



WHITE PAPER

TRIMIT CATEGORY MANAGEMENT 22.1

This document contains information regarding the Category Management in TRIMIT 22.1 for Business Central 2022 release Wave 1 W1 (BC20).

Version: 22.1
Date: 29-07-2022

CONTENTS

Introduction	1
Components	1
Create Category Structures	2
Category	2
Description of the Fields.....	2
Functions on Categories Page	4
Actions on Categories Page	7
Related on Categories Page.....	9
Category Lines	11
Description of the Fields.....	11
Description of the Fields not Visible by Default	18
Related on Category Lines page	20
Enable Portal from Master	23
Description of the Fields.....	23
Category Management Tool.....	25
Description of the Fields.....	25
Actions on Category Management	26
Related on Category Management	26
Attach Multiple Lines to a Category	27
Attaching a Structure to Users	28
Setting up Category Structure for Portals	28
Attaching a Structure in the Portal Profile	29
Attaching a Structure in the Portal User	29
Attaching a Structure in the Order Type	30
Appendix.....	31
Filter Items in Portals Categories	31

INTRODUCTION

TRIMIT Category Management is a tool to support sales activities on the Standard Out-of-the-Box Webshops and Portals of TRIMIT. It provides users of TRIMIT an easy and familiar approach to publish and maintain Products on their TRIMIT Webshop or Portal.

The Structures build will provide web users a logical and easy navigation to Products.

The Categories can be used for the TRIMIT B2C Webshop, TRIMIT B2B Webshop and TRIMIT Sales Agent Portal based on settings in the **Portal Profiles**.

The functionality described is the functionality in **TRIMIT 22.1 for Business Central W1 BC20.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 22.1**, which is based on Microsoft Dynamics 365 Business Central 2022 release Wave 1, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT Category Management contains the following objects:

The tables **6036327 trm Temp Category Management**

6038120 trm Category

6038121 trm Category Line

6038122 trm Category Buffer

6038206 trm CPO Category Buffer Header

6038207 trm CPO Category Buffer Line

The pages **6038119 trm Category Line Card**

6038120 trm Category Card

6038121 trm Category List

6038122 trm Category Lines

6038124 trm Category Management

6038125 trm Category Man Subform

6038135 trm Attach to Category

6038136 trm Category TreeView

6038153 trm Portal Browser

6038154 trm Category Copy Wizard

6038158 trm Category Lines All

The reports **6036813 trm Category Management**

The codeunits **6038111 trm Category Handling**

6038113 trm Call Generate Category

The queries **6038100 trm Portal Category Distinct**

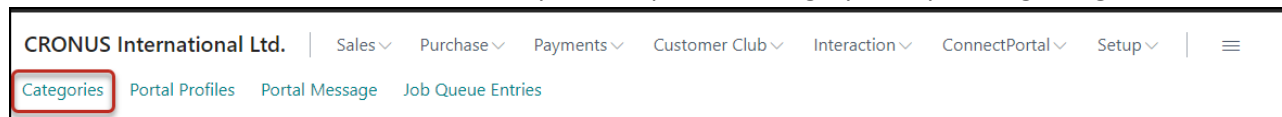
6038104 trm Category Master Distinct

CREATE CATEGORY STRUCTURES

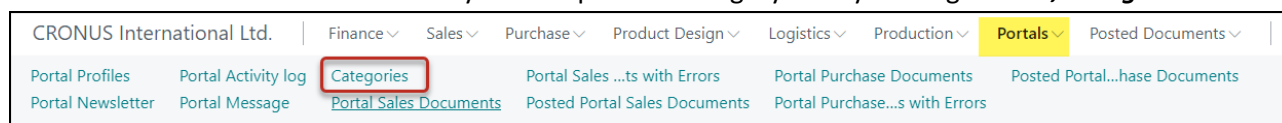
In this chapter, we will go through the setup of a Category Structure.

CATEGORY

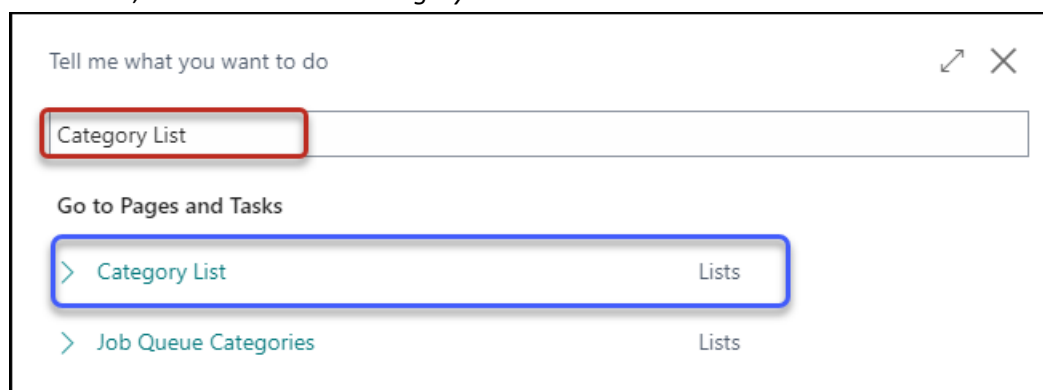
In Role Center **TRIMIT Portal Administrator** you can open the Category List by clicking **Categories**.



In Role Center **TRIMIT Small Business** you can open the Category List by clicking **Portals, Categories**.



Otherwise, find it via **Tell me Category List**.



Categories: All ▾ Search + New Delete Edit List Category Lines Show Category Copy Wizard Card ...										
No.	Description	Matrix Limitation	Do not show on First Level ▾	Alternative Sorting ↑	Customer Club Level	Collection	Google Product Taxonomy ID	Categ... Lines Attach...	Attach... to Categ... Lines	Use CPO Category Buffer
AGENT	Sales Agent Top Level		☐	0	Level 0		0	☒	☐	☒
AGENT_F_CABINETS	Cabinets		☐	0	Level 0		0	☒	☒	☐
AGENT_F_CHAIRS	Cabinets		☐	0	Level 0		0	☒	☒	☐
AGENT_F_SOFAS	Sofas		☐	0	Level 0		0	☒	☒	☐
AGENT_F_TABLES	Tables		☐	0	Level 0		0	☒	☒	☐
AGENT_FASHION	Fashion		☐	0	Level 0		0	☒	☒	☒

DESCRIPTION OF THE FIELDS

NO.

This is the unique identity of a Category. It is recommended to give it a meaningful name.

DESCRIPTION

This Field contains a descriptive name for the Category. This **Description** will be shown on the Webshop/Portal and must help the web user to quickly determine the content of the Category.

MATRIX LIMITATION

Here you can determine that only specific Variants like Colors or Sizes can be used. This means that if you connect a **Matrix Limitation Setup** to a Category, only specific Variants like Colors or Sizes from the connected Maters to a Category will be shown on the portal. I.e.: for a “*Summer*” Category you only want to see the Colors *100 – 200*, for a “*Winter*” Category you only want to see the Colors *150 – 250*.

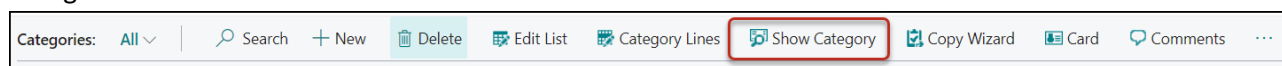
You can see in the **White Paper – TRIMIT Collection Management** how you can setup these **Matrix Limitation Setups**.

DO NO SHOW ON FIRST LEVEL

The list of Categories can grow over time. To help keeping an overview you can hide (Sub-) Categories in the page **trm Category List (6038121)** by selecting this option.

This page will by default always hide Categories with this Field set to *TRUE*.

Click [Show Category](#) or [Related, Show Category](#) or [Actions, Show All Categories](#) to reveal hidden Categories.



To change the view – adjust filters on Category list page again.

This Field does not affect viewing Categories on Portals.

ALTERNATIVE SORTING

Instead of the sorting of the Categories according to the Alphabet, you can enter an **Alternative Sorting**, so the Categories in the Category List will be shown according to this **Alternative Sorting**.

This sorting is only related to **Categories** page and does not affect the sorting on Portals. Sorting on Portals can be changed on **Category Lines** page. Change requires running Portals Schedules.

CUSTOMER CLUB LEVEL

Related to B2C Webshop. **Customer Club Level** can be set on the Category. Available options in this Field are *Level 0 – Level 5*. If **Customer Club Level** is set, then this means that only members of this **Customer Club Level** and members of **Customer Club Level** above can see this Category.

Change requires running Portals Schedules.

COLLECTION

In this Field you can enter a **Collection No.** that can be applicable for underlying Category Lines of **Type Collection from Category**.

For more details see [Type](#).

GOOGLE PRODUCT TAXONOMY ID

This Field indicates the unique Product Group number of Google.

I.e., 5622 for Baby & Toddler Outfits or 4355 for Kitchen & Dining Room Tables.

These IDs can be used for Google Analytics. See [Open Google Product Taxonomy](#)

CATEGORY LINES ATTACHED

This Field indicates if there are Category Lines attached to the current Category.

It is automatically updated by the system and non-editable.

ATTACHED TO CATEGORY LINES

This Field indicates if this Category is attached to a Parent Category.
It is automatically updated by the system and non-editable.

USE CPO CATEGORY BUFFER

Used in connection to data synchronization between TRIMIT and Portals. Set to **TRUE** after running the Action **Pre-Generate Category Data** for the Top-Level Category of the Sales Agent Portal or B2B Webshop, and when running the **Products – Master Choices** Schedule on B2B Webshop.

FUNCTIONS ON CATEGORIES PAGE

Categories:	All	Search	+ New	Delete	Edit List	Category Lines	Show Category	Copy Wizard	Card	Comments	Translation Text	Picture	Workflow	More options
-------------	-----	--------	-------	--------	-----------	----------------	---------------	-------------	------	----------	------------------	---------	----------	--------------

CATEGORY LINES

Opens **Category Lines** page. Here it is possible to create Sub-Category levels and attach Category related Items. This page will be described in detail in [Category Lines](#).

Edit - Category Lines - AGENT

Search

+ New

Edit List

Delete

All Category Lines

More options

Type	No.	Matrix Limitation	Description	Logo Placement	Visual Configuration	Configuration filters Y-axis	Allow Bulk Sale on Webshop	Filter Delivery Period	Category Lines 2	Gift Card	Customer Club Level	Alternative Sorting	Effective Date	Expiry Date	Handle Item as	Sales Status
Category	AGENT_FASHION		Fashion	No	No	Yes	☐		☐	☐	Level 0	0				Sellable
→ Category	AGENT_FURNITURE		Furniture	No	No	Yes	☐		☐	☐	Level 0	0				Sellable

SHOW CATEGORY

This activity will open a graphical presentation of the Category Structure. Often Structures are under development for some time before being published on the web. This feature will help users to work with Structures without having to check content on any website.

On the **Category Tree View** page, it is possible to show and hide all the sub categories by clicking the **Toggle Expand/Collapse All**, but also on every Line, you can click to **Collapse row** or **Expand row**.

Clicking **Related Record** opens the Category card for Categories and the Master-/Item card for Masters or Items.

Clicking **Category Line** opens **Category Lines** page for that specific **Category**.

Edit - Category Tree View						
Related Record Category Line Related Fewer options						
Category Type	No.	Description	Description 2	Matrix Limitation	Alternative Sorting	
→ Category	AGENT				0	
Category	AGENT_FASHION	Fashion			0	
Category	AGENT_W_TROUSERS	Trousers			0	
Master	2000	Olivia Trousers			0	
Master	2010	Amelia Trousers			0	
Master	2020	Isla Trousers			0	
Master	2030	Ella Trousers			0	
Category	AGENT_W_TOPS	Tops			0	
Master	2100	Lily Blouse			0	
Master	2110	Mia Blouse			0	
Master	2120	Sophia Shirt			0	
Master	2130	Rose Shirt			0	
Master	2600	Helen Blouse			0	
Master	2610	Hope Shirt			0	

COPY WIZARD

With this action, you can copy Categories and Category Lines from one Category to another existing Category or to a new Category.

Category Setup

The wizard will guide you through the copy process

Choose Copy Method

Copy to Existing Category ☐

Copy to New Category ☒

Back Next Finish

Category Setup

Copy from Category

No. AGENT

Description Sales Agent Top Level

Set Name for the new Category

No. AGENT-2

Description SA Top SS-CY

Matrix Limitation

Collection SS-CY

Customer Club Level Level 0

Alternative Sorting 0

Do not show on First Level ☐

Back Next Finish

Category Setup

Copy All Lines ☐

Select Lines to Copy ☒

Back Next Finish

With **Select Lines to Copy** you can choose the Category Lines that you want to copy:

Type	No.	Matrix Limitation	Description	Logo Placement	Visual Configuration	Configuration filters Y-axis	Allow Bulk Sale on Webshop	Filter Delivery Period	Cat... Lines	Gift Card	Customer Club Level	Alternative Sorting
→ Category	AGENT_FASHION		Fashion	No	No	Yes	☐		☒	☐	Level 0	0
Category	AGENT_FURNITURE		Furniture	No	No	Yes	☐		☒	☐	Level 0	0

After clicking **Next** again it will show:

Category Setup

Click Finish to complete the copy.

Result Copy 1 line(s) from category AGENT to category AGENT-2

Back Next Finish

After clicking **Finish**, the Category Lines will be copied to the new Category.

No.	Description	Matrix Limitation	Do not show on First Level	Alternative Sorting	Customer Club Level	Collection	Google Product Taxonomy ID	Category Lines Attached	Attached to Category Lines
AGENT_W_JACKETS	Blazers		☐	0	Level 0		0	☒	☒
AGENT_W_TOPS	Tops		☐	0	Level 0		0	☒	☒
AGENT_W_TROUSERS	Trousers		☐	0	Level 0		0	☒	☒
AGENT-2	SA Top SS-CY		☐	0	Level 0	SS-CY	0	☒	☐
B2B	B2B Top Level		☐	0	Level 0		0	☒	☐
B2B_F_CABINETS	Cabinets		☐	0	Level 0		0	☒	☒
B2B_F_CHAIRS	Chairs		☐	0	Level 0		0	☒	☒

CARD

Opens the Category card.

Category Card

AGENT

New Related Fewer options

Show Category

General

No. AGENT

Description Sales Agent Top Level

Description 2

Search Descriptions SALES AGENT TOPLEVEL

Category Lines Attached ☐

Related Picture

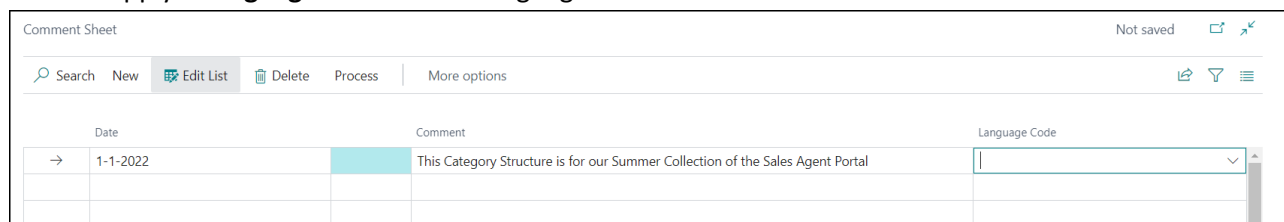
Picture No. ADD

ADD

COMMENTS

This function will open the **Comment Sheet** in which you can relate information to the Category.

The commentary part is for Business Central only and is not used on any standard TRIMIT Portal. The Date is not mandatory and only an indication on when the Comment was created. The **Comment** holds free text. You can apply a **Language Code** for the language in which the Comment was created.



Date	Comment	Language Code
→ 1-1-2022	This Category Structure is for our Summer Collection of the Sales Agent Portal	

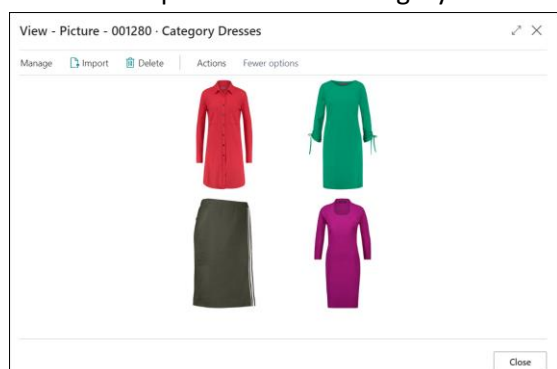
PICTURE

A Category can have a Picture attached which will be used on TRIMIT Portals. Pictures attached to Categories give a nice “Clickable area” and help the user to understand the content of a Category.

Pictures are automatically scaled for web usage. A Category can only hold one Picture.

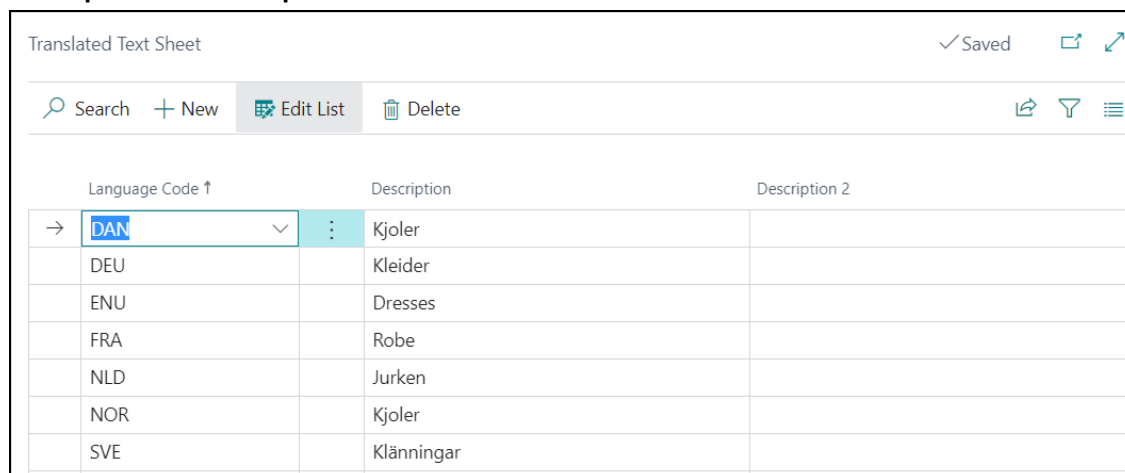
Category Pictures can be applied to Sales Agent Portal and B2B Webshop.

B2C Webshop does not use Category Pictures.



TRANSLATION TEXT

User Language may differ on a web page, and you can create Translations for the Descriptions of the Categories, so they respond to the language rules set by a Portal solution. **Translation Text** will open the **Translated Text Sheet**. In this worksheet, you can specify per **Language Code** the Translation for **Description** and **Description 2**.



Language Code ↑	Description	Description 2
→ DAN	Kjoler	
DEU	Kleider	
ENU	Dresses	
FRA	Robe	
NLD	Jurken	
NOR	Kjoler	
SVE	Klänningar	

WORKFLOW

You can connect Workflow Steps to a Category, the same way as for i.e., Masters.

For this Workflow related to a Category, you can also create a Workflow Template if you like.

Workflow for trm Category: AGENT_W_DRESSES

Step No.	Depending on Steps	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Closing Date	Closed by Type	Closed By	Assign Status Code
10	0	Define Category	1-6-2022	User Group	SALES	☐		User		
20	10	Add Masters/Items	6-6-2022	User Group	SALES	☐		User		
30	10	Add Category Picture	6-6-2022	User Group	DESIGN	☐		User		
40	10	Add Category Translations	6-6-2022	User Group	SALES	☐		User		
50	20,40	Add Category to Toplevel	10-6-2022	User Group	SALES	☐		User		
60	50	Add pictures in PIR	17-6-2022	User Group	DESIGN	☐		User		
70	60	Check Portal	30-6-2022	User Group	SALES	☐		User		

See **White Paper – TRIMIT Workflows** for more details.

ACTIONS ON CATEGORIES PAGE

After clicking **Edit List**:

Categories

Search	New	Edit List	Delete	Category Lines	Show Category	Copy Wizard	Card	Comments	Translation Text	Picture	Workflow	Actions	Related	Fewer options
Copy Wizard	Move Content To	Copy Content To	Show all Categories	Hide Categories Underlying Levels	Pre-Generate Category Data	Open Google Product Taxonomy								

COPY WIZARD

See [Copy Wizard](#).

MOVE CONTENT TO

Allows moving the content of the currently selected Category to another Category.

Clicking this action opens a dialog window. To move the entire content of the Category, click **Yes**.

To select the content of the Category to be moved click **No**:



Choose Yes to move all. No to select lines?

Clicking **Yes** or **No** opens a new window **Choose Destination Category**. Select the destination Category and click **OK**:

Choose Destination category.

No.	Description	Matrix Limitation	Do not show on First Level	Alternative Sorting	Customer Club Level	Collection	Go Pro Taxon
AGENT_W_ACCESS	Accessories		☐	0	Level 0		
AGENT_W_DRESSES	Dresses/Skirts		☐	0	Level 0		
AGENT_W_JACKETS	Blazers		☐	0	Level 0		
AGENT_W_TOPS	Tops		☐	0	Level 0		
AGENT_W_TROUSERS	Trousers		☐	0	Level 0		

If all Category content must be moved, then there will be a confirmation window as follows:


2 Lines will be moved from AGENT_W_DRESSES to AGENT_W_TOPS. Continue?

Yes
No

After clicking **Yes**, the content will be moved to selected destination Category.

If user selected to move a part of the Category content, then after clicking **No** in the first dialog window and selecting a destination Category in **Choose Destination Category** window, user will be prompted to select the Category Lines to be moved in window **Category Lines**:

Category Lines - AGENT_W_DRESSES
New
Edit List

Type	No.	Matrix Limitation	Description	Logo Placement	Visual Configuration	Configuration filters Y-axis	Allow Bulk Sale on Webshop
☒ Statistics Group 2	155		Dresses	No	No	Yes	☐
☐ Statistics Group 2	230		Skirts	No	No	Yes	☐

OK
Cancel

After clicking **OK** there will be shown a confirmation dialog window. To confirm the content moving click **Yes**.


1 Lines will be moved from AGENT_W_DRESSES to AGENT. Continue?

Yes
No

COPY CONTENT TO

This action has the same functionality as **Move Content To** action, but it allows duplicate Category content by copying from a target to destination Category.

SHOW ALL CATEGORIES

This action will show all Categories.

HIDE CATEGORIES UNDERLYING LEVELS

This action applies a filter to the list and will hide all Categories with the Field **Do not show on First Level** set to Yes.

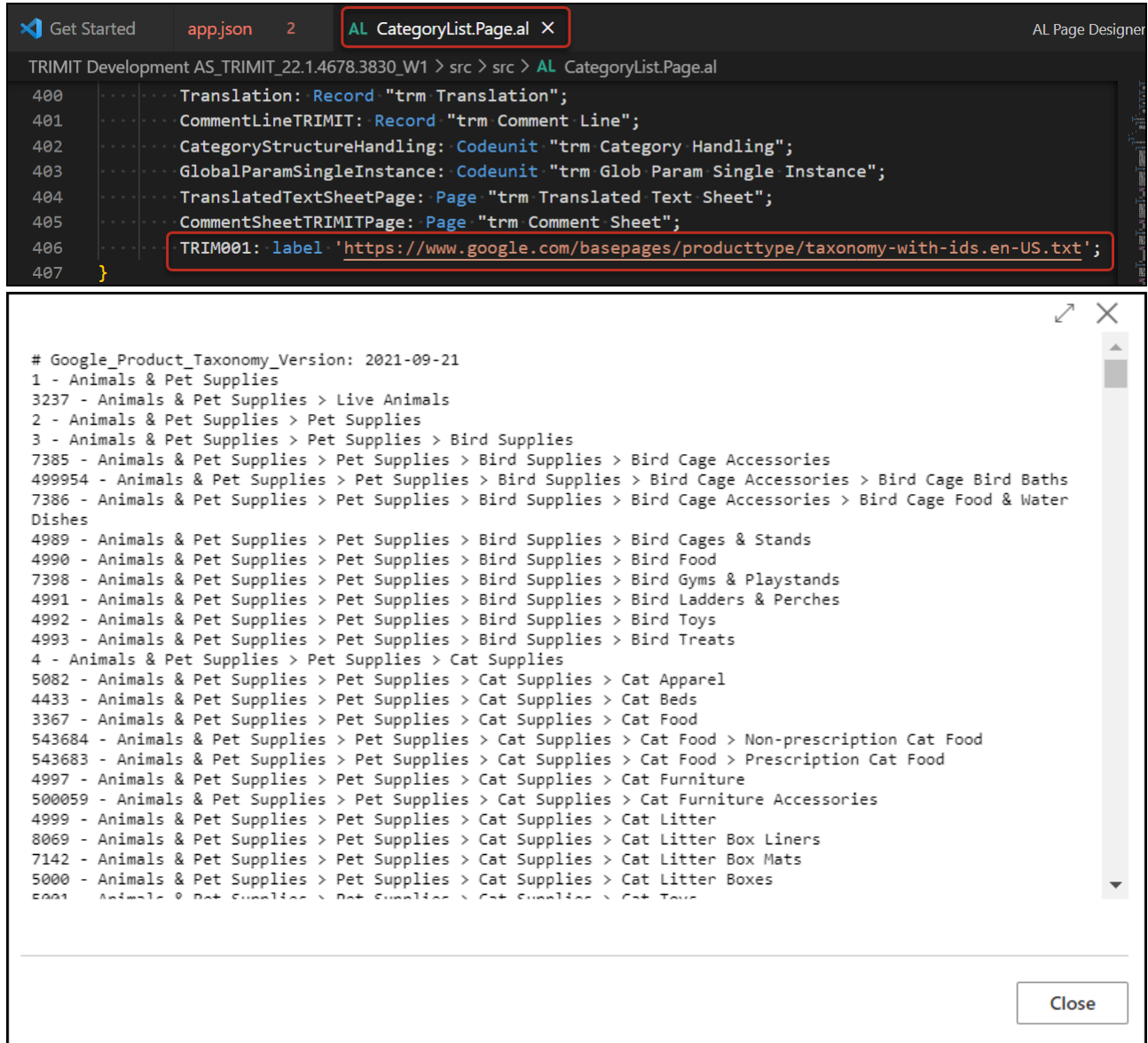
PRE-GENERATE CATEGORY DATA

Activates Category Data Generation in connection to Portal's data synchronization.

Otherwise, the Portals will generate it for you when needed for synchronizing the data.

OPEN GOOGLE PRODUCT TAXONOMY

This will show the list of the Product codes based on **Google Product Taxonomy** based on the following website: <https://www.google.com/basepages/producttype/taxonomy-with-ids.en-US.txt>, which is hard-coded in:



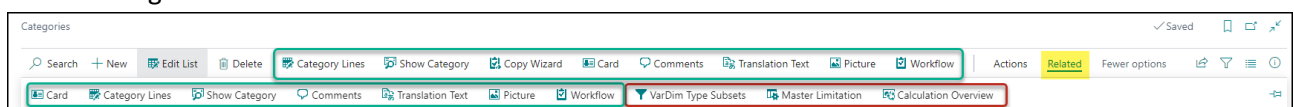
The screenshot shows the TRIMIT Development environment with the file `AL CategoryList.Page.al` open. The code defines several variables for translation, comment lines, category structure handling, global parameters, translated text sheets, and comment sheets. The `TRIM001` variable is set to the URL `https://www.google.com/basepages/producttype/taxonomy-with-ids.en-US.txt`.

Below the code, a list of Google Product Taxonomy categories is displayed, starting with `# Google_Product_Taxonomy_Version: 2021-09-21`. The list includes categories for Animals & Pet Supplies, Live Animals, Pet Supplies, Bird Supplies, Bird Cage Accessories, Bird Cage Bird Baths, Bird Cage Food & Water Dishes, Bird Cages & Stands, Bird Food, Bird Gyms & Playstands, Bird Ladders & Perches, Bird Toys, Bird Treats, Cat Supplies, Cat Apparel, Cat Beds, Cat Food, Cat Food > Non-prescription Cat Food, Cat Food > Prescription Cat Food, Cat Furniture, Cat Furniture Accessories, Cat Litter, Cat Litter Box Liners, Cat Litter Box Mats, and Cat Litter Boxes.

This list can be used to fill the [Google Product Taxonomy ID](#).

RELATED ON CATEGORIES PAGE

After clicking **Edit List**:



The screenshot shows the Categories page with the 'Related' tab selected. The page displays a list of categories and their related items. The 'Related' tab is highlighted in yellow.

Besides the functions already mentioned in [Functions on Categories Page](#)

VARDIM TYPE SUBSETS

If you have entered a **Matrix Limitation** for the Category, you can see the **VarDim Type Subset** of this **Matrix Limitation Setup**. I.e., for `MLS_S`:

Edit - VarDim Type Subset - MLS_S

Search
New
Edit List
Delete
More options

VarDim Type ↑	VarDim Type Name	Options Var 1
→ COLOR_1	Garment/Fabric Colors	11

By changing the **VarDim Type Subset**, it will affect all Masters with these specific **VarDim Types** throughout the whole Category Structure of this specific Category.

NOTE

How to setup the **VarDim Type Subsets** for a **Matrix Limitation** can be seen in detail in the *White Paper – TRIMIT Collections*.

MASTER LIMITATION

If you have entered a **Matrix Limitation** for the Category, you can see the **Matrix Limitation Master Relations** of this **Matrix Limitation Setup**. I.e., for *DROP1*:

Edit - Matrix Limitation Master Relations

Search
New
Edit List
Delete
More options

Master No. ↑	Master Description	Status Code	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	VarDim Variant
→ 2000	Olivia Trousers		COLOR_1	2	SIZE_EU	0	
2210	Poppy Blazer		COLOR_1	2	SIZE_US	0	

By changing the **Master Relations**, it will affect these Masters throughout the whole Category Structure of this specific Category.

NOTE

How to setup the **Master Relations** for a **Matrix Limitation** can be seen in detail in the *White Paper – TRIMIT Collections*.

CALCULATION OVERVIEW

Opens **Calculation Overview** page related to the Masters on the Category.

See *White Paper – TRIMIT Calculations* for more details.

In the Category Card, you can add the field **Calculation Template** via **Personalization**.

CATEGORY LINES

This page shows a Structure in which you can create Sub Levels and add Masters / Items related to a Level.

Edit - Category Lines - AGENT_W_JACKETS

Search

New

Edit List

Delete

All Category Lines

Related

Fewer options

Type

No.

Matrix Limitation

Description

Logo Placement

Visual Configuration

Configuration filters Y-axis

Allow Bulk Sale on Webshop

Filter Delivery Period

Category Lines 2

Gift Card

Customer Club Level

Alternative Sorting

Effective Date

Expiry Date

Handle Item as

Sales Status

Matrix

2200

Grace Bomber

No

No

Yes

☐

☐

☐

Level 0

0

Matrix

Sellable

Matrix

2210

Poppy Blazer

No

No

Yes

☐

☐

☐

Level 0

0

Matrix

Sellable

Matrix

2220

Charlotte Coat

No

No

Yes

☐

☐

☐

Level 0

0

Matrix

Sellable

→ Matrix

2230

Jessica Coat

No

No

Yes

☐

☐

☐

Level 0

0

Matrix

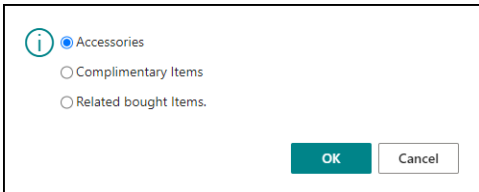
Sellable

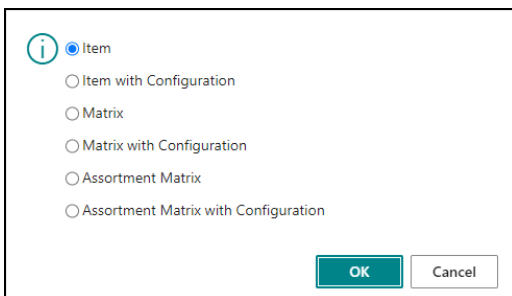
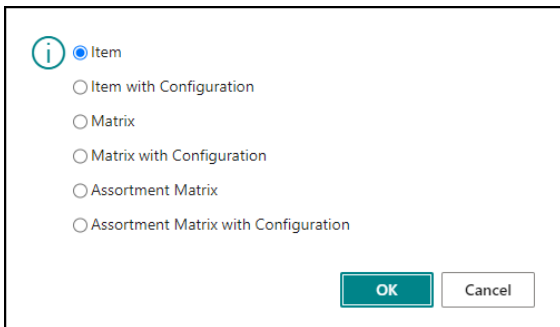
DESCRIPTION OF THE FIELDS

TYPE

In this Field, you can select which **Type** of Category line you want to create.

You can choose between the following options:

User Defined Category	With this Type you can create a level which can carry a Sub Structure. This is an alternative to creating a Category and will only be a Structure Level in the current Category. Example is the creation of a Category called <i>Fashion</i> and under that you want to divide in to <i>Men</i> and <i>Women</i>.
Category	With this Type, you can select an already defined Category as a Sub Structure. This enables the usage of Categories in many levels and different Category Structures.
Item	With this Type, you can select a flat Item. An Item Level has no Sub Levels directly. Via Related/Next Level the system will automatically present the possibility to create only 1 level under this Item Category Line of the Subtype: <i>Accessories, Complementary Items, or Related bought Items.</i>  These options are used on the B2C and B2B Webshops to promote Masters/Items under the specified conditions.
Matrix	With this Type you can only select Masters with an attached Matrix. The standard Sales Agent/B2B will navigate to a specific product page which handles Matrix Sales. In the B2C framework a Matrix is transformed into selection of the Y- and X-Axis. In most cases a selection of Color and Size. A Matrix Level has no Sub Levels directly. Via Related/Next Level the system will automatically present the possibility to create only 1 level under this Matrix Category Line of the Subtype: <i>Accessories, Complementary Items, or Related bought Items.</i>
Assortment Matrix	With this Type you can only select Masters with related Assortments. The Assortment Items will be shown in a Matrix. An Assortment Matrix Level has no Sub Levels directly. Via Related/Next Level the system will automatically present the possibility to create only 1 level under this Assortment Matrix Category Line of the Subtype: <i>Accessories, Complementary Items, or Related bought Items.</i>

Create Variant Combinations	With this Type you can select Masters. The Structure level itself will at runtime automatically create and show all Valid Combinations as Items. A Create Variant Combinations Level has no Sub Levels directly. Via Related/Next Level the system will automatically present the possibility to create only 1 level under this Create Variant Combinations Category Line of the Type: <i>Accessories, Complementary Items, or Related bought Items</i>. NOTE: If at runtime the possible Combinations are hundreds or more – performance may decrease.
Collection	With this Type you can select Collections. All Masters/Items related to the Collection will automatically be populated at runtime. When a Collection has been selected you must choose the way the Items are to be sold.  This selection will also be filled in Handle Item as.
Global Dimension 1, 2	These Types allows runtime filtering on Global Dimension Codes. All Items/Masters related to the selected Global Dimension Codes Value will be shown on this Category Structure Level.
Statistics Group 1, 2, 3, 4, 5	These Types allows filtering on Item Statistics Group Values. At runtime, the Category level is populated either by Items or Masters with the related value.
Period Code	This Type allows filtering on a specific Shipment Date Code. All Items/Masters related to the Shipment Date Code are inserted at the Category level.
Collection from Category	This Type allows you to automatically take the Collection from a higher Category – in the Category Structure. This means, that if the Collection would change, you do not have to change all the Category Lines but can simply change the Collection on the highest level, and this will also influence the lower levels with Type Collection for Category. You still need to choose one of the following options – just as with Type Collection.  This selection will also be filled in Handle Item as.

NOTE 1

Be aware that using *Collection*, *Global Dimension* or *Statistics Groups* as a Type on a **Category Line** makes certain restrictions on portals. That is, it will not be possible to use alternative sorting on Master or Item level on the Category which uses Collection, Global Dimension, or Item Statistics group.

NOTE 2

Be aware that portals do not support Items without related Masters. That is a flat Item should always have a Master.

NO.

Based on the selected **Type** this Field should be filled and the lookup will show accordingly views.

I.e., if the **Type** is set to *Matrix* the lookup is filtering on Masters which have a related Matrix or if the **Type** is set to *User Defined Category* the **No.** is free Text. The different lookups are specified above.

MATRIX LIMITATION

This Field will determine which Colors/Sizes/etc. of the Master will be shown on the Portal.

If the **Type** is *Collection*, the **Matrix Limitation** will be filled with the **No.** of the Collection because of the way of filtering the Masters/Colors/Sizes/etc. for the Portals.

In that case, the Field **Matrix Limitation Relation** – a Field that is not in the page by default – will also be set correctly to *Collection* and will therefore influence the lookup in the Field **Matrix Limitation**: the list of Collections.

If the **Type** is *Shipment Group*, the **Matrix Limitation** will be filled with the **No.** of the Shipment Group because of the way of filtering the Masters/Colors/Sizes/etc. for the Portals.

In that case, the Field **Matrix Limitation Relation** – a Field that is not in the page by default – will also be set correctly to *Shipment Group* and will therefore influence the lookup in the Field **Matrix Limitation**: the list of Shipment Groups.

If the **Type** is not *Collection* or *Shipment Group*, you can enter a **Matrix Limitation Setup**.

I.e.: If the Category is “Summer 2022” the **Matrix Limitation Setup** can determine that only the Colors 100-200 can be used and shown on the Portals for all Masters.

If the Category is “Winter 2022” the **Matrix Limitation Setup** can determine that only the Colors 150-250 can be used and shown on the Portals for all Masters.

This means that you do not have to set the Color filters on every Category Line with a Master individually but can simply enter the **Matrix Limitation Setup** in which you already determined your Filters.

NOTE

How to setup the **Matrix Limitation Setups** is described in detail in the *White Paper – TRIMIT Collections*.

DESCRIPTION

This Field it populated from the selected **No.**

If the **Type** is *Matrix* and the **No.** is a Master, the Description Field is automatically inheriting the Description from the Master.

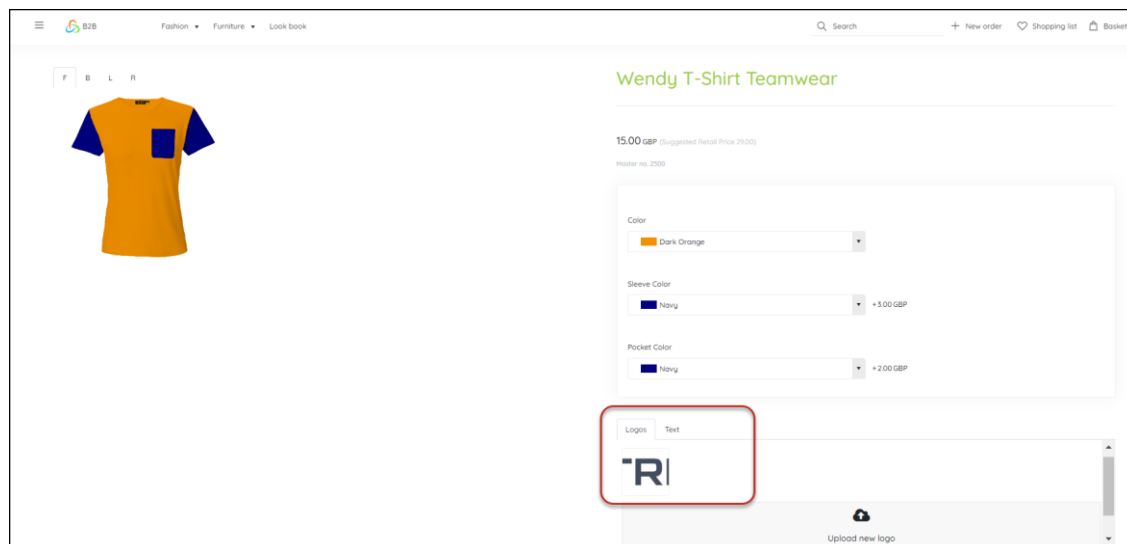
This **Description** is only used in the Structure if no Description is found on the **No.** itself.

If a Translation is requested, the search for a Translation is done on the **No.** itself.

I.e., if the Category Structure is called specifying a preferred Language, then on all Structure Levels the search for a Translation is carried out on the related **Master Data** (Category, Item or Master).

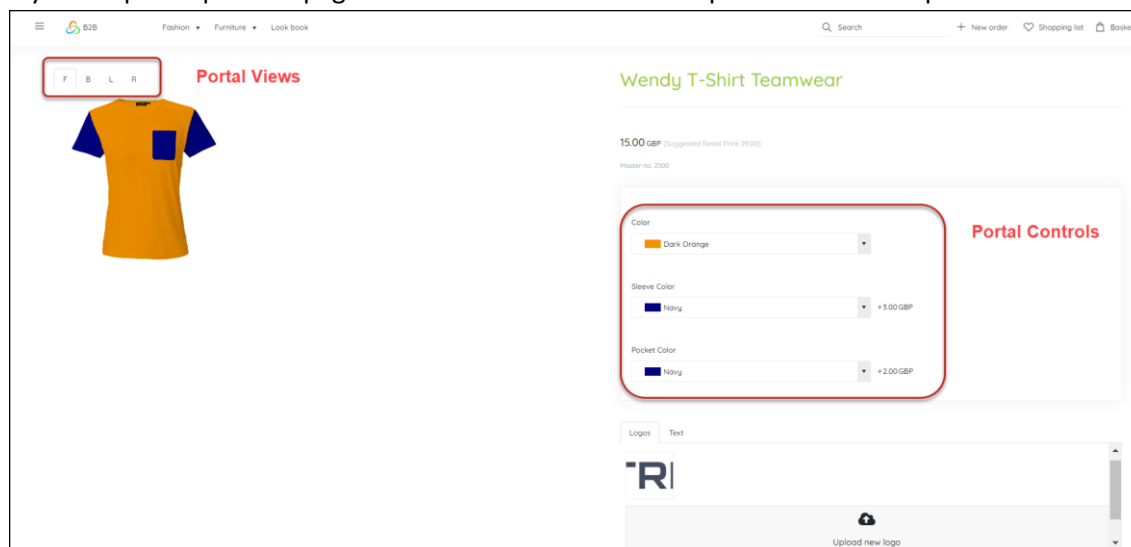
LOGO PLACEMENT

Related to [Visual Configuration](#). If set to Yes, then it will be possible to use **Logo Placement** and **Text** functionality on corresponding portal Product page. This option takes affect when Category Line **Type** is set to *Matrix*.



VISUAL CONFIGURATION

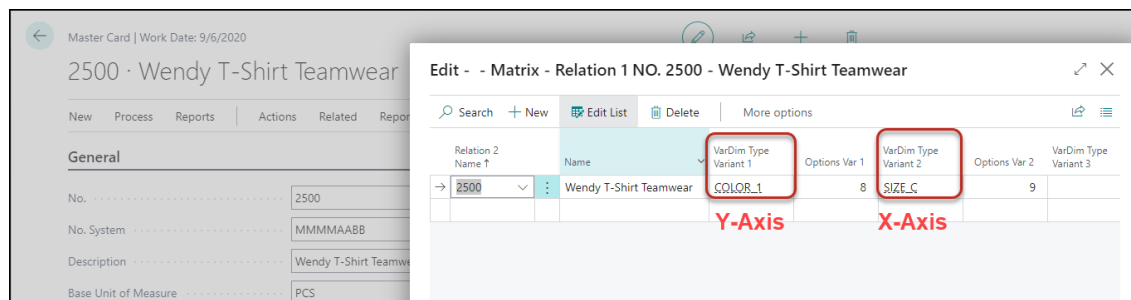
Related to product visual configuration. If set to Yes, then it will be possible to view product views and layers on portal product page and see visual reflection of options selected in portal controls



CONFIGURATION FILTERS Y-AXIS

If the value is set to Yes, then product Matrix, on portals Product page, will display only the VarDim Types (i.e., Color) in the **Portal Controls** which are related to Y-Axis and the VarDim Types that are not related to the Y-Axis or the X-Axis.

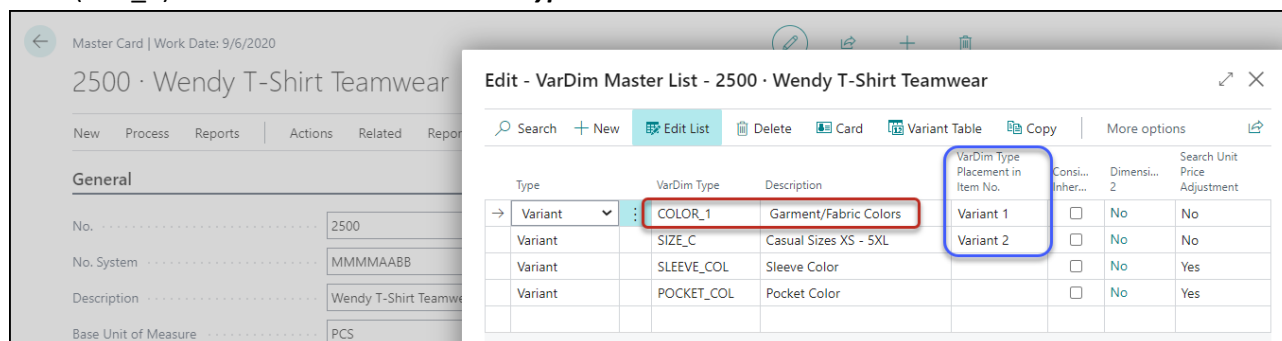
I.e., everything but the last VarDim Type in the **Matrix - Relation 1** List of the Master (via **Actions, Matrix, Matrix, Matrix**):



Setup in VarDim Master List (via Master List/Card, **Process, VarDim Master**):

Color (COLOR_1) is set to Variant 1 in **VarDim Type Placement in Item No** column.

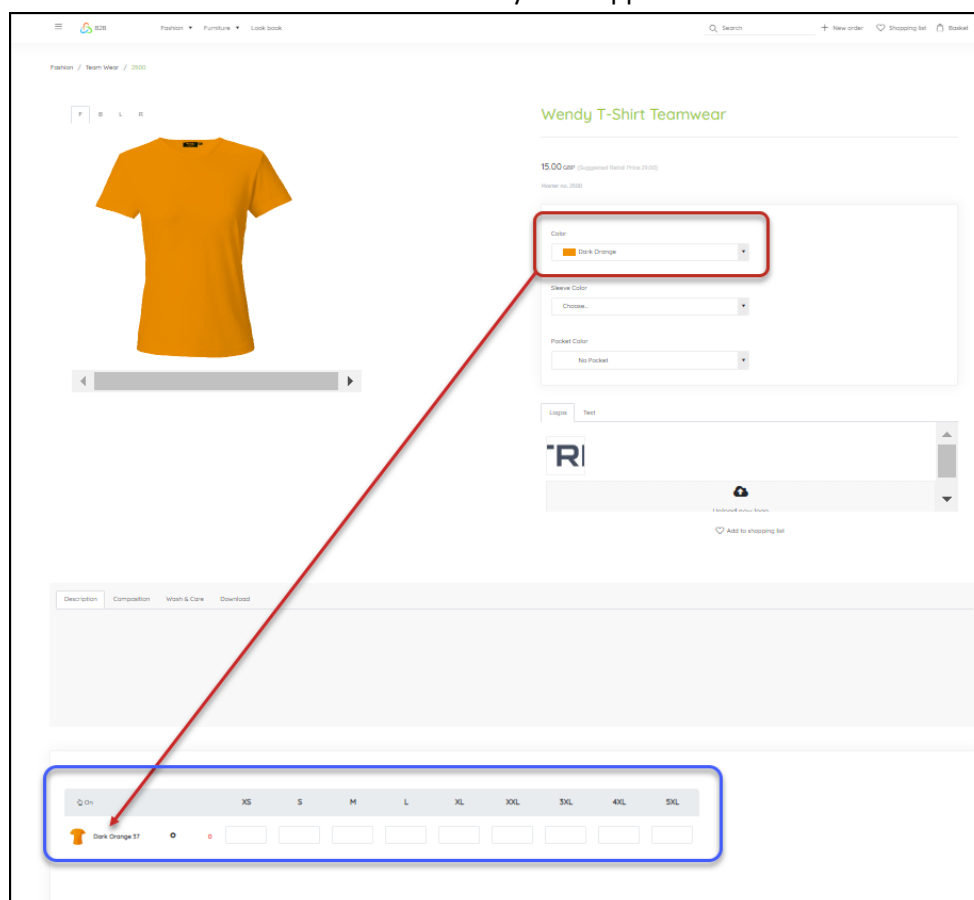
Sizes (SIZE_C) is set to Variant 2 in **VarDim Type Placement in Item No** column.



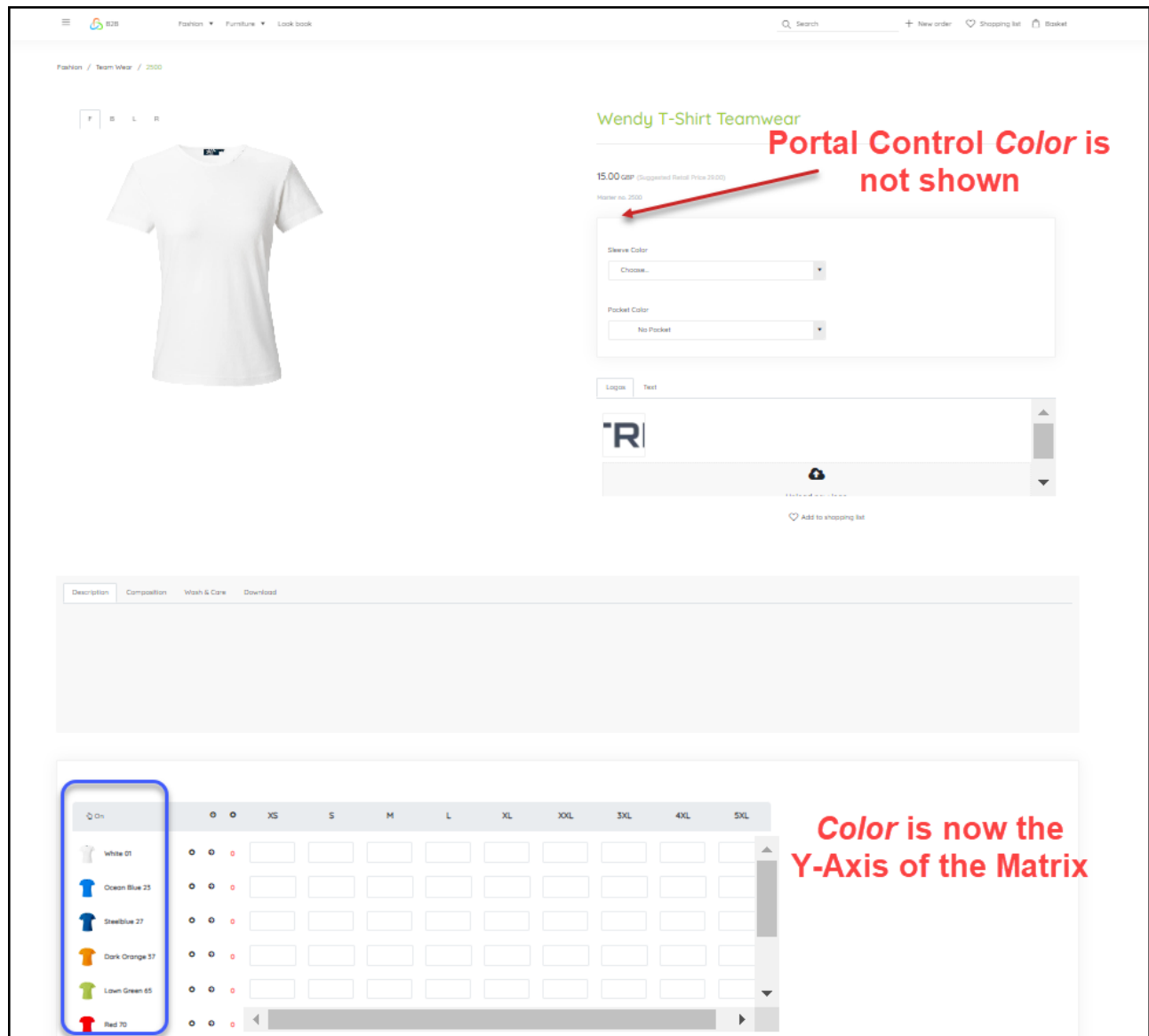
Portal Product page.

I.e., the **Color** Portal Control allows selection of a Color from a drop down.

When Color is selected – a matrix with only Sizes appears:



When **Configuration Filter Y-axis** Field set to *No*, then the Product matrix will display all the relevant VarDim Types (i.e., Colors and Sizes) and Portal Control **Color** will not be shown:



Wendy T-Shirt Teamwear

15.00 GBP (Suggested Retail Price 20.00)

Master no. 2500

Portal Control Color is not shown

Size Color

Choose...

Packet Color

No Packet

Logos Text

Color is now the Y-Axis of the Matrix

	XS	S	M	L	XL	XXL	3XL	4XL	5XL
White 01									
Ocean Blue 25									
SteelBlue 27									
Dark Orange 57									
Lozen Green 65									
Red 70									

ALLOW BULK SALE ON WEBSHOP

Only applicable for the B2C Webshop.

If set to *TRUE*, the B2C User can buy Items via a Matrix instead of buying it by selecting the Variants individually.

FILTER DELIVERY PERIOD

If **Type** is set to *Collection* and the Collection has differentiated Items for different Delivery Periods, the content can be detailed to showing only Items belonging to the Collection with the chosen filter for Delivery Periods in this Field.

CATEGORY LINES

This Field shows if the current Category Line has content on the Next Level.
It is a non-editable Field and automatically updated by the system.

GIFT CARD

Related to B2C Webshop. Should be set to *TRUE* if the Item is a Gift Card. They are handled differently on the Portals as the regular Items.

CUSTOMER CLUB LEVEL

Related to B2C Webshop. Available options in this Field are *Level 0 – Level 5*.

If **Customer Club Level** is set, then this means that only members of this **Customer Club Level** and members of higher **Customer Club Levels** can see the content this Category Line.

Change requires running Portals Schedules.

ALTERNATIVE SORTING

A Category Structure is normally created top down on every Level. However, you can change the order in which the Levels are displayed, simply by applying **Alternative Sorting** values. The Field accepts integers and will sort records ascending.

EFFECTIVE DATE

In a Structure, you can set individual Lines to only be visible from a given Date. This enables an administrator to work with and create Structures in advance towards an upcoming sales season.

EXPIRY DATE

A Structure level can have an **Expiry Date** which effectively removes it at runtime if the Date is exceeded.

HANDLE ITEM AS

This Field specifies how the Item(s) is presented on a Web page. Also, it will do implicit filtering at runtime. Consider that a Collection holds a Master which has Matrix Relations but the Master itself also represents Items which are the specifics of a Color and Size.

If the Category Line specifies **Handle Item As Matrix**, the Masters themselves are shown.

If set to **Handle Item As Item**, the runtime generation will find all the Items under the related Masters and display these Items in the Category List.

You can choose between the following options:

Value	Description	Available for
Blank	This option does not indicate a Sales Method. Not valid if the Category Line is in fact representing a Master/Item directly or a level that is at runtime replaced by an Item List.	
Item	This option indicates that it is an Item known by its unique number. This Item can be sold straight out of the box with no further needed information/configuration.	SA, B2B, B2C
Item With Configuration	This product is an Item that must be configured. This will indicate that a VarDim Order is attached at selling point.	SA, B2B, B2C
Matrix	This option will indicate that the Master must be sold as a Matrix. On TRIMIT Portals the product page applies the Matrix with normal TRIMIT rules showing all valid combination.	SA, B2B, B2C
Assortment Matrix	This option specifies that the Master is sold as a Matrix showing all Assortment combinations.	SA, B2B

Matrix With Configuration	This product is a Master with Matrix and must be configured. This will indicate that a VarDim Order is attached at selling point.	SA, B2B
Assortment With Configuration	This product is a Master with Assortment Matrix and must be configured. This will indicate that a VarDim Order is attached at selling point.	SA, B2B

NOTE

Setting the correct **Handle Item As** is particularly important. Standard TRIMIT Portals will malfunction if an Item or a Master is set to be sold in an illogical manor. If in doubt always test the behavior on the intended Portal.

SALES STATUS

With this Field you can determine if this Category Line can be bought on the Portals (*Sellable*) or if it will only show the Products – which cannot be bought yet i.e. (*Only show*).

DESCRIPTION OF THE FIELDS NOT VISIBLE BY DEFAULT

These Fields could be added via **Personalize**.

PARENT NO.

Shows the Parent Category (Line) in the Structure.

DESCRIPTION 2

This Field is populated from the selected **No.**, under the same conditions as **Description**.

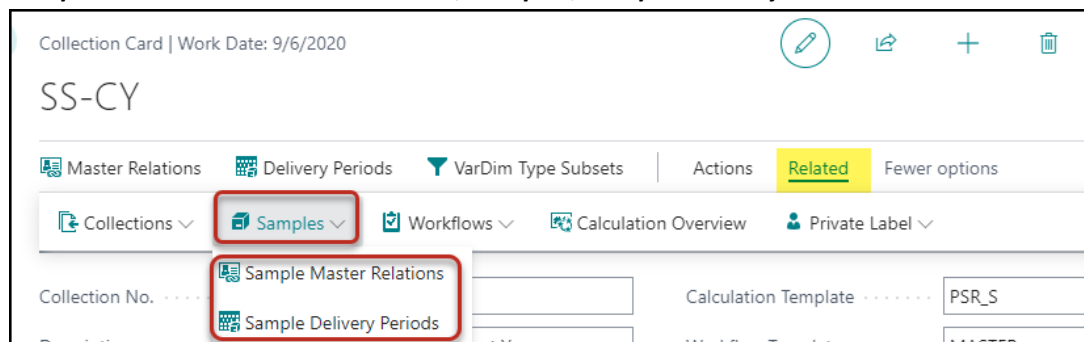
FILTER COLLECTION TYPE

Only applicable for Category Lines with **Type Collection**.

Items/Masters related to a Collection can have a specific **Type** which defines the Collection intent. The valid options are *General*, *Samples*, and *CPO*. This Field will filter out specific **Types** from a given Collection.

Option *General* will not show the Masters/Items that have been connected to a Collection via **Related, Samples Master Relations** or **Related, Samples, Sample Delivery Periods**.

Option *Samples* will only filter the Masters/Items that have been connected to a Collection via **Related, Samples Master Relations** or **Related, Samples, Sample Delivery Periods**.



Option *CPO* is not implemented.

PORTAL CODE

Code which the CSS on the Portal page can react upon. The Code is your own choice which you then coordinate with the CSS/HTML developer, who can change the Code in the CSS to react accordingly. Read more in ***White Paper – TRIMIT Campaign Customization.***

FILTER COLLECTION GROUP NO.

Only applicable for Category Lines with **Type Collection**.

Items/Masters related to a Collection can have **Group Code** which you can use for filtering and thereby only show a subset from a Collection.

FILTER GLOBAL DIMENSION 1

Only applicable for Category Lines with **Type Collection**.

Set a Global Dimension 1 Filter to get an Item/Master subset from the Collection of this Category Line.

FILTER GLOBAL DIMENSION 2

Only applicable for Category Lines with **Type Collection**.

Set a Global Dimension 2 Filter to get an Item/Master subset from the Collection of this Category Line.

ITEM STATISTICS GROUP FILTER

Using the **Item Statistics Group** for filtering will create the matching subset of Items/Masters. (Shown as *Design Filter* in our TRIMIT Demo Company).

ITEM STATISTICS GROUP 2 FILTER

Using the **Item Statistics Group 2** for filtering will create the matching subset of Items/Masters. (Shown as *Item Group Filter* in our TRIMIT Demo Company).

ITEM STATISTICS GROUP 3 FILTER

Using the **Item Statistics Group 3** for filtering will create the matching subset of Items/Masters. (Shown as *Gender Filter* in our TRIMIT Demo Company).

ITEM STATISTICS GROUP 4 FILTER

Using the **Item Statistics Group 4** for filtering will create the matching subset of Items/Masters.

ITEM STATISTICS GROUP 5 FILTER

Using the **Item Statistics Group 5** for filtering will create the matching subset of Items/Masters.

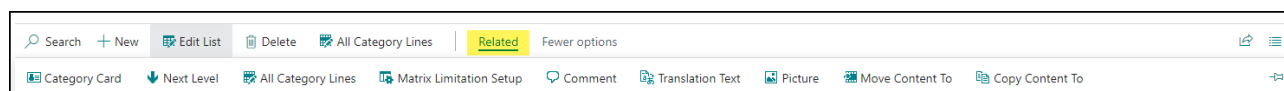
NOTE

Be aware that applying Filters can create a slow Category generation on the Portals.

MATRIX LIMITATION RELATION

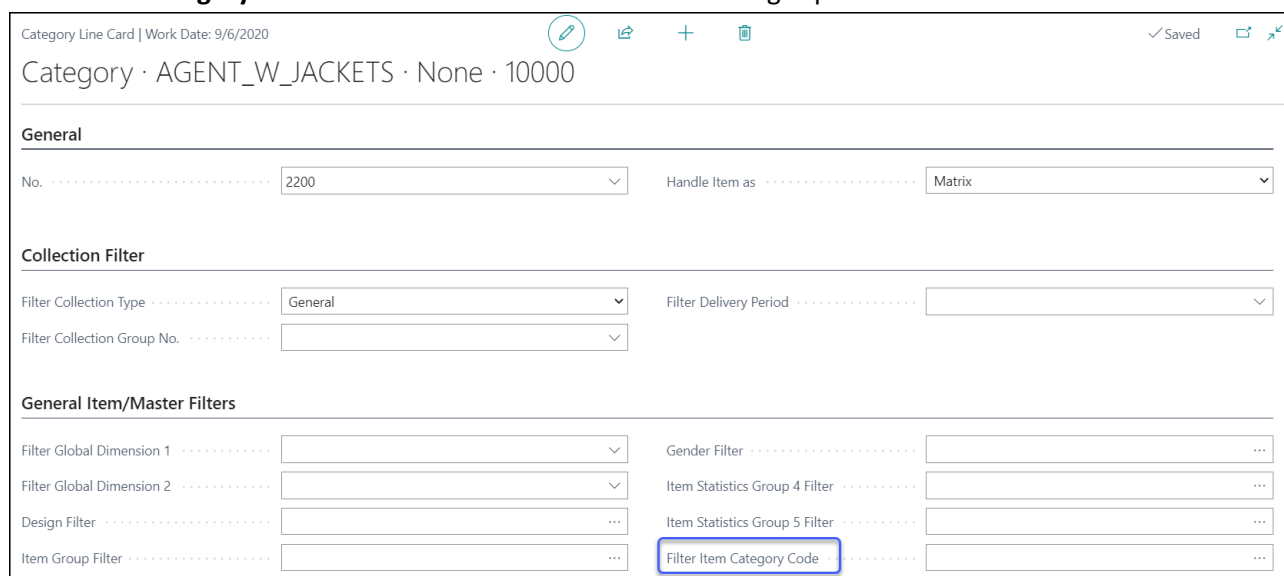
Set automatically after the **Type** is selected. It has the following options: *Matrix Limitation Setup, Collection* and *Shipment Group*.

RELATED ON CATEGORY LINES PAGE



CATEGORY CARD

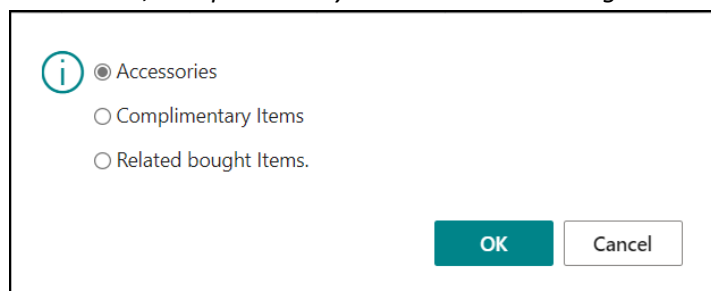
This will open the Card of the Category (Line) All Fields are described under [Category Lines](#). Additional Field **Filter Item Category Code** is available here. This extends filtering capabilities.



NEXT LEVEL

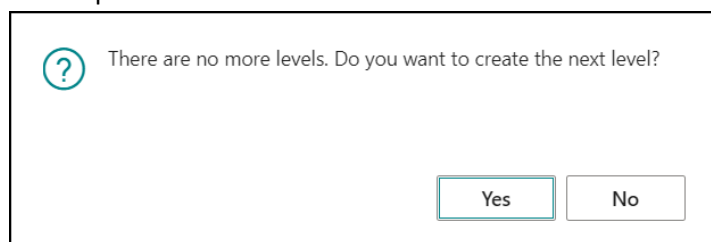
This action will take you to the next Level with relationship to the current **Category Line**.

If the current Category Line represents an Item/Master directly or indirectly the next Level can only be *Accessories*, *Complimentary Items* or *Related bought Items*.



In that case, the **Subtype** field of the Category Line will be filled with the choice you made. This field can be added to the page of the Category Lines when using Personalization.

If the current level is of **Type User Defined Category** or *Category*, the **Next Level** action will take the user to the next Level in the tree Structure. If a Level under the current Level does not exist, the user is prompted to accept the creation of *Next Level*.



ALL CATEGORY LINES

This action will show all Category Lines without any Filters.

This enables the user to easily change data over all the Category Lines.

Category Lines Work Date: 9/6/2020											
Search Edit List Delete More options Save Filter Menu											
Parent No. ↑	Parent Type ↑	Type	No.	Matrix Limitation	Description	Logo Placement	Visual Configurati...	Configurati... filters Y-axis	Allow Bulk Sale on	Filter Delivery Period	Cat. Line
→ AGENT	Category	Category	AGENT_FASHION		Fashion	No	No	Yes	☐		
AGENT	Category	Category	AGENT_FURNITURE		Furniture	No	No	Yes	☐		
AGENT_F_CABINETS	Category	Item	3300		Storage Cabinet Nemesis	No	Yes	Yes	☐		
AGENT_F_CHAIRS	Category	Item	3000		Chair Zeus	No	Yes	Yes	☐		
AGENT_F_CHAIRS	Category	Item	3010		Chair Hades	No	Yes	Yes	☐		
AGENT_F_CHAIRS	Category	Item	3020		Chair Poseidon	No	Yes	Yes	☐		
AGENT_F_SOFAS	Category	Item	3200		Sofa Helios 2 Seater	No	Yes	Yes	☐		
AGENT_F_SOFAS	Category	Item	3210		Sofa Helios 3 Seater	No	Yes	Yes	☐		
AGENT_F_SOFAS	Category	Item	3220		Sofa Apollo 2,5 Seater	No	Yes	Yes	☐		
AGENT_F_SOFAS	Category	Item	3230		Sofa Apollo 3 Seater	No	Yes	Yes	☐		
AGENT_F_TABLES	Category	Item	3100		Dining Table Artemis	No	Yes	Yes	☐		
AGENT_F_TABLES	Category	Item	3110		Side Table Hera	No	Yes	Yes	☐		
AGENT_F_TABLES	Category	Item	3120		Coffee Table Athena	No	Yes	Yes	☐		
AGENT_FASHION	Category	Category	AGENT_W_TROUSERS		Trousers	No	No	Yes	☐		
AGENT_FASHION	Category	Category	AGENT_W_TOPS		Tops	No	No	Yes	☐		
AGENT_FASHION	Category	Category	AGENT_W_JACKETS		Blazers	No	No	Yes	☐		

MATRIX LIMITATION SETUP

If the **Matrix Limitation** of the Category Line is of **Matrix Limitation Relation Matrix Limitation Setup**, this action will show the **Matrix Limitation Master Relations**.

COMMENT

This will open the **Comment Sheet** in which you can relate information to the Category Line.

These Comments are not used in the Portals, but only for Business Central.

TRANSLATION TEXT

User Language may differ on a web page, and you can create Translations for the Descriptions of the Category Lines, so they respond to the language rules set by a Portal solution. **Translation Text** will open the **Translated Text Sheet**. In this worksheet, you can specify per **Language Code** the translation for **Description** and **Description 2**.

PICTURE

A Category Line can have a Picture attached which will be used on TRIMIT Portals. Pictures attached to Category Lines give a nice “Clickable area” and help the user to understand the content of a Category Line. Pictures are automatically scaled for web usage. A Category Line can only hold one Picture. Category Line Pictures can be applied to Sales Agent portal and B2B Webshop. B2C Webshop does not use Category Pictures.

MOVE CONTENT TO

Allows moving the content of the selected Category to another Category.

Even when standing on a Matrix Category Line, it would copy all Category Lines of the current Category!!

Clicking this action opens a dialog window. To move the entire content of the Category, click **Yes**.

To select the content of the Category to be moved click **No**:

 Choose Yes to move all. No to select lines?

Yes

No

Clicking **Yes** or **No** opens a new window **Choose Destination Category**. Select the destination Category and click **OK**:

Choose Destination category. | 🔍 + New Edit List ...

No.	Description	Matrix Limitation	Do not show on First Level	Alternative Sorting	Customer Club Level	Collection	Go Pro Taxon
AGENT_W_ACCESSORIES	Accessories		☐	0	Level 0		
AGENT_W_DRESSES	Dresses/Skirts		☐	0	Level 0		
AGENT_W_JACKETS	Blazers		☐	0	Level 0		
AGENT_W_TOPS	Tops		☐	0	Level 0		
AGENT_W_TROUSERS	Trousers		☐	0	Level 0		
AGENT_W_SHOES	Shoes		☐	0	Level 0		

OK

Cancel

If all Category content must be moved, then there will be a confirmation window as follows:

 2 Lines will be moved from AGENT_W_DRESSES to AGENT_W_TOPS. Continue?

Yes

No

After clicking **Yes**, the content will be moved to selected destination Category.

If user selected to move a part of the Category content, then after clicking **No** in the first dialog window and selecting a destination Category in **Choose Destination Category** window user will be prompted to select the Category Lines to be moved in window **Category Lines**:

Category Lines - AGENT_W_DRESSES | 🔍 + New Edit List ...

Type	No.	Matrix Limitation	Description	Logo Placement	Visual Configuration	Configuration filters Y-axis	Allow Bulk Sale on Webshop
☒ Statistics Group 2	155		Dresses	No	No	Yes	☐
☐ Statistics Group 2	230		Skirts	No	No	Yes	☐

OK

Cancel

After clicking **OK** there will be shown a confirmation dialog window. To confirm the content moving click **Yes**.


1 Lines will be moved from AGENT_W_DRESSES to AGENT.
Continue?

Yes
No

COPY CONTENT TO

This action has the same functionality as **Move Content To** action, but it allows duplicate Category content by copying from a target to destination Category.

ENABLE PORTAL FROM MASTER

In the **Master Card/List**, there has an action **Enable Portal** under **Related, Portal**.

Master Card | Work Date: 9/6/2020
2000 · Olivia Trousers

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

Master Data Statistics Comments **Portal** Sales Receivables Pur

No. 2000
No. System MMMMAABB
Description Olivia Trousers
Base Unit of Measure PCS
Status Code READY

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

Inventor
Finished
One Col

This action allows attaching a Master to a portal Category through **Attach to Category** window:

Edit - Attach 2000 to Category - AGENT

Item to Attach

Item(s) to Attach 2000

Select Type

Item ☐ Matrix with Configuration ☐ Create Variant Combinations ☐
Item with Configuration ☐ Assortment Matrix ☐
Matrix ☐ Assortment Matrix with Configuration ☐

Dates

Effective Date Expiry Date

Choose Category

Exist in Category	Attach	No. ↑	Description	Description 2
☐	☐	AGENT_W_TOPS	Tops	
☒	☐	AGENT_W_TROUSERS	Trousers	
☐	☐	B2B	B2B Toplevel	
☐	☐	B2B_F_CABINETS	Cabinets	
☐	☐	B2B_F_CHAIRS	Chairs	
☐	☐	B2B_F_SOFAS	Sofas	

OK Cancel

DESCRIPTION OF THE FIELDS

ITEMS(S) TO ATTACH

Current Item or Master number.

It can also have the text **MULTIPLE**, if this page is used to connect multiple Items/Masters at the same time.

SELECT TYPE

Fields in this area define the Category Line **Handle Item as** which is suitable for the Item or Master.

Available options are *Item*, *Item with Configuration*, *Matrix*, *Matrix with Configuration*, *Assortment Matrix*, *Assortment Matrix with Configuration* and *Create Variant Combinations*.

System automatically determines appropriate options.

It is mandatory to choose one of the **Types**.

EFFECTIVE DATE

This Date specifies from when the Item/Master or bundle should be visible in the Category.

EXPIRY DATE

This Date specifies when the Item/Master or bundle should stop showing in the Category.

Choose Category area contains a list of all portal Categories.

DESCRIPTION OF THE FIELDS**EXIST IN CATEGORY**

Shows if Item or Master is attached to the **No.** Category. Does not have values when attaching multiple Lines at once.

ATTACH

This Field is a selection on which Category the Item/Master or multiple Items/Masters should be attached to. You can choose one Category or multiple Categories.

NO.

This is the unique Category Code.

DESCRIPTION, DESCRIPTION 2

These Fields show the **Description** and **Description 2** of the Category.

NOTE

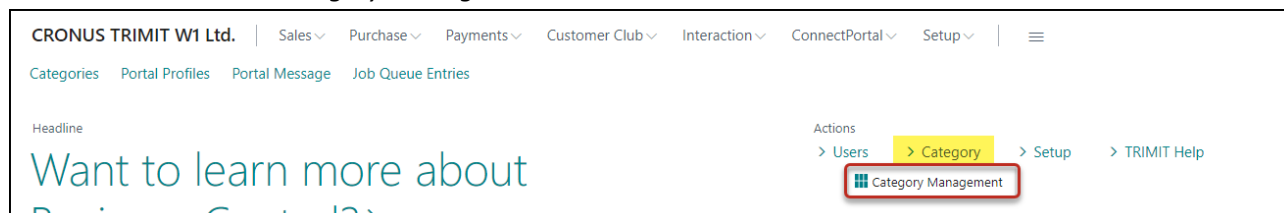
Items without a Master are not supported by TRIMIT B2C Webshop.

CATEGORY MANAGEMENT TOOL

To make setup of the Category Structure easier, we also provide a Tool called **Category Management**.

In the Role Center **Portal Administrator**, it can be found via **Category, Category Management**.

Otherwise via **Tell me Category Management**.



This Tool helps creating an overview seen from Item level.

It is an effortless way to see which Items are related and which are not.

It inserts filtered bulk Items into Categories.

Item Type 1	No. 1	Attached to Category	Master No. 1	Master Attached to Category	Description	Description 2	Brand Code	Season Code	Item Category Code	Design	Item Group	Gender	Item Statistics Group 4	Item Statistics Group 5
Finished Goods	21009903		2100	3	Lily Blouse	Black,M	FASHION	02-SUMMER		1	110	110	0	20
Finished Goods	21009904		2100	3	Lily Blouse	Black,L	FASHION	02-SUMMER		1	110	110	0	20
Finished Goods	21009905		2100	3	Lily Blouse	Black,XL	FASHION	02-SUMMER		1	110	110	0	20
Finished Goods	21009906		2100	3	Lily Blouse	Black,XXL	FASHION	02-SUMMER		1	110	110	0	20
Finished Goods	21009907		2100	3	Lily Blouse	Black,3XL	FASHION	02-SUMMER		1	110	110	0	20
Master Item	2100	3	2100	3	Lily Blouse	--	FASHION	02-SUMMER		1	110	110	0	20
Finished Goods	21103001		2110	4	Mia Blouse	Yellow,XS	FASHION	02-SUMMER		5	110	110	0	20
Finished Goods	21103002		2110	4	Mia Blouse	Yellow,S	FASHION	02-SUMMER		5	110	110	0	20
Finished Goods	21103003		2110	4	Mia Blouse	Yellow,M	FASHION	02-SUMMER		5	110	110	0	20

Parent No.	Type	No. 1	Description	Description 2	Effective Date	Expiry Date	Alternative Sorting	Category Lines
AGENT_W_TOPS	Matrix	2100	Lily Blouse				0	☐
B2B_W_TOPS	Matrix	2100	Lily Blouse				0	☐
B2C_W_TOPS	Matrix	2100	Lily Blouse				0	☐

The Main list shows all Items in the Company. The list is non-editable.

DESCRIPTION OF THE FIELDS

ITEM TYPE

This Field shows the **Item Type** value.

Values can be: *Finished Goods, Semi-Finished Goods, Raw Materials, Master Item*.

NO.

This is the Item number

ATTACHED TO CATEGORY

This is a Flow Field which is system updated. It shows the number of Categories in which the Item is directly represented. Note that Structures in which the Item is indirectly represented are not counted.

If an item is attached accessories, then the parent Item Level will be listed as well.

MASTER NO.

This shows the Master of the Item.

MASTER ATTACHED TO CATEGORY

This Field is a Flow Field which is system updated. It shows the number of Categories in which the Master of the Item is in.

The rest of the Fields are inherited from the **Item** card.

The FastTab **Lines** shows the Categories in which a specific Item (or Master) can be found. The Fields in the list are inherited from the Category Lines and are described previously in this document.

Lines		Manage							
Parent No.	Type	No. ↑	Description	Description 2	Effective Date	Expiry Date	Alternative Sorting	Category Lines	
AGENT_W_TOPS	Matrix	2100	Lily Blouse				0	☐	
B2B_W_TOPS	Matrix	2100	Lily Blouse				0	☐	
B2C_W_TOPS	Matrix	2100	Lily Blouse				0	☐	

ACTIONS ON CATEGORY MANAGEMENT

Search

+

Attach Line to Category

+

Attach Selected Lines to Category

Actions

Related

Fewer options

+

Attach Line to Category

+

Attach Selected Lines to Category

ATTACH LINE TO CATEGORY

Use this function to attach a specific Item to a Category the same way as in [Enable Portal from Master](#).

If the Item is of **Item Type Master Item**, it means that the Master will be attached to the Category

ATTACH SELECTED LINES TO CATEGORY

This function will insert all Items or Masters that have been selected to a given Category the same way as in [Enable Portal from Master](#).

RELATED ON CATEGORY MANAGEMENT

Search

+

Attach Line to Category

+

Attach Selected Lines to Category

Actions

Related

Fewer options

Selected Category Lines

Category List

SELECTED CATEGORY LINES

Shows the **Category Lines** to which the Item (or Master) is connected directly.

Here it is possible to Manage the Item occurrences in Category Structure by deleting Lines.

If there are no Category Lines connected directly, you will get a Message. I.e.:

!

The field No. of table Category Line contains a value (2330) that cannot be found in the related table (Category).

Was this information helpful?

Yes

No

OK

CATEGORY LIST

This will open the **Category List**.

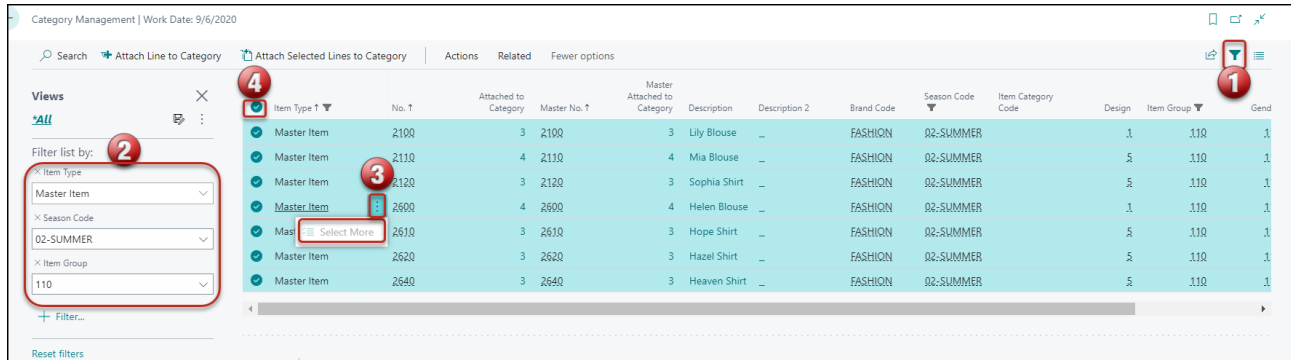
For information on this page see [Category](#).

ATTACH MULTIPLE LINES TO A CATEGORY

As described previously the Main list in **Category Management** page shows all Items/Masters.

The Fields are inherited from the Item card and are the most used Fields to classify and group Items.

To bundle multiple Items and attach them to a specific Category in one go, you can set filters as follows and view lines in Item list, after which you can easily select them via **Select more**.



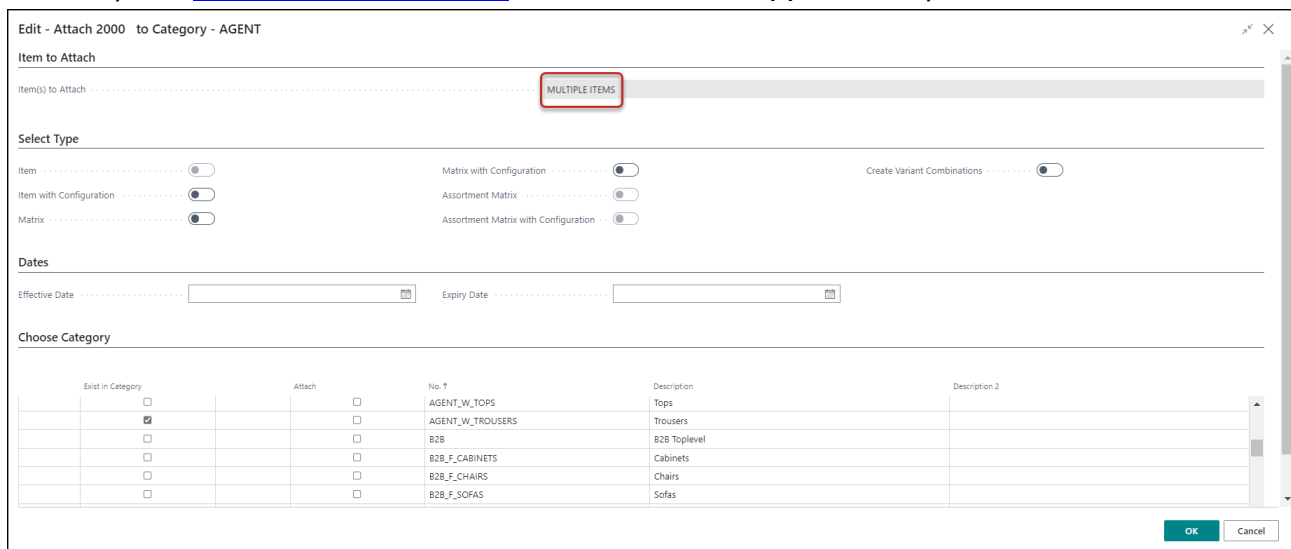
Category Management | Work Date: 9/6/2020

Search Attach Line to Category Attach Selected Lines to Category Actions Related Fewer options

Views Filter list by: Master Item 02-SUMMER 110 Filter... Reset filters

Item Type	No. 1	Attached to Category	Master No. 1	Master Attached to Category	Description	Description 2	Brand Code	Season Code	Item Category Code	Design	Item Group	Gen
Master Item	2100	3	2100	3	Lily Blouse	—	FASHION	02-SUMMER		.1	.110	.1
Master Item	2110	4	2110	4	Mia Blouse	—	FASHION	02-SUMMER		.5	.110	.1
Master Item	2120	3	2120	3	Sophia Shirt	—	FASHION	02-SUMMER		.5	.110	.1
Master Item	2600	4	2600	4	Helen Blouse	—	FASHION	02-SUMMER		.1	.110	.1
Master Item	2610	3	2610	3	Hope Shirt	—	FASHION	02-SUMMER		.5	.110	.1
Master Item	2620	3	2620	3	Hazel Shirt	—	FASHION	02-SUMMER		.5	.110	.1
Master Item	2640	3	2640	3	Heaven Shirt	—	FASHION	02-SUMMER		.5	.110	.1

After you have selected multiple Items, you can use the action **Attach Selected Lines to Category** in the same way as in [Enable Portal from Master](#) but on the Field **Item(s) to Attach** you will see **MULTIPLE ITEMS**.



Edit - Attach 2000 to Category - AGENT

Item to Attach

Item(s) to Attach MULTIPLE ITEMS

Select Type

Item ☐ Matrix with Configuration ☐ Create Variant Combinations ☐

Item with Configuration ☐ Assortment Matrix ☐

Matrix ☐ Assortment Matrix with Configuration ☐

Dates

Effective Date Expiry Date

Choose Category

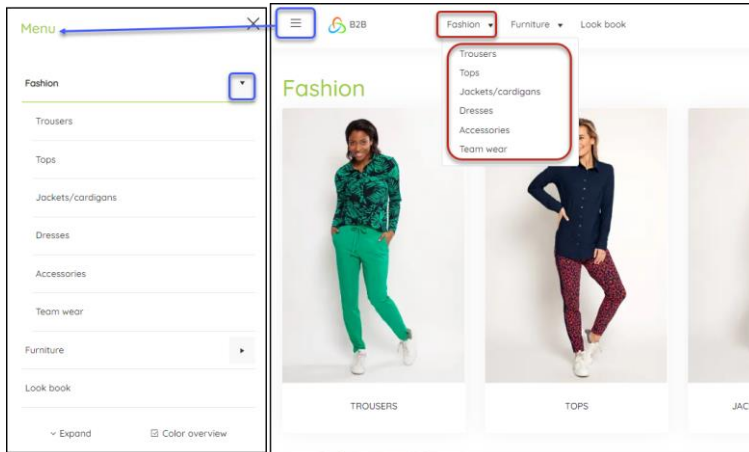
Exist in Category	Attach	No. 1	Description	Description 2
☐	☐	AGENT_W_TOPS	Tops	
☒	☐	AGENT_W_TROUSERS	Trousers	
☐	☐	B2B	B2B Toplevel	
☐	☐	B2B_F_CABINETS	Cabinets	
☐	☐	B2B_F_CHAIRS	Chairs	
☐	☐	B2B_F_SOFAS	Sofas	

OK Cancel

ATTACHING A STRUCTURE TO USERS

SETTING UP CATEGORY STRUCTURE FOR PORTALS

On standard TRIMIT Portals it is possible to show Categories as a drop-down menu or as a tree menu. This chapter will go through the basic steps for setting this up.



Any Category Structure used on a standard TRIMIT Portal has one important condition that the Top Level (also often called the Root) is not shown. The Top Level is only used for reference when a Structure is attached in various contexts. Consider that if you want to build a specific Category Structure for a Sales Agent Group the Top-Level Category would express the entity relationship rather than the content.

Categories: All ▾ Search + New Delete Edit List Category Lines Show Category Copy Wizard Card Comments										
No.	Description	Matrix Limitation	Do not show on	Accessories	Complementary Items	Relat. Bought...	Alternat. Sorting ↑	Customer Club Level	Collecti...	Google Product Taxonomy ID
AGENT	Sales Agent Toplevel		☐	☐	☐	☐		0 Level 0		0
AGENT_F_CABINETS	Cabinets		☐	☐	☐	☐		0 Level 0		0
AGENT_F_CHAIRS	Chairs		☐	☐	☐	☐		0 Level 0		0
AGENT_F_SOFAS	Sofas		☐	☐	☐	☐		0 Level 0		0
AGENT_F_TABLES	Tables		☐	☐	☐	☐		0 Level 0		0
AGENT_FASHION	Fashion		☐	☐	☐	☐		0 Level 0		0

Sales Agent Top Level on **Category Tree View** (click **Show Category** in the Categories List)

Edit - Category Tree View					
Related Record Category Line More options					
Category Type	No.	Description	Description 2	Matrix Limitation	Alternati Sortir
Category	AGENT				
Category	AGENT_FASHION	Fashion			
Category	AGENT_W_TROUSERS	Trousers			
Master	2000	Olivia Trousers			
Master	2010	Amelia Trousers			
Master	2020	Isla Trousers			
Master	2030	Ella Trousers			
Category	AGENT_W_TOPS	Tops			
Category	AGENT_W_JACKETS	Jackets/Cardigans			
Category	AGENT_W_DRESSES	Dresses			
Category	AGENT_W_ACCESS	Accessories			
Category	AGENT_TEAM	Team Wear			
Category	AGENT_FURNITURE	Furniture			
Category	AGENT_F_CHAIRS	Chairs			

ATTACHING A STRUCTURE IN THE PORTAL PROFILE

In the **Portal Profile** you can enter a **Category Structure**. This is the Top Level for you Category Structure. You can find the **Portal Profiles** in the Role Center **Portal Administrator** or via **Tell me Portal Profiles**.

CRONUS TRIMIT W1 Ltd. Sales ▾ Purchase ▾ Payments ▾ Customer Club ▾ Interaction ▾ ConnectPortal ▾ Setup ▾ ≡			
Categories	Portal Profiles	Portal Message	Job Queue Entries

Portal Profiles:	All ▾	Search	+ New	Delete	Edit List	More options
------------------	-------	--------	-------	--------	-----------	--------------

Code ↑	Type	Description
AGENT	SalesAgent	Sales Agent Basic Setup
AGENT_FASH	SalesAgent	Sales Agent Fashion Setup
AGENT_FURN	SalesAgent	Sales Agent Furniture Setup
B2B	BusinessToBusiness	B2B Basic Setup
B2B_FASH	BusinessToBusiness	B2B Fashion Setup
B2B_FURN	BusinessToBusiness	B2B Furniture Setup
B2C	BusinessToConsumer	Webshop Basic Setup

On the **Portal Profile** card set the needed Root Category in to **Category Structure** Field under FastTab **Item**.

Edit - Sales Agent Portal Profile - AGENT		⌵	✕
Manage Order Type Setup Customer Templates Setup Page Related Fewer options			
Item			
Category Structure	AGENT	Show Available Dates as	Date
Calculate Prices in Item Menu	☒	Set Item Shipment Date	
Availability Check Method	No	Allow Change of Shipment Date on Sales ...	☐
Inventory Profile Setup	SALESAGENT	Allow Change of Delivery Period	☒
Hide Available Qty.	☐	Price Info on Matrix	None
Hide Availability Markers	☐	Campaign Calc. Level	Model

Setting up a **Category Structure** relationship on the Portal Profile means that all users who are connected to this Portal Profile will have this specific Category Structure for navigation.

ATTACHING A STRUCTURE IN THE PORTAL USER

By attaching a **Portal Profile** to a Portal User, you also determine the **Category Structure** that is applicable for the Portal User.

You can find the **Portal Users** via the Role Center **Portal Administrator** or via **Tell me Portal Users**.

CRONUS TRIMIT W1 Ltd. Sales ▾ Purchase ▾ Payments ▾ Customer Club ▾ Interaction ▾ ConnectPortal ▾ Setup ▾ ≡			
Categories	Portal Profiles	Portal Message	Job Queue Entries

Headline	Actions
This is Business Central running with the TRIMIT App	Users Category Setup TRIMIT Help Portal Users B2B Relationship Authorization Create B2B Authorization Code

kbi@trimit.com | Work Date: 9/6/2020 ✓ Saved

User Relationship Management Search Edit List Delete Actions Related Fewer options

Relationships

General

Status Filter Related

Status ▼ User information ▼ Relationships ▼ Profile ▼ Last Login ▼ Last Synchronized ▼ ConnectPortal Domain ▼

→ Related ... 7 B2B|B2C|B2C-INSTORE|SUPPLIER|AGENT_FASH|INSITE 6/23/2022 2:51 PM 4/8/2022 3:09 PM ...

Via **Related**, **Relationships** you can determine the applicable **Portal Profile** for a Portal User, and therefore the **Category Structure** of the **Portal Profile** will determine the Category Structure this specific Portal User will see in the Portal.

Edit - User Relationship List - Customer 2000 ↗ ✕

Search + New Edit List Delete More options ↗ ☰

Type ↑	No.	Name	Profile ↑	Creation Date	Token Avail...	Token Created Date
→ Customer ▼ ...	2000	Customer 2000	B2B	4/8/2022 3:09 PM	☐	
Customer	CW00041	Kitty Bisseling	B2C	4/8/2022 3:09 PM	☐	
Customer	2000	InstoreCustomer	B2C-INSTORE	4/8/2022 3:09 PM	☐	
Vendor	2300	Vendor 2300	SUPPLIER	4/8/2022 3:09 PM	☐	
Salesperso...	JR	John Roberts	AGENT_FASH	4/8/2022 3:09 PM	☐	
Business C...	KBI@TRIMIT....	kbi@trimit.com		4/8/2022 3:09 PM	☒	4/8/2022
Business C...	KBI@TRIMIT....	InSite User	INSITE	4/8/2022 3:09 PM	☒	4/8/2022

ATTACHING A STRUCTURE IN THE ORDER TYPE

To increase the dynamic use of Categories it is possible to attach a Category Structure not only to the Portal Profile itself but also to a specific **Order Type**.

The Order Type **Category** (Structure) Field will override the one set on the Portal Profile.

You can find the **Order Types** via **Tell me Order Types**.

On the **Order Type** card, you can set a specific **Category** relationship on FastTab **Portal**

Order Type Card | Work Date: 9/6/2020 ✎ ↗ + ✕ ✓ Saved

SA

Related

Portal

Category AGENT ▼ Instant ASI Posting ☑

Show on Web ☑ Posting Lines Threshold ...

CPO Availability Check Method Available ▼ Disable Signature in Checkout ☑

Create Web Orders as Order ▼ Skip Credit Card Payment ☑

APPENDIX

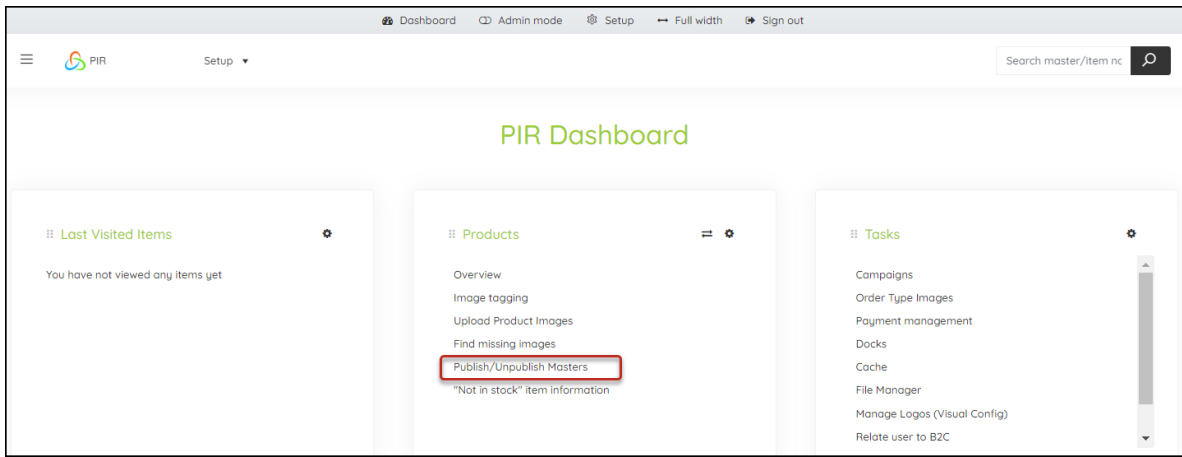
Here you can find examples of using Category Management features.

FILTER ITEMS IN PORTALS CATEGORIES

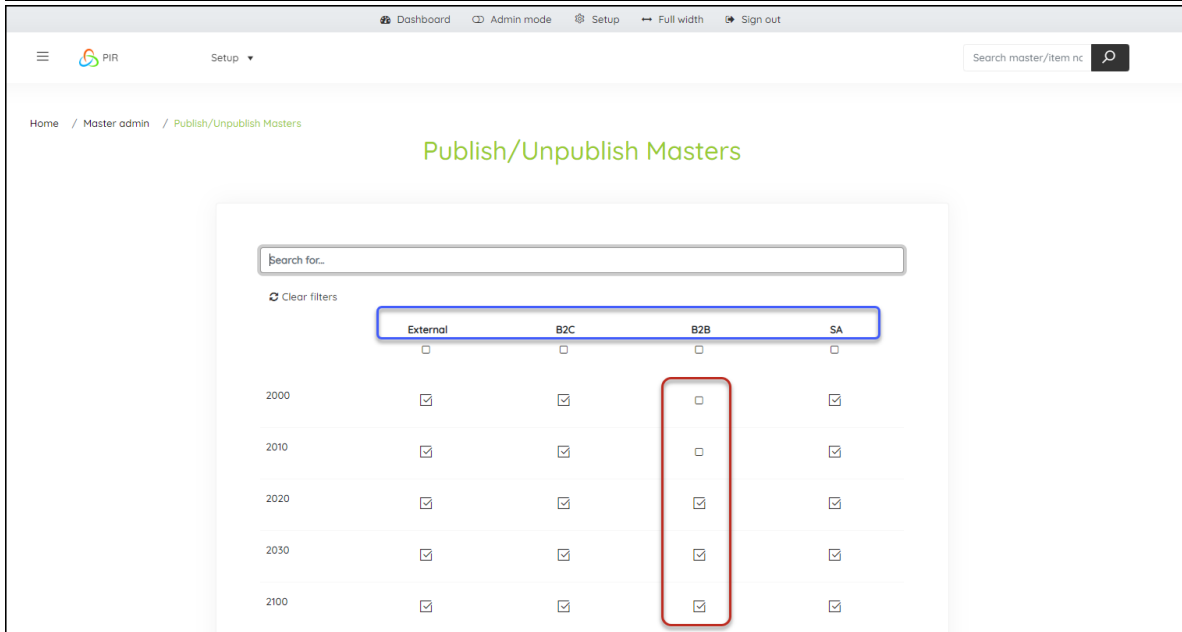
Here is described a way to set a Filter on Items being synchronized with the TRIMIT Portals.

If an admin user needs to work with Items on Portal, but these Items should be hidden from ordinary Portal Users, then here is how this can be done in TRIMIT (use one of the approaches):

- Create a new Portal Profile in TRIMIT and attach a new Category Structure to it.
The Category Structure should contain Items which must be hidden from ordinary Portal Users.
Assign this new Portal Profile to an admin user.
Now only admin user will be able to view and work with these specific Items.
- Make needed Masters/Items published or unpublished in Product Information Repository (PIR), in this way they are only visible for admin users.



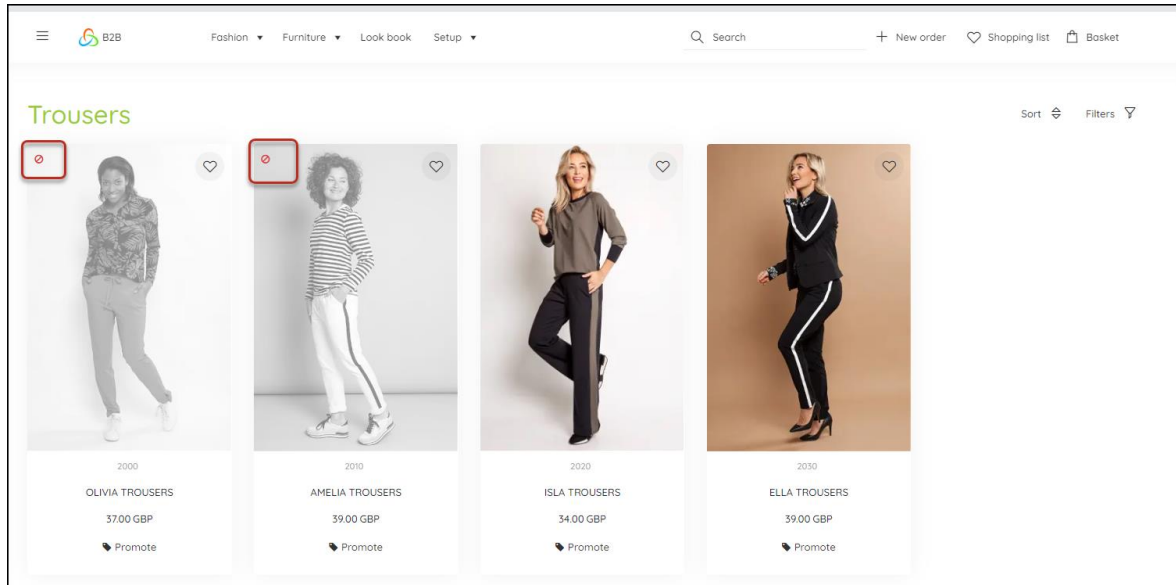
The screenshot shows the PIR Dashboard with a sidebar menu. The 'Products' menu is expanded, and the 'Publish/Unpublish Masters' option is highlighted with a red box.



The screenshot shows the 'Publish/Unpublish Masters' page. It features a search bar and a table with columns for 'External', 'B2C', 'B2B', and 'SA'. The 'B2B' column is highlighted with a red box, and the 'Publish/Unpublish Masters' option is highlighted with a red box.

	External	B2C	B2B	SA
2000	☒	☒	☐	☒
2010	☒	☒	☐	☒
2020	☒	☒	☒	☒
2030	☒	☒	☒	☒
2100	☒	☒	☒	☒

- The admin user might see it as follows:



2000 and 2010 are not Published, 2020 and 2030 are published.

- A regular user might see it as follows: he will only see the 2020 and 2030.

