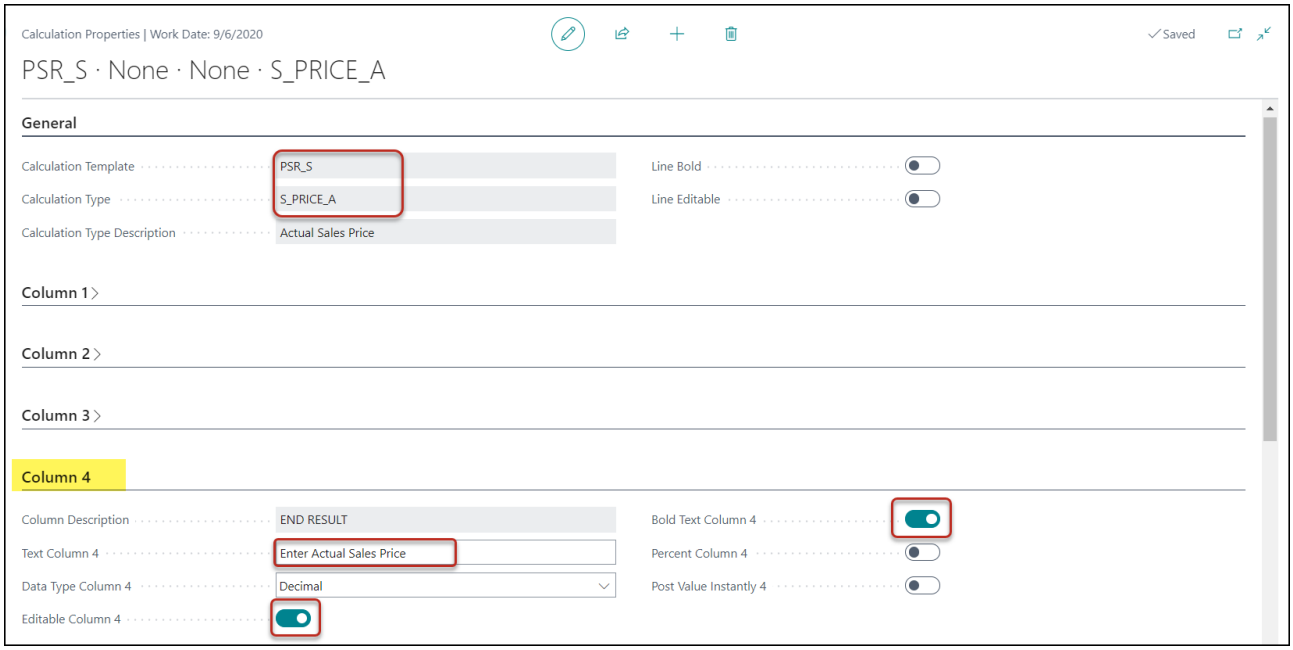
Description of the Fields FastTabs Column 1 – 10

Column Description

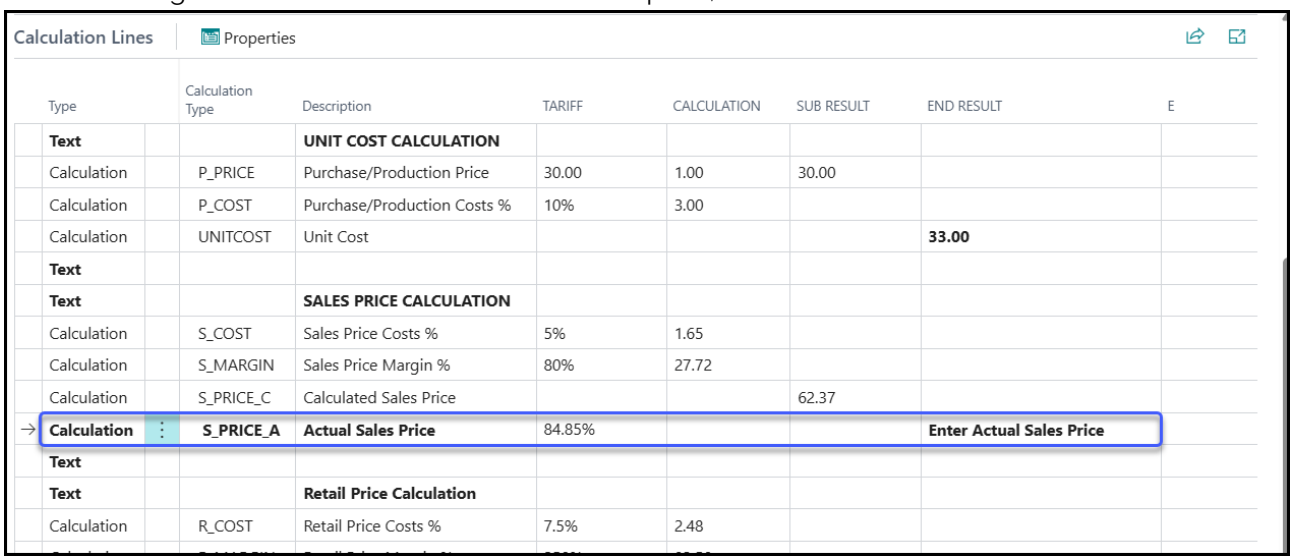
Shows the **Description Column Caption 1 – 10.** These Fields cannot be changed. They come from the content of the FastTab **Column Description** of the Template.

Text

In this Field, a **Text** can be entered. The **Text** can be used to guide the user of the Calculation in entering the correct Value into the Cell. Once a Value is entered into a Cell of the Calculation, the Text will no longer be shown in the Cell of the Calculation.
I.e.



When creating a new Calculation based on this Template, it will look like:



Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT	E
Text		**UNIT COST CALCULATION**					
Calculation	P_PRICE	Purchase/Production Price	30.00	1.00	30.00		
Calculation	P_COST	Purchase/Production Costs %	10%	3.00			
Calculation	UNITCOST	Unit Cost				**33.00**	
Text							
Text		**SALES PRICE CALCULATION**					
Calculation	S_COST	Sales Price Costs %	5%	1.65			
Calculation	S_MARGIN	Sales Price Margin %	80%	27.72			
Calculation	S_PRICE_C	Calculated Sales Price			62.37		
Calculation	**S_PRICE_A**	**Actual Sales Price**	84.85%			**Enter Actual Sales Price**	
Text							
Text		**Retail Price Calculation**					
Calculation	R_COST	Retail Price Costs %	7.5%	2.48			

NOTE
You do not see the Text in the Cells of the Template: only in the Cells of the Calculation that has been created based on this Template and only until a Value has been entered in the Cell.

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Data Type

The content of this Field is related to the **Calculation Type** but can be changed.
The normal *Decimal* Values of the Calculation will be written in the Fields 30 – 39 of the Table ***trm 6037044 Calculation Line.***
If you select *Text* Values, the system will automatically write it in the Fields 130 - 139 of the Table ***trm 6037044 Calculation Line.***
If you select *Date* Values, the system will automatically write it in the Fields 230 - 239 of the Table ***trm 6037044 Calculation Line.***
If you select *Time* Values, the system will automatically write it in the Fields 330 - 339 of the Table ***trm 6037044 Calculation Line.***

Editable

This property controls whether data in the Cell of the Calculation, based on the current Template, is editable and will overrule the setting of the **Line Editable** on the FastTab ***General*** for this specific Column.

Bold Text

This property controls whether data (text or Value) in the Cell of a Calculation based on the current Template will appear **Bold** and will overrule the setting of the **Line Bold** on the FastTab ***General*** for this specific Column**.**

Percent

This property controls whether the Value in the Cell of a Calculation based on the current Template appears as a percentage.
This checkmark will however have no influence on a Formula! For a Formula, the content of this specific column is simply a decimal, and you need to make sure that you do divide by *100*.

I.e.
If you enter *5* and the **Data Type** is *Decimal* and no checkmark in *Percent,* it will be shown as *5,00*
If you enter *5* and the **Data Type** is *Decimal* and checkmark in *Percent,* it will be shown as *5%*
But in the Formula, you still need to have i.e., PURCHASE[C]*PLANE[A]**/100.**

Post Value Instantly

This property controls whether the Value of this Cell in a Calculation should be posted instantly based on the **Formula by Post** of the Template.

NOTE
The **Properties** are connected to a **Template** (and a Calculation if you have changed the Properties in a Calculation Line) and a **Calculation Type;** therefore, it is not possible to have the same **Calculation Type** more than once taken into the Lines of the **Template.** You will even get an error message if you try.

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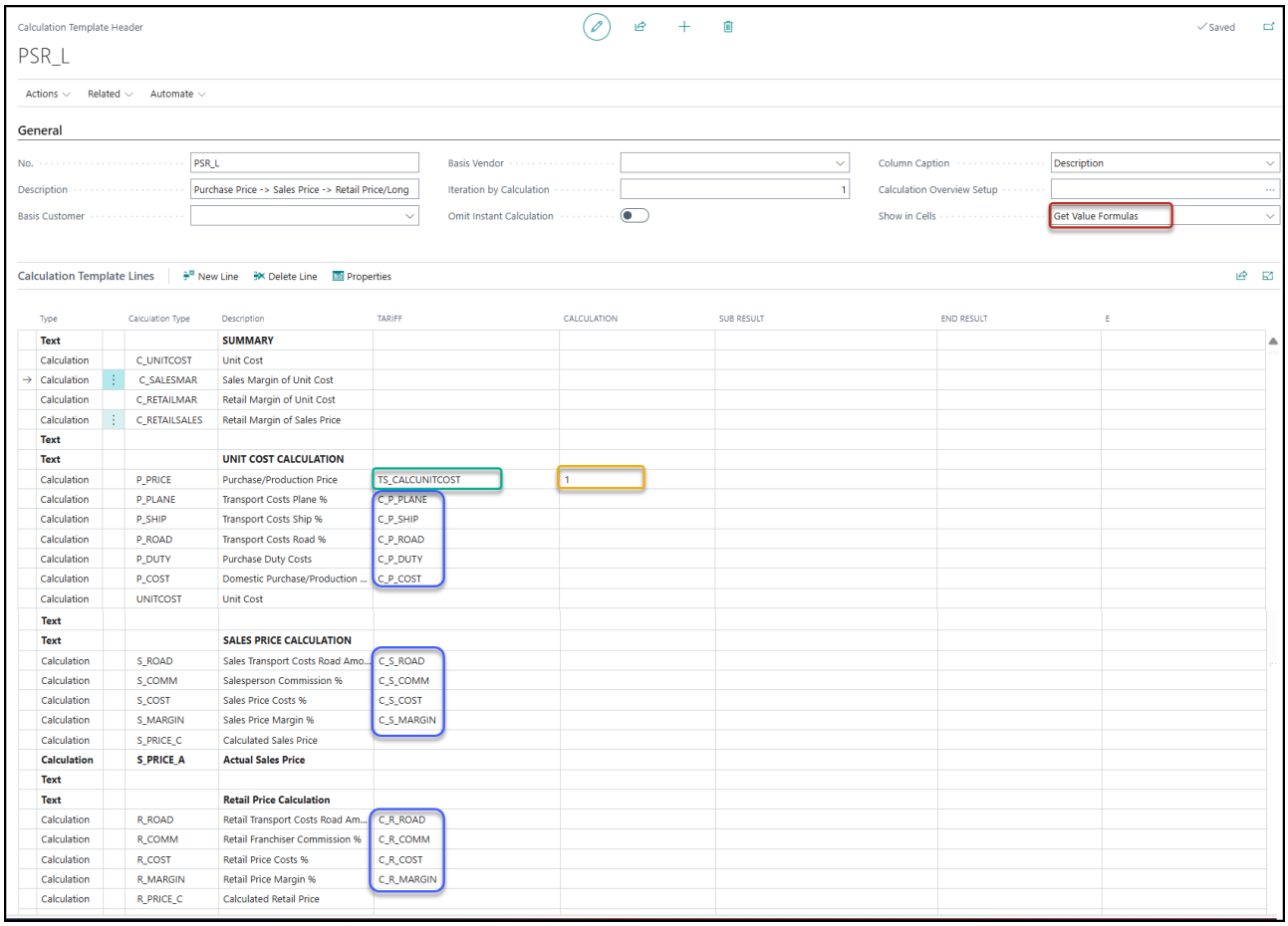
Show in Cells: Get Value Formulas

After you have created the **Calculation Types,** determined the **Properties** of the Lines, and created the Formulas for the Cells, you are also able to setup the default Values for the Cells.
Therefore, you need to select **Show in Cells** *Get Value Formulas* on the FastTab ***General.***
In that case, any Value or Formula entered in the Cells will be taken as default when you create a Calculation based on the current Template.
The content of the Cells (defaults) will also be taken when you use the Actions ***Recreate Calculations*** or ***Get Values and Calculate*** in a Calculation.
Therefore, these Formulas represent the defaults for your Calculation Cells.

I.e., the *Get Value Formulas* of the Template *PSR_L*



NOTE
TS_CALCUNITCOST that you see in the P_PRICE[A] Cell is a **TRIMIT Formula Function** to determine the Unit Cost of the Master/Item of the Calculation. (**Search** *Formula Function*)

In addition, you can see that for the Cell P_PRICE[B], there is a *1* entered, so simply a Decimal.
In addition, you can also see that for some Cells there is a connection to a **Formula Constant.**
I.e., press **Alt+PageDown** on the Cell **P_PLANE[A]** with *C_P_PLANE.*

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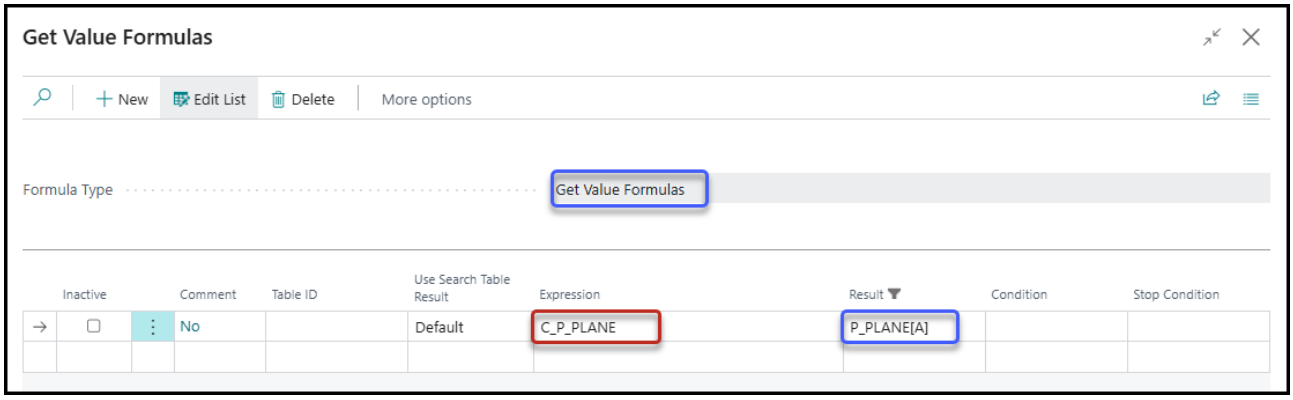
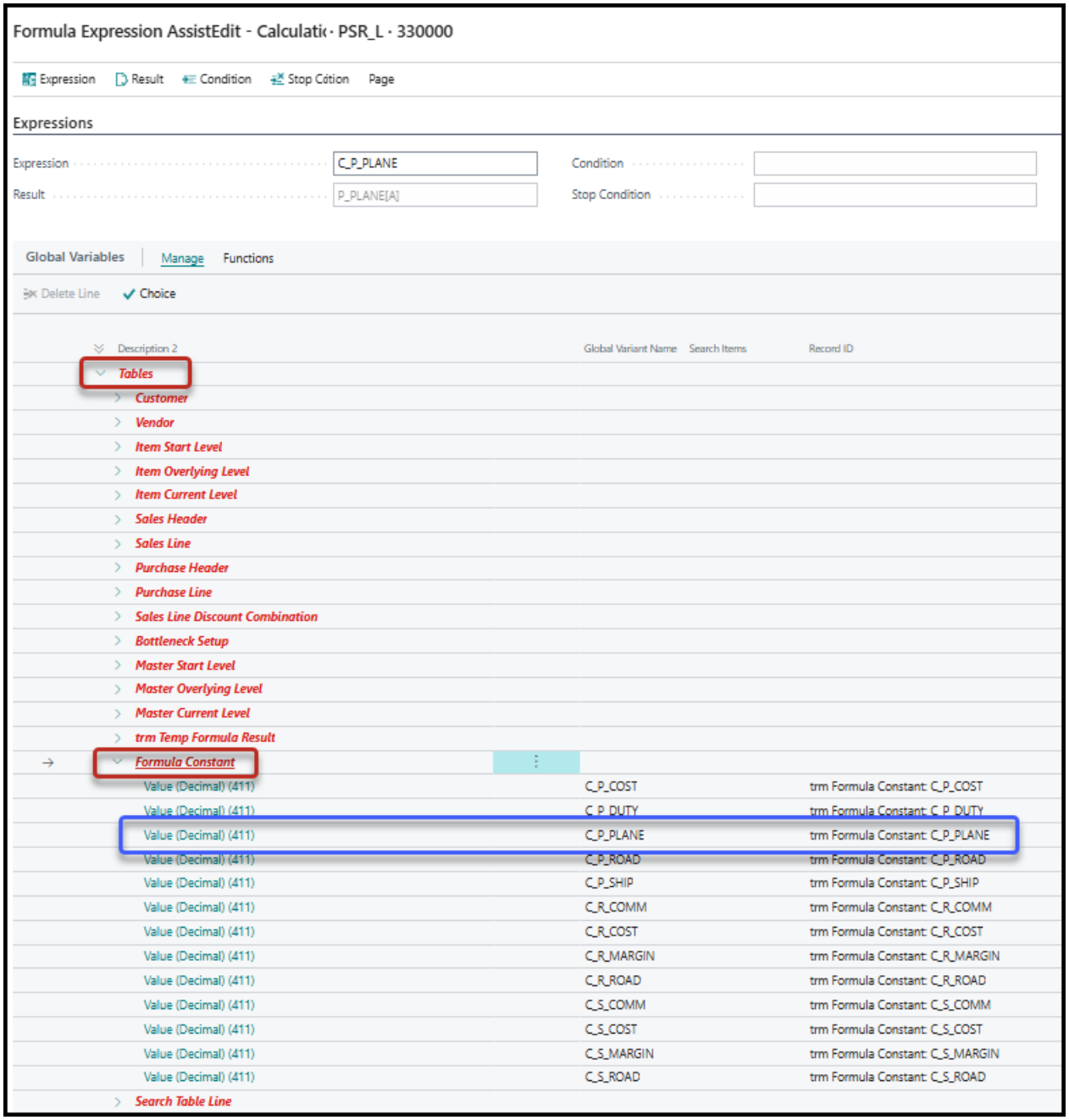


Now press **Alt+PageDown** in the Field **Expression** of the Formula with *C_P_PLANE*



Click on the ▷ before **Tables** and **Formula Constant** to see the list of the Formula Constants.

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This means that if a Calculation is generated based on the current Template, the Cell **P_PLANE[A]** will automatically be filled with the Value of the **Formula Constant** *C_P_PLANE*.
You can maintain the Formula Constants via **Search** *Constants.*

Constants

Name	Description	Value (Text)	Value (Integer)	Value (Big Integer)	Value (Decimal)	Value (Code)	Value (Date)	Value (Time)	Value (Bool...
C_P_COST	Other Purchase Costs %	Calculations P_COST	0	0	1.50				
C_P_DUTY	Purchase Duty	Calculations P_DUTY	0	0	12.00				
C_P_PLANE	Purchase Freight Charge for Plane %	Calculations P_PLANE	0	0	5.00				
C_P_ROAD	Purchase Freight Charge for Road %	Calculations P_ROAD	0	0	3.00				
C_P_SHIP	Purchase Freight Charge for Ship	Calculations P_SHIP	0	0	4.00				
C_R_COMM	Franchiser Commission %	Calculations R_COMM	0	0	5.00				
C_R_COST	Other Retail Costs %	Calculations R_COST	0	0	1.50				
C_R_MARGIN	Retail Price Margin %	Calculations R_MARGIN	0	0	250.00				
C_R_ROAD	Retail Freight Charge per Road Amount	Calculations R_ROAD	0	0	1.25				
C_S_COMM	Salesperson Commission %	Calculations S_COMM	0	0	2.00				
C_S_COST	Other Sales Costs %	Calculations S_COST	0	0	2.50				
C_S_MARGIN	Sales Price Margin %	Calculations S_MARGIN	0	0	80.00				
C_S_ROAD	Sales Freight Charge for Road Amount %	Calculations S_ROAD	0	0	1.25				

It might seem like double work to set up and use a **Constant** instead of entering a decimal in the Template Cell.
However, if you have about 20 Templates and a specific **Constant** need to change; you only need to change 1 Value in **Constants**, instead of changing a Formula in every Template.

Besides using a **Constant** for a Value, you can of course also use a hard Value in your Formulas.
I.e., the *Get Value Formulas* of the Template *PSR_S*

Calculation Template Header
PSR_S

General

No. PSR_S
Description Purchase Price -> Sales Price -> Retail Price/Short
Basis Customer
Basis Vendor
Iteration by Calculation 1
Omit Instant Calculation
Column Caption Description
Calculation Overview Setup
Show in Cells Get Value Formulas

Calculation Template Lines

Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT	E
Text		**UNIT COST CALCULATION**					
Calculation	P_PRICE	Purchase/Production Price	TS_CALCUNITCOST	1			
Calculation	P_COST	Purchase/Production Costs %	10				
Calculation	UNITCOST	Unit Cost					
Text							
Text		**SALES PRICE CALCULATION**					
Calculation	S_COST	Sales Price Costs %	5				
Calculation	S_MARGIN	Sales Price Margin %	80				
Calculation	S_PRICE_C	Calculated Sales Price					
Calculation	**S_PRICE_A**	**Actual Sales Price**					
Text							
Text		**Retail Price Calculation**					
Calculation	R_COST	Retail Price Costs %	7,5				
Calculation	R_MARGIN	Retail Price Margin %	250				
Calculation	R_PRICE_C	Calculated Retail Price					
Calculation	**R_PRICE_A**	**Actual Retail Price**					

In the previous picture you can see that for some Cells in the Template decimal Values have been set in the **Expression** of the corresponding Formula.
I.e.
80 for the **S_MARGIN[A]** *(TARIFF).*
Press **Alt+PageDown** in the Cell – this will open the **Calculation Formulas** with the **Formula Type** *Get Value Formulas* and show you the Formulas of this Cell:

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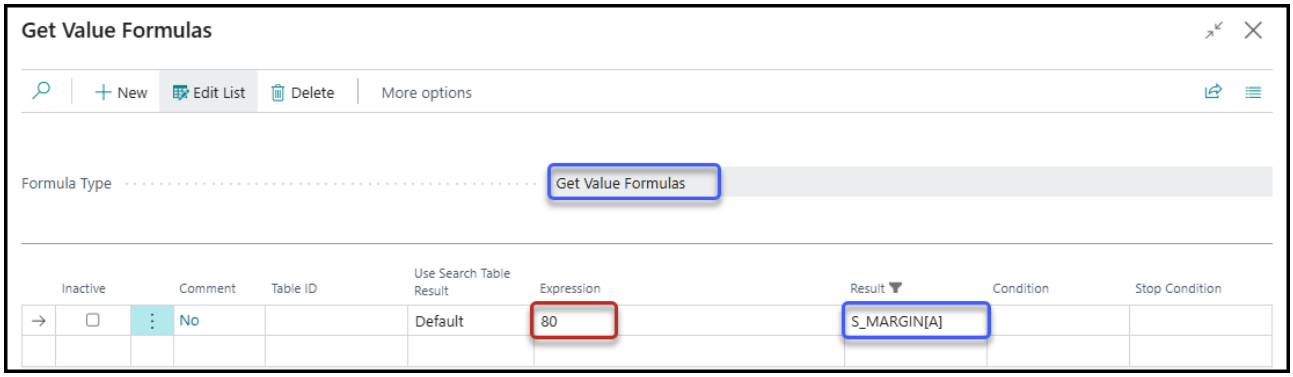
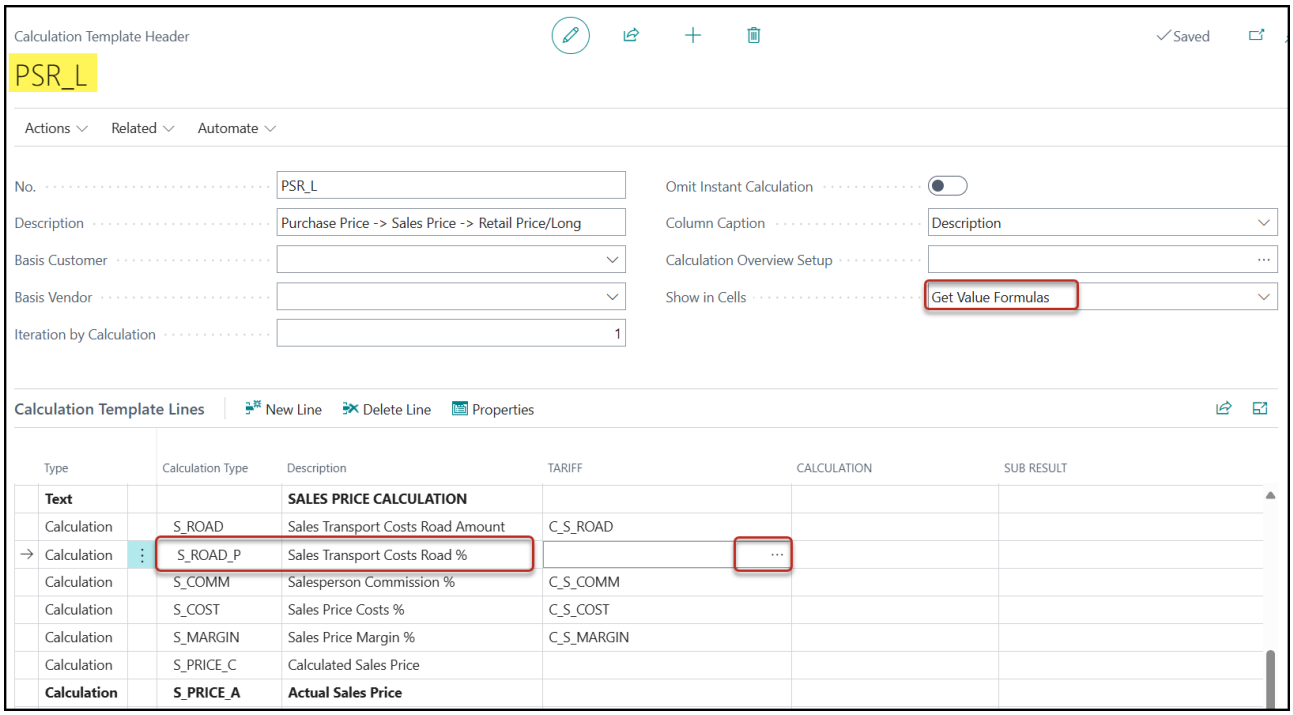


This means that if a Calculation is generated based on the current Template, the Cell **S_MARGIN[A]** will automatically be filled by the Value *80.*

Creating/Maintaining a new Get Value Formula

If you want to create/change a Formula for a Cell that needs to be executed when you create a Calculation, you need to press **Alt+PageDown** in the Cell of the Template.
This will open the page **Calculation Formulas,** and the Field **Result** will automatically be filled with the Name of the Cell where you were coming from.

I.e.: You want to have a default **Sales Transport Costs Road %** of *3,50* in every new Calculation that is based on the Template *PSR_L.*



Press **Alt+PageDown** in the Cell ***S_ROAD_P[A]*** *(TARIFF)***:**

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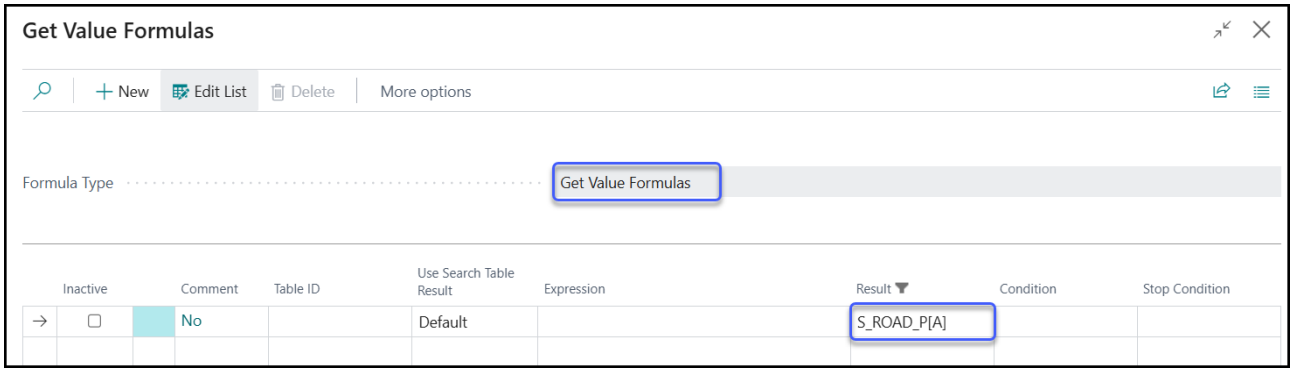
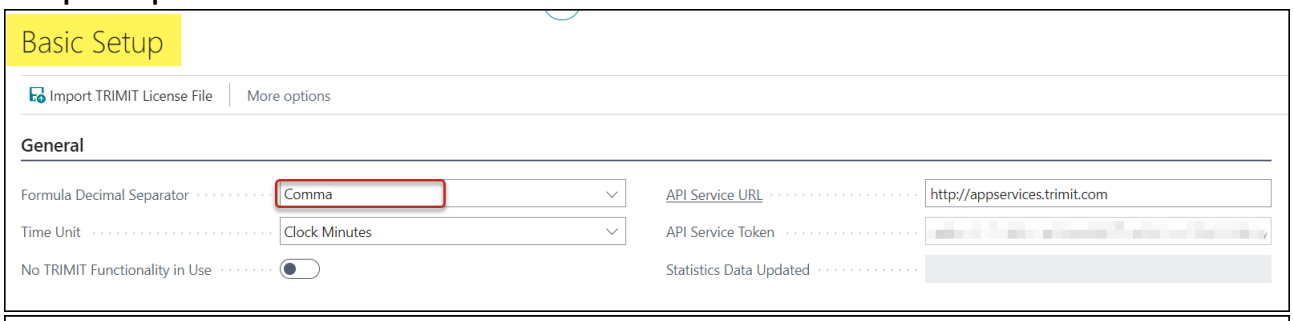
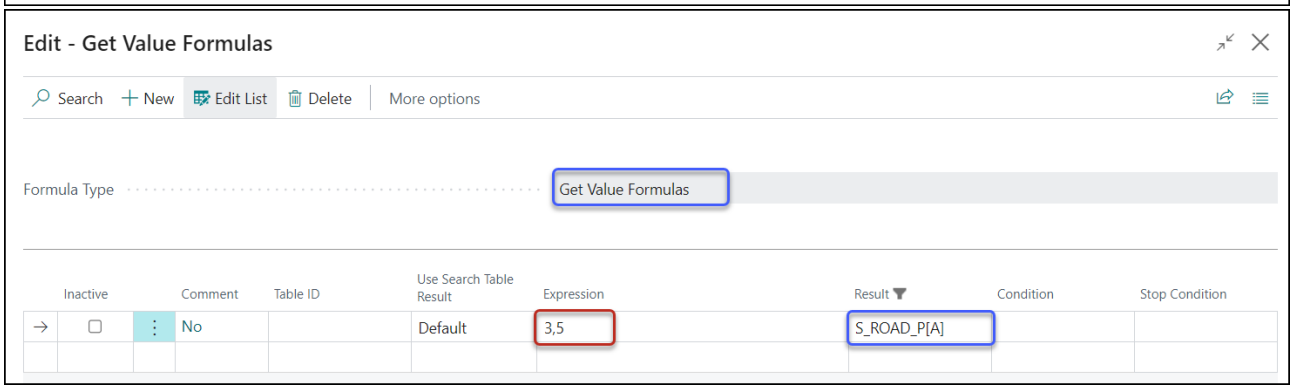


As you can see: **Result** = *S_ROAD_P[A]* (the Cell where you pressed **Alt+PageDown**)

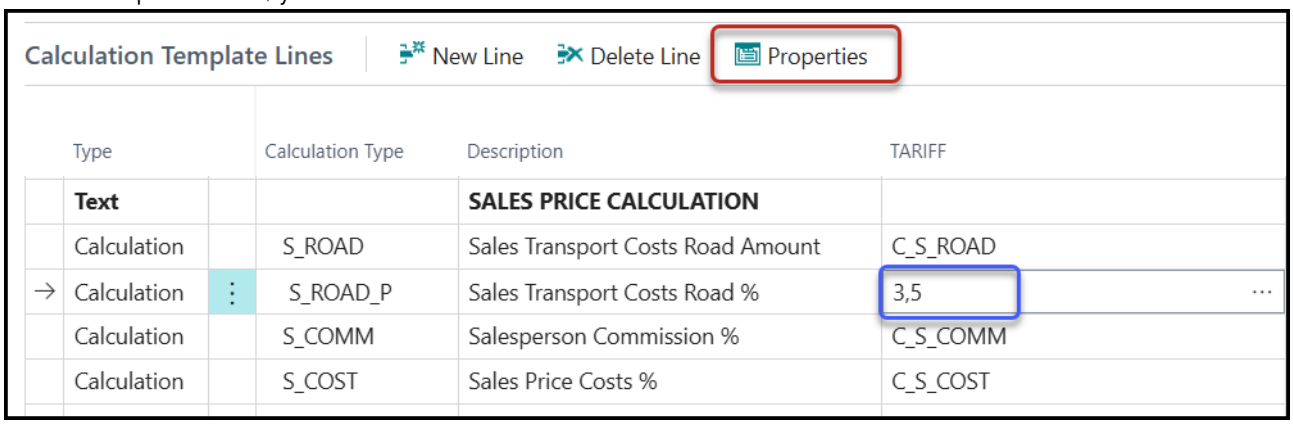
Now you can enter the Value *3,50* (or *3.50* depending on the **Formula Decimal Separator** in the **Basic Setup**) in **Expression** of the Formula.





Click **CLOSE**

In the Template itself, you now see:



In this example, the *3,5* represents a Percentage and in a Calculation, we want to be able to change it. Therefore, we need to change the **Properties** of this Line:

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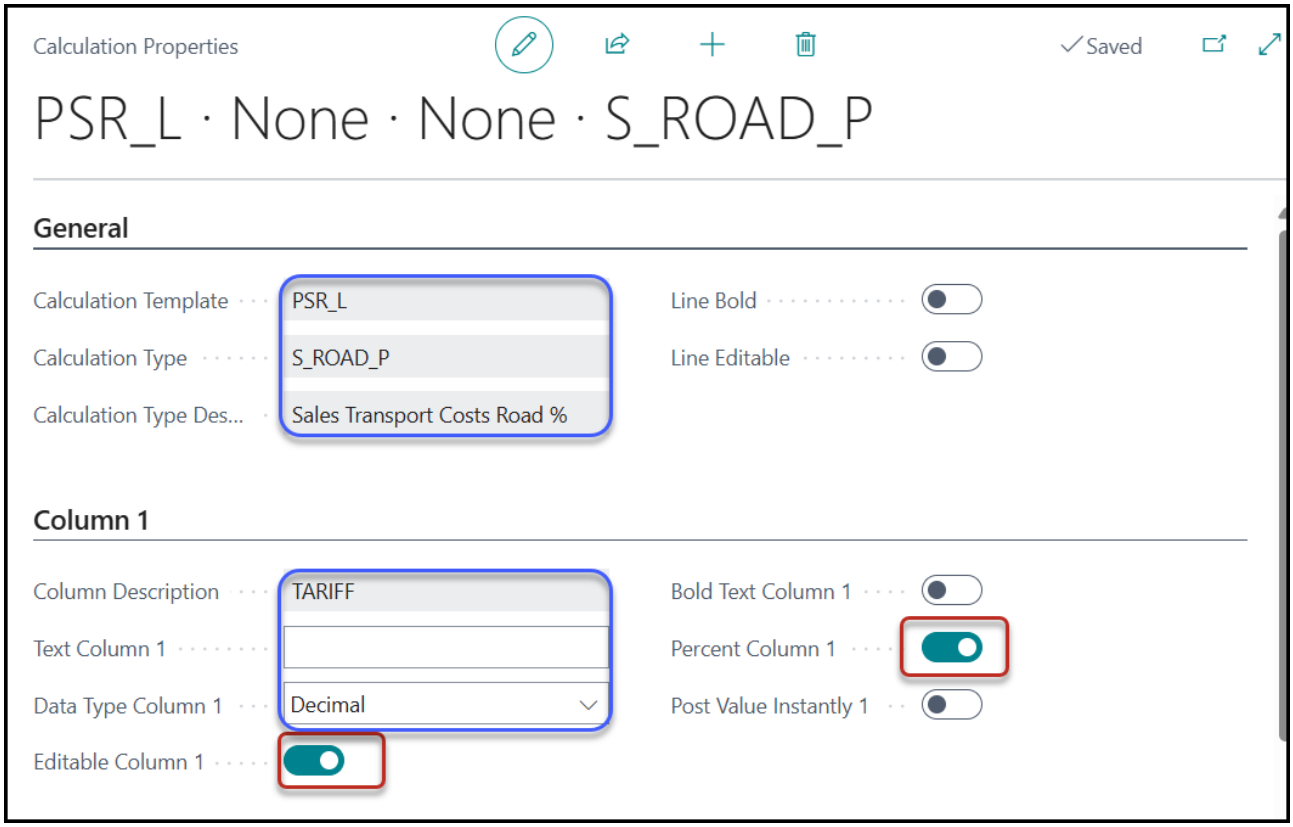

NOTE

It is not necessary to create a Formula Header first before you can create the Formula Lines.
This means that you will create new Formula Lines, for which no Formula Header will be present in the database.

NOTE for Developers

The link between the Type of the Formula Lines (*Calculation Formulas*, *Get Value Formulas* or *Formula by Post*) and the specific Cell in a Template or Calculation is via table ***6037215 Formula Connection***.
The Field **Formula Track** in this table is the same as in the corresponding Field in the Formula Lines.

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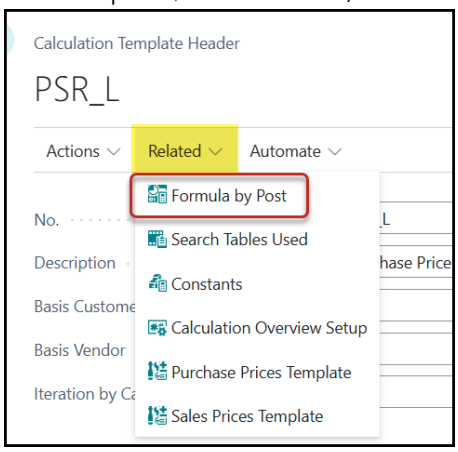
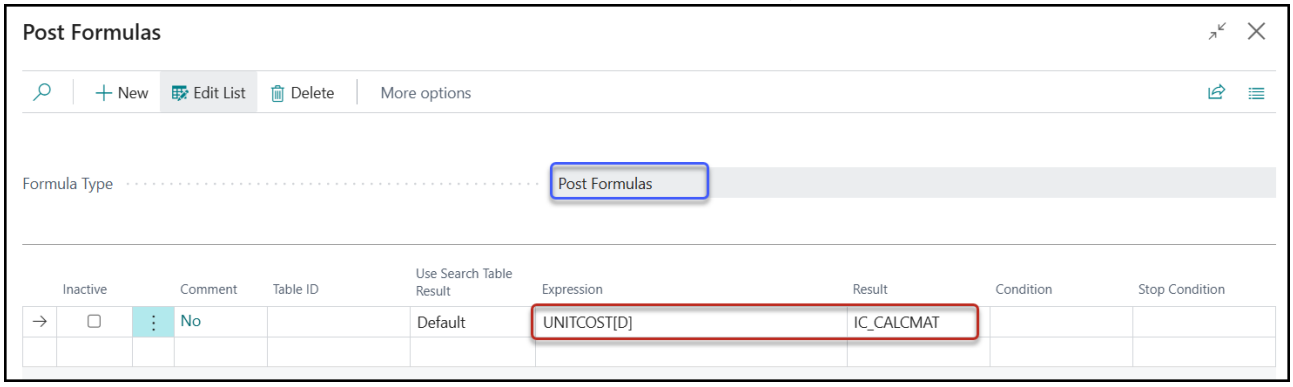
Related, Formula by Post

With **Formula by Post,** it is possible to create Formulas for the Post Values that should be taken from a Calculation and saved in the Database (i.e., Unit Cost).
In a Template, click ***Related, Formula by Post***

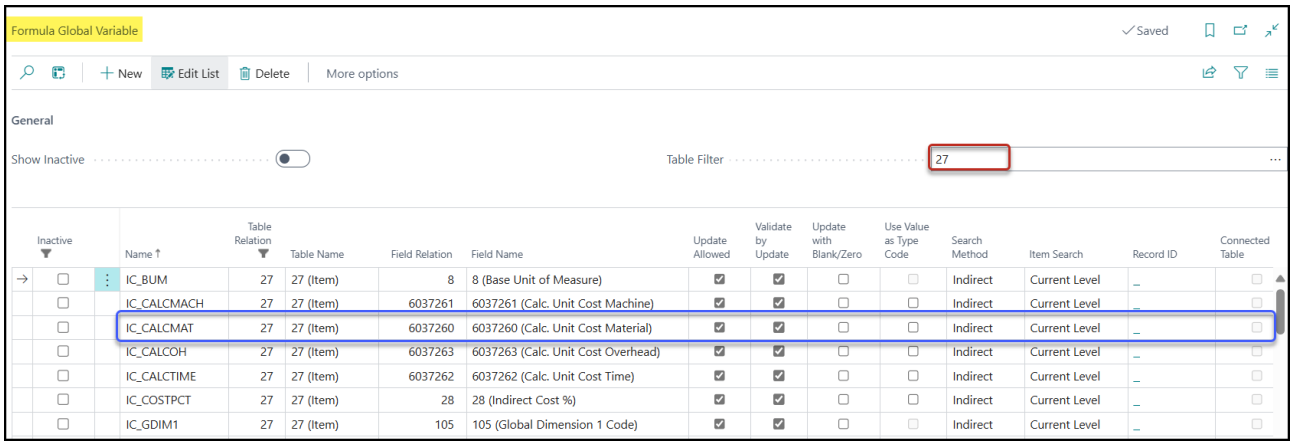


The page for Calculation Formulas will open and the **Formula Type** will be set to *Post Formulas*



Here you can enter the Formulas that you want to execute when you Post the Values of a Calculation that were calculated based on this specific Template.
Usually in the **Expression,** you will have the Name of a Cell, or a calculation based on the Name of a Cell.

IC_CALCMAT is the **Formula Global Variable** for the Field **Calc. Unit Cost Material** in table 27 Item: (**Search** *Formula Global Variables*)



For a detailed description of how to create/maintain Formula (Lines) and the possibilities of the Formula Global Variables and Constants, please see the ***White Paper – TRIMIT Formulas***

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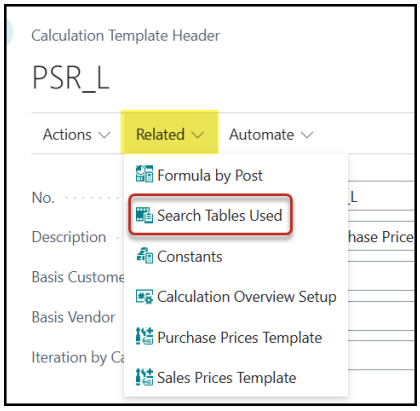
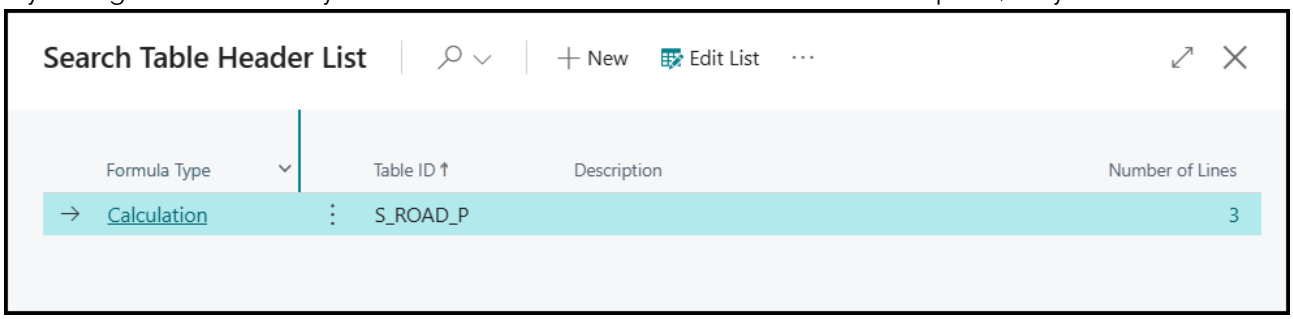
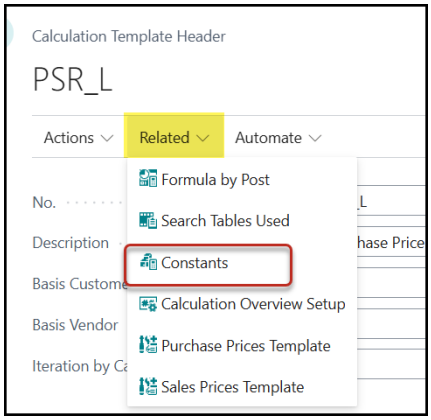
Related, Search Tables Used



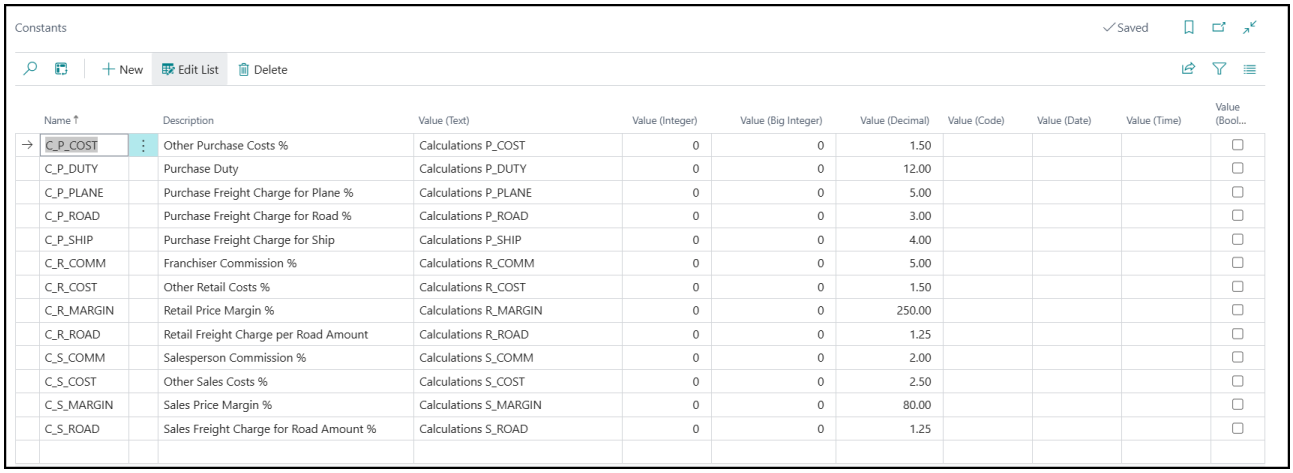
If you might have used any **Search Tables** in the Formula Lines for this Template, they will be shown.



Related, Constants



This will show a list of all the **Constants,** so it is easier to use a Constant in your Template. I.e.:



Name	Description	Value (Text)	Value (Integer)	Value (Big Integer)	Value (Decimal)	Value (Code)	Value (Date)	Value (Time)	Value (Bool...
C_P_COST	Other Purchase Costs %	Calculations P_COST	0	0	1.50				☐
C_P_DUTY	Purchase Duty	Calculations P_DUTY	0	0	12.00				☐
C_P_PLANE	Purchase Freight Charge for Plane %	Calculations P_PLANE	0	0	5.00				☐
C_P_ROAD	Purchase Freight Charge for Road %	Calculations P_ROAD	0	0	3.00				☐
C_P_SHIP	Purchase Freight Charge for Ship	Calculations P_SHIP	0	0	4.00				☐
C_R_COMM	Franchiser Commission %	Calculations R_COMM	0	0	5.00				☐
C_R_COST	Other Retail Costs %	Calculations R_COST	0	0	1.50				☐
C_R_MARGIN	Retail Price Margin %	Calculations R_MARGIN	0	0	250.00				☐
C_R_ROAD	Retail Freight Charge per Road Amount	Calculations R_ROAD	0	0	1.25				☐
C_S_COMM	Salesperson Commission %	Calculations S_COMM	0	0	2.00				☐
C_S_COST	Other Sales Costs %	Calculations S_COST	0	0	2.50				☐
C_S_MARGIN	Sales Price Margin %	Calculations S_MARGIN	0	0	80.00				☐
C_S_ROAD	Sales Freight Charge for Road Amount %	Calculations S_ROAD	0	0	1.25				☐

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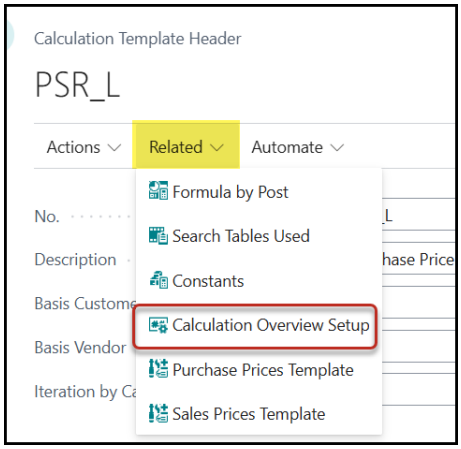
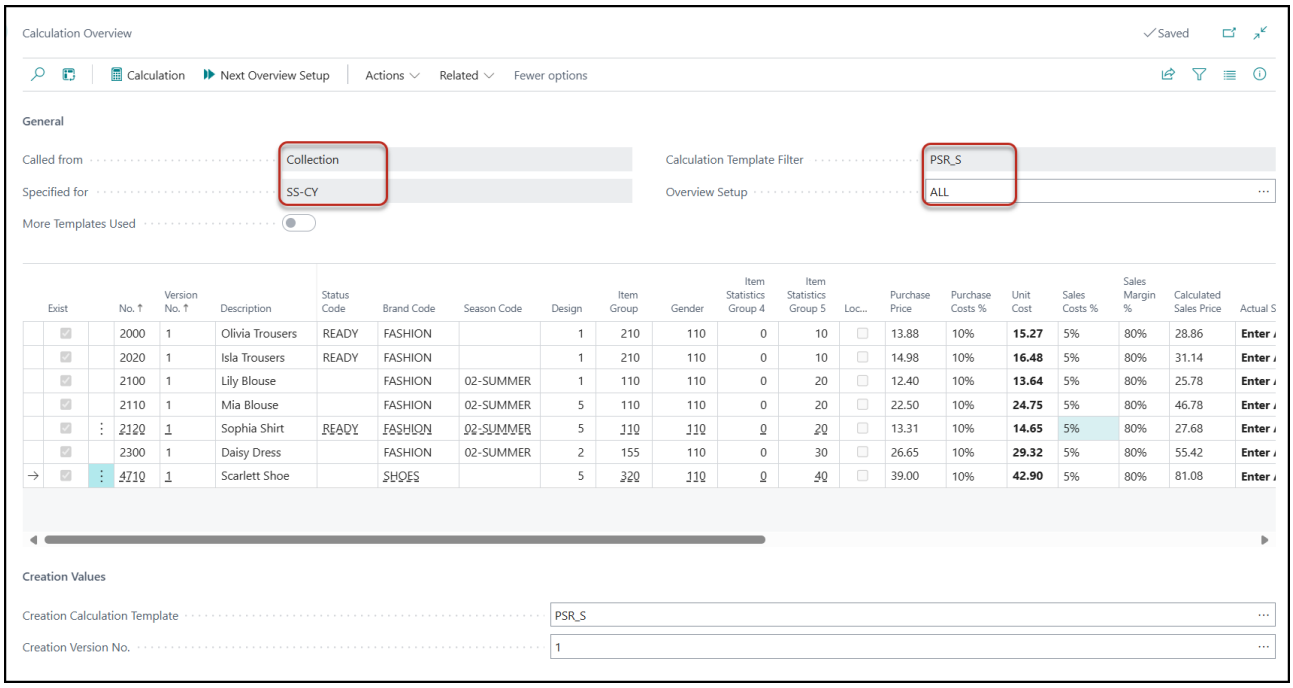
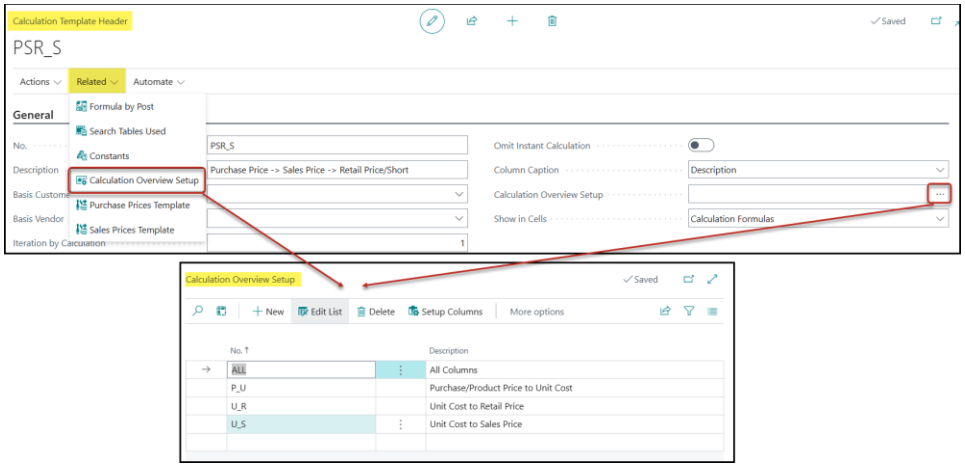
Related, Calculation Overview Setup



The **Calculation Overview** can be used on several levels (Items, Master, Collection, Shipment Group, Category) to have a matrix with Items or Masters on the Lines, and Calculation Cells in the Columns, so you are able to see/change the content of many Calculations in one page without having to create/change individual Calculations. I.e., for all Masters on Collection *SS-CY*:



You can create several **Calculation Overview Setups** (selection of Cells of the Template to be shown in the Matrix of the Calculation Overview).



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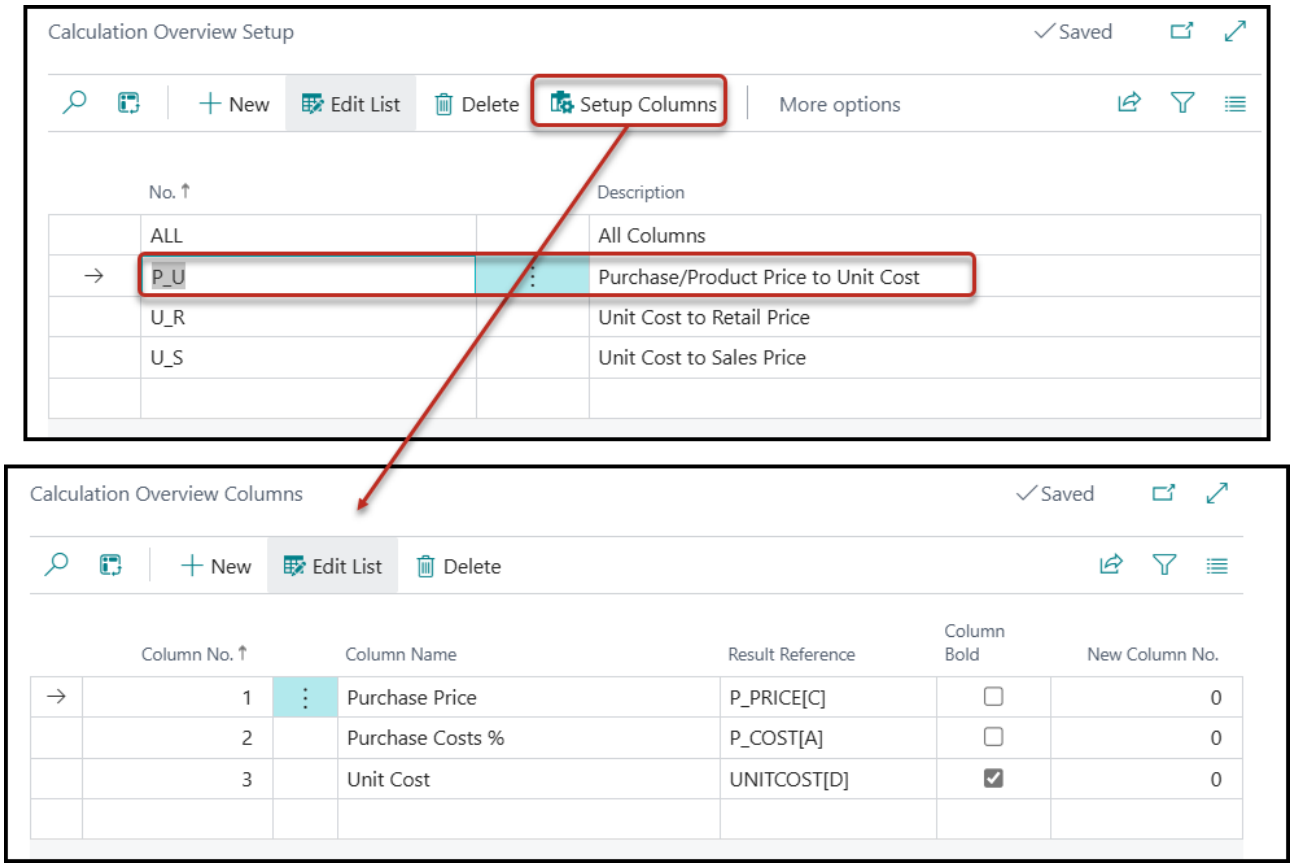
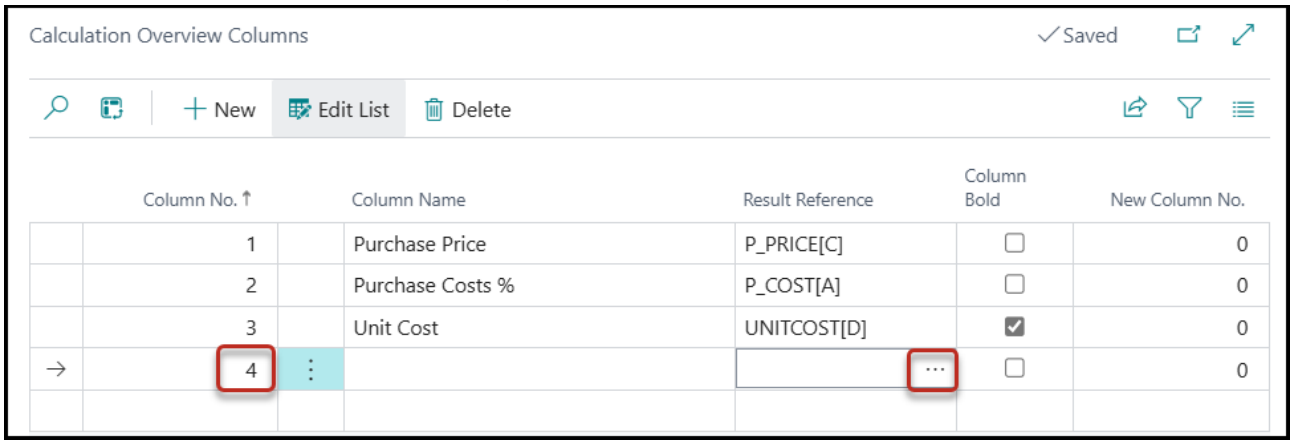
In the **Calculation Overview Setup,** click ***Setup Columns*** to determine which Columns you want to see/maintain in the Calculation Overview:



I.e., for Template *PSR_S* the Calculation Overview Setup *P_U.*

The content you need to enter in the **Result Reference** Field is the same as the Name of a Cell in the Template!

To create a new Column: Enter Column **No.**
If you press **Alt+PageDown** on a **Result Reference** Field, you can choose a **Calculation Type** (i.e., *S_PRICE_A*) from the list of **Calculation Types** that are in the current Template.



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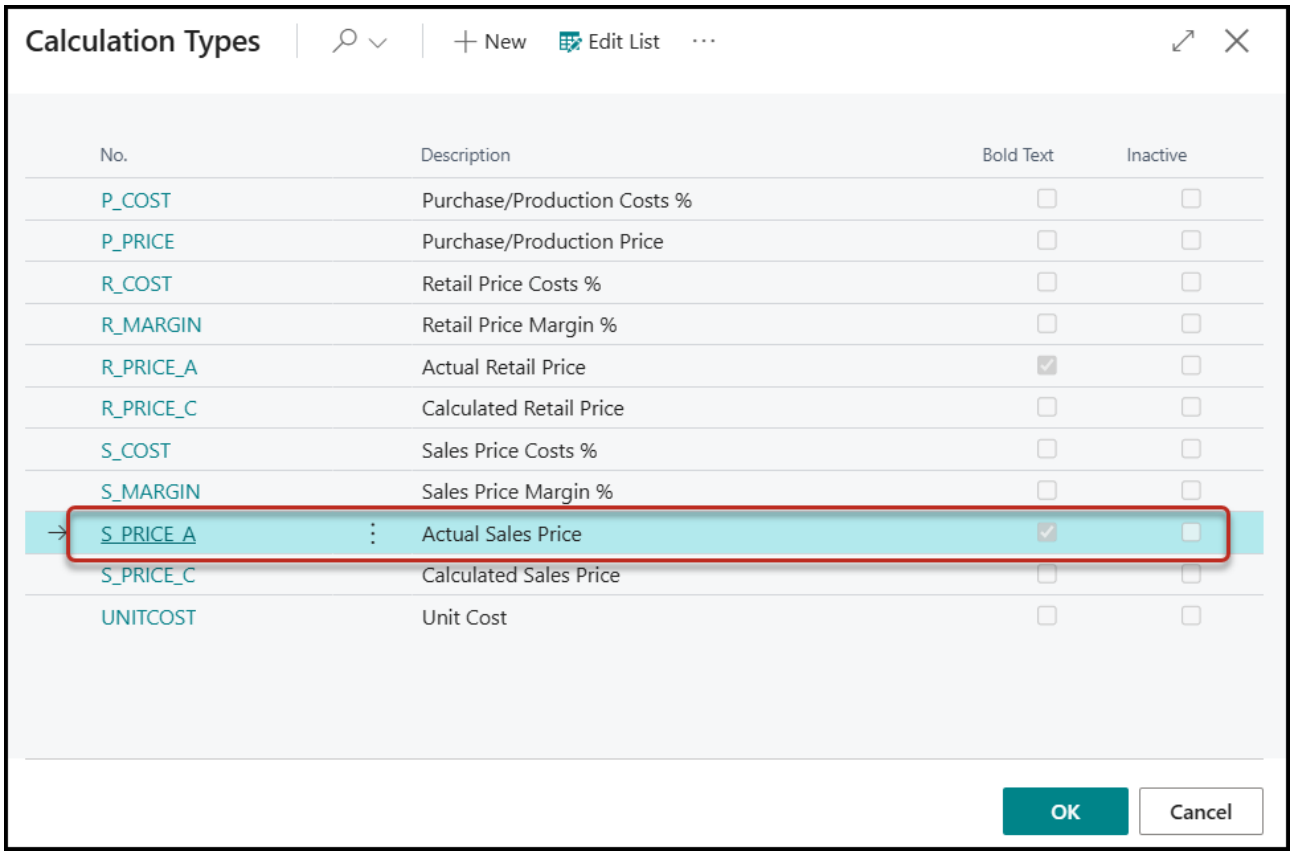
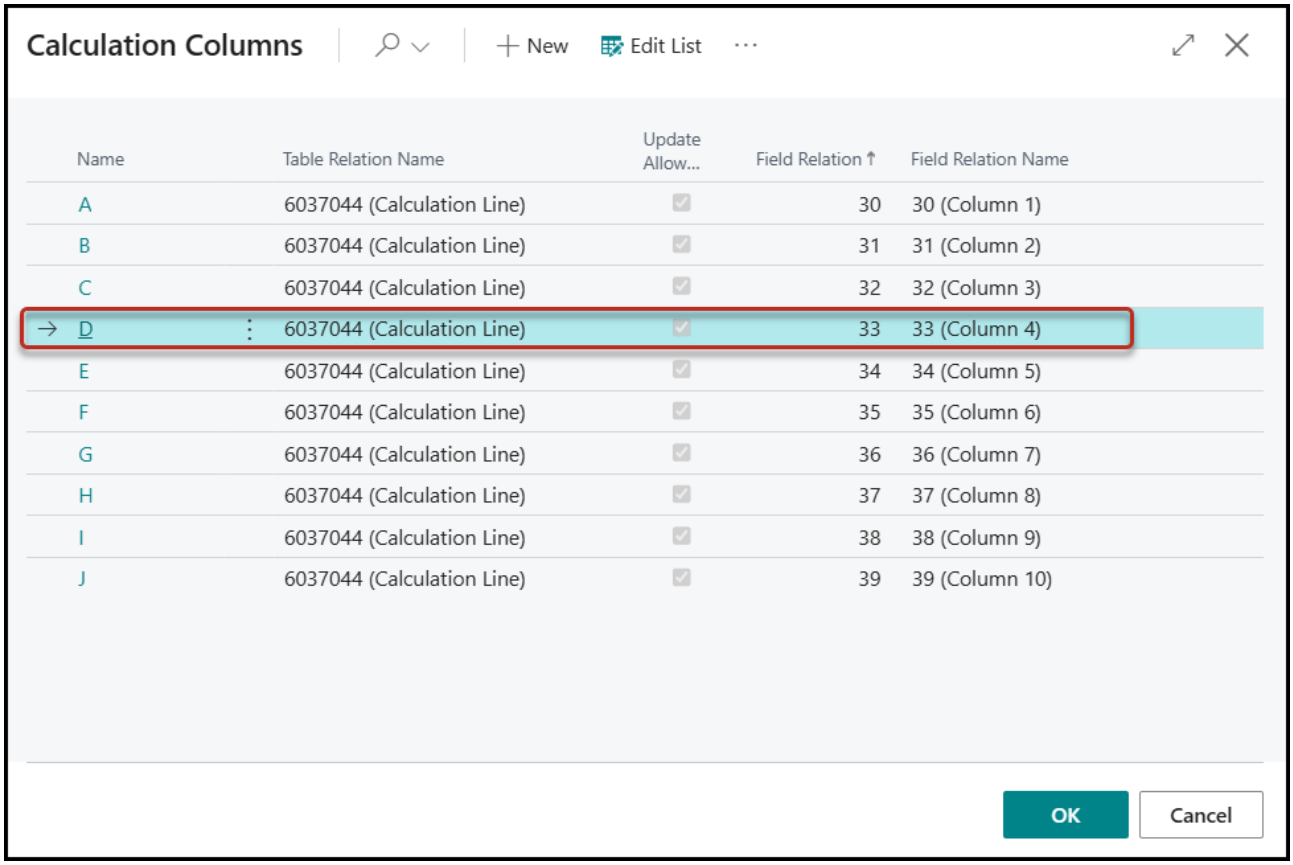
I.e.: Select *S_PRICE_A* and click **OK**.



After you have chosen a **Calculation Type,** the list with **Calculation Columns** will automatically open and you can select the name of the **Calculation Column** (i.e., *D*) and click **OK.**



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The system will now automatically combine the **Calculation Type** and the **Calculation Column** to the name of the Cell (i.e., *S_PRICE_A[D]*).
The **Column Name** Field will automatically be filled with the name of the Cell you selected), but you can simply overwrite it to a Description that you want to see in the Calculation Overview as name of a Column.

Calculation Overview Columns ✓Saved

+ New | Edit List | Delete

Column No. ↑	Column Name	Result Reference	Column Bold	New Column No.
1	Purchase Price	P_PRICE[C]	☐	0
2	Purchase Costs %	P_COST[A]	☐	0
3	Unit Cost	UNITCOST[D]	☑	0
4	S_PRICE_A[D]	S_PRICE_A[D]	☐	0

Calculation Overview Columns ✓Saved

+ New | Edit List | Delete

Column No. ↑	Column Name	Result Reference	Column Bold	New Column No.
1	Purchase Price	P_PRICE[C]	☐	0
2	Purchase Costs %	P_COST[A]	☐	0
3	Unit Cost	UNITCOST[D]	☑	0
4	ACTUAL SALES PRICE	S_PRICE_A[D]	☐	0

Description of the Fields:

Column No.
The Number of the Column in the Calculation Overview

Column Name
You can enter a **Name** that should be shown above the column in the Calculation Overview

Result Reference
The name of the Cell in the Calculation that should be filled with the content of this specific Column in the Calculation Overview

Column Bold
A checkmark in this Field will make sure that the corresponding column in the Calculation Overview will appear **Bold**.

New Column No.
This Field can be used if you want to switch columns from places (Column No.).
You can create up to 20 different Columns for the **Calculation Overview**.
You are also able to determine the columns for a **Calculation Overview Setup** in the Template itself.

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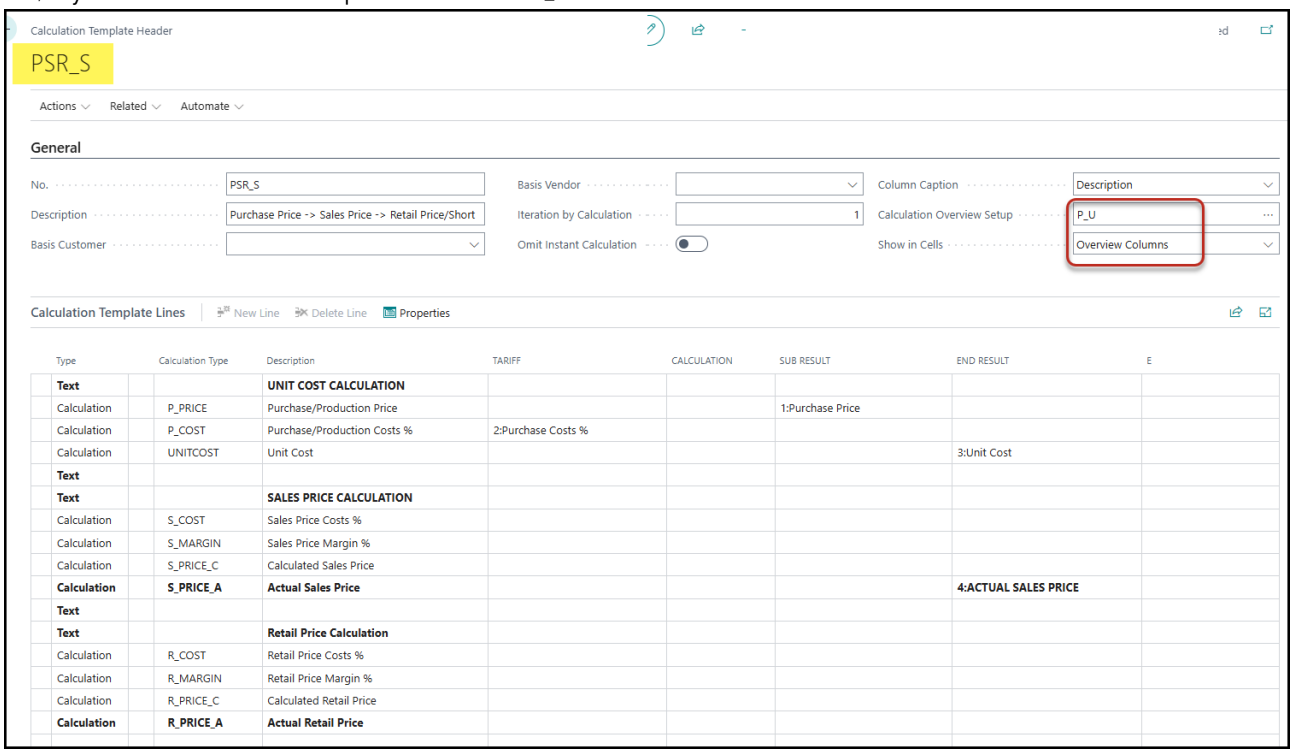
Therefore, you need to select a **Calculation Overview Setup** (you need to create Setup **No.** before, so you can select it) in the Header of the Template and the Field **Show in Cells** should be set to *Overview Columns.*

I.e., if you do this in the Template called *PSR_S* and choose the **Calculation Overview** *OS-2:*



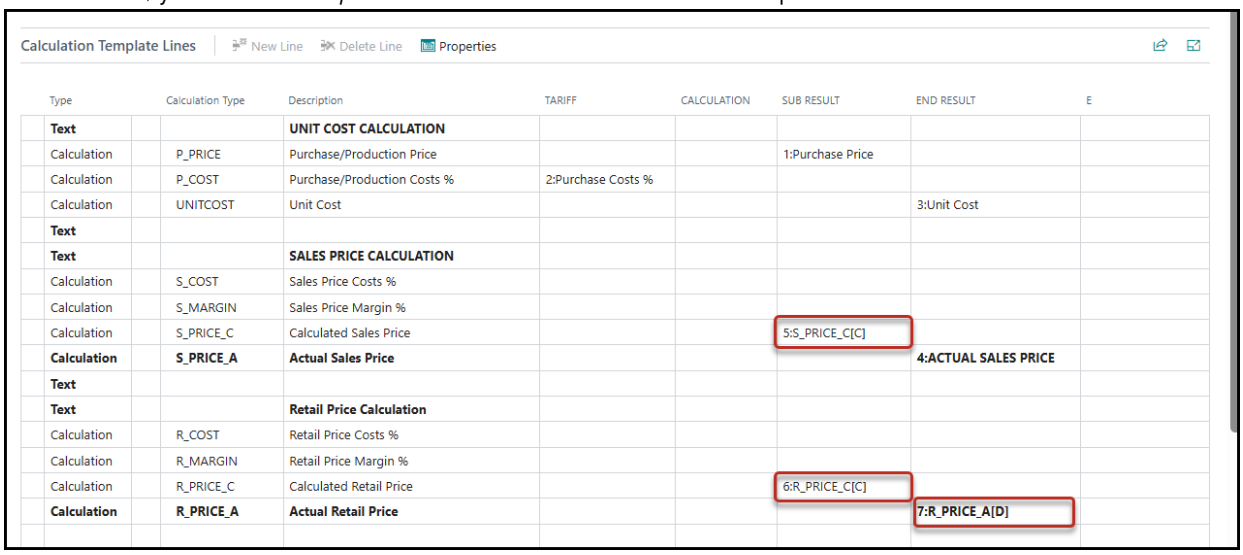
You will see the 4 different Columns that have been chosen already as you could also see in the picture of the previous page of this White Paper.

If you want to add a column to your **Calculation Overview Setup**, you have three options:

- Enter a number between 1 and 20 – the system might change this number in the first available number. Afterwards you can go to the **Calculation Overview Setup** and click ***Setup Columns*** to enter a name for it.
- Enter a name for this Cell – the system will give it the first available number.
- Enter a space – the system will give it the first available number and the **Column Name** will automatically be filled with the name of the Cell. I.e., *R_PRICE_A[D].*

I.e., you want to see the *R_COST[A]* Cell in the 8th Column of the Overview

In that case, you can fill a *"space"* <*Enter*> in the Cell of the Template.



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The Cell will get the *8* (the first available number) and as a description the name of the Cell *R_COST[A].*

Calculation Template Lines | New Line | Delete Line | Properties

Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT	E
Text		**UNIT COST CALCULATION**					
Calculation	P_PRICE	Purchase/Production Price			1:Purchase Price		
Calculation	P_COST	Purchase/Production Costs %	2:Purchase Costs %				
Calculation	UNITCOST	Unit Cost				3:Unit Cost	
Text							
Text		**SALES PRICE CALCULATION**					
Calculation	S_COST	Sales Price Costs %					
Calculation	S_MARGIN	Sales Price Margin %					
Calculation	S_PRICE_C	Calculated Sales Price			5:S_PRICE_C[C]		
Calculation	**S_PRICE_A**	**Actual Sales Price**				**4:ACTUAL SALES PRICE**	
Text							
Text		**Retail Price Calculation**					
Calculation	R_COST	Retail Price Costs %	8:R_COST[A]				
Calculation	R_MARGIN	Retail Price Margin %					
Calculation	R_PRICE_C	Calculated Retail Price			6:R_PRICE_C[C]		
Calculation	**R_PRICE_A**	**Actual Retail Price**				**7:R_PRICE_A[D]**	

You are also able to change the numbers for the columns that have been assigned.
I.e., the *S_PRICE_A[C]* should become the 4th Column instead of the 5th Column.
Therefore, enter a *4*in the Cell *S_PRICE_A[C]*

Calculation Template Lines | New Line | Delete Line | Properties

Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT	E
Text		**UNIT COST CALCULATION**					
Calculation	P_PRICE	Purchase/Production Price			1:Purchase Price		
Calculation	P_COST	Purchase/Production Costs %	2:Purchase Costs %				
Calculation	UNITCOST	Unit Cost				3:Unit Cost	
Text							
Text		**SALES PRICE CALCULATION**					
Calculation	S_COST						
Calculation	S_MARGIN						
Calculation	S_PRICE_C				4		
Calculation	**S_PRICE_A**					**4:ACTUAL SALES PRICE**	
Text							
Text							
Calculation	R_COST						
Calculation	R_MARGIN	Retail Price Margin %					
Calculation	R_PRICE_C	Calculated Retail Price			6:R_PRICE_C[C]		
Calculation	**R_PRICE_A**	**Actual Retail Price**				**7:R_PRICE_A[D]**	

The overview result column 4 is already used in connection with S_PRICE_C column 3. Do you want to renumber columns?

Yes | No

End result:

Calculation Template Lines | New Line | Delete Line | Properties

Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT	E
Text		**UNIT COST CALCULATION**					
Calculation	P_PRICE	Purchase/Production Price			1:Purchase Price		
Calculation	P_COST	Purchase/Production Costs %	2:Purchase Costs %				
Calculation	UNITCOST	UnitCost				3:Unit Cost	
Text							
Text		**SALES PRICE CALCULATION**					
Calculation	S_COST	Sales Price Costs %					
Calculation	S_MARGIN	Sales Price Margin %					
Calculation	S_PRICE_C	Calculated Sales Price			4:S_PRICE_C[C]		
Calculation	**S_PRICE_A**	**Actual Sales Price**				**5:ACTUAL SALES PRICE**	
Text							
Text		**Retail Price Calculation**					
Calculation	R_COST	Retail Price Costs %	8:R_COST[A]				
Calculation	R_MARGIN	Retail Price Margin %					
Calculation	R_PRICE_C	Calculated Retail Price			6:R_PRICE_C[C]		
Calculation	**R_PRICE_A**	**Actual Retail Price**				**7:R_PRICE_A[D]**	

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You can also simply change the **Column Names** of the columns for the Overview or even create a column simply by entering the **Column Name** for the column in a Cell of the Template:

Calculation Template Lines | New Line | Delete Line | Properties

Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT
Text		**UNIT COST CALCULATION**				
Calculation	P_PRICE	Purchase/Production Price			1:Purchase Price	
Calculation	P_COST	Purchase/Production Costs %	2:Purchase Costs %			
Calculation	UNITCOST	Unit Cost				3:Unit Cost
Text						
Text		**SALES PRICE CALCULATION**				
Calculation	S_COST	Sales Price Costs %				
Calculation	S_MARGIN	Sales Price Margin %				
Calculation	S_PRICE_C	Calculated Sales Price			4:S_PRICE_C[C]	
Calculation	**S_PRICE_A**	**Actual Sales Price**				**5:ACTUAL SALES PRICE**
Text						
Text		**Retail Price Calculation**				
Calculation	R_COST	Retail Price Costs %	8:R_COST[A]			
Calculation	R_MARGIN	Retail Price Margin %	RETAIL PRICE MARGIN			
Calculation	R_PRICE_C	Calculated Retail Price			6:R_PRICE_C[C]	
Calculation	**R_PRICE_A**	**Actual Retail Price**				**7:R_PRICE_A[D]**

It will get the number 9 (for the 9th column), and you can change the number again and confirm renumbering the rest – as shown before.

Calculation Template Lines | New Line | Delete Line | Properties

Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT
Text		**UNIT COST CALCULATION**				
Calculation	P_PRICE	Purchase/Production Price			1:Purchase Price	
Calculation	P_COST	Purchase/Production Costs %	2:Purchase Costs %			
Calculation	UNITCOST	Unit Cost				3:Unit Cost
Text						
Text		**SALES PRICE CALCULATION**				
Calculation	S_COST	Sales Price Costs %				
Calculation	S_MARGIN	Sales Price Margin %				
Calculation	S_PRICE_C	Calculated Sales Price			4:S_PRICE_C[C]	
Calculation	**S_PRICE_A**	**Actual Sales Price**				**5:ACTUAL SALES PRICE**
Text						
Text		**Retail Price Calculation**				
Calculation	R_COST	Retail Price Costs %	8:R_COST[A]			
Calculation	R_MARGIN	Retail Price Margin %	9:RETAIL PRICE MARGIN			
Calculation	R_PRICE_C	Calculated Retail Price			6:R_PRICE_C[C]	
Calculation	**R_PRICE_A**	**Actual Retail Price**				**7:R_PRICE_A[D]**

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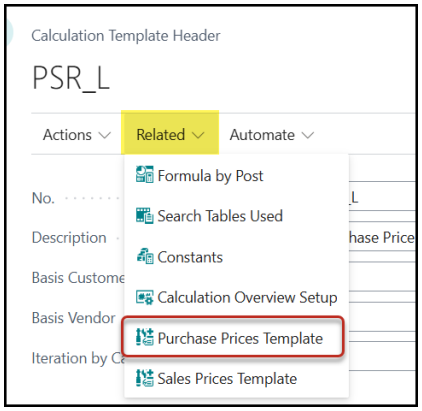
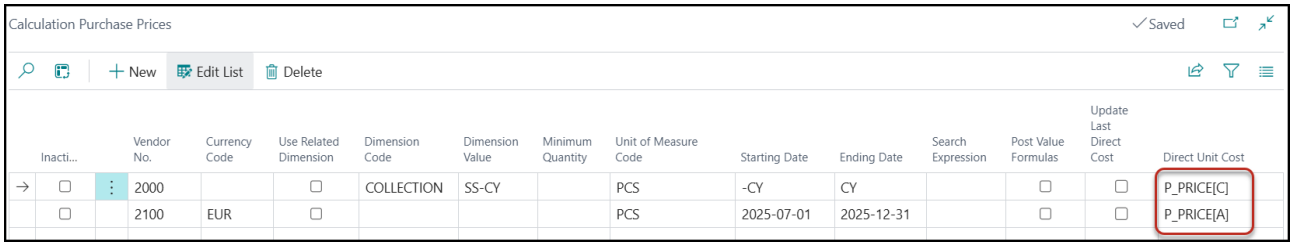
Related, Purchase Prices Template



In a Template, you can also define rules for creating Purchase Prices.
In the individual **Calculations** based on the Template, you are then able to ***Post Purchase Prices***: the system will create the record(s) in the Purchase Price Table of the Master (or Item) of the Calculation. This is also possible in the **Calculation Overview** of Items, Masters, Collections, Shipment Groups or Categories.

You can enter the rules for the Purchase Prices by clicking ***Related, Purchase Prices Template***. I.e.



Inacti...	Vendor No.	Currency Code	Use Related Dimension	Dimension Code	Dimension Value	Minimum Quantity	Unit of Measure Code	Starting Date	Ending Date	Search Expression	Post Value Formulas	Update Last Direct Cost	Direct Unit Cost
☐	2000		☐	COLLECTION	SS-CY		PCS	-CY	CY		☐	☐	P_PRICE[C]
☐	2100	EUR	☐				PCS	2025-07-01	2025-12-31		☐	☐	P_PRICE[A]

*Not all Fields are visible by default; you need to add them via **Personalize**.*

Description of some Fields:

Currency

If you leave this Field empty, it does NOT mean that it is your Local Currency, but the Currency of the Vendor – as usual when you create Purchase Prices manually.
That means that if your Calculation is based on the Local Currency, you need to have a Cell in which you have the Purchase Price in the Currency of the Vendor.

Use Related Dimension

If a Calculation is created via a **Calculation Overview** on a **Collection** or **Shipment Group**, the Dimension of the Collection or Shipment Group can be taken as the **Dimension Value** for the Purchase Price.

Dimension Code / Dimension Value

You can enter a **Dimension Code** and **Dimension Value** for which this Purchase Price will be applicable.

Starting Date

This can be a **Date Formula** of which the **Starting Date** will be determined for the Purchase Price, or you can simply enter a **Starting Date**.

Ending Date

This can be a **Date Formula** of which the **Ending Date** will be determined for the Purchase Price, or you can simply enter an **Ending Date**.

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Search Expression

Here you can enter the **Search Expression** for the Purchase Prices that need to be created. You can enter a text, i.e., *SIZE_1* or you can select a **Search Expression** based on a Cell of the Template.
First, you need to choose the **Calculation Type** and then the **Column;** or enter the name of the Cell directly.
You do not have the possibility to determine different Purchase Prices based on this **Search Expression**. That will be an action that you need to do after creating the actual Purchase Prices.

Formula

Here you can enter the **Formula** for the Purchase Prices that need to be created.

Post Value Formulas

A checkmark in this Field means that the **Update by Post** Formulas will also be executed if you **Post the Purchase Prices** in a Calculation or Calculation Overview.

Update Last Direct Cost

A checkmark in this Field means that the Field **Last Direct Cost** on the Master/Item of the Calculation will be updated with the calculated Purchase Price if you **Post the Purchase Prices** in a Calculation or Calculation Overview.
If you have entered several Lines, only one of the Lines can have a checkmark in **Update Last Direct Cost.**

Note
Be aware that also the **Calc. Unit Cost Materials** will be updated if you update the **Last Direct**

Use Calculation Cell

To create records in **Purchase Prices** you need to determine which Cell of a Calculation is the Value to determine the Purchase Price. I.e.: *P_PRICE[C].*

The rest of the Fields are similar to the Fields of the Purchase Prices that you can setup via a Master-/Item Card.

I.e.: The following Calculation Purchase Prices might then result in new Purchase Prices:

Calculation Purchase Prices ✓Saved

+ New | Edit List | Delete

Inacti...	Vendor No.	Currency Code	Use Related Dimension	Dimension Code	Dimension Value	Minimum Quantity	Unit of Measure Code	Starting Date	Ending Date	Search Expression	Post Value Formulas	Update Last Direct Cost	Direct Unit Cost
☐	2000		☐	COLLECTION	SS-CY		PCS	-CY	CY		☐	☐	P_PRICE[C]
☐	2100	EUR	☐				PCS	2025-07-01	2025-12-31		☐	☐	P_PRICE[A]

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Calculation Header

Master · 2110 · None · S

Actions · Related · Automate

Table Relation	Master	Version No.	S	Expired	
No.	2110	Calculation Template	PSR_S	Show Decimals	
Specification Level	None	Description	Mia Blouse	Show in Cells	
Specified for		Locked		Calculation Overview Setup	

Calculation Lines | Properties

Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT
Text		**UNIT COST CALCULATION**				
Calculation	P_PRICE	Purchase/Production Price	22.50	<0.80>	18.00	
Calculation	P_COST	Purchase/Production Costs %	10%	1.80		
Calculation	UNITCOST	Unit Cost				**19.80**
Text						
Text		**SALES PRICE CALCULATION**				
Calculation	S_COST	Sales Price Costs %	5%	0.99		
Calculation	S_MARGIN	Sales Price Margin %	80%	16.63		
Calculation	S_PRICE_C	Calculated Sales Price			37.42	
Calculation	**S_PRICE_A**	**Actual Sales Price**	96.97%			**39.00**
Text						
Text		**Retail Price Calculation**				
Calculation	R_COST	Retail Price Costs %	7.5%	1.49		
Calculation	R_MARGIN	Retail Price Margin %	250%	49.50		
Calculation	R_PRICE_C	Calculated Retail Price			70.79	
Calculation	**R_PRICE_A**	**Actual Retail Price**	273.74%			**74.00**

The above Calculation would result in the following Purchase Prices:

Purchase Prices - Item 2110

General

Vendor No. Filter		Item/Master No. Filter	2110
Item No. Filter	2110	Starting Date Filter	
Item Type Filter	Master		

Manage · Copy Prices · Dimension Prices · Search Table Lines · Formula Lines · More options

Vendor No.	Item No.	Item/Master No.	Currency Code	Unit of Measure Code	Minimum Quantity	Direct Unit Cost	Dimension Prices	Starting Date	Ending Date	Search Expression	Search Table	Use Search Table Result	Form
2000	2110	2110		PCS	0	0.00	1	1/1/2025	12/31/2025			Default	
2100	2110	2110	EUR	PCS	0	22.50	0	7/1/2025	12/31/2025			Default	
2300	2110	2110		PCS	0	22.50	0					Default	

Dimension Purchase Price · Saved

New · Edit List · Delete · Search Table Lines · Formula Lines · More options

Dimension Code	Dimension Value	Description	Direct Unit Cost	Currency Code	Search Expression	Use Search Table Result	Formula
COLLECTION	SS-CY	Spring Summer Current Year	18.00			Default	

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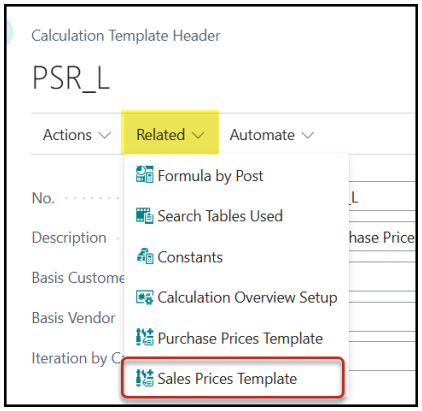
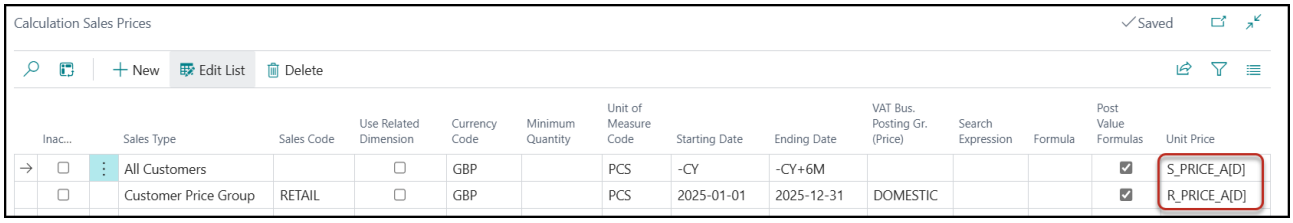
Related, Sales Prices Template



For a Template, you can define rules for creating Sales Prices.
In the individual **Calculations** based on the Template, you are then able to ***Post Sales Prices***: the system will create the record(s) in the Sales Price Table of the Master (or Item) of the Calculation.
This is also possible in the **Calculation Overview** of Items, Masters, Collections, Shipment Groups or Categories.

You can enter the rules for the Sales Prices by clicking ***Related, Sales Prices Template.***



*Not all Fields are visible by default; you need to add them via **Personalize**.*

Description of some Fields:

Currency Code

If you leave this Field blank, it means that the Sales Price will be in your Local Currency.

NOTE
Be aware that if you want to use another **Currency** then the local Currency you also need to be sure that this is calculated in the **Use Calculation Cell** of your Calculation. The system will not calculate this automatically based on Exchange Rates.

Use Related Dimension

If a Calculation is created via a Calculation Overview on a Collection or Shipment Group, the Dimension of the Collection or Shipment Group can be taken as the **Dimension Value** for the Sales Price.

Dimension Code / Dimension Value

You can enter a **Dimension Code** and **Dimension Value** for which this Sales Price will be applicable.

Starting Date

This can be a **Date Formula** of which the **Starting Date** will be determined for the Sales Price, or you can simply enter a **Starting Date**.

Ending Date

This can be a **Date Formula** of which the **Ending Date** will be determined for the Sales Price, or you can simply enter an **Ending Date**.

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Search Expression

Here you can enter the **Search Expression** for the Sales Prices that need to be created. You can enter a text, i.e., *SIZE_1* or you can select a **Search Expression** based on a Cell of the Template.
First, you need to choose the **Calculation Type** and then the **Column;** or enter the name of the Cell directly.
You do not have the possibility to determine different Sales Prices based on this **Search Expression**. That will be an action that you need to do after creating the actual Sales Prices.

Formula

Here you can enter the **Formula** for the Sales Prices that needs to be created.

Post Value Formulas

A checkmark in this Field means, that the **Update by Post** formulas will be executed if you **Post the Sales Prices** in a Calculation or Calculation Overview.

Use Calculation Cell

To create records in **Sales Prices** you need to determine which Cell of a Calculation is the basic Value to calculate the Sales Price. I.e.: *S_PRICE_A[D]* or *R_PRICE_A[D].*

The rest of the Fields are similar to the Fields of the Sales Prices that you can setup via a Master-/Item Card.

I.e.: The following Calculation might then result in the new Sales Prices:

Calculation Sales Prices

New | Edit List | Delete

Inac...	Sales Type	Sales Code	Use Related Dimension	Currency Code	Minimum Quantity	Unit of Measure Code	Starting Date	Ending Date	VAT Bus. Posting Gr. (Price)	Search Expression	Formula	Post Value Formulas	Unit Price
☐	All Customers		☐	GBP		PCS	-CY	-CY+6M				☑	S_PRICE_A[D]
☐	Customer Price Group	RETAIL	☐	GBP		PCS	2025-01-01	2025-12-31	DOMESTIC			☑	R_PRICE_A[D]

Calculation Header

Master · 2110 · None · S

Actions | Related | Automate

General

Table Relation	Master	Version No.	S	Expired	
No.	2110	Calculation Template	PSR_S	Show Decimals	
Specification Level	None	Description	Mia Blouse	Show in Cells	
Specified for		Locked		Calculation Overview Setup	

Calculation Lines | Properties

Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT
Text		**UNIT COST CALCULATION**				
Calculation	P_PRICE	Purchase/Production Price	22.50	<0.80>	18.00	
Calculation	P_COST	Purchase/Production Costs %	10%	1.80		
Calculation	UNITCOST	Unit Cost				**19.80**
Text						
Text		**SALES PRICE CALCULATION**				
Calculation	S_COST	Sales Price Costs %	5%	0.99		
Calculation	S_MARGIN	Sales Price Margin %	80%	16.63		
Calculation	S_PRICE_C	Calculated Sales Price			37.42	
Calculation	**S_PRICE_A**	**Actual Sales Price**	96.97%			**39.00**
Text						
Text		**Retail Price Calculation**				
Calculation	R_COST	Retail Price Costs %	7.5%	1.49		
Calculation	R_MARGIN	Retail Price Margin %	250%	49.50		
Calculation	R_PRICE_C	Calculated Retail Price			70.79	
Calculation	**R_PRICE_A**	**Actual Retail Price**	273.74%			**74.00**

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The above Calculation would result in the following Sales Prices:

Sales Prices - Item 2110

New | Edit List | Delete | Dimension Prices | Search Table Lines | Formula Lines | More options

General

Sales Type Filter: None
Sales Code Filter:
Item Type Filter: Master
Item/Master No. Filter: 2110
Starting Date Filter:
Currency Code Filter:

Sales Type	Sales Code	Item No.	Currency Code	Unit of Measure Code	Minimum Quantity	Unit Price	Dimension Prices	Starting Date	Ending Date	Price Inclu... VAT	VAT Bus. Posting Gr. (Price)	Search Expression	Search Table	Use Search Table Result	Formula
Customer Pri...	RETAIL	2110		PCS	0	79.00	0			☑	DOMESTIC			Default	
Customer Pri...	RETAIL	2110	DKK	PCS	0	675.00	0			☑	DOMESTIC			Default	
Customer Pri...	RETAIL	2110	EUR	PCS	0	119.00	0			☑	DOMESTIC			Default	
Customer Pri...	RETAIL	2110	NOK	PCS	0	729.00	0			☑	DOMESTIC			Default	
Customer Pri...	RETAIL	2110	SEK	PCS	0	790.00	0			☑	DOMESTIC			Default	
Customer Pri...	RETAIL	2110	USD	PCS	0	124.00	0			☑	DOMESTIC			Default	
Customer Pri...	RETAIL	2110	GBP	PCS	0	74.00	0	1/1/2025	12/31/2025	☑	DOMESTIC			Default	
All Customers		2110		PCS	0	39.99	0			☐				Default	
All Customers		2110	EUR	PCS	0	49.99	0			☐				Default	
All Customers		2110	GBP	PCS	0	39.00	0	1/1/2025	7/1/2025	☐				Default	

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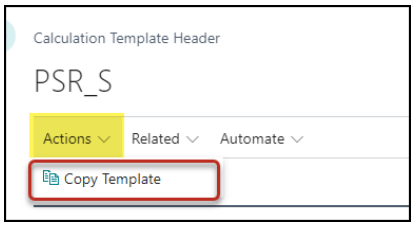
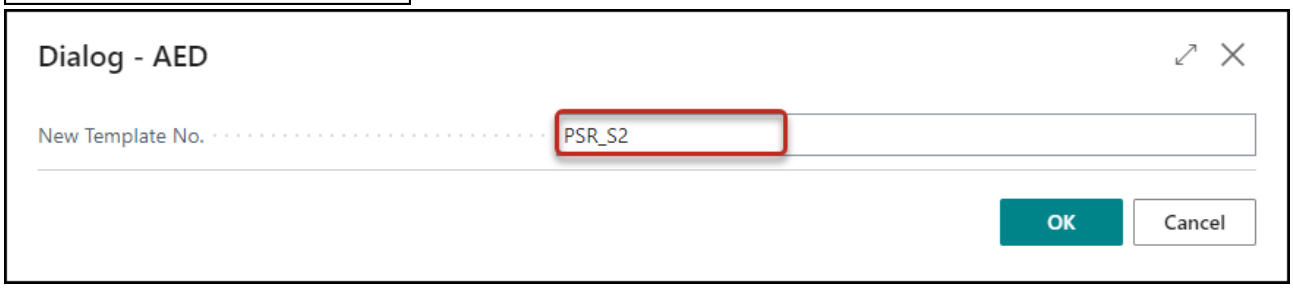
Actions, Copy Template

You can **Copy** a complete Template into a new Template.
Therefore, you need to click ***Actions, Copy Template*** in the Template List or Card.
You will be asked to enter a **New Template No.** for the new **Template:**





Every setup of the original Template will be copied into the **New Template No.**:

- Template Lines
- Template Line Properties
- Calculation Formulas
- Get Value Formulas
- Update by Post Formulas
- Calculation Overview Setups
- Purchase Price Templates
- Sales Price Templates

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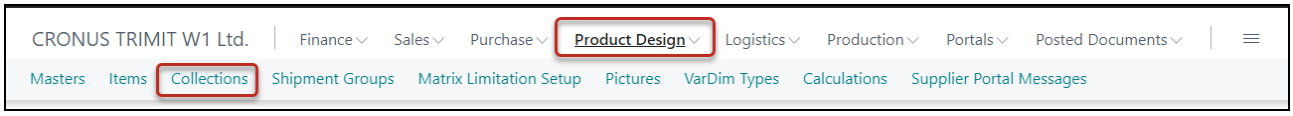
Calculation Overview

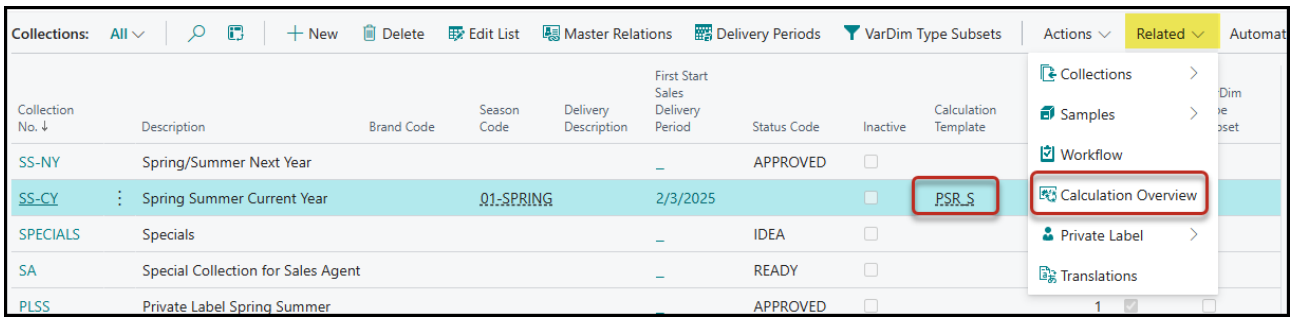
The **Calculation Overview** enables you to see corresponding Values of Calculations of several Masters or Items at the same time.
The **Calculation Overview** can be based on Masters, Items, Collections, Shipment Groups or (e-commerce) Categories.
The Setup of the Calculation Overview takes place in the Templates – see Calculation Overview Setup.

Calculation Overview via Collection

In a Collection, **Search** *Collection* or click ***Product Design, Collection*** in the TRIMIT Small Business Role Center, you can enter the **Calculation Template**.

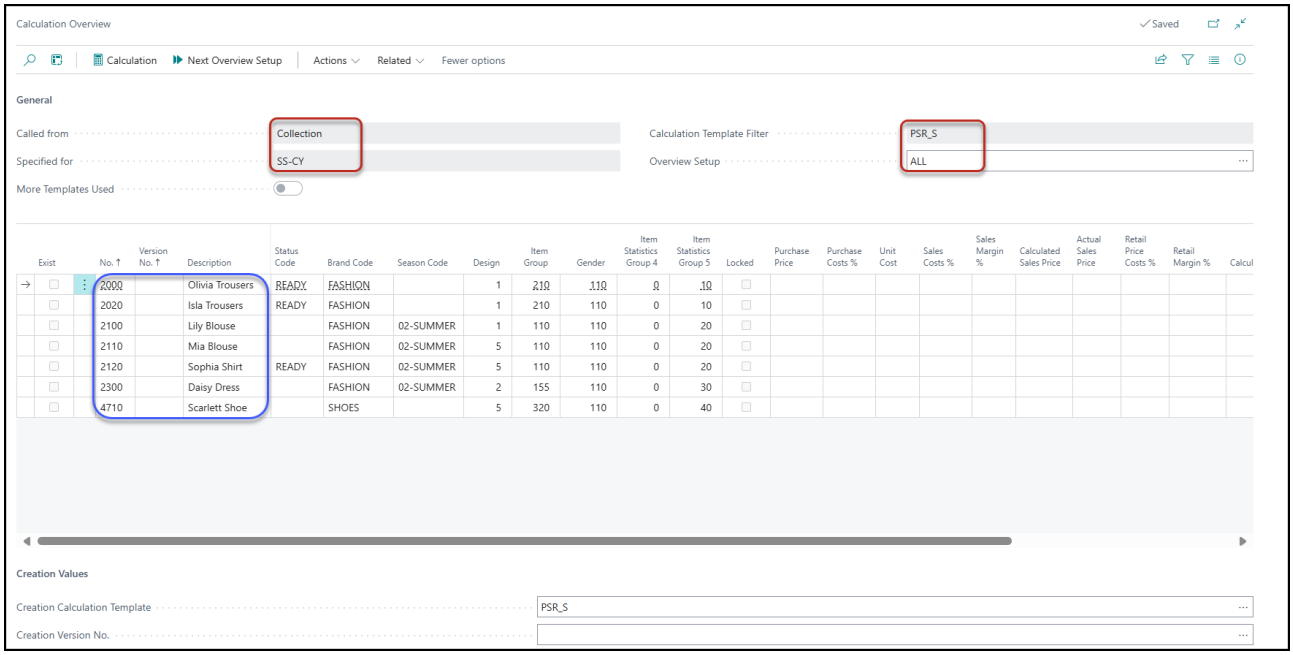


This Template is applicable for all the Masters of the Collection.



By clicking ***Related, Calculation Overview*** you can see (and create) all Calculations for the Masters/Items that are part of the Collection.

It might – i.e., for the **Collection** *SS-CY* look like:



For the Masters of this Collection, there are no Calculations created yet (**Exist** is *FALSE*).

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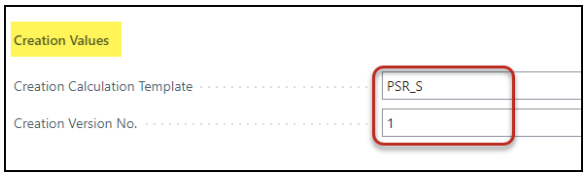
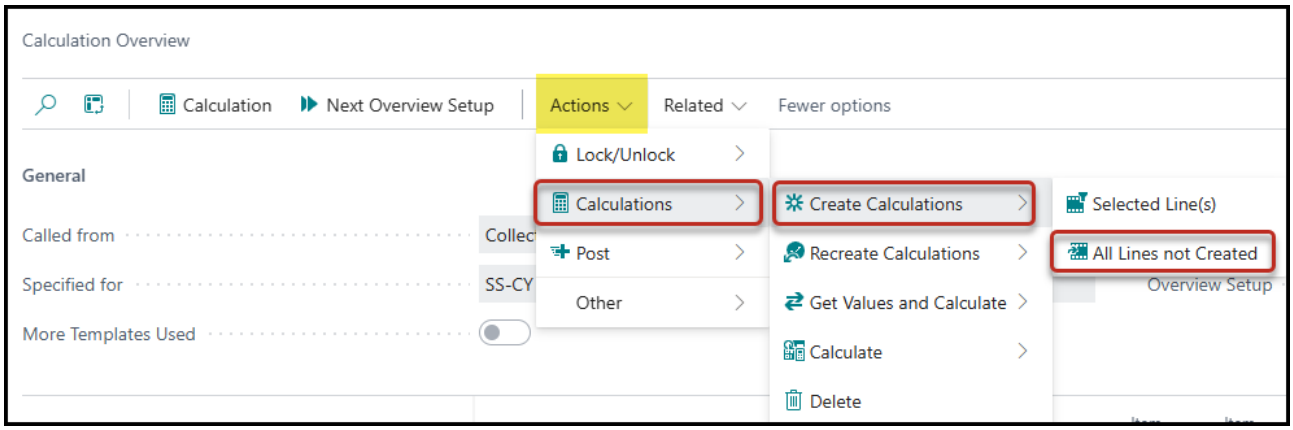
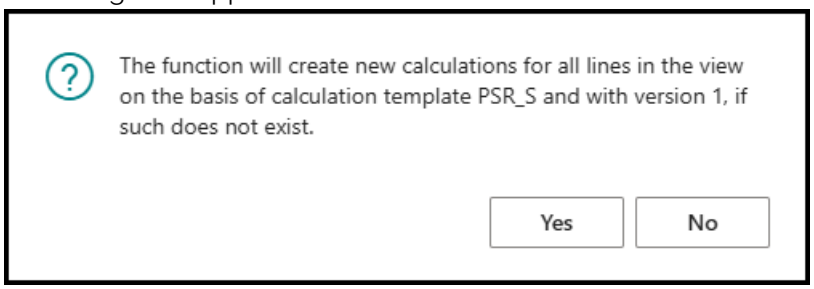
Therefore, the first step is to create Calculations based on a specific **Creation Calculation Template** and **Creation Version No.** that needs to be entered in the Fields on ***Creation Values*** i.e.:



After you entered the Fields for ***Creation Values,*** you can create the Calculations for all the Masters on this page that did not already have a Calculation. This can be done by clicking ***Actions, Calculations, Create Calculations, All Lines not Created***.

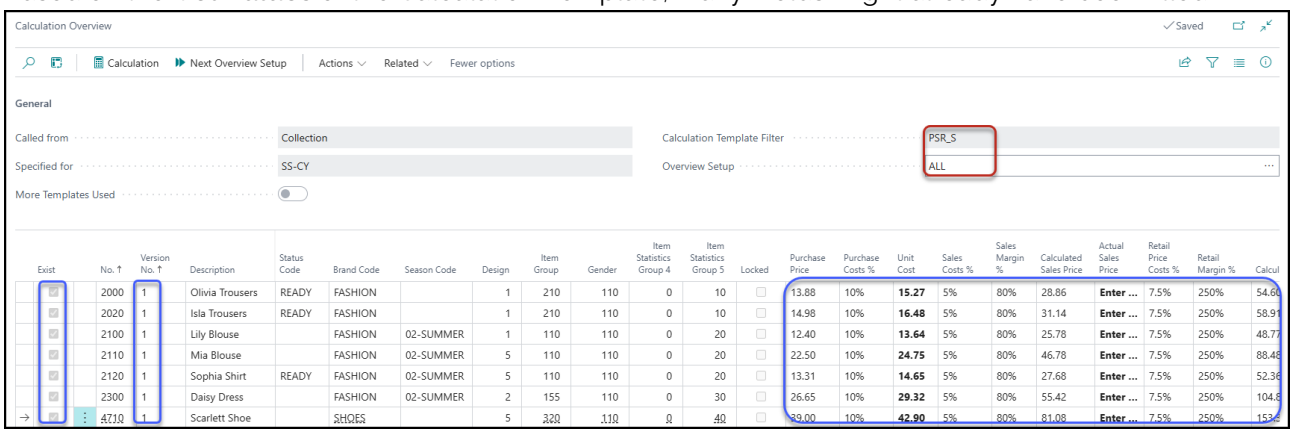


A message will appear:



Click **Yes.**

After that has been done, the **Calculation Template Filter** in the FastTab ***General*** will be filled, **Exist** will get a checkmark and the **Version No.** on the Lines of the Masters will be filled.
Based on the **Get Values** of the Calculation Template, many Fields might already have been filled.



Now you can select an **Overview Setup** in the FastTab ***General*** that is related to the **Calculation Template Filter** of the FastTab ***General*** *PSR_S.*

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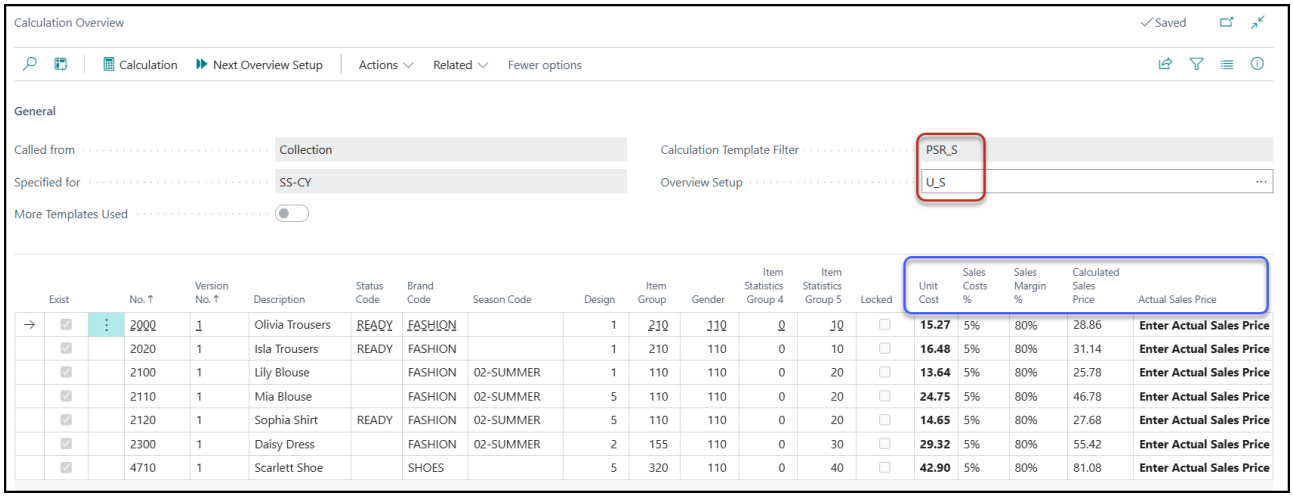
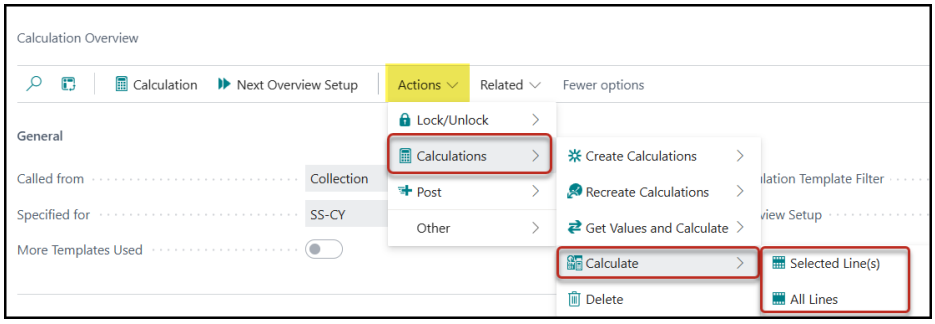
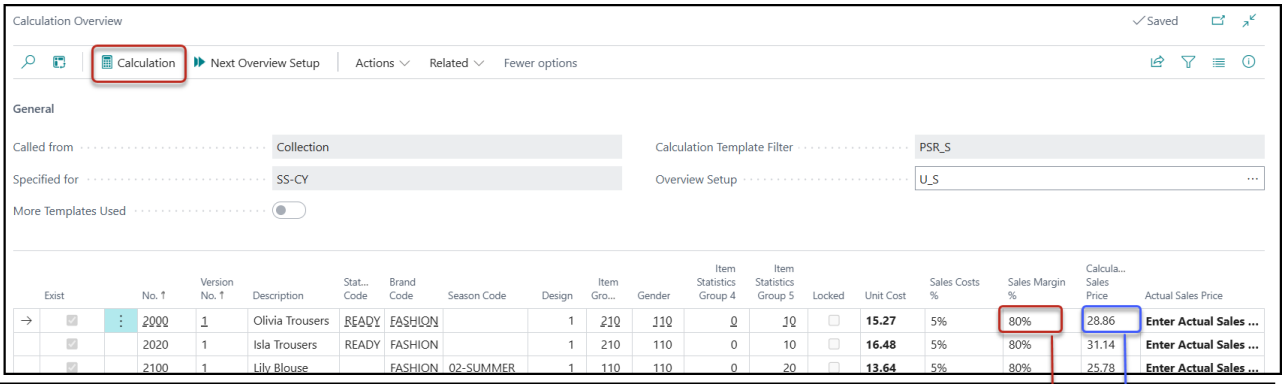


Exist	No.	Version No.	Description	Status Code	Brand Code	Season Code	Design	Item Group	Gender	Item Statistics Group 4	Item Statistics Group 5	Locked	Unit Cost	Sales Costs %	Sales Margin %	Calculated Sales Price	Actual Sales Price
✓	2000	1	Olivia Trousers	READY	FASHION		1	210	110	0	10		**15.27**	5%	80%	28.86	**Enter Actual Sales Price**
✓	2020	1	Isla Trousers	READY	FASHION		1	210	110	0	10		**16.48**	5%	80%	31.14	**Enter Actual Sales Price**
✓	2100	1	Lily Blouse		FASHION	02-SUMMER	1	110	110	0	20		**13.64**	5%	80%	25.78	**Enter Actual Sales Price**
✓	2110	1	Mia Blouse		FASHION	02-SUMMER	5	110	110	0	20		**24.75**	5%	80%	46.78	**Enter Actual Sales Price**
✓	2120	1	Sophia Shirt	READY	FASHION	02-SUMMER	5	110	110	0	20		**14.65**	5%	80%	27.68	**Enter Actual Sales Price**
✓	2300	1	Daisy Dress		FASHION	02-SUMMER	2	155	110	0	30		**29.32**	5%	80%	55.42	**Enter Actual Sales Price**
✓	4710	1	Scarlett Shoe		SHOES		5	320	110	0	40		**42.90**	5%	80%	81.08	**Enter Actual Sales Price**

Now it is much easier to change the Amounts and Percentages of the individual Calculations, instead of going to each individual Calculation itself.
Changing a Percentage or Amount in the Calculation Overview will have its direct consequence for the underlying Calculation.
Unless you have a checkmark in the Field **Omit Instant Calculation** on the Template. In that case, you need to calculate all Amounts again via ***Actions, Calculations, Calculate.*** You can choose to calculate the **Selected Line(s)** or **All Lines** of the Overview.



I.e., if you change the **Sales Margin %** in the line of Master *2000* from *80%* to *90%* the rest of the Fields will be re-calculated as well, and you can see the result of the total Calculation if you click ***Calculation***:



Exist	No.	Version No.	Description	Stat... Code	Brand Code	Season Code	Design	Item Gro...	Gender	Item Statistics Group 4	Item Statistics Group 5	Locked	Unit Cost	Sales Costs %	Sales Margin %	Calcula... Sales Price	Actual Sales Price
✓	2000	1	Olivia Trousers	READY	FASHION		1	210	110	0	10		**15.27**	5%	80%	28.86	**Enter Actual Sales ...**
✓	2020	1	Isla Trousers	READY	FASHION		1	210	110	0	10		**16.48**	5%	80%	31.14	**Enter Actual Sales ...**
✓	2100	1	Lily Blouse		FASHION	02-SUMMER	1	110	110	0	20		**13.64**	5%	80%	25.78	**Enter Actual Sales ...**

Exist	No.	Version No.	Description	Stat... Code	Brand Code	Season Code	Design	Item Gro...	Gender	Item Statistics Group 4	Item Statistics Group 5	Locked	Unit Cost	Sales Costs %	Sales Margin %	Calcula... Sales Price	Actual Sales Price
✓	2000	1	Olivia Trousers	READY	FASHION		1	210	110	0	10		**15.27**	5%	<90%>	30.47	**Enter Actual Sales ...**
✓	2020	1	Isla Trousers	READY	FASHION		1	210	110	0	10		**16.48**	5%	80%	31.14	**Enter Actual Sales ...**
✓	2100	1	Lily Blouse		FASHION	02-SUMMER	1	110	110	0	20		**13.64**	5%	80%	25.78	**Enter Actual Sales ...**
✓	2110	1	Mia Blouse		FASHION	02-SUMMER	5	110	110	0	20		**24.75**	5%	80%	46.78	**Enter Actual Sales ...**

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Calculation Header - Master · 2000 · Collection · SS-CY · 1

Manage Page More options

General

Table Relation	Master	Version No.	1	Expired	
No.	2000	Calculation Template	PSR_S	Show Decimals	
Specification Level	Collection	Description	Olivia Trousers	Show in Cells	
Specified for	SS-CY	Locked		Calculation Overview Setup	

Calculation Lines Properties

Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT
Text		**UNIT COST CALCULATION**				
Calculation	P_PRICE	Purchase/Production Price	13.88	1.00	13.88	
Calculation	P_COST	Purchase/Production Costs %	10%	1.39		
Calculation	UNITCOST	Unit Cost				**15.27**
Text						
Text		**SALES PRICE CALCULATION**				
Calculation	S_COST	Sales Price Costs %	5%	0.76		
Calculation	S_MARGIN	Sales Price Margin %	<90%>	14.43		
Calculation	S_PRICE_C	Calculated Sales Price			30.47	
Calculation	**S_PRICE_A**	**Actual Sales Price**	-100%			**Enter Actual Sales Price**
Text						
Text		**Retail Price Calculation**				
Calculation	R_COST	Retail Price Costs %	7.5%	1.15		
Calculation	R_MARGIN	Retail Price Margin %	250%	38.18		
Calculation	R_PRICE_C	Calculated Retail Price			54.60	
Calculation	**R_PRICE_A**	**Actual Retail Price**	-100%			**Enter Actual Retail Price**

If you now look in the Calculations via **Search** *Calculations*, the **Specification Level** is now filled with *Collection* and the **Specified for** is filled with the actual Collection *SS-CY.*

Calculation List

New Manage More options

Locked	Expir...	No.	Version No.	Description	Calculation Template	Specification Level	Specified for ↑
No		2030	1	Ella Trousers	PSR_S	None	
No		2110	S	Mia Blouse	PSR_S	None	
No		2210	1	Poppy Blazer	PSR_S	None	
No		22102010	1	Poppy Blazer Blue Stripe,10	PSR_S	None	
No		22102504	1	Poppy Blazer Navy,4	PSR_S	None	
No		2000	1	Olivia Trousers	PSR_S	Collection	SS-CY
No		2020	1	Isla Trousers	PSR_S	Collection	SS-CY
No		2100	1	Lily Blouse	PSR_S	Collection	SS-CY
No		2110	1	Mia Blouse	PSR_S	Collection	SS-CY
No		2120	1	Sophia Shirt	PSR_S	Collection	SS-CY
No		2300	1	Daisy Dress	PSR_S	Collection	SS-CY
No		4710	1	Scarlett Shoe	PSR_S	Collection	SS-CY

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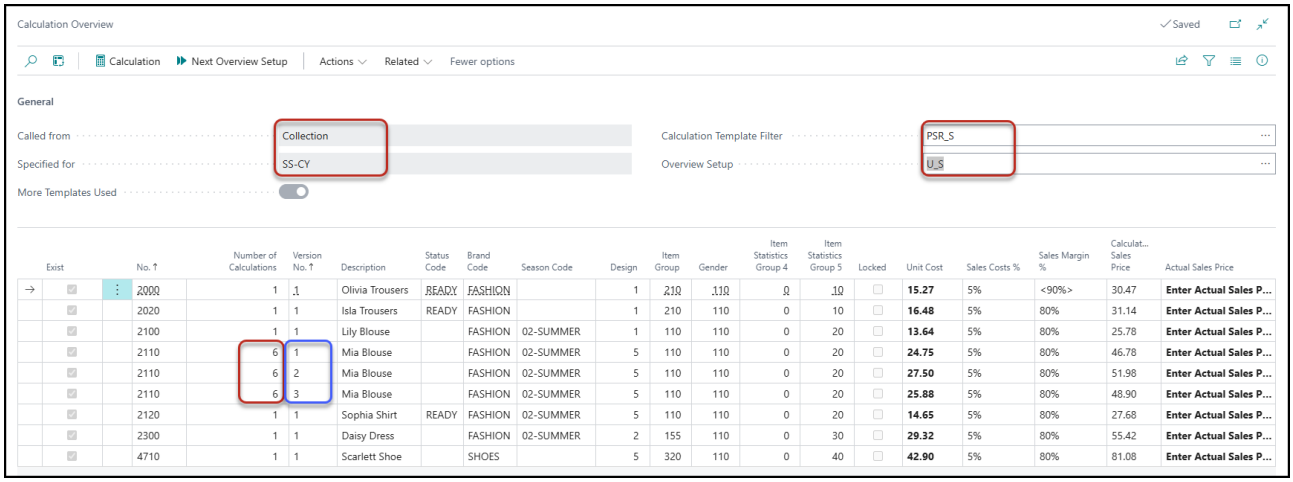
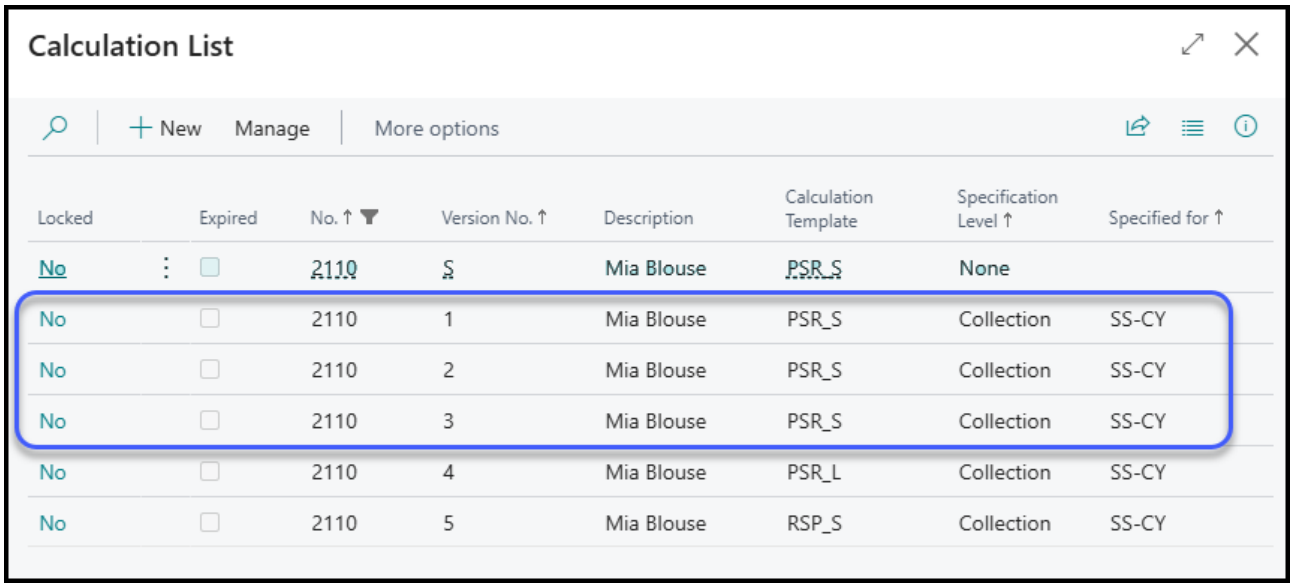
No. of Calculations

It might be possible that for a specific Master/Item you have several versions of the Calculation.
You can add a Field called **Number of Calculations** via ***Personalize***.
In that case, the **Calculation Overview** might look as follows:



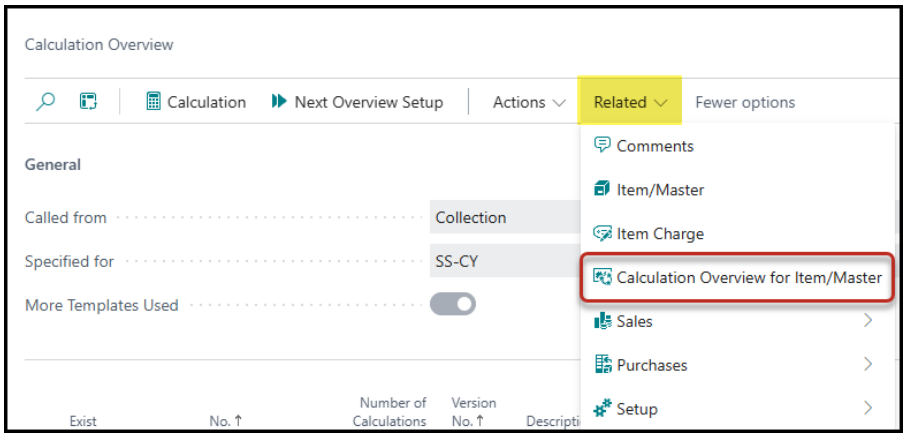
Exist	No.	Number of Calculations	Version No.	Description	Status Code	Brand Code	Season Code	Design	Item Group	Gender	Item Statistics Group 4	Item Statistics Group 5	Locked	Unit Cost	Sales Costs %	Sales Margin %	Calculat... Sales Price	Actual Sales Price
✓	2000	1	1	Olivia Trousers	READY	FASHION		1	210	110	0	10		**15.27**	5%	<90%>	30.47	**Enter Actual Sales P...**
✓	2020	1	1	Isla Trousers	READY	FASHION		1	210	110	0	10		**16.48**	5%	80%	31.14	**Enter Actual Sales P...**
✓	2100	1	1	Lily Blouse		FASHION	02-SUMMER	1	110	110	0	20		**13.64**	5%	80%	25.78	**Enter Actual Sales P...**
✓	2110	6	1	Mia Blouse		FASHION	02-SUMMER	5	110	110	0	20		**24.75**	5%	80%	46.78	**Enter Actual Sales P...**
✓	2110	6	2	Mia Blouse		FASHION	02-SUMMER	5	110	110	0	20		**27.50**	5%	80%	51.98	**Enter Actual Sales P...**
✓	2110	6	3	Mia Blouse		FASHION	02-SUMMER	5	110	110	0	20		**25.88**	5%	80%	48.90	**Enter Actual Sales P...**
✓	2120	1	1	Sophia Shirt	READY	FASHION	02-SUMMER	5	110	110	0	20		**14.65**	5%	80%	27.68	**Enter Actual Sales P...**
✓	2300	1	1	Daisy Dress		FASHION	02-SUMMER	2	155	110	0	30		**29.32**	5%	80%	55.42	**Enter Actual Sales P...**
✓	4710	1	1	Scarlett Shoe		SHOES		5	320	110	0	40		**42.90**	5%	80%	81.08	**Enter Actual Sales P...**

The **Number of Calculations** is *6*, but you only see *3*, because this page is filtered based on **Called From, Specified for** and **Calculation Template Filter.**
But there might be more Calculations outside these filters. You can drill-down on the **Number of Calculations** to see the *6* Calculations related to the Master/Item on the Line.



Locked	Expired	No.	Version No.	Description	Calculation Template	Specification Level	Specified for
No		2110	S	Mia Blouse	PSR_S	None	
No		2110	1	Mia Blouse	PSR_S	Collection	SS-CY
No		2110	2	Mia Blouse	PSR_S	Collection	SS-CY
No		2110	3	Mia Blouse	PSR_S	Collection	SS-CY
No		2110	4	Mia Blouse	PSR_L	Collection	SS-CY
No		2110	5	Mia Blouse	RSP_S	Collection	SS-CY

In addition, you can also click ***Related, Calculation Overview for Item/Master*** in the Calculation Overview.



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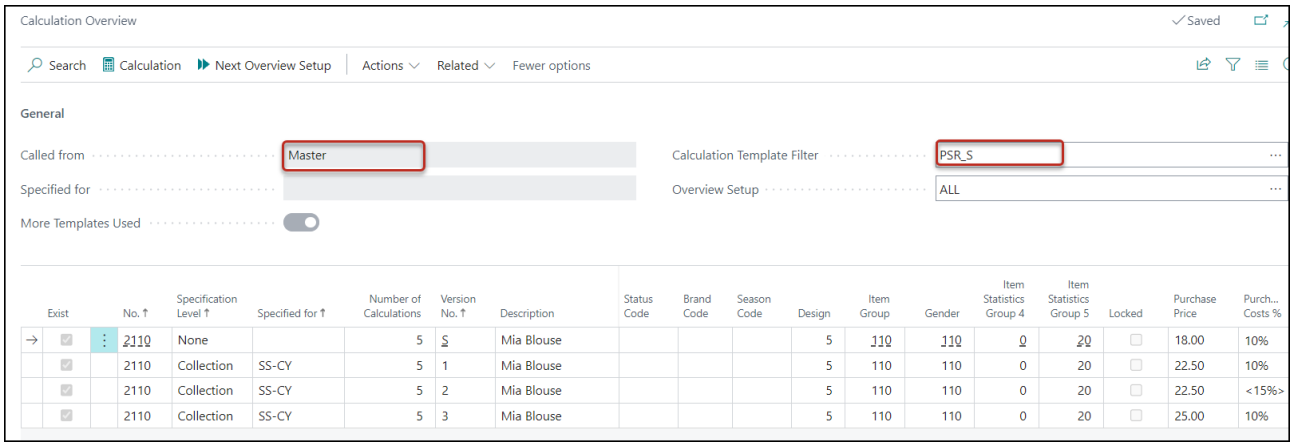
But this will still have a filter on the **Calculation Template Filter**.

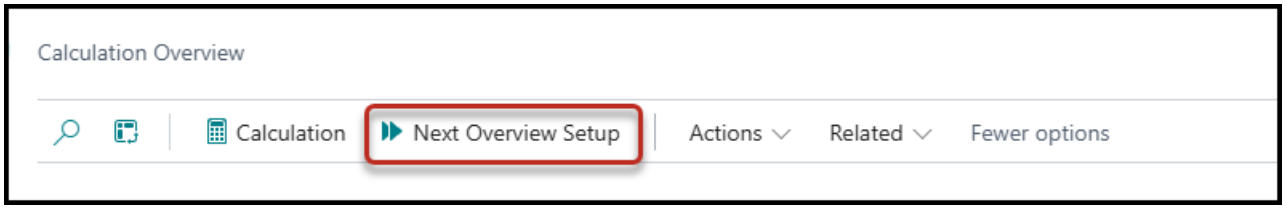


Exist	No.	Specification Level	Specified for	Number of Calculations	Version No.	Description	Status Code	Brand Code	Season Code	Design	Item Group	Gender	Item Statistics Group 4	Item Statistics Group 5	Locked	Purchase Price	Purch... Costs %
	2110	None		5	S	Mia Blouse				5	110	110	0	20		18.00	10%
	2110	Collection	SS-CY	5	1	Mia Blouse				5	110	110	0	20		22.50	10%
	2110	Collection	SS-CY	5	2	Mia Blouse				5	110	110	0	20		22.50	<15%>
	2110	Collection	SS-CY	5	3	Mia Blouse				5	110	110	0	20		25.00	10%

Actions in Calculation Overview

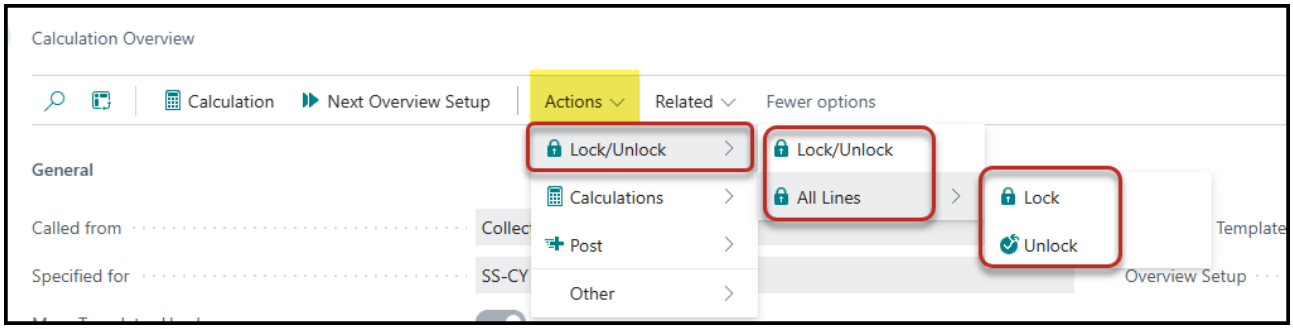
Back in the **Calculation Overview** of the **Collection** *SS-CY* there are many Actions you can execute. For several Actions, an extra Question will pop-up to ask you if you want to execute the Action.

Next Overview Setup



If you have several **Calculation Overview Setups** for the **Calculation Template Filter** that is mentioned in the FastTab ***General*** of the Calculation Overview, you can see them individually by clicking ***Next Overview Setup***.

Lock/Unlock



Lock/Unlock

With **Lock/Unlock,** you can lock the Calculation of the Line. This means that the underlying Calculation cannot be changed anymore.
If a Line is locked, you can unlock it again using the same Action.

All Lines

With **All Lines,** you can *Lock/Unlock* all the Lines at once.

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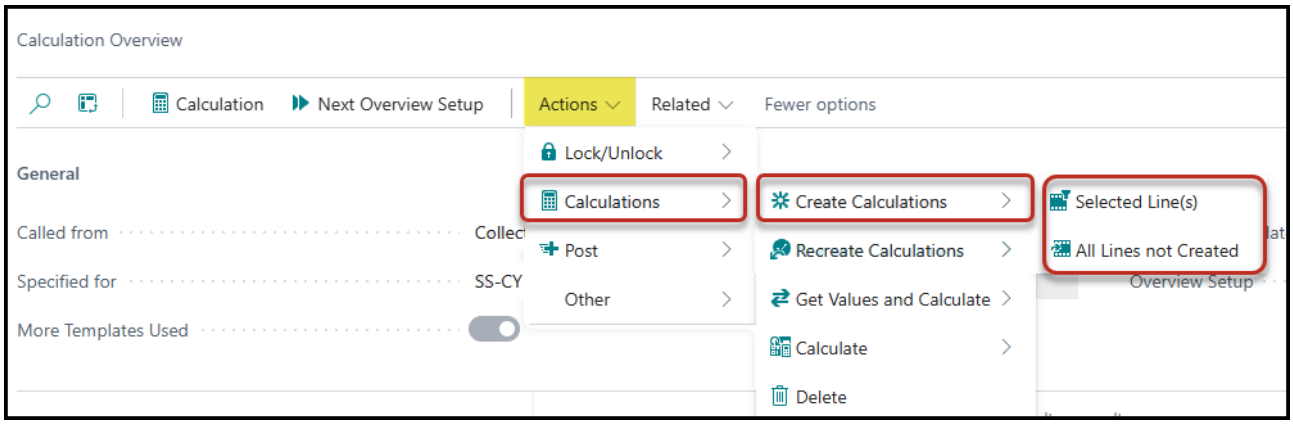
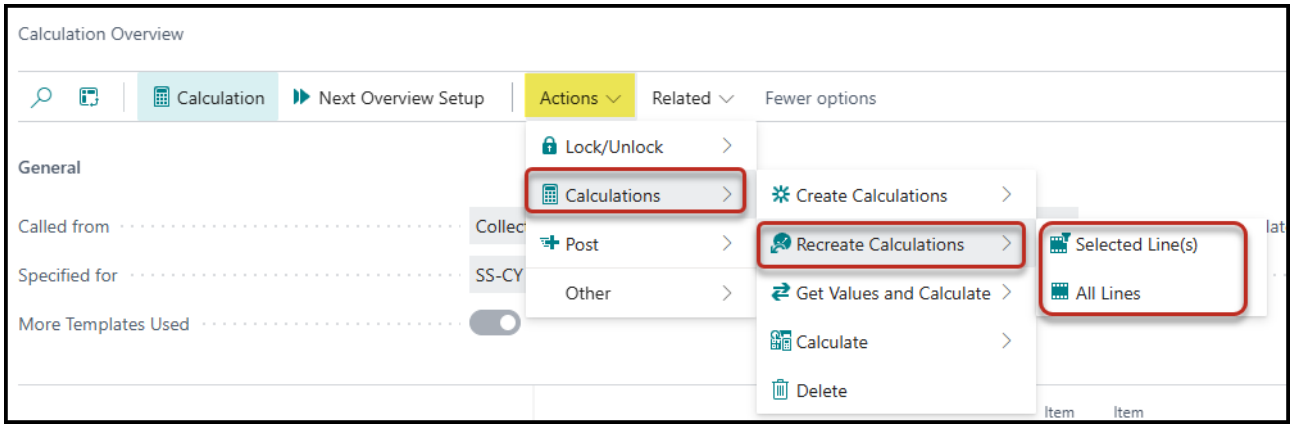
Calculations, Create Calculations



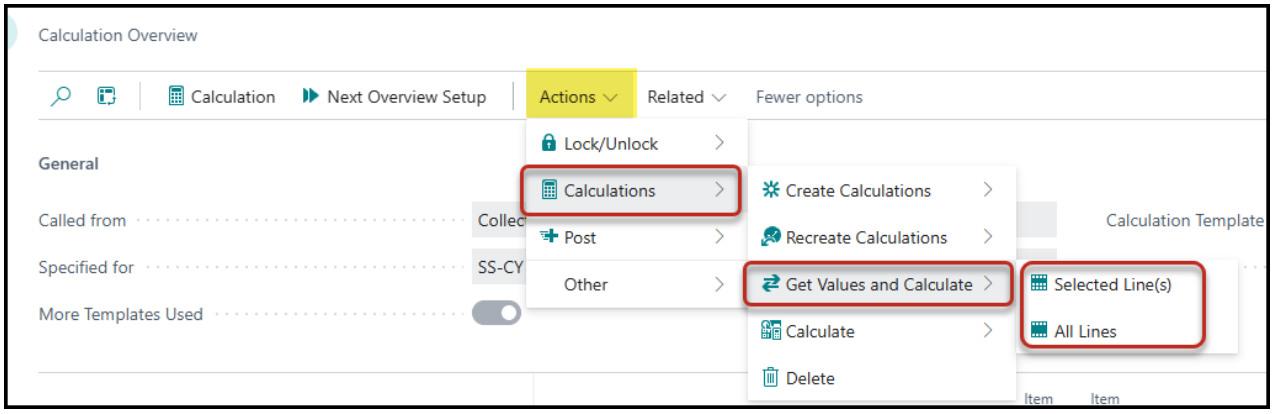
Based on the Fields **Creation Calculation Template** and the **Creation Version No.** of the Calculation Overview the individual Master Calculations can be created for the **Selected Line(s),** or **All Lines not Created.**

Calculations, Recreate Calculations



Based on the **Template** of the Calculations that are shown in the Lines of the Calculation Overview of the Collection, the individual Master Calculations Lines will be deleted and created again based on the settings in the Template. The header of the Calculation however, will not change.
This can be done for the **Selected Line(s)** or for **All Lines**.

Calculations, Get Values and Calculate



Based on the **Template** of the Calculations that are shown in the Lines, the Values of the individual Master Calculations will be set to the defaults (that you entered in the Template by using the **Show in Cells** *Get Value Formulas)* of the Template again and all the Formulas will be recalculated.
The lines of the Calculation will however stay the same as they are.
This can be done for the **Selected Line(s)** or for **All Lines**.

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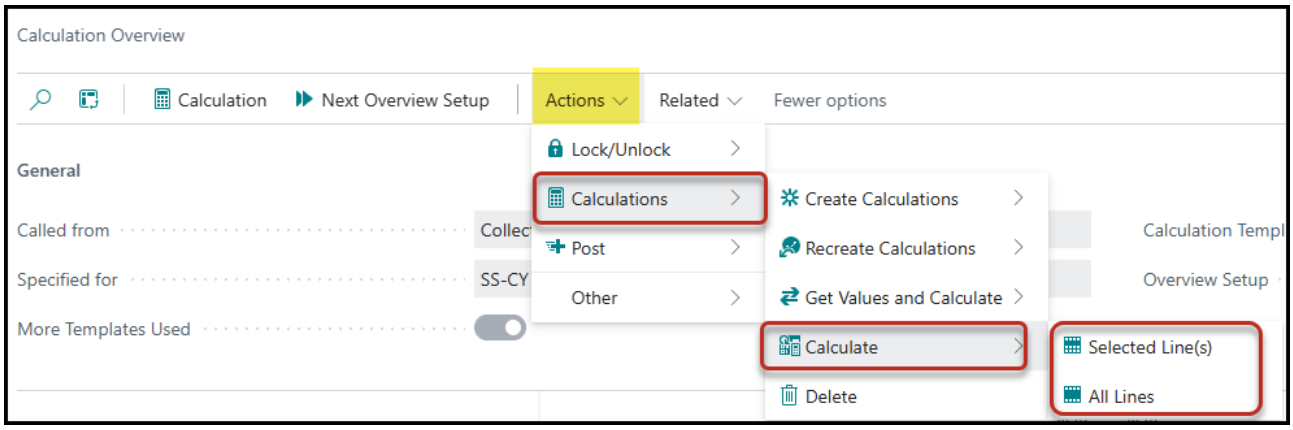
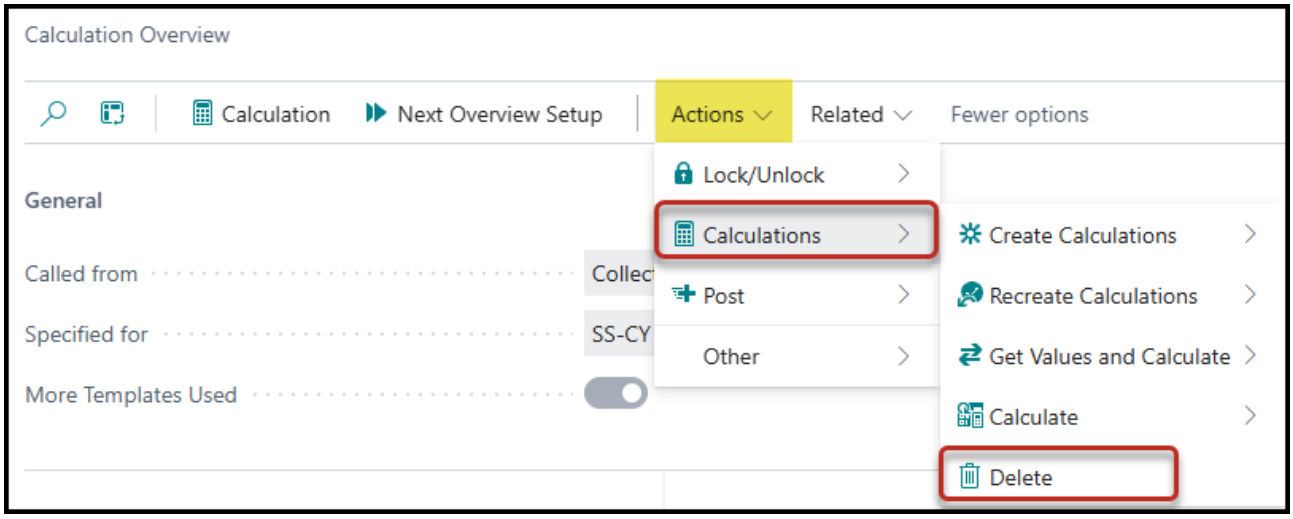
Calculations, Calculate



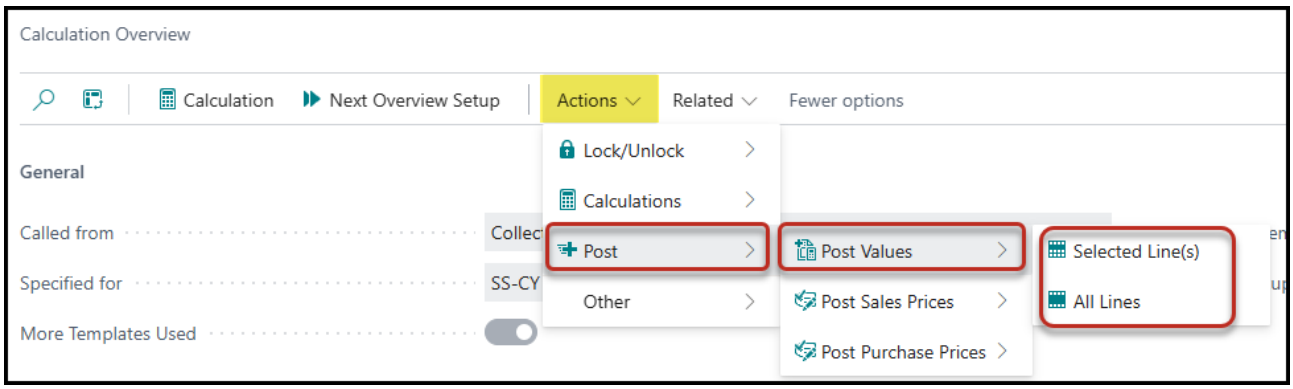
All the Calculation Formulas of the individual Master Calculations in the Calculation Overview will be recalculated. This can be done for the **Selected Line(s)** or for **All Lines**.

Calculations, Delete



You can **Delete** the Calculation related to the Line you are standing on.
By selecting several Lines in the Calculation Overview, you can Delete several Calculations at the same time.

Post, Post Values



The Action **Post Values** will execute the **Update by Post** Formulas that were entered for the Template. This can be done for the **Selected Line(s)** or for **All Lines**.

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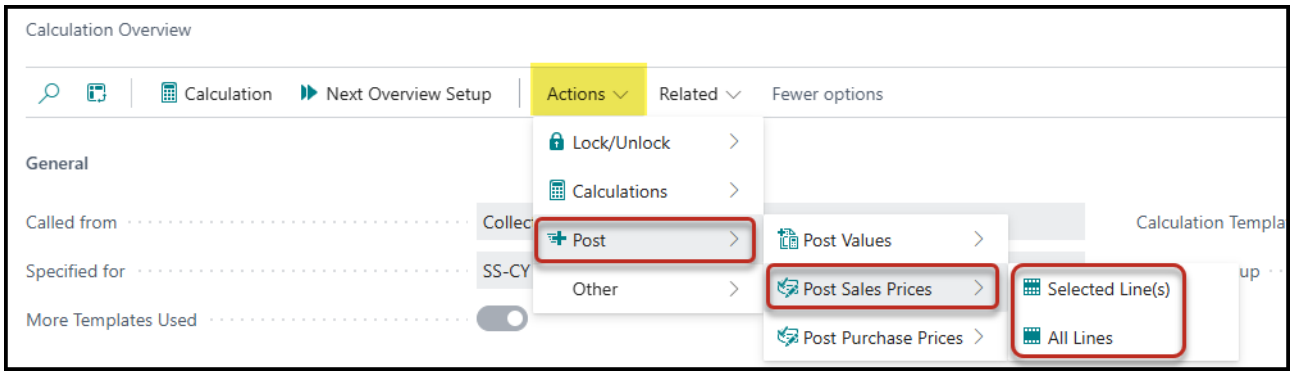
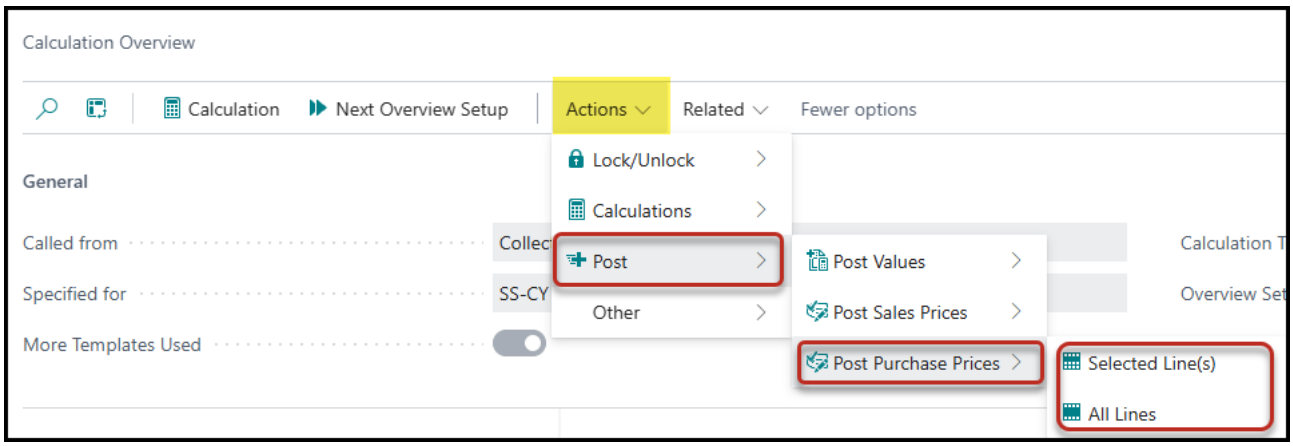
Post, Post Sales Prices



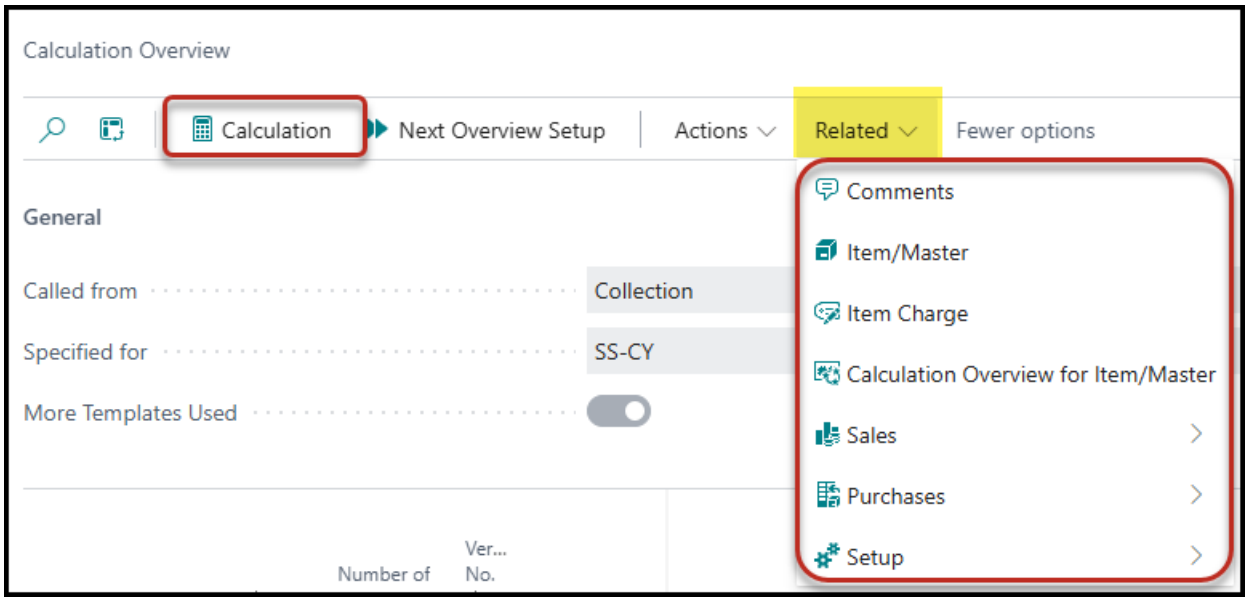
The Action **Post Sales Prices** will execute the **Sales Price Templates** that were entered for the Template and (over-) write records in the table **Sales Prices**.
This can be done for the **Selected Line(s)** or for **All Lines**.

Post, Post Purchase Prices



The Action **Post Purchase Prices** will execute the **Purchase Price Templates** that were entered for the Template and (over-) write records in the table **Purchase Prices**
This can be done for the **Selected Line(s)** or for **All Lines**.

Related in Calculation Overview



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Calculation

The **Calculation** will show you the detailed Calculation of the Master/Item on the current Line.

Comments

You can enter specific **Comments** to the Calculation of the current line.

Item/Master

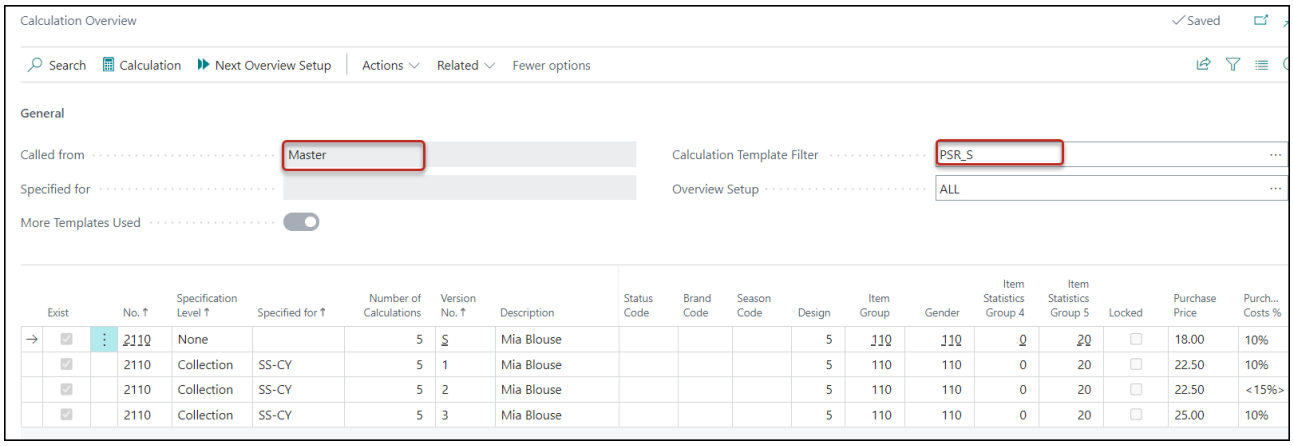
This will open the Item- or Master Card of the **No.** on the current Line.

Item Charge

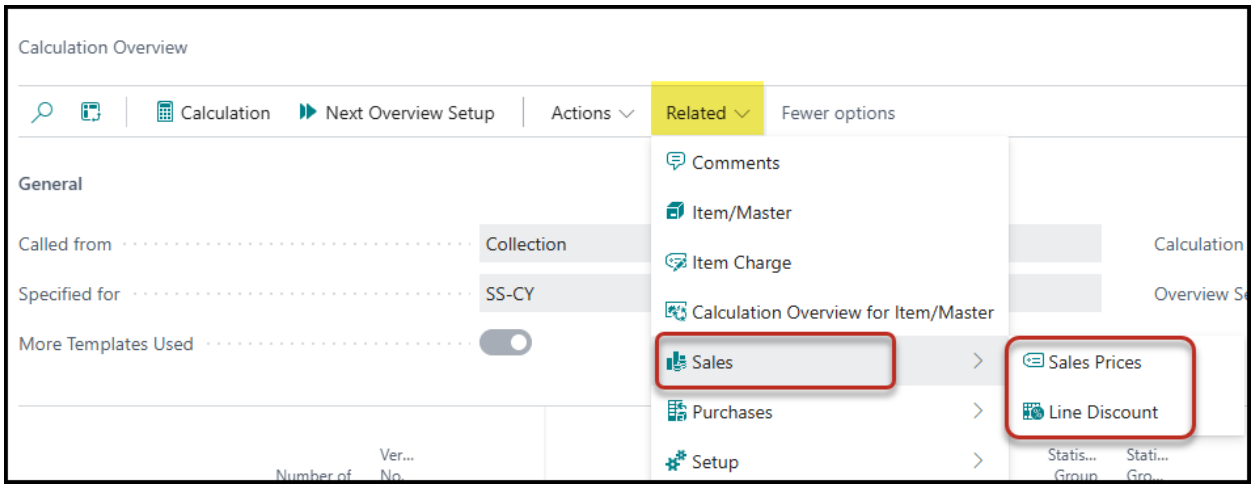
This will show the **Item Charges** that are connected to the Item- or Master **No.** on the current Line.
You are also able to create/maintain the Item Charges here.

Calculation Overview for Item/Master

This will show all the Calculations that are related to the Item- or Master **No.** on the current line based on the **Calculation Template Filter**.
Be aware that you might have to select an **Overview Setup** again for this Calculation Overview.



Sales, Sales Prices



This will show the **Sales Prices** that are connected to the Item- or Master **No.** on the current Line.
You are also able to create/maintain the Sales Prices here.

Sales, Line Discount

This will show the **Sales Line Discounts** that are connected to the Item- or Master **No.** on the current Line.
You are also able to create/maintain the Sales Line Discounts here.

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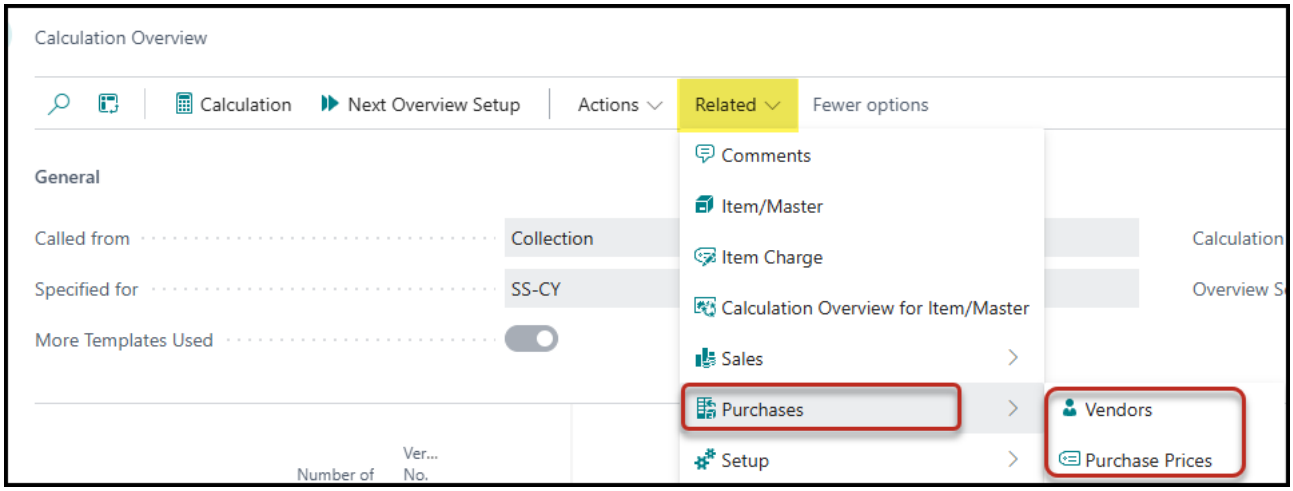
Note
These are only the **Sales Line Discounts** of standard BC, not the TRIMIT **Sales Line Discount Types**.

Purchases, Vendors

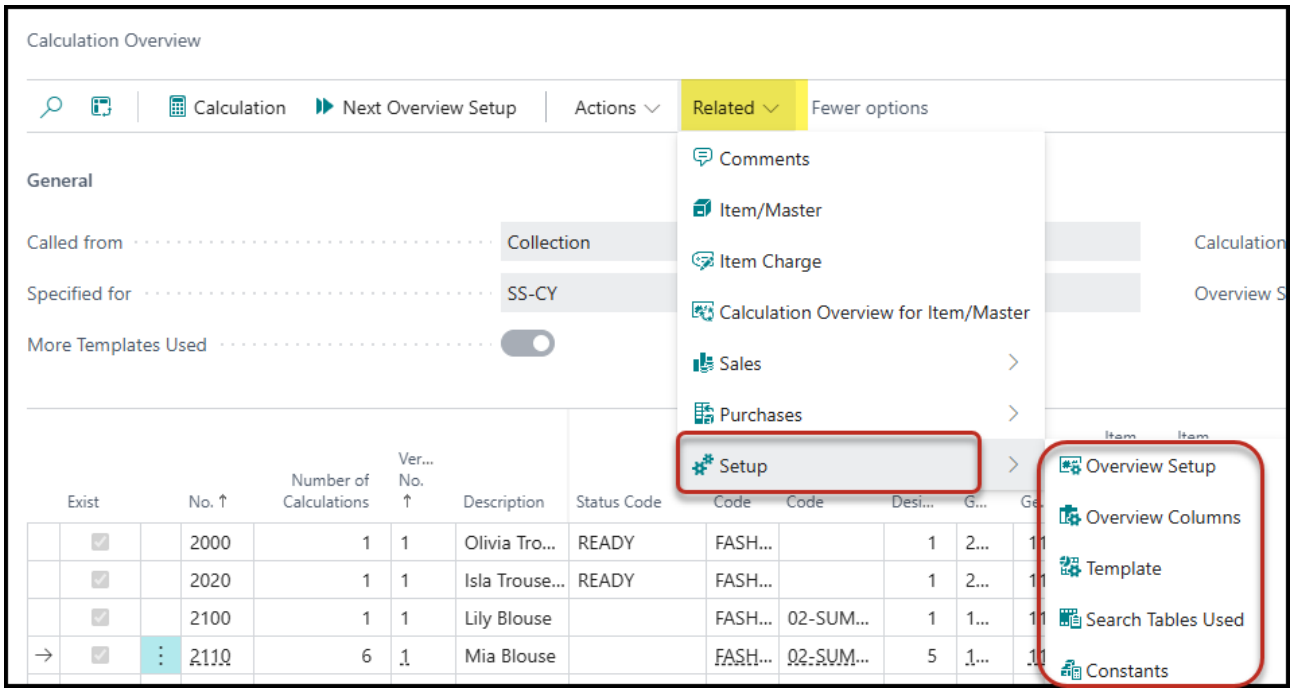


This will show the **Item Vendor Catalog** that is connected to the Item- or Master **No.** on the current Line. You are also able to create/maintain the Vendors here.

Purchases, Purchase Prices

This will show the **Purchase Prices** that are connected to the Item- or Master **No.** on the current Line. You are also able to create/maintain the Purchase Prices here.

Setup, Overview Setup



This will open the **Calculation Overview Setup** of the **Calculation Template Filter** of the Calculation Overview. You are also able to maintain the Setups.

Setup, Overview Columns

This will show the Columns of the current **Calculation Overview Setup.**
If you change the Columns of the current **Calculation Overview Setup**, it will have its immediate impact on the columns you see.

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Setup, Template

This will open the **Template Card** of the Calculations based on the **Calculation Template Filter** of the Calculation Overview.
You are also able to maintain the Template here.

Setup, Search Tables Used

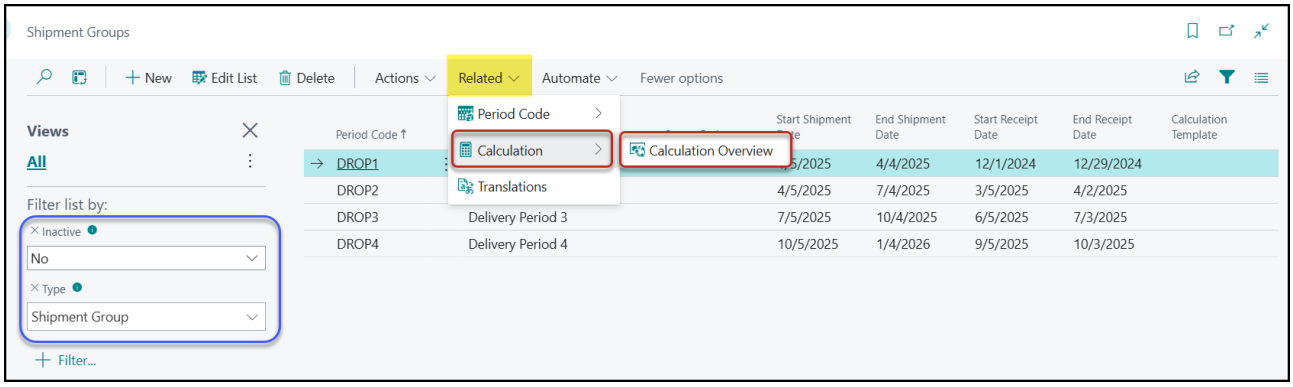
See Related, Search Tables Used.

Setup, Constants

See Related, Constants.

Calculation Overview via Shipment Group

Also, in a Shipment Group (**Search** *Shipment Group*) with **Type** = *Shipment Group* you can use the functionality of the **Calculation Overview**, the same way as in the Collection.



Via ***Related, Calculation Overview*** you can see all the Masters and/or Items of the Shipment Group.

The rest of the functionality is comparable with Calculation Overview via Collection.
Although, if you create Calculations via the **Calculation Overview** of the **Shipment Group** the **Specification Level** is now filled with *Shipment Group* and the **Specified for** is filled with the actual Shipment Group.

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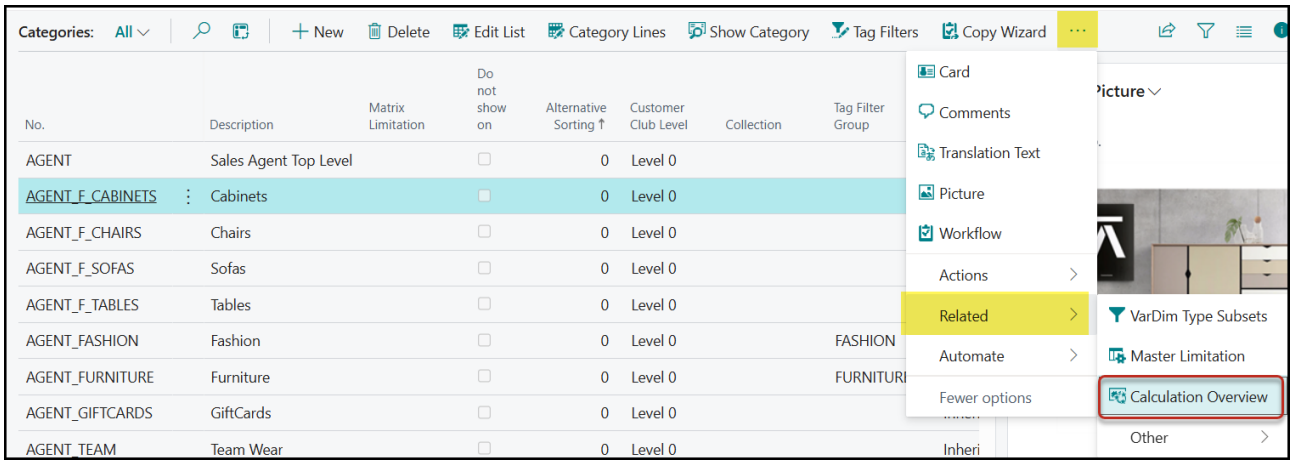
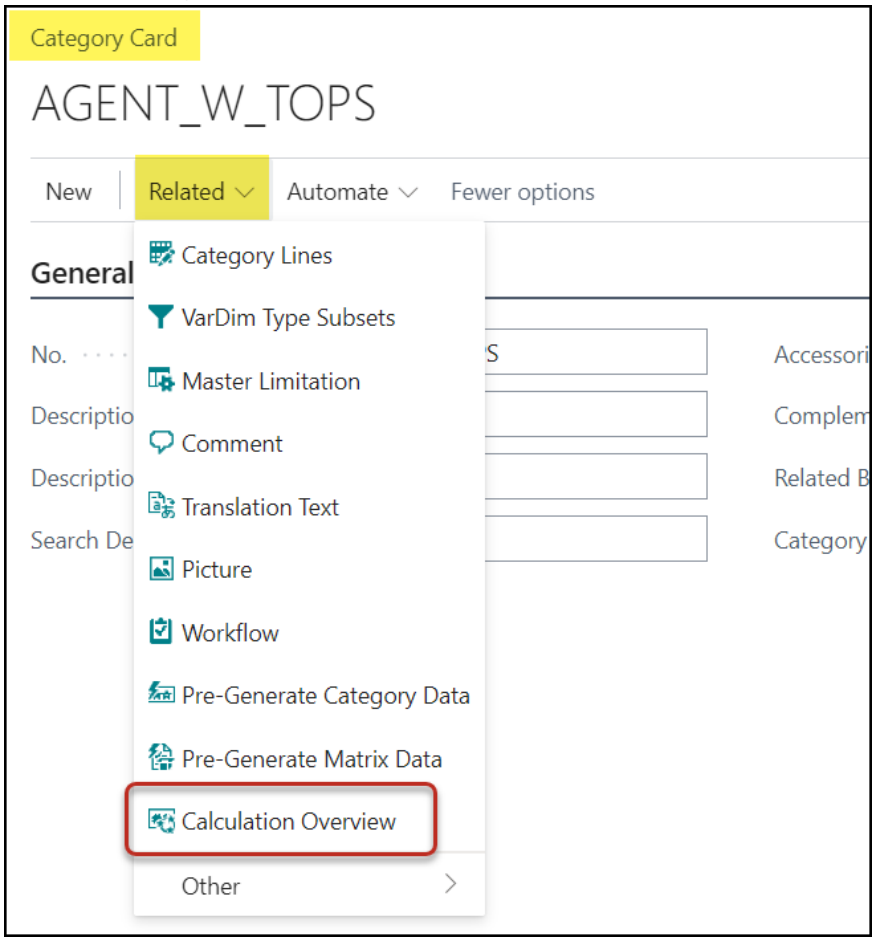
Calculation Overview via Category Card

Also, in a Category (**Search** *Category List*) and click ***Card***, you can use the functionality of the **Calculation Overview**, the same way as in the Collection.



The ***Calculation Overview*** however**,** is not visible by default; you need to add it via ***Personalize***.
It will show you all the Masters and/or Items of the Category.
In the **Category Card**, the ***Calculation Overview*** is visible by default under ***Related***:



The rest of the functionality is comparable with [Calculation Overview via Collection](#).
Although, if you create Calculations via the **Calculation Overview** of the **Category** the **Specification Level** is now filled with *Category* and the **Specified for** is filled with the actual Category.

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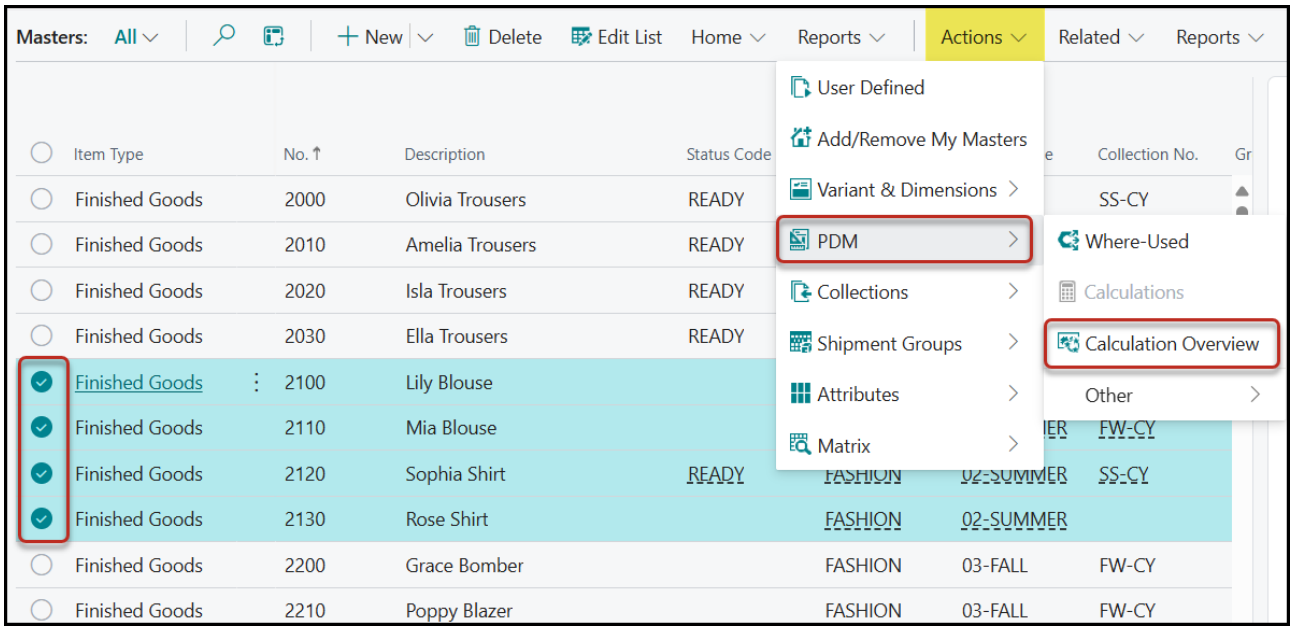
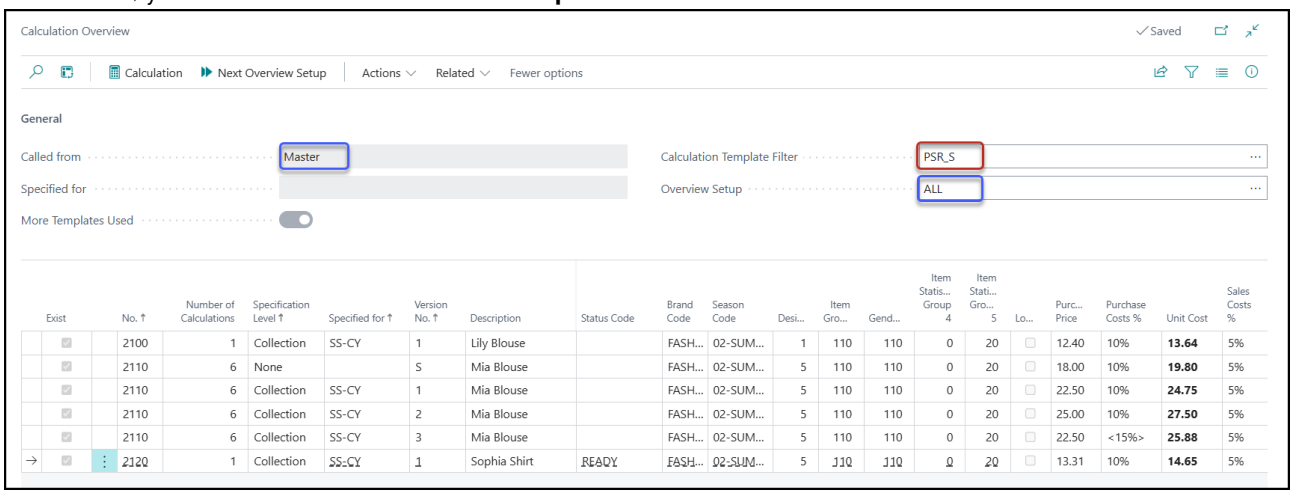
Calculation Overview via Master

It is also possible, to select several Masters in the **Master List** via **Search** *Masters* or simply click ***Masters*** in the TRIMIT Small Business Profile and open the **Calculation Overview** via ***Actions, PDM, Calculation Overview.***



In the **Calculation Overview,** you will see the Calculations that already have been created based on the **Calculation Template Filter**.

In addition, you can select an **Overview Setup** to see the Values of the columns.



In this case, if you click **Create Calculations** only for the existing Calculations, new Calculations and Versions can be created. I.e.:

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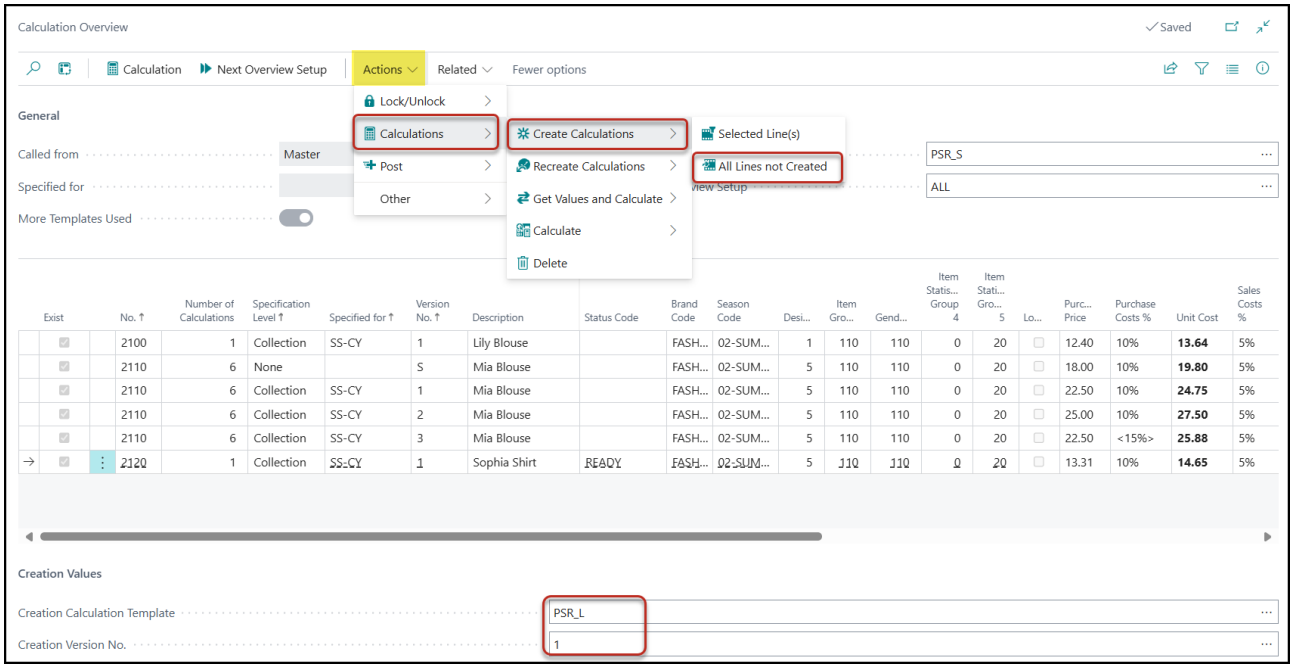
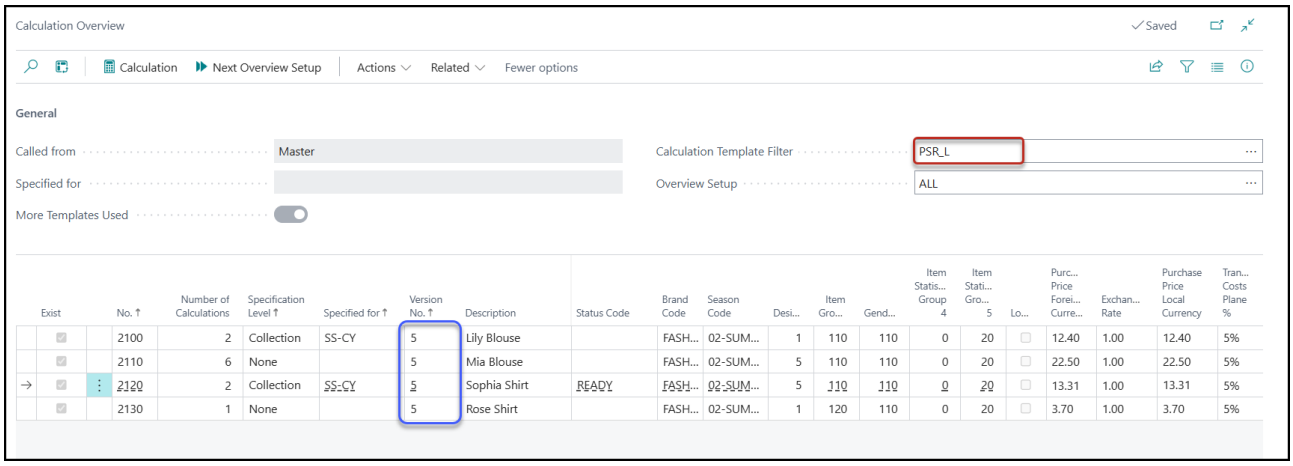


Will result in:



Note

Because some of the original Calculations had **Specification Level** *Collection* and ***Specified for*** *SS-CY*, also the new created Calculations have these specifications.

Calculation Overview via Items

It is also possible, to select several Item in the **Items List** via **Search** *Items* or click ***Product Design, Items*** in the TRIMIT Small Business Profile, and open the **Calculation Overview** via ***Actions,*** click ***Calculation Overview.***

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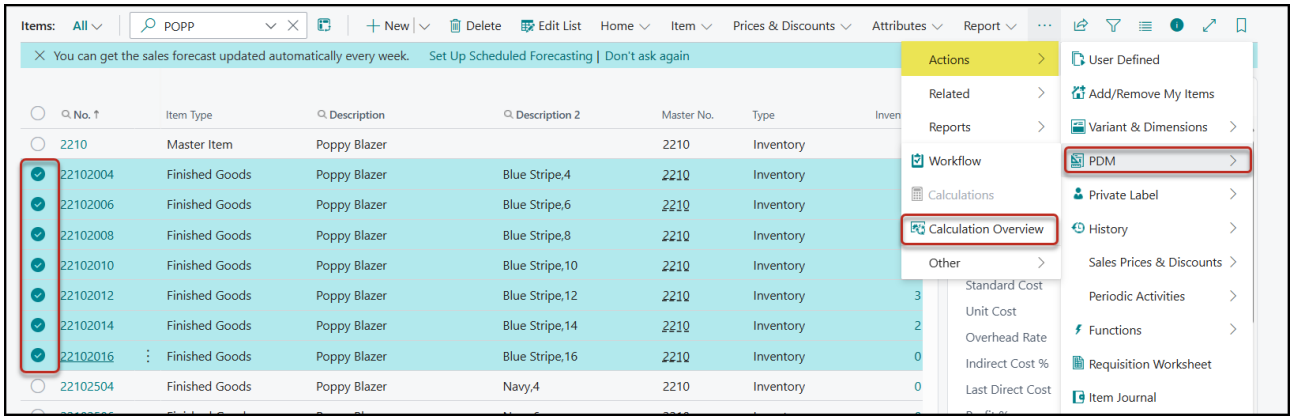
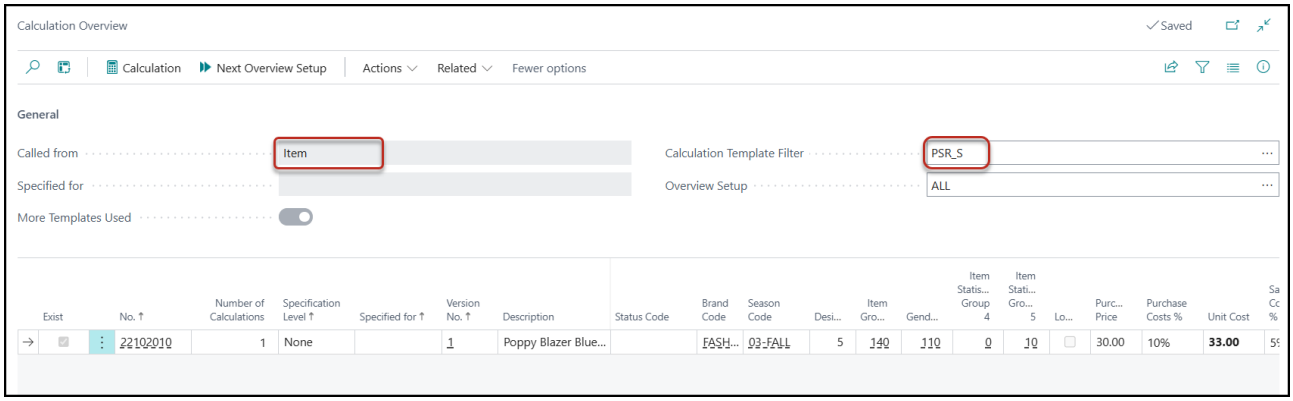
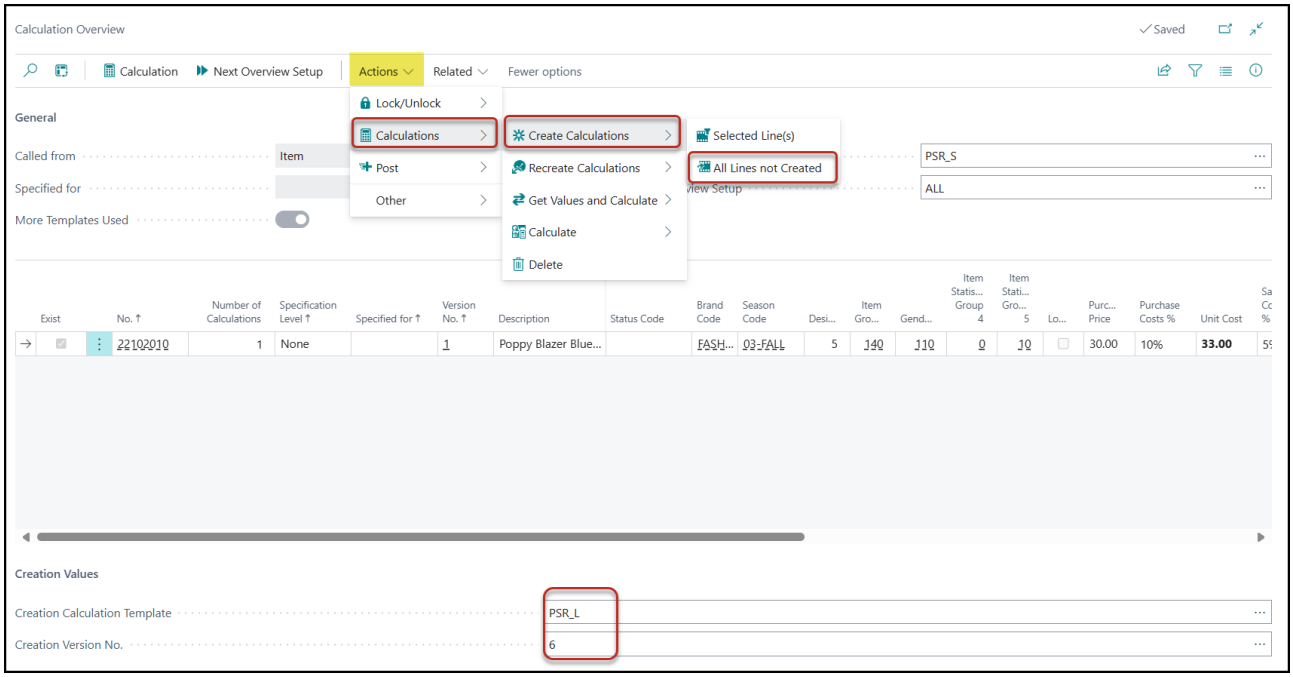


In the **Calculation Overview,** you will see the Calculations that already have been created.
In addition, you can select an **Overview Setup** to see the Values of the columns.



In this case, if you click **Create Calculations** only for the existing Calculations, new Calculations and Versions can be created. I.e.:



And after clicking **Yes**, it will result in:

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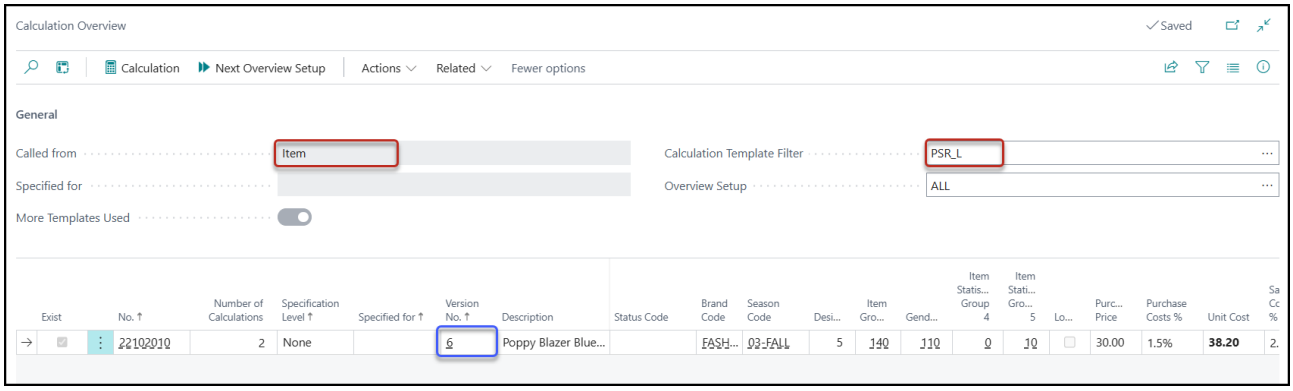

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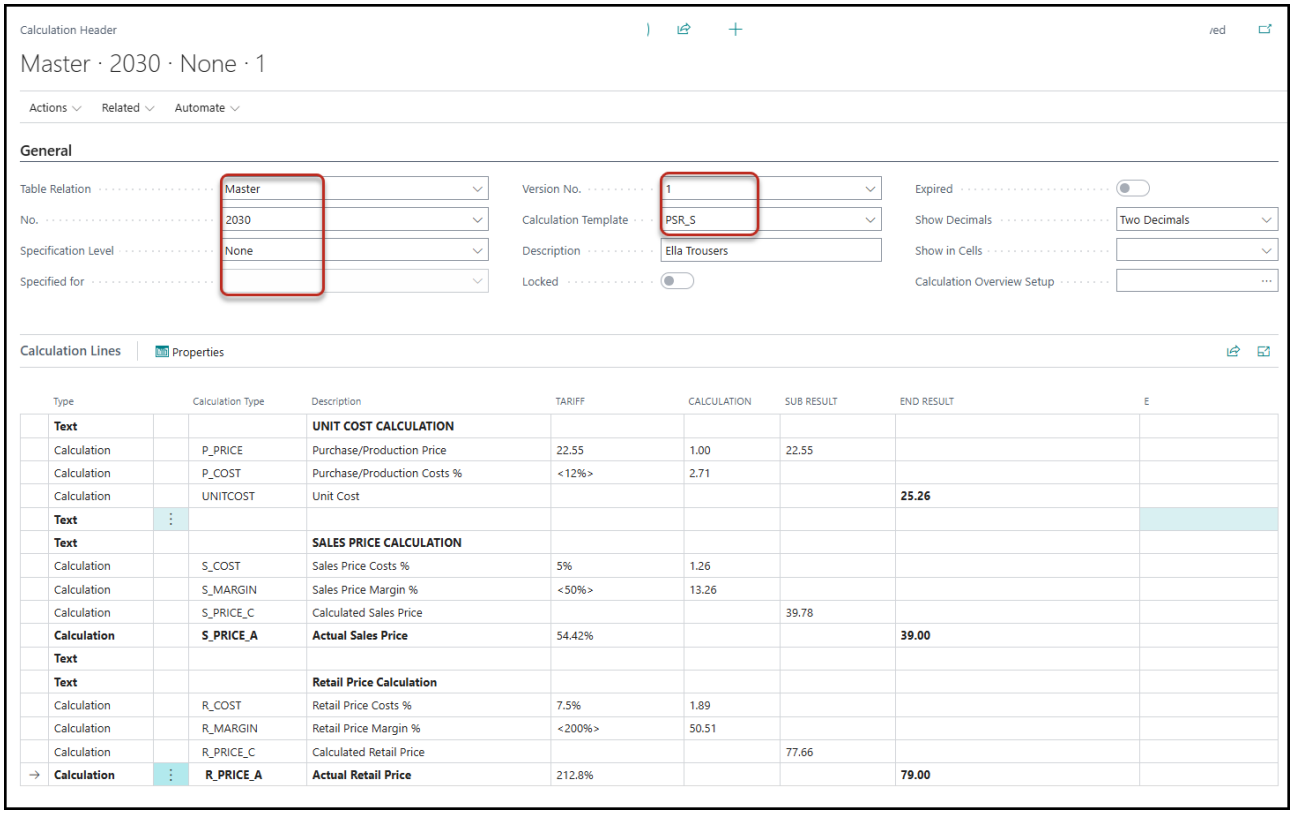
Calculations

Although by using the Templates and the Calculation Overview you can create and maintain individual Calculations, you are also able to create and maintain individual Calculations via **Search** *Calculation List.* You can also find the Calculations via the Master- or Item List/Card, by clicking ***Actions, PDM, Calculations.***

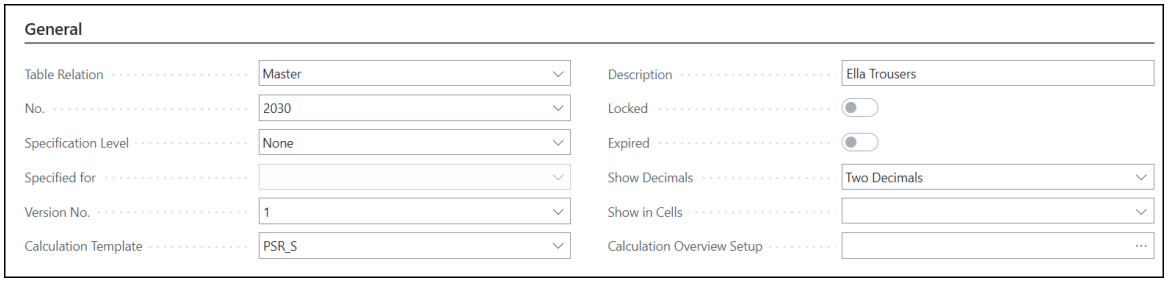
The Calculation page is the workspace for creating and working with individual Calculations. Once the Field **Calculation Template No.** is filled, the **Calculation** will be created automatically from the **Calculation Template**, and the ***Get Value Formulas*** will be executed.



When a Value in a Field (i.e., in the ***A (TARIFF)*** column) is changed and will be shown between **<..>**, all the Calculation Formulas will be executed again, and the entire Calculation will be recalculated.

FastTab General

The FastTab **General** contains the general specification of the Calculation:



Description of the Fields:

Table Relation

You can choose if you want to have a Calculation for a *Master* or an *Item.*
The default is *Master*.

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No.

In this Field, the Master or Item Number for the Calculation must be entered.

Specification Level

This Field shows via which way the Calculation is created if you create your Calculations via a **Calculation Overview**.
However, if you create a **Calculation** manually, you can simply enter the Value for the **Specification Level**.
There is however no check if the entered **Master** is connected to the **Specification Level** + **Specified for.**
Changing the Specification **Level** will also result in the deletion of the Field **Specified for** which you need to enter afterwards again.
You can choose between the following four options:

None	Created via **Calculations** itself or via the Calculation Overview of a Masters List
Collection	Created via the Calculation Overview of a **Collection**
Shipment Group	Created via the Calculation Overview of a **Shipment Group**
Category	Created via the Calculation Overview of a (e-commerce) **Category**

Specified For

In this Fields you can enter a **Collection, Shipment Group** with **Type** = *Shipment Group* or **Category**– this depends on the content of the Field **Specification Level.**
If **Specification Level** is *Collection,* this content of this Field will be checked in the **Collections.**
If **Specification Level** is *Shipment Group,* the content of this Field will be checked in the **Shipment Groups** with **Type** = *Shipment Group*.
If **Specification Level** is *Category,* this content of this Field will be checked in the **Categories.**

Version No.

In this Field, it is possible to define a Version Number for the Calculation.
There is also a table ***Calculation Version No. (6037048)*** attached to this Field.

NOTE
You can only select Version **No.** that is already created in the **Calculation Version No.** table. Therefore, if you want to use a new Version No. you need to add this (via Lookup/click ***New***) before you can enter it.

Calculation Template No.

In this Field, the **Template** must be selected. Once filled, the Calculation will be created based on the selected Template.

Description

In this Field, it is possible to enter a **Description** for the Calculation.
Default is the **Description** of the Master or Item you entered in **No.**

Locked

This Field can be set by clicking ***Actions, Lock/Unlock, Lock/Unlock.***
A checkmark means that the Calculation cannot be changed/updated anymore.

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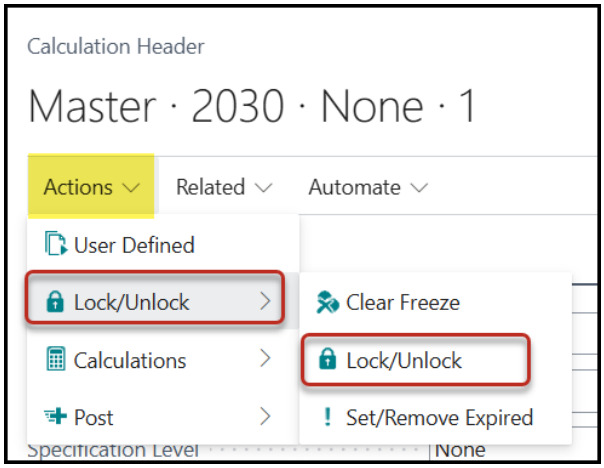
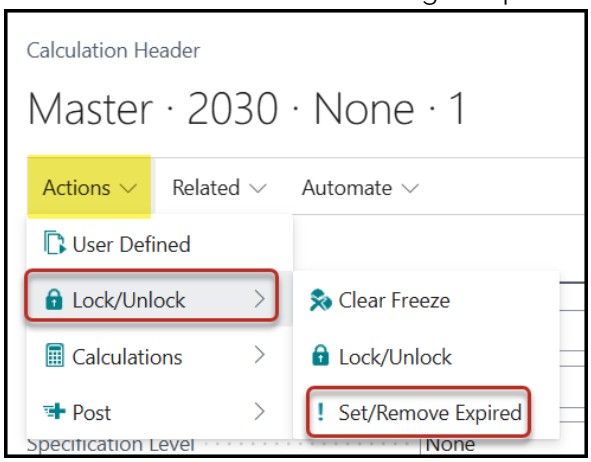


NOTE
A Locked Calculation can cause messages if you want to recalculate many Calculations at the same time, because a Locked Calculation cannot be recalculated.

Expired

This Field can be set by clicking ***Actions, Lock/Unlock*, Set/Remove Expired.**
A checkmark means that the Calculation is expired. At the same time, a checkmark will be set to **Locked** so the Calculation cannot be changed/updated anymore.



Show Decimals

You can determine how many decimals you want to see in the Cells.
You can choose between the following two options:

Two	Only two decimals will be shown
All	All decimals will be shown

Show in Cells

The content of this Field determines what you will see in the columns of the Lines of the Calculation.
You can choose between the following four options:

<empty>	With this option, the content you enter/see are the calculated (or changed) Values based on the Template Formulas.
Calculate Formulas	With this option, the content you see in a Cell will be the Formula Lines of the Template for that specific Cell. You are not able to change them in the individual Calculations; therefore, you need to go to the Template.

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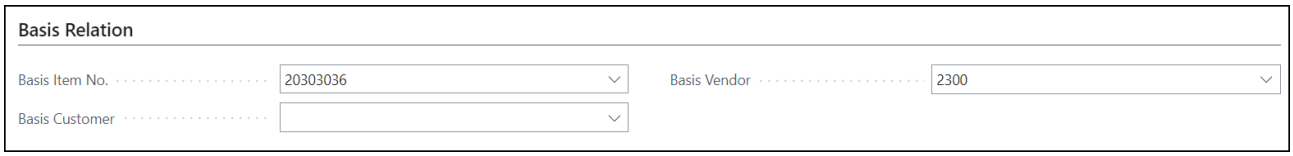
Get Value Formulas	With this option, the content you see in a Cell will be the Formula Lines that will automatically fill defaults in a new Calculation when created with the Template. You are not able to change them in the individual Calculations; therefore, you need to go to the Template.
Overview Columns	With this option, the content you see in a Cell will be the Columns for the specific Calculation Overview that you need to enter in the next Field **Calculation Overview Setup** of the Calculation. You are not able to change them in the individual Calculations; therefore, you need to go to the **Calculation Overview Setup** itself.

Calculation Overview Setup

Here you can enter a **Calculation Overview Setup** of the **Calculation Template No.**
This will influence the content of the Cells if you choose **Show in Cells** = *Overview Columns.*

FastTab Basis Relation



Basis Item No.

In this Field, it is possible to select an Item Number. The Item is used, to get Item Cost, when calculating a Master. In case the **Table Relation** is *Master,* this Field is automatically filled with the first Item No. that is related to the Master but can be changed. In case the **Table Relation** is *Item*, this Field will automatically be filled with the **No.** of FastTab ***General*** but can be changed.

Note
If a Formula is created to get Item Information, the Field **Basis Item No.** must be filled.

Basis Customer

In this Field, you can enter a **Customer.** The **Customer** entered will be used in the Calculation if the Calculation runs a Function that can be called for a specific Customer, for instance if you want the program to calculate a Unit Price (Sales Price).
This Field will by default be filled with the **Basis Customer** from the **Calculation Template.**

NOTE
If a Formula is created to get Customer Information, the Field **Basis Customer** must be filled.

Basis Vendor

In this Field, you can enter a **Vendor.** The **Vendor** entered will be used in the Calculation if the Calculation runs a Function that can be called for a specific Vendor, for instance if you want the program to calculate a Direct Unit Cost (Purchase Price).
This Field will by default be filled with the **Basis Vendor** from the **Calculation Template.**
If this is not filled, the **Basis Vendor** will by default be filled with the **Vendor No.** of the Item in case the **Table Relation** is *Item* or the **Vendor No.** of the Master in case the **Table Relation** is *Master.*

Note
If a Formula is created to get Vendor Information, the Field **Basis Vendor.** must be filled.

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FastTab Calculation Lines (Lines)

The **Calculation Lines** area is built similarly to a Spreadsheet.
The first three columns (**Type**, **Calculation Type** and **Description**) are fixed and are based on the **Calculation Template** from which the Calculation has been created.
The following, up to ten columns, are defined by the **Calculation Columns** (see Calculation Columns) and the **Column Descriptions** (see FastTab Column Description) selected in the **Calculation Template**

Calculation Lines | Properties

Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT	E
Text		**UNIT COST CALCULATION**					
Calculation	P_PRICE	Purchase/Production Price	<22.55>	1.00	22.55		
Calculation	P_COST	Purchase/Production Costs %	<12%>	2.71			
Calculation	UNITCOST	Unit Cost	**Enter desired Unit Cost**			25.26	
Text							
Text		**SALES PRICE CALCULATION**					
Calculation	S_COST	Sales Price Costs %	5%	1.26			
Calculation	S_MARGIN	Sales Price Margin %	<50%>	13.26			
Calculation	S_PRICE_C	Calculated Sales Price			39.78		
Calculation	**S_PRICE_A**	**Actual Sales Price**	54.42%			39.00	
Text							

The difference between **Calculation Lines** and (**Calculation**) **Template Lines** is the ten Calculation Columns.
In the Template, these lines can only display the underlying Formulas.
In the Calculation, where a Master or Item is selected, these lines will show the calculated Values based on the Formulas in the Template and the **Get Value Formulas** of the Template (defaults when creating a Calculation). You are also able to change Values in the Cells of the Calculation based on the properties of the Template Lines. In that case, all the other Values will be recalculated.

You can use both numbers and text in the Cells of the Calculation and any text can also be used in the Formulas that are in the Template, for instance as part of a Condition.
All Fields from the FastTabs ***General*** and ***Basis Relation*** of the Calculation can also be used in Calculation Formulas.

If you need to change a Formula, you need to go back to the **Template**.
You can see the Formulas however if you choose **Show in Cells** *Calculation Formulas.*
Properties for the Cells in a Calculation can be edited from the Calculation Line, but you must be aware that it will change the Properties for the corresponding Cells in the related Template Line and therefore for all other Calculations based on the same Template.

It is not possible to add or delete lines from a Calculation; therefore, you need to go to the related Template – but this will influence all related Calculations as well!

Description of the Fields:

Type

This column defines whether the line is Text (i.e., Headline) or Calculation.

Calculation Type

In this column, the **Calculation Type** is shown (see Calculation Types).

Description

In this column, the **Description** is copied from the Calculation Type but can be changed.

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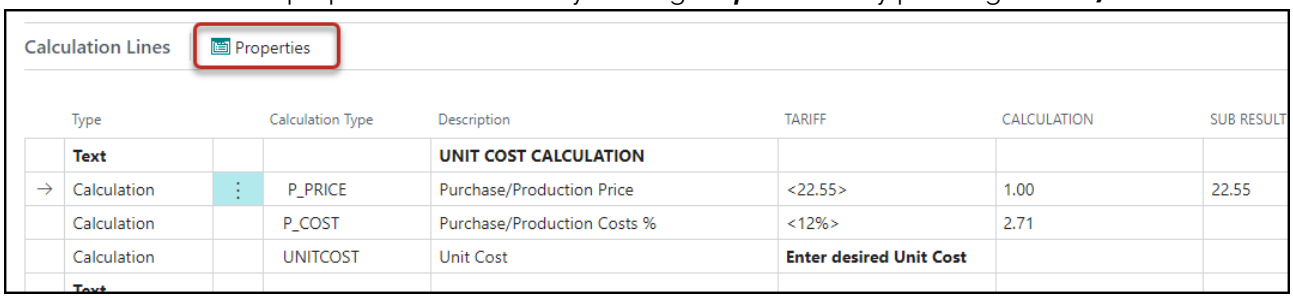
Calculation Columns

Ten columns are available. Five are default shown. The text above the columns is determined by the content of the Field **Column Caption** of the Template (see Column Caption)
The Values in the Cells are the results of the Formulas in the Template, or by entering a Value in it.
The Formulas are using Names that match the Columns and Rows in the Calculation, making it easy to see what is calculated.

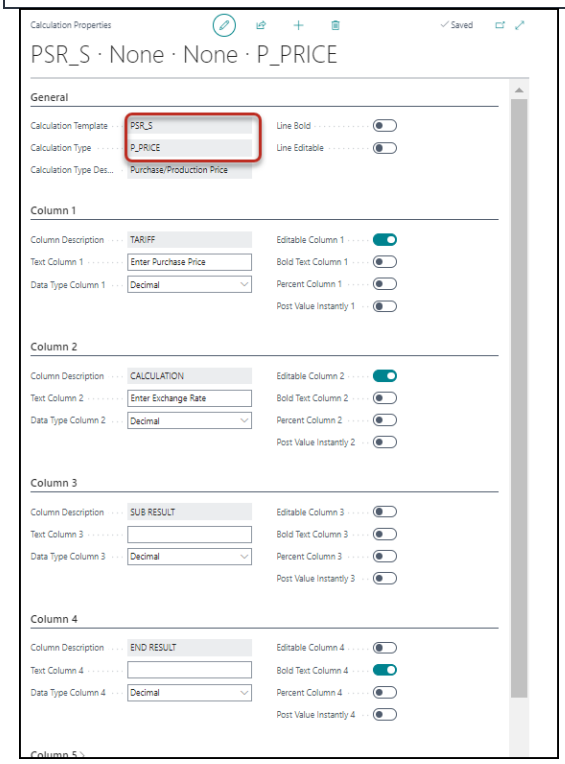
Properties of the Lines (Shift+F7)

For each Calculation Line of **Type** *Calculation,* it is possible to select **Properties**, to enhance the usability of the Calculation. The properties are shown by clicking ***Properties*** or by pressing **Shift+F7**.



The system will redirect you to the **Properties** of the connected Template and the corresponding Calculation Template Line.

NOTE
This means changing the Properties of a Calculation Line = changing properties of the Template Line and having its direct effect on all the Calculations that are based on the same Template.



For a detailed description of the Fields of the **Properties,** see Properties of the Lines (Shift+F7)

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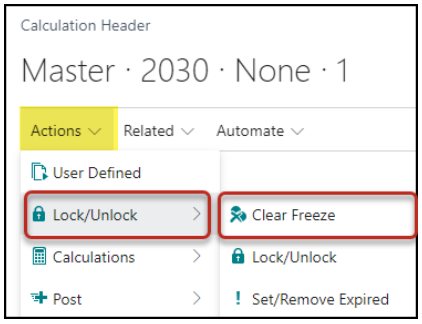
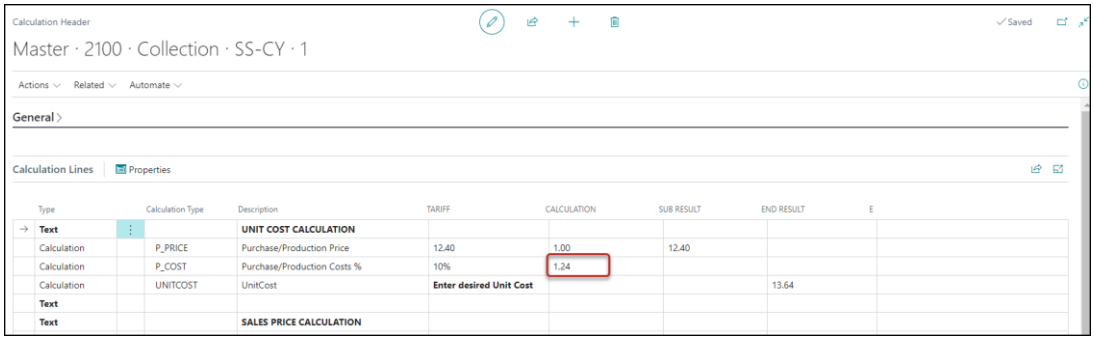
Actions in the Calculation



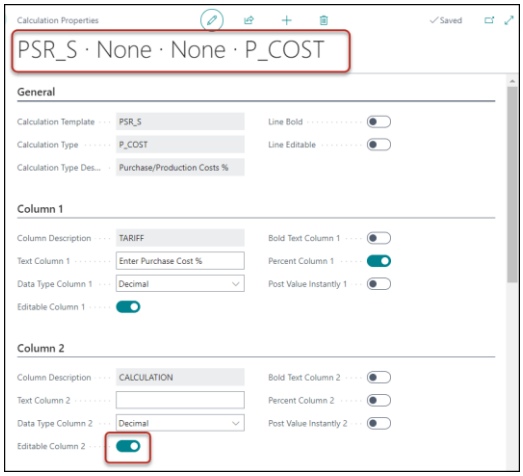
Lock/Unlock, Clear Freeze

If a Cell of the Calculation is calculated based on a **Calculation Formula** or **Get Value Formula** of the Template, you are initially not able to change the Value in the Cell.
If you however click ***Actions, Lock/Unlock, Clear Freeze.*** Now you can change the Value in these Cells. However, this also depends on the **Properties** of the Line; if the Property of a specific Line and Column does not have a checkmark in **Editable** the Cell remains not editable.
If you click ***Clear Freeze*** again, it will be frozen again.

I.e., in a Calculation, you want to change the *1.24* in the Cell *P_COST[B]* so it might represent a higher Cost Amount. The Value *1.24* came originally from the **Template** by calculating *10 %* of the *12.40* and is initially not editable.



First Step:
Change the **Property** of the Line/Columns so you can edit the Cell.



Keep in mind that this will change the property for ALL Calculations that are related to the Template *PSR_S*.

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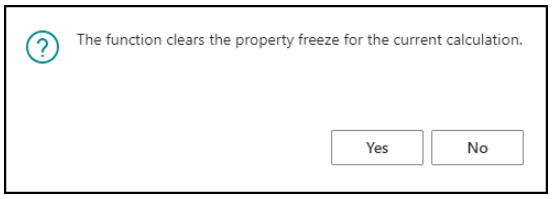
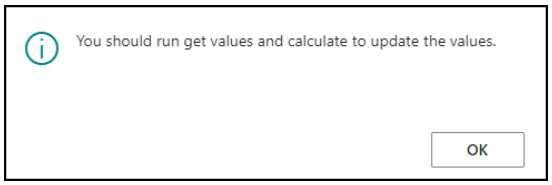
Second Step:

Click ***Actions, Lock/Unlock Clear Freeze.***



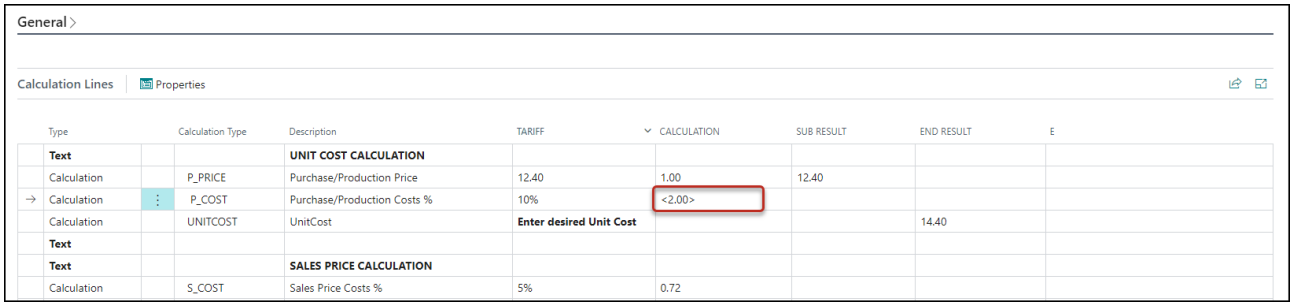
Click **Yes**.



This message reminds you of restoring the original **Get Value Formula** Values if you do not want to keep the Calculation after your manual changes. Click **OK**.

Third Step:

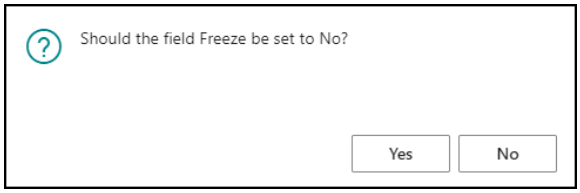
Now you can change the content of the Cell:

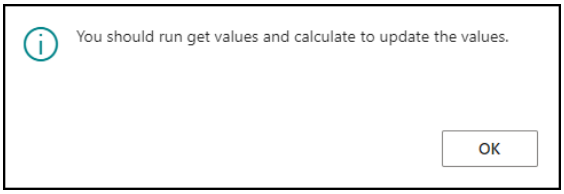


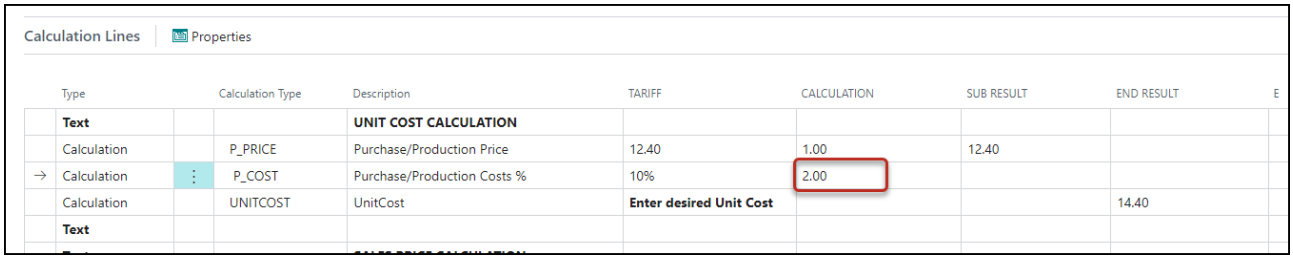
The Calculation will automatically again be set to *Freeze,* so the *2.00* will not be overwritten again if you recalculate this calculation and will be shown between Less-then sign (<) and Greater-than sign (>)

If you want the original Value – based on the Template – back, you need to click ***Actions, Lock/Unlock, Clear Freeze*** again.

It is also possible to enter a "-"(minus sign) in the Cell, after which a message appears asking you to confirm the un-freeze:







The Less-then sign (<) and Greater-than sign (>) are gone again, and if you now click **Get Values and Calculate** the original Value will be back.

You might however also get other default Values back.

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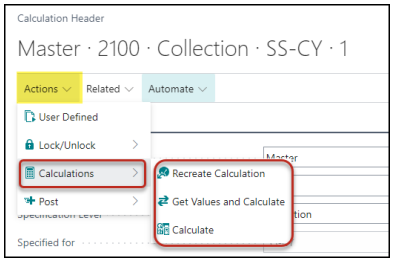
Calculation Lines | Properties

Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT
Text		**UNIT COST CALCULATION**				
Calculation	P_PRICE	Purchase/Production Price	12.40	1.00	12.40	
Calculation	P_COST	Purchase/Production Costs %	10%	1.24		
Calculation	UNITCOST	UnitCost	**Enter desired Unit Cost**			13.64
Text						
Text		**SALES PRICE CALCULATION**				

Calculations, Recreate Calculations



Based on the **Calculation Template No.** of the Calculation, the Calculation Lines will be deleted and created new based on the settings in the Template. The header of the Calculation however, will not change.

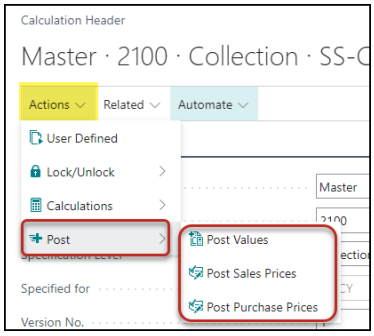
Calculations, Get Values and Calculate

Based on the **Calculation Template No.** of the Calculation the individual Calculation Values will be updated based on the **Get Value Formulas** and the Formulas (Subtotals and Totals) will be recalculated. The Lines of the Calculation however, will stay the same as they are.

Calculations, Calculate

All the Formulas (Subtotals and Totals) of the individual Lines will be recalculated.

Post, Post Values



The Action ***Post Values*** will execute the **Update by Post** Formulas of the attached **Calculation Template No**.

Post Sales Prices

The Action ***Post Sales Prices*** will execute the **Sales Price Templates** of the attached **Calculation Template No**. and (over-) write records in the table **Sales Prices** for the **No.** in the header of the Calculation.

Post Purchase Prices

The Action ***Post Purchase Prices*** will execute the **Purchase Price Templates** of the attached **Calculation Template No**. and (over-) write records in the table **Purchase Prices** for the **No.** in the header of the Calculation.

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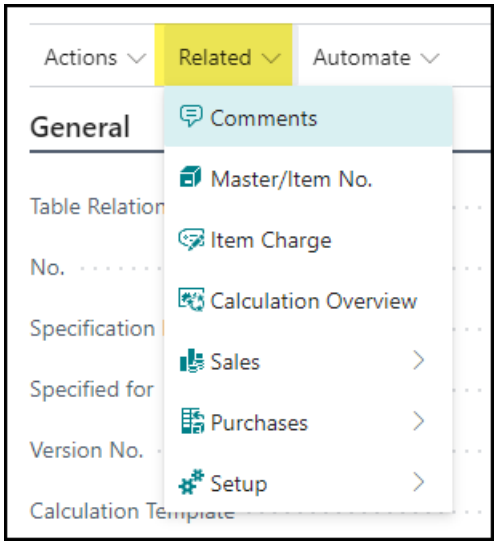
Related in Calculation



Comments

You can enter specific **Comments** to the Calculation.

Master/Item

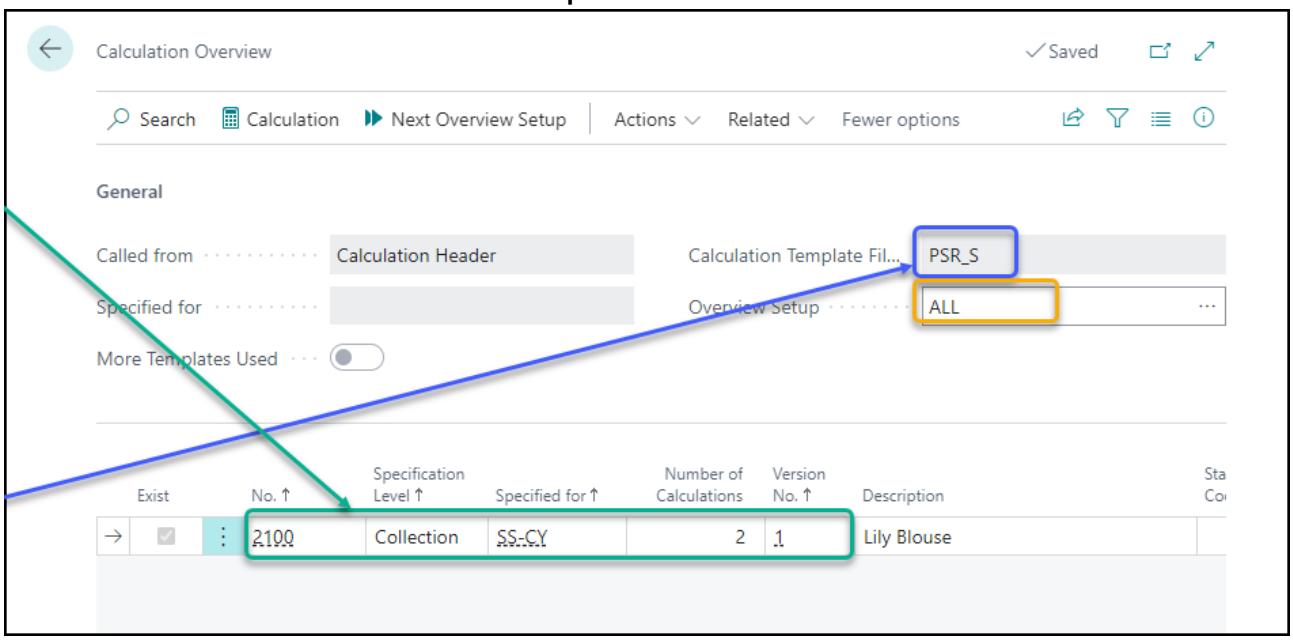
This will open the Master- or Item Card of the **No.** on the current Line.

Item Charge

This will show the **Item Charges** that are connected to the **No.** of the Calculation.
You are also able to create/maintain the Item Charges here.

Calculation Overview

This can show the Calculation Overview of the current Calculation based on the **Calculation Template** of the Calculation and the first **Overview Setup**.



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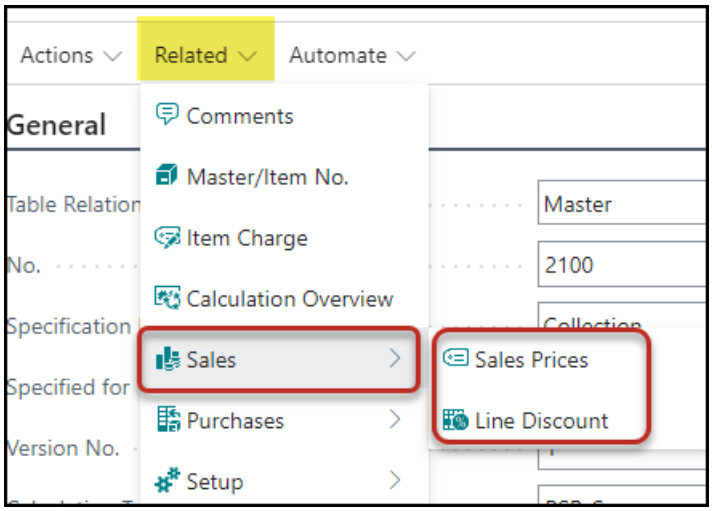
Sales, Sales Prices



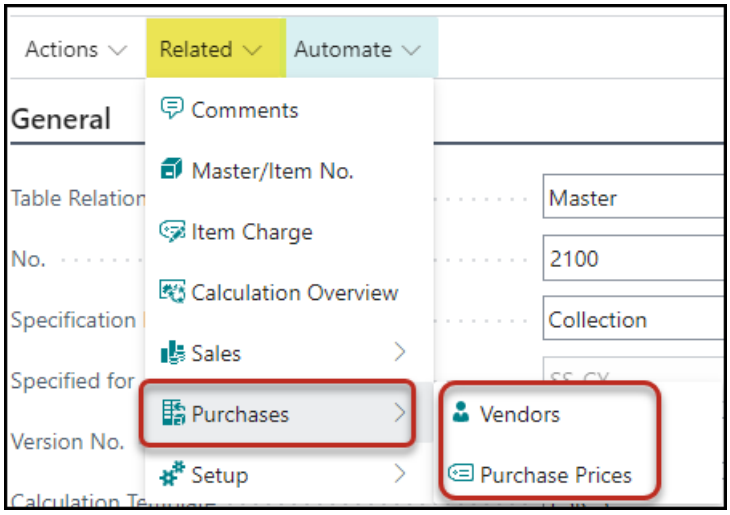
This will show the **Sales Prices** that are connected to the **No.** on the current Calculation.
You are also able to create/maintain the Sales Prices here.

Sales, Line Discount

This will show the **Sales Line Discounts** that are connected to the **No.** on the current Calculation.
You are also able to create/maintain the Sales Line Discounts here.

> **Note**
> These are only the **Sales Line Discounts** of standard BC, not the TRIMIT **Sales Line Discount Types**.

Purchases, Vendor



This will show the **Item Vendor Catalog** that is connected to the **No.** on the current Calculation.
You are also able to create/maintain the Item Vendor Catalog here.

Purchases, Purchase Prices

This will show the **Purchase Prices** that are connected to the **No.** on the current Calculation.
You are also able to create/maintain the Purchase Prices here.

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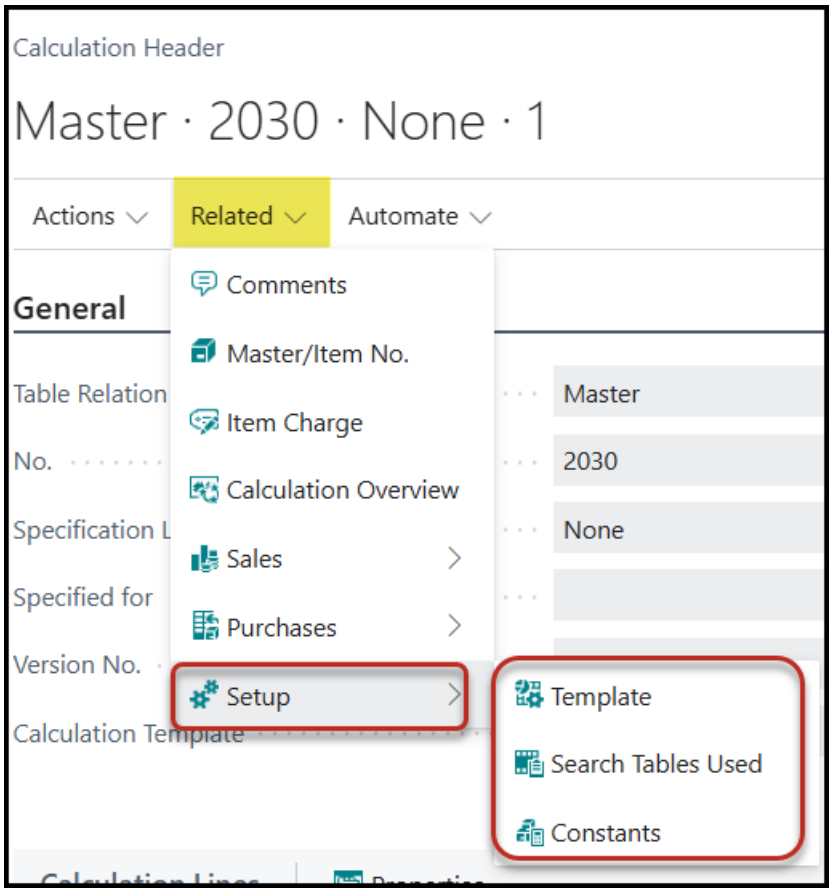
Setup, Template

Setup is not shown by default, but you can add it via ***Personalize.***



This will open the **Template** of the Calculation based on the **Calculation Template No**.
You are also able to maintain the Template here.

Setup, Search Tables Used

See Related, Search Tables Used.

Setup, Constants

See Related, Constants.

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Formulas Used for Calculations

The Formulas determine how all the Values are calculated and distributed.
In fact, there will be no Formula Headers created, but only Formula Lines in connection with the Templates.
This is also the only place from which you can change the Formula Lines: via the **Template.**
You can see them via an individual Calculation but adding/maintaining them must be done via the Template.

A Formula is a general tool in TRIMIT that is used in a specified way in TRIMIT Calculations. To know more about Formulas, see the ***White Paper – TRIMIT Formulas***.

In TRIMIT Calculations, Formulas are used in three ways:

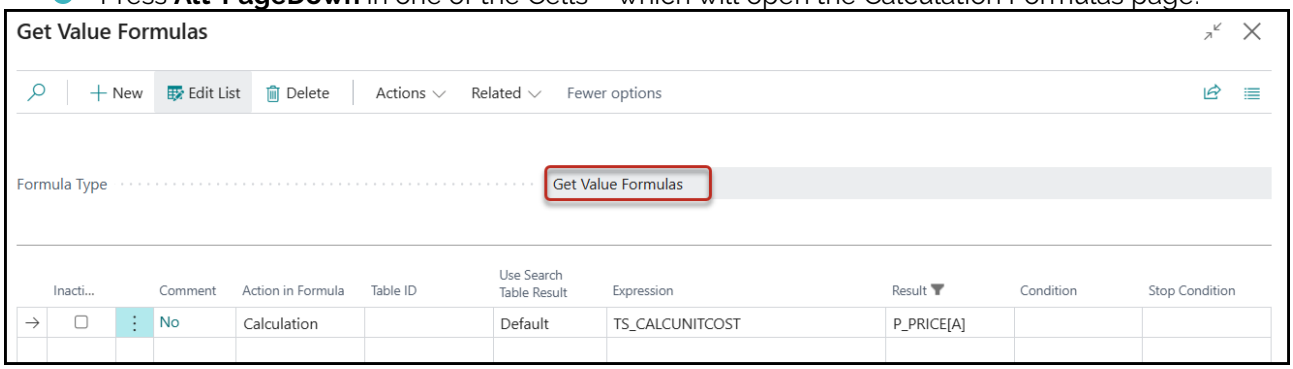
- **Get Value** Formulas
- **Calculation** Formulas
- **Formula by Post** Formulas

Each of these three ways has a unique appearance.

Get Value Formulas

These Formulas (see also Get Value Formulas) are used to set the default Values in a new Calculation or to reset Values in an existing Calculation. They are attached to the **Template.**
To see all the **Get Value Formulas** of a **Template**, you need to:

- Choose **Show in Cells** = *Get Value Formulas*
- Press **Alt+PageDown** in one of the Cells – which will open the Calculation Formulas page:



You are also able to see these **Get Value Formulas** in individual Calculations, but in that case, you will only see the first Formula Line connected to the current Cell and you are not able to change them; therefore, you need to go to the Template.

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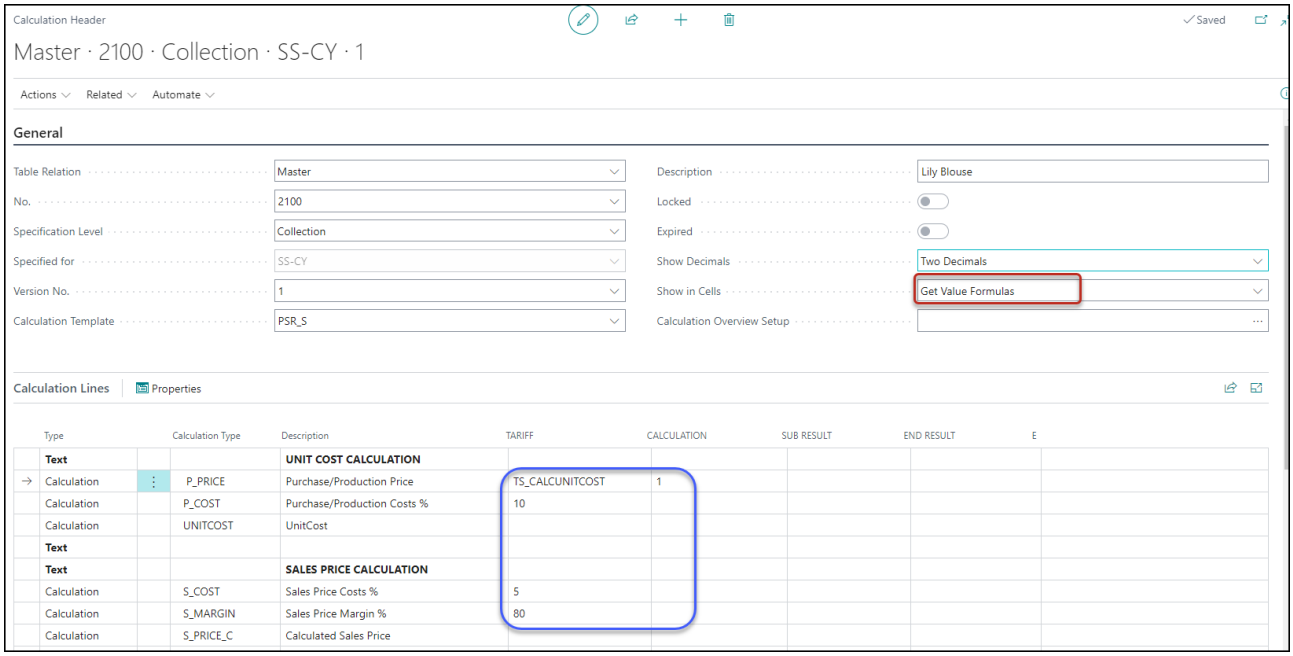
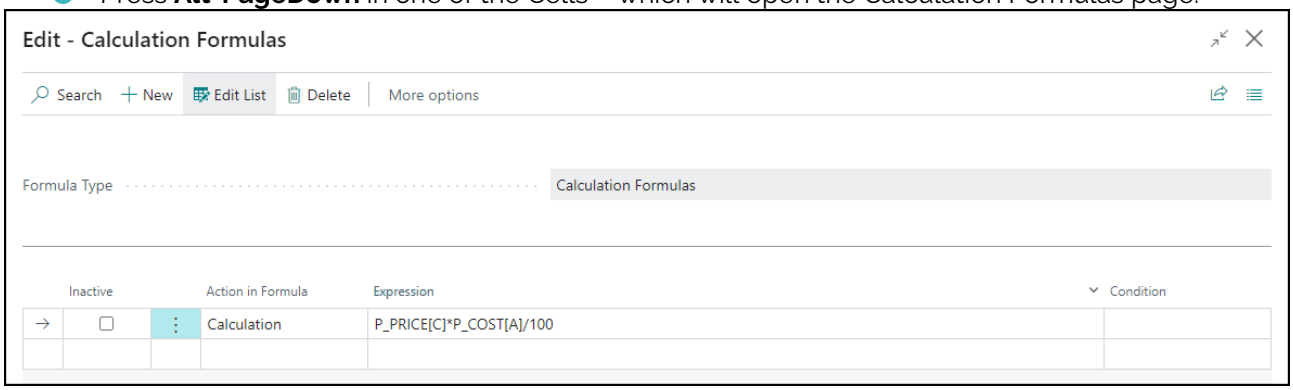


Calculation Formulas

These Formulas are used to calculate Values in a Calculation. They are the content of the Cells in a Template: **Template Line/Columns** (see also 1. – 10. Column).

To see all the **Calculation Formulas** of a Template, you need to:

- Choose **Show in Cells** = *Calculation Formulas*
- Press **Alt+PageDown** in one of the Cells – which will open the Calculation Formulas page.



You are also able to see these **Calculation Formulas** in individual Calculations, but in that case, you will only see the first Formula Line connected to the current Cell and you are not able to change them; therefore, you need to go to the Template.

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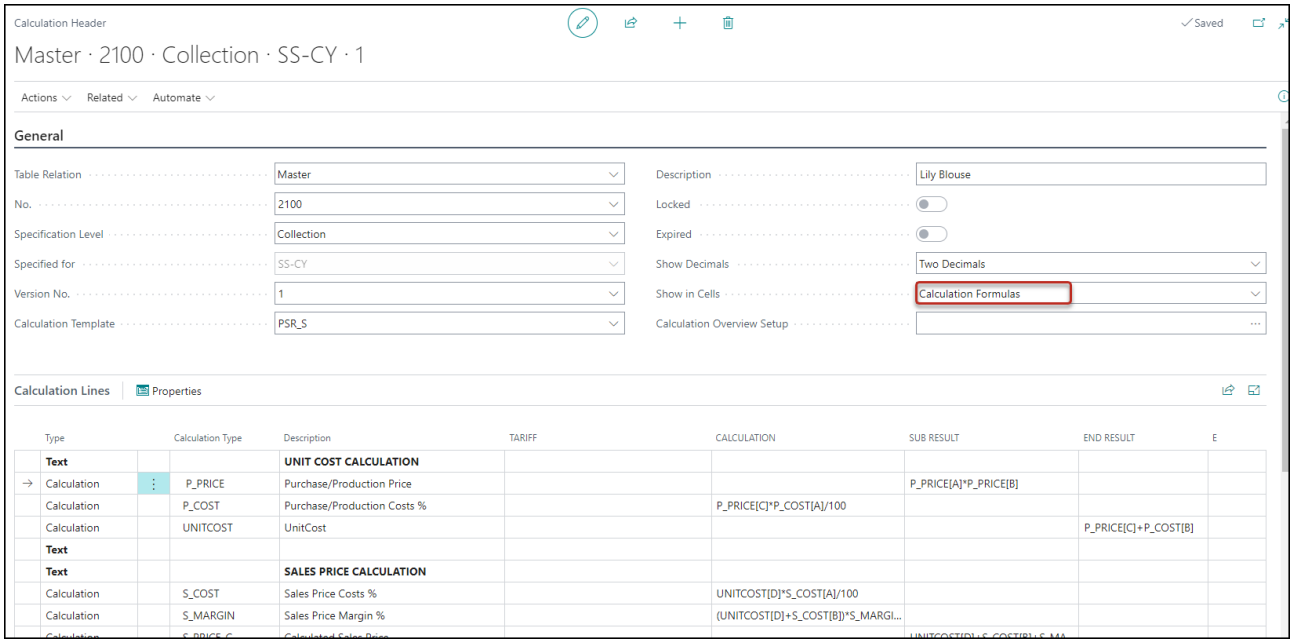
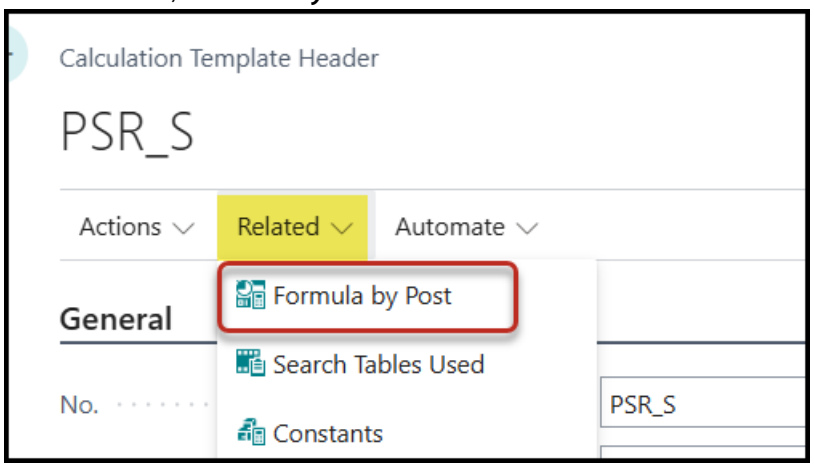
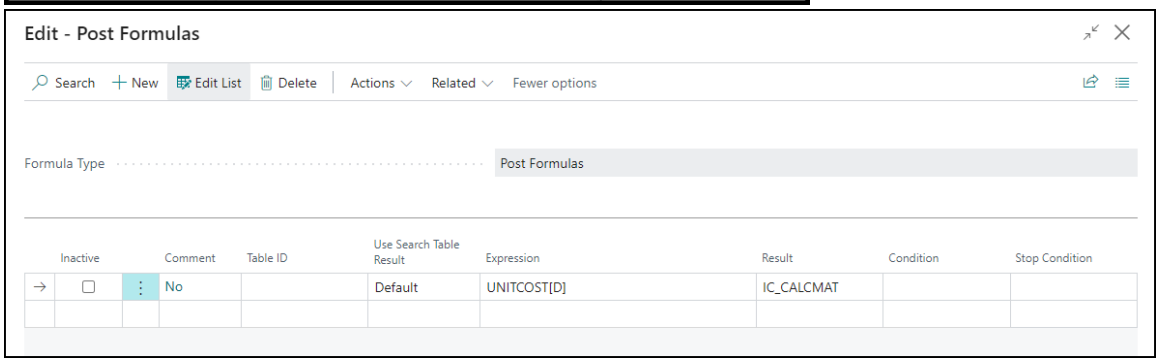


Formula by Post Formulas

These Formulas (see also Formula by Post) are used to post (copy) the calculated Values of Cells in the Calculation to a specified places in the Database.
They are attached to the **Template.**
This could be Calculation Unit Cost, which is posted to the Item Table.
You can see the **Formula by Post** Formulas only via the **Template** and not via the Calculations itself (click ***Related, Formula by Post***)





This Formula window is like the standard Formula window.
IC_CALCMAT is a so-called **Formula Global Variable** and stands for the Field **Calc. Unit Cost Material** of an Item.

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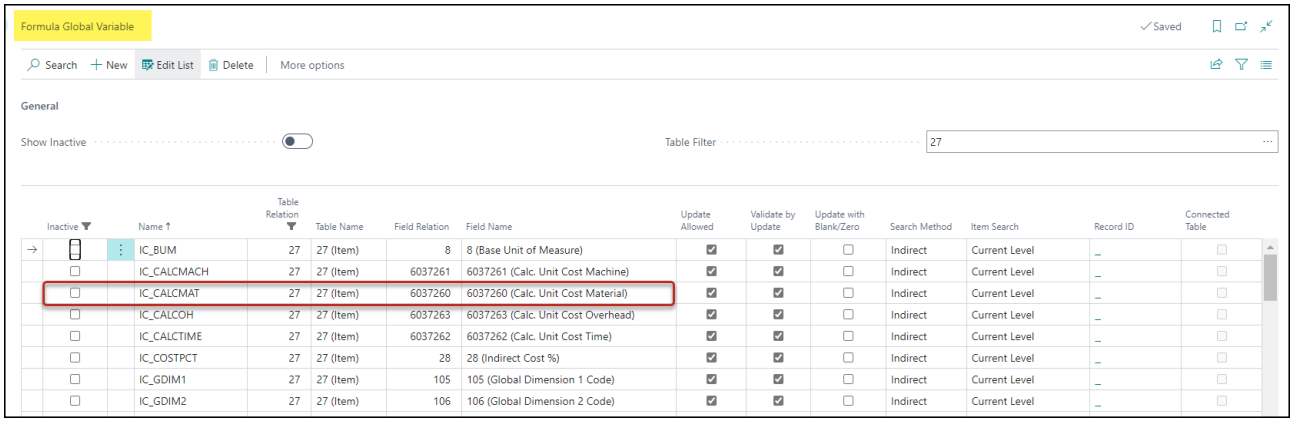

Formula Global Variable

Saved

Search | New | Edit List | Delete | More options

General

Show Inactive

Table Filter: 27

Inactive	Name	Table Relation	Table Name	Field Relation	Field Name	Update Allowed	Validate by Update	Update with Blank/Zero	Search Method	Item Search	Record ID	Connected Table
☐	IC_BUM	27	27 (Item)	8	8 (Base Unit of Measure)	☑	☑	☐	Indirect	Current Level	_	☐
☐	IC_CALCMACH	27	27 (Item)	6037261	6037261 (Calc. Unit Cost Machine)	☑	☑	☐	Indirect	Current Level	_	☐
☐	IC_CALCMAT	27	27 (Item)	6037260	6037260 (Calc. Unit Cost Material)	☑	☑	☐	Indirect	Current Level	_	☐
☐	IC_CALCOH	27	27 (Item)	6037263	6037263 (Calc. Unit Cost Overhead)	☑	☑	☐	Indirect	Current Level	_	☐
☐	IC_CALCTIME	27	27 (Item)	6037262	6037262 (Calc. Unit Cost Time)	☑	☑	☐	Indirect	Current Level	_	☐
☐	IC_COSTPCT	27	27 (Item)	28	28 (Indirect Cost %)	☑	☑	☐	Indirect	Current Level	_	☐
☐	IC_GDIM1	27	27 (Item)	105	105 (Global Dimension 1 Code)	☑	☑	☐	Indirect	Current Level	_	☐
☐	IC_GDIM2	27	27 (Item)	106	106 (Global Dimension 2 Code)	☑	☑	☐	Indirect	Current Level	_	☐

More about these Formula Functions and how to create the necessary Formula Lines, can be found in the ***White Paper – TRIMIT Formulas***

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Spreadsheet Cells vs. Calculation Fields

In a spreadsheet, a calculation can be created as A3 + B6, where A3 and B6 are Cell positions (A is the column and 3 is the row) and the Cell that contains this function is where the result is shown.
TRIMIT Calculations are created to work in a comparable way.
The Columns are defined by the **Calculation Columns** – not by the **Column Descriptions** of the individual Templates.
The Calculation Type, selected in the Template Lines, defines the Rows. This is also described in this table:

	Excel	TRIMIT Calculations
Column	A, B, C…	Calculation Columns
Row	1, 2, 3…	Calculation Type
Cell	*F20*	*P_PRICE[C]*

Example:
The marked Cell in this screenshot from a spreadsheet is *F3*.

F3 =D3*E3

	A	B	C	D	E	F	G
1	Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT
2	Text		UNIT COST CALCULATION				
3	Calculation	P_PRICE	Purchase/Production Price	12,4	1	12,4	
4	Calculation	P_COST	Purchase/Production Costs %	10%	1,24		
5	Calculation	UNITCOST	UnitCost	Enter desired Unit Cost			13,64
6	Text						
7	Text		SALES PRICE CALCULATION				
8	Calculation	S_COST	Sales Price Costs %	5%	0,68		
9	Calculation	S_MARGIN	Sales Price Margin %	80%	11,46		
10	Calculation	S_PRICE_C	Calculated Sales Price			25,78	
11	Calculation	S_PRICE_A	Actual Sales Price	-100%			Enter the actual Sales Price
12	Text						
13	Text		Retail Price Calculation				
14	Calculation	R_COST	Retail Price Costs %	7,50%	1,02		
15	Calculation	R_MARGIN	Retail Price Margin %	250%	34,11		
16	Calculation	R_PRICE_C	Calculated Retail Price			48,77	
17	Calculation	R_PRICE_A	Actual Retail Price	-100%			Enter Actual Retail Price
18							

The corresponding Cell in the **Template** *PSR_S* is *P_PRICE[C]*

Calculation Lines | Properties

Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT	E
Text		**UNIT COST CALCULATION**					
Calculation	P_PRICE	Purchase/Production Price			P_PRICE[A]*P_PRICE[B]		
Calculation	P_COST	Purchase/Production Costs %		P_PRICE[C]*P_COST[A]/100			
Calculation	UNITCOST	UnitCost				P_PRICE[C]+P_COST[B]	
Text							
Text		**SALES PRICE CALCULATION**					
Calculation	S_COST	Sales Price Costs %		UNITCOST[D]*S_COST[A]/100			

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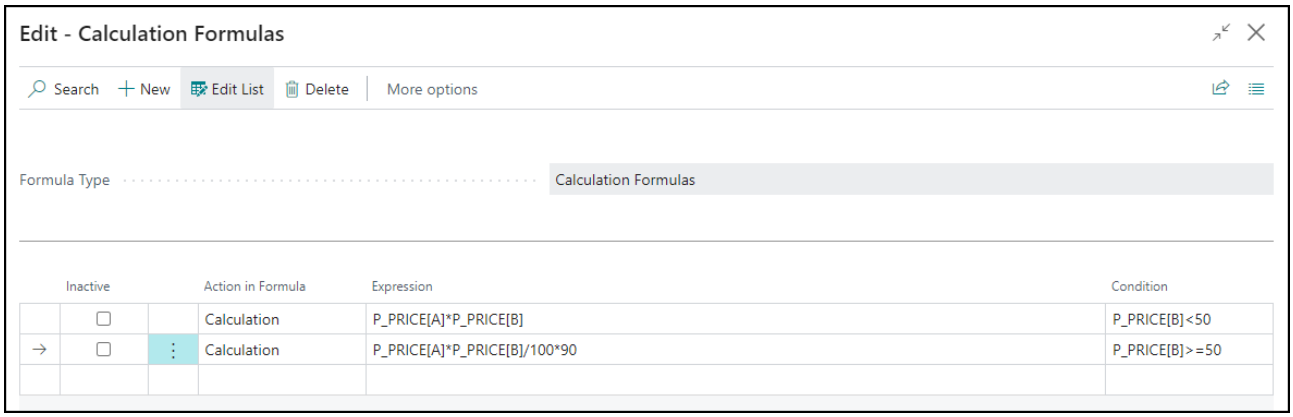
Spreadsheet Functions vs. Calculation Formula Lines

In a spreadsheet, the calculation can be created in a function like:

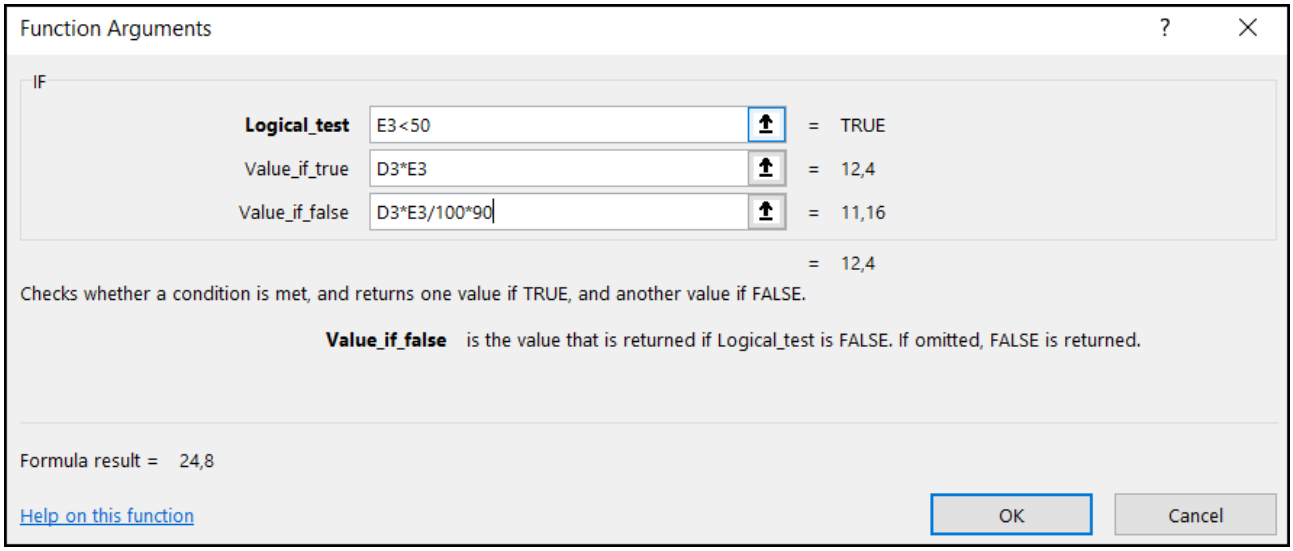
IF(E3<50;D3*E3;D3*E3/100*90),

The following example shows how this calculation is created in **TRIMIT Calculations** by using the Formulas.

The TRIMIT Formula:



In the Excel Spreadsheet, the **Function Arguments** look like:



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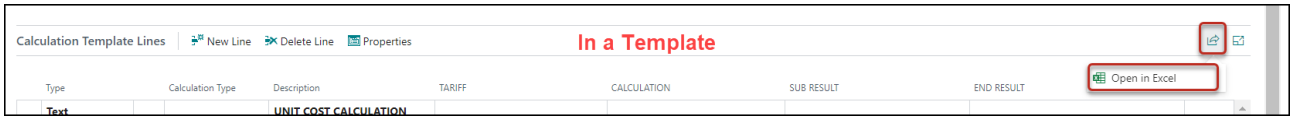
Reports

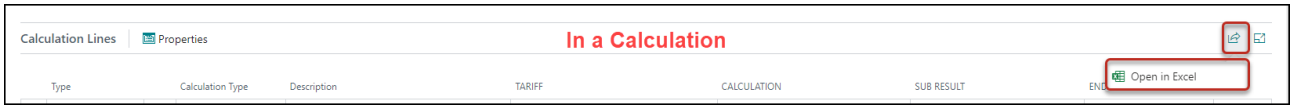
No reports are currently available.

You can, however, very easily send the information about a **Template** or a **Calculation** to Excel:



Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT
Text		UNIT COST CALCULATION				
Calculation	P_PRICE	Purchase/Production Price			P_PRICE[A]*P_PRICE[B]	
Calculation	P_COST	Purchase/Production Costs %		P_PRICE[C]*P_COST[A]/100		
Calculation	UNITCOST	UnitCost				P_PRICE[C]+P_COST[B]
Text						
Text		SALES PRICE CALCULATION				
Calculation	S_COST	Sales Price Costs %		UNITCOST[D]*S_COST[A]/100		
Calculation	S_MARGIN	Sales Price Margin %		(UNITCOST[D]+S_COST[B])*S_MARGIN[A]/100		
Calculation	S_PRICE_C	Calculated Sales Price			UNITCOST[D]+S_COST[B]+S_MARGIN[B]	
Calculation	S_PRICE_A	Actual Sales Price	(S_PRICE_A[D]-UNITCOST[D])/UNITCOST[D]*100			
Text						
Text		Retail Price Calculation				
Calculation	R_COST	Retail Price Costs %		UNITCOST[D]*R_COST[A]/100		
Calculation	R_MARGIN	Retail Price Margin %		UNITCOST[D]*R_MARGIN[A]/100		
Calculation	R_PRICE_C	Calculated Retail Price			UNITCOST[D]+R_COST[B]+R_MARGIN[B]	
Calculation	R_PRICE_A	Actual Retail Price	(R_PRICE_A[D]-UNITCOST[D])/UNITCOST[D]*100			

This can show the Formulas that you saw in the page.
You would get a problem in the Cells with more than 1 Formula line ("more formula lines")



Type	Calculation Type	Description	TARIFF	CALCULATION	SUB RESULT	END RESULT
Text		UNIT COST CALCULATION				
Calculation	P_PRICE	Purchase/Production Price	12.40	1.00	12.40	
Calculation	P_COST	Purchase/Production Costs %	10%	1.24		
Calculation	UNITCOST	UnitCost	Enter desired Unit Cost			13.64
Text						
Text		SALES PRICE CALCULATION				
Calculation	S_COST	Sales Price Costs %	5%	0.68		
Calculation	S_MARGIN	Sales Price Margin %	80%	11.46		
Calculation	S_PRICE_C	Calculated Sales Price			25.78	
Calculation	S_PRICE_A	Actual Sales Price	-100%			Enter the actual Sales Price
Text						
Text		Retail Price Calculation				
Calculation	R_COST	Retail Price Costs %	7.5%	1.02		
Calculation	R_MARGIN	Retail Price Margin %	250%	34.11		
Calculation	R_PRICE_C	Calculated Retail Price			48.77	
Calculation	R_PRICE_A	Actual Retail Price	-100%			Enter Actual Retail Price

This would only show the Values of the Cells.

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