



WHITE PAPER

## TRIMIT CATEGORY MANAGEMENT 23.1

This document contains information regarding the Category Management in TRIMIT 23.1 for Business Central 2023 release Wave 1 W1 (BC22).

Version: 23.1  
Date: 03-11-2023

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# 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 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 in **TRIMIT 23.1 for Business Central W1 BC22.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 23.1**, which is based on Microsoft Dynamics 365 Business Central 2023 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**  
                  **6036704 trm Group Codes**  
                  **6038120 trm Category**  
                  **6038121 trm Category Line**  
                  **6038122 trm Category Buffer**  
                  **6038206 trm CPO Category Buffer Header**  
                  **6038207 trm CPO Category Buffer Line**  
                  **6038212 trm Tag Filter Setup**

The pages       **6036682 trm Group Code**  
                  **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**  
                  **6038212 trm Tag Management**

The reports     **6036813 trm Category Management**

The codeunits **6038111 trm Category Handling**  
                  **6038113 trm Call Generate Category**

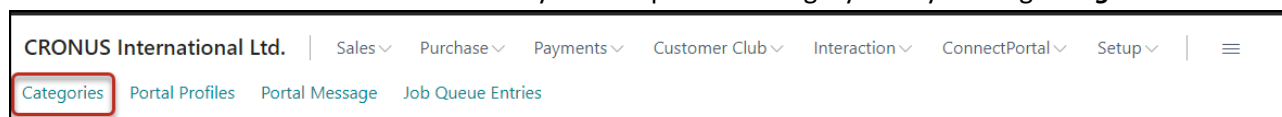
The queries     **6038100 trm Portal Category Distinct**  
                  **6038104 trm Category Master Distinct**

# CREATE CATEGORY STRUCTURES

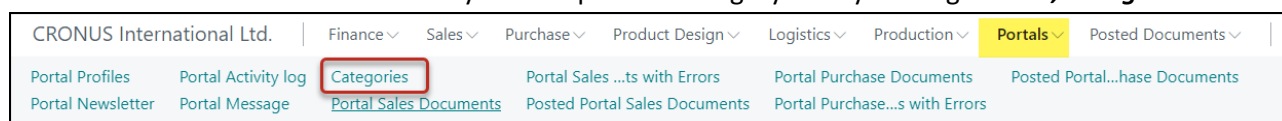
In this chapter, we will go through the setup of a Category Structure which is used for the Categories shown on the TRIMIT Portals and Webshops.

## CATEGORY

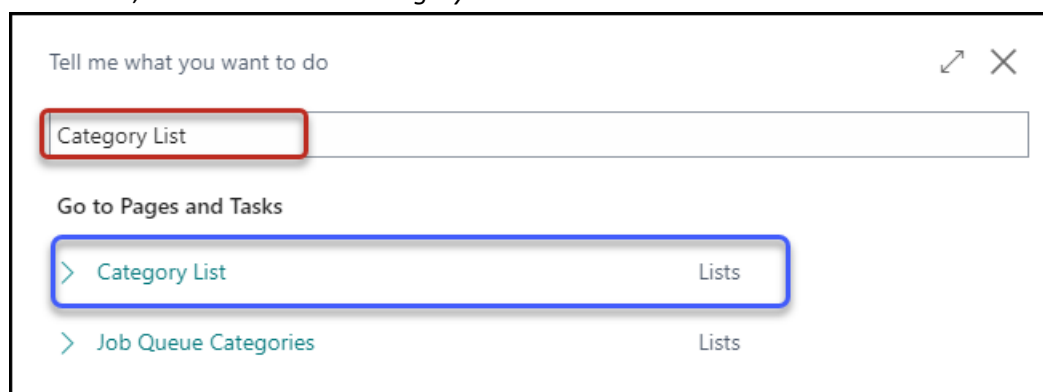
In Role Center **TRIMIT Portal Administrator** you can open the Category List by clicking **Categories**.



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 Tag Filters Copy Wizard Card Comments ... |                      |                   |                              |                       |                     |            |                  |                    |                            |                                     |                                     |
|------------------------------------------------------------------------------------------------------------------------|----------------------|-------------------|------------------------------|-----------------------|---------------------|------------|------------------|--------------------|----------------------------|-------------------------------------|-------------------------------------|
| No.                                                                                                                    | Description          | Matrix Limitation | Do not show on First Level ▾ | Alternative Sorting ↑ | Customer Club Level | Collection | Tag Filter Group | Expand On Overv... | Google Product Taxonomy ID | Category Lines Attached             | Attached to Category Lines          |
| AGENT                                                                                                                  | Sales Agent Toplevel |                   | <input type="checkbox"/>     | 0                     | Level 0             |            |                  | Inherited          | 0                          | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| AGENT_F_CABINETS                                                                                                       | Cabinets             |                   | <input type="checkbox"/>     | 0                     | Level 0             |            |                  | Inherited          | 0                          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AGENT_F_CHAIRS                                                                                                         | Chairs               |                   | <input type="checkbox"/>     | 0                     | Level 0             |            |                  | Inherited          | 0                          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AGENT_F_SOFAS                                                                                                          | Sofas                |                   | <input type="checkbox"/>     | 0                     | Level 0             |            |                  | Inherited          | 0                          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AGENT_F_TABLES                                                                                                         | Tables               |                   | <input type="checkbox"/>     | 0                     | Level 0             |            |                  | Inherited          | 0                          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AGENT_FASHION                                                                                                          | Fashion              |                   | <input type="checkbox"/>     | 0                     | Level 0             |            | FASHION          | Inherited          | 0                          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AGENT_FURNITURE                                                                                                        | Furniture            |                   | <input type="checkbox"/>     | 0                     | Level 0             |            | FURNITURE        | Inherited          | 0                          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AGENT_GIFTCARDS                                                                                                        | Gift Cards           |                   | <input type="checkbox"/>     | 0                     | Level 0             |            |                  | Inherited          | 0                          | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

## 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 Masters 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.

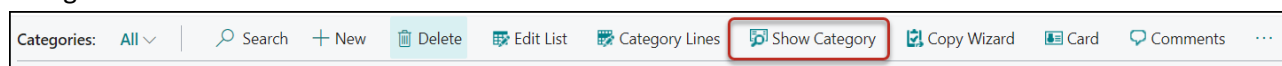
You can see in the **White Paper – TRIMIT Collection Management** how you can setup these **Matrix Limitation Setups**.

## 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](#).

## TAG FILTER GROUP

In this Field, you can enter a **Tag Filter Group** to determine which Tag Filters you would like to see in the Product Overview Page of this specific Category.

For more details see [Tag Filters](#).

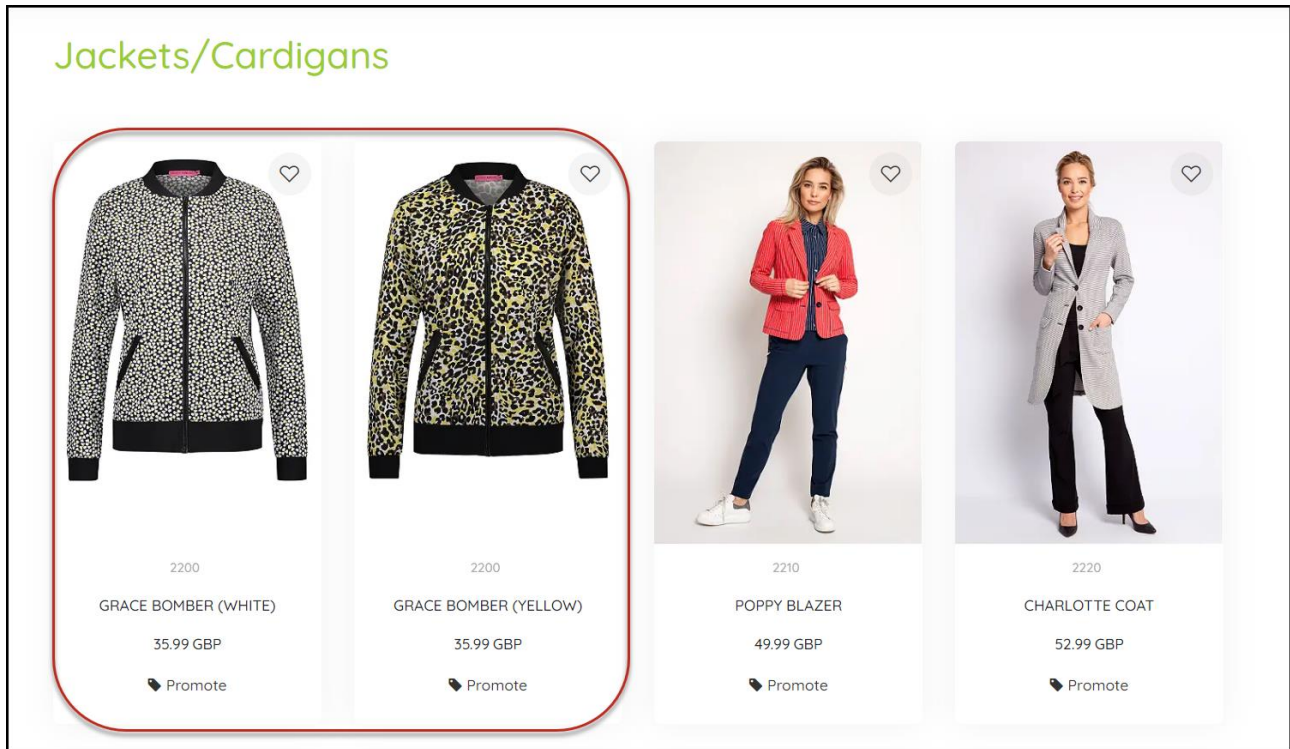
## EXPAND ON OVERVIEW

Expanding the Overview means that in the Product Overview Page, not the Masters, but the Masters+First Variant (typically the Colors) will be shown.

You can choose between the following three options:

|           |                                                                               |
|-----------|-------------------------------------------------------------------------------|
| Inherited | The field <b>Expand On Overview</b> from the overlying level will be taken.   |
| Yes       | You want the Product Overview Page to show the Master+First Variant Products. |
| No        | You simply want the Master Pictures to be shown in the Product Overview Page. |

If set to Yes, it could look as follows:



## 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.

## TAG FILTERS

|                                 |                                                                                                                                                                                                         |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tag Group   Work Date: 9/6/2020 |                                                                                                                                                                                                         |
| Group Codes                     | <a href="#">Search</a> <a href="#">+ New</a> <a href="#">Edit List</a> <a href="#">Delete</a> <a href="#">Tag Filters</a> <a href="#">Actions</a> <a href="#">Related</a> <a href="#">Fewer options</a> |
| Code ↑                          | Description                                                                                                                                                                                             |
| → DRESSES                       | Tags for Dresses                                                                                                                                                                                        |
| FASHION                         | Tags for Fashion                                                                                                                                                                                        |
| FURNITURE                       | Tags for Furniture                                                                                                                                                                                      |

After entering a **Code** and **Description**, you can click **Tag Filters** to determine the applicable Filters for this **Tag Group**.

|                        |                       |                           |                        |                              |
|------------------------|-----------------------|---------------------------|------------------------|------------------------------|
| Edit - Tag Management  |                       |                           |                        |                              |
| <a href="#">Search</a> | <a href="#">+ New</a> | <a href="#">Edit List</a> | <a href="#">Delete</a> | <a href="#">Translations</a> |
| Type ↑                 | Code ↑                | Description               | Sorting                |                              |
| → Item Attribute       | 20                    | TRIMIT_COLOR              | 1                      |                              |
| Global Dimension 1     |                       | Brand Code                | 2                      |                              |
| Global Dimension 2     |                       | Season Code               | 3                      |                              |
| Collection             |                       |                           | 4                      |                              |

## DESCRIPTION OF THE FIELDS

### TYPE

You can choose the **Type** for filtering.

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

|                        |
|------------------------|
| Item Attribute         |
| VarDim Variant         |
| Global Dimension 1     |
| Global Dimension 2     |
| Collection             |
| Periode Code           |
| Group Master           |
| Item Statistic Group   |
| Item Statistic Group 2 |
| Item Statistic Group 3 |
| Item Statistic Group 4 |
| Item Statistic Group 5 |
| Item Category Code     |



## CODE

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

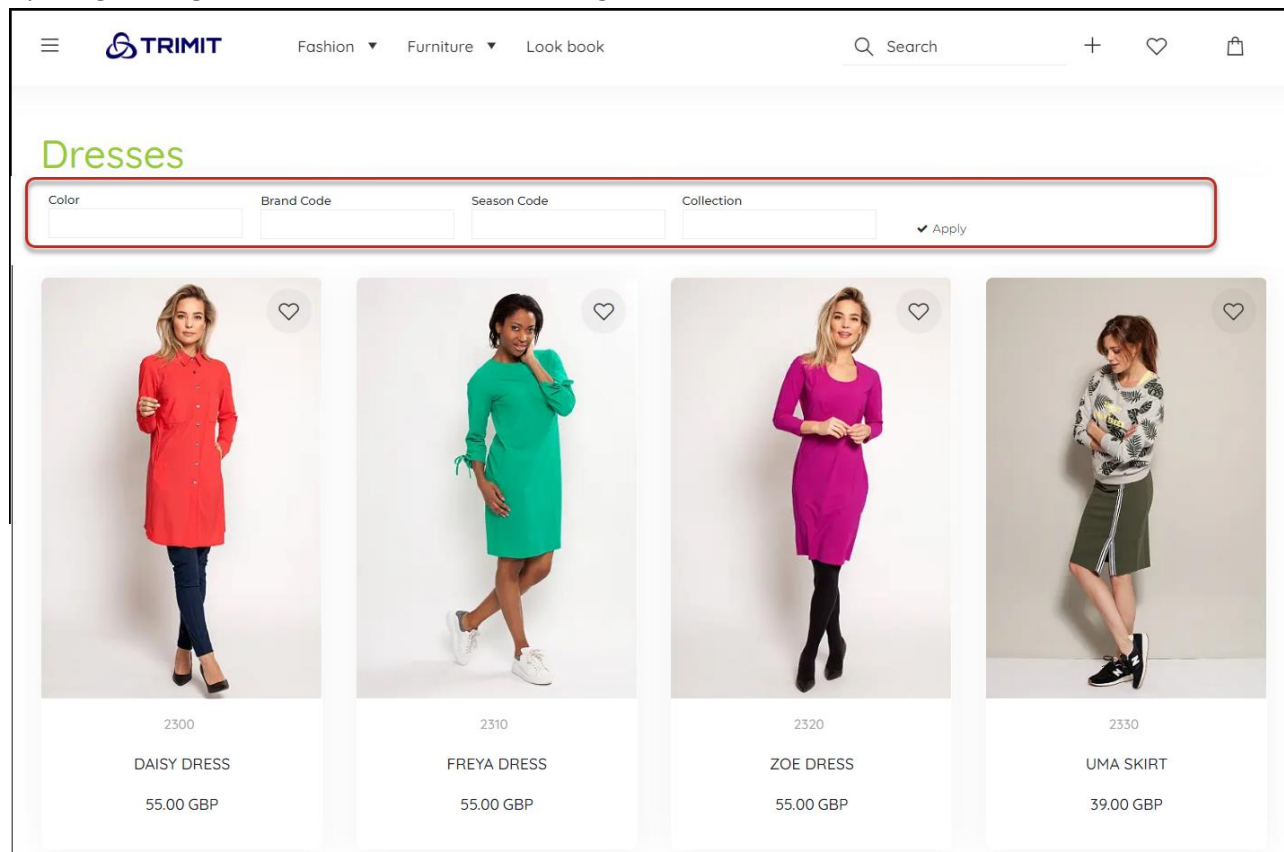
## DESCRIPTION

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

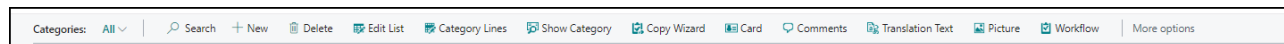
## SORTING

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

By using the **Tag Filters**, the Product Overview Page could look as follows:



## FUNCTIONS ON CATEGORIES PAGE



## 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                          | <input type="checkbox"/>   |                        | <input type="checkbox"/> | <input type="checkbox"/> | Level 0             | 0                   |                |             |                | Sellable     |
| → Category | AGENT_FURNITURE |                   | Furniture   | No             | No                   | Yes                          | <input type="checkbox"/>   |                        | <input type="checkbox"/> | <input type="checkbox"/> | 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 subcategories 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                          | <input type="checkbox"/>   |                        | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Level 0             | 0                   |
| Category   | AGENT_FURNITURE |                   | Furniture   | No             | No                   | Yes                          | <input type="checkbox"/>   |                        | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 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       |                   | <input type="checkbox"/>   | 0                   | Level 0             |            | 0                          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AGENT_W_TOPS     | Tops          |                   | <input type="checkbox"/>   | 0                   | Level 0             |            | 0                          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AGENT_W_TROUSERS | Trousers      |                   | <input type="checkbox"/>   | 0                   | Level 0             |            | 0                          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AGENT-2          | SA Top SS-CY  |                   | <input type="checkbox"/>   | 0                   | Level 0             | SS-CY      | 0                          | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| B2B              | B2B Top Level |                   | <input type="checkbox"/>   | 0                   | Level 0             |            | 0                          | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| B2B_F_CABINETS   | Cabinets      |                   | <input type="checkbox"/>   | 0                   | Level 0             |            | 0                          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| B2B_F_CHAIRS     | Chairs        |                   | <input type="checkbox"/>   | 0                   | Level 0             |            | 0                          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

## 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

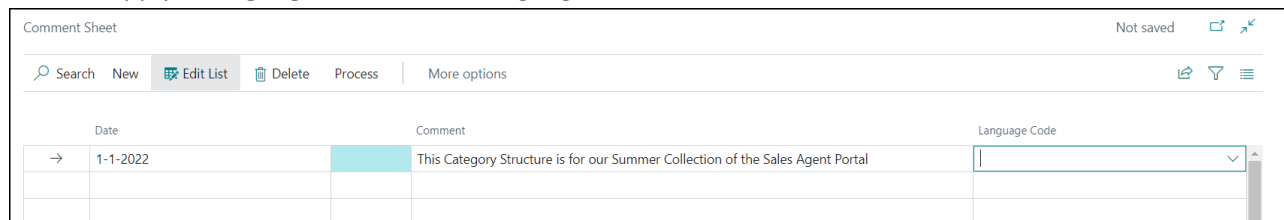
Picture No. ADD

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 |               |

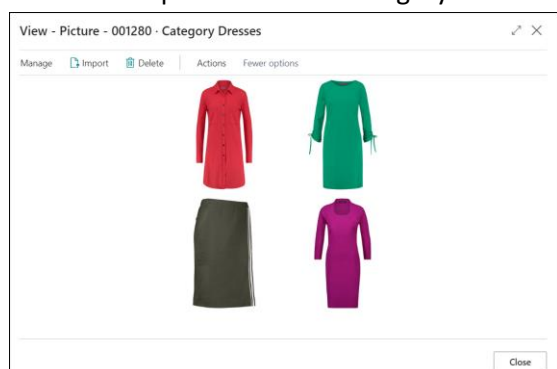
## PICTURE

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.

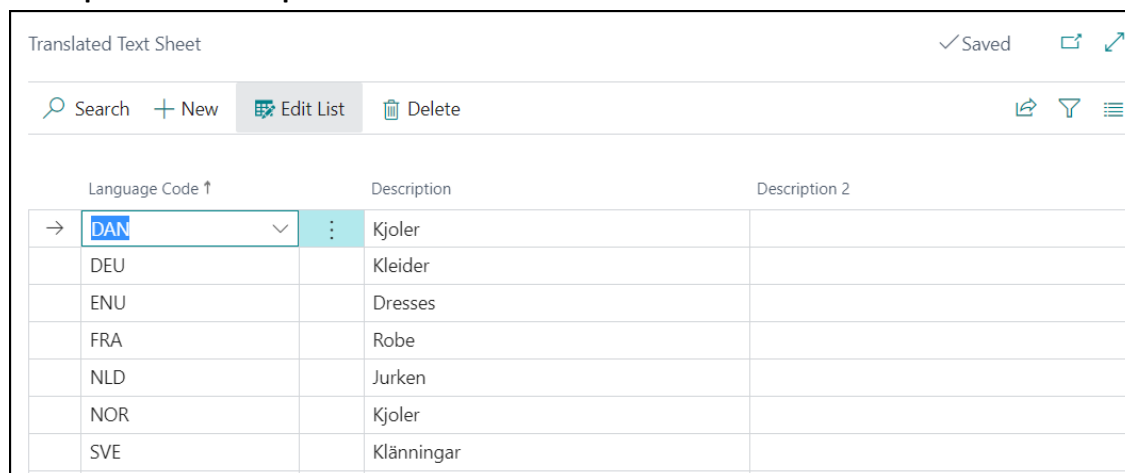
Category Pictures can be applied to Sales Agent Portal and B2B Webshop.

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          | <input type="checkbox"/> |              | User           |           |                    |
| 20       | 10                 | Add Masters/Items         | 6-6-2022  | User Group          | SALES          | <input type="checkbox"/> |              | User           |           |                    |
| 30       | 10                 | Add Category Picture      | 6-6-2022  | User Group          | DESIGN         | <input type="checkbox"/> |              | User           |           |                    |
| 40       | 10                 | Add Category Translations | 6-6-2022  | User Group          | SALES          | <input type="checkbox"/> |              | User           |           |                    |
| 50       | 20,40              | Add Category to Toplevel  | 10-6-2022 | User Group          | SALES          | <input type="checkbox"/> |              | User           |           |                    |
| 60       | 50                 | Add pictures in PIR       | 17-6-2022 | User Group          | DESIGN         | <input type="checkbox"/> |              | User           |           |                    |
| → 70     | 60                 | Check Portal              | 30-6-2022 | User Group          | SALES          | <input type="checkbox"/> |              | 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?

Yes

No

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    |                   | <input type="checkbox"/>   | 0                   | Level 0             |            |              |
| AGENT_W_DRESSES  | Dresses/Skirts |                   | <input type="checkbox"/>   | 0                   | Level 0             |            |              |
| AGENT_W_JACKETS  | Blazers        |                   | <input type="checkbox"/>   | 0                   | Level 0             |            |              |
| → AGENT_W_TOPS   | Tops           |                   | <input type="checkbox"/>   | 0                   | Level 0             |            |              |
| AGENT_W_TROUSERS | Trousers       |                   | <input type="checkbox"/>   | 0                   | Level 0             |            |              |
| AGENT_W_CLOAKS   | Cloaks         |                   | <input type="checkbox"/>   | 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 |
|-----------------------------------------------------|-----|-------------------|-------------|----------------|----------------------|------------------------------|----------------------------|
| <input checked="" type="radio"/> Statistics Group 2 | 155 |                   | Dresses     | No             | No                   | Yes                          | <input type="checkbox"/>   |
| <input type="radio"/> Statistics Group 2            | 230 |                   | Skirts      | No             | No                   | Yes                          | <input type="checkbox"/>   |

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.

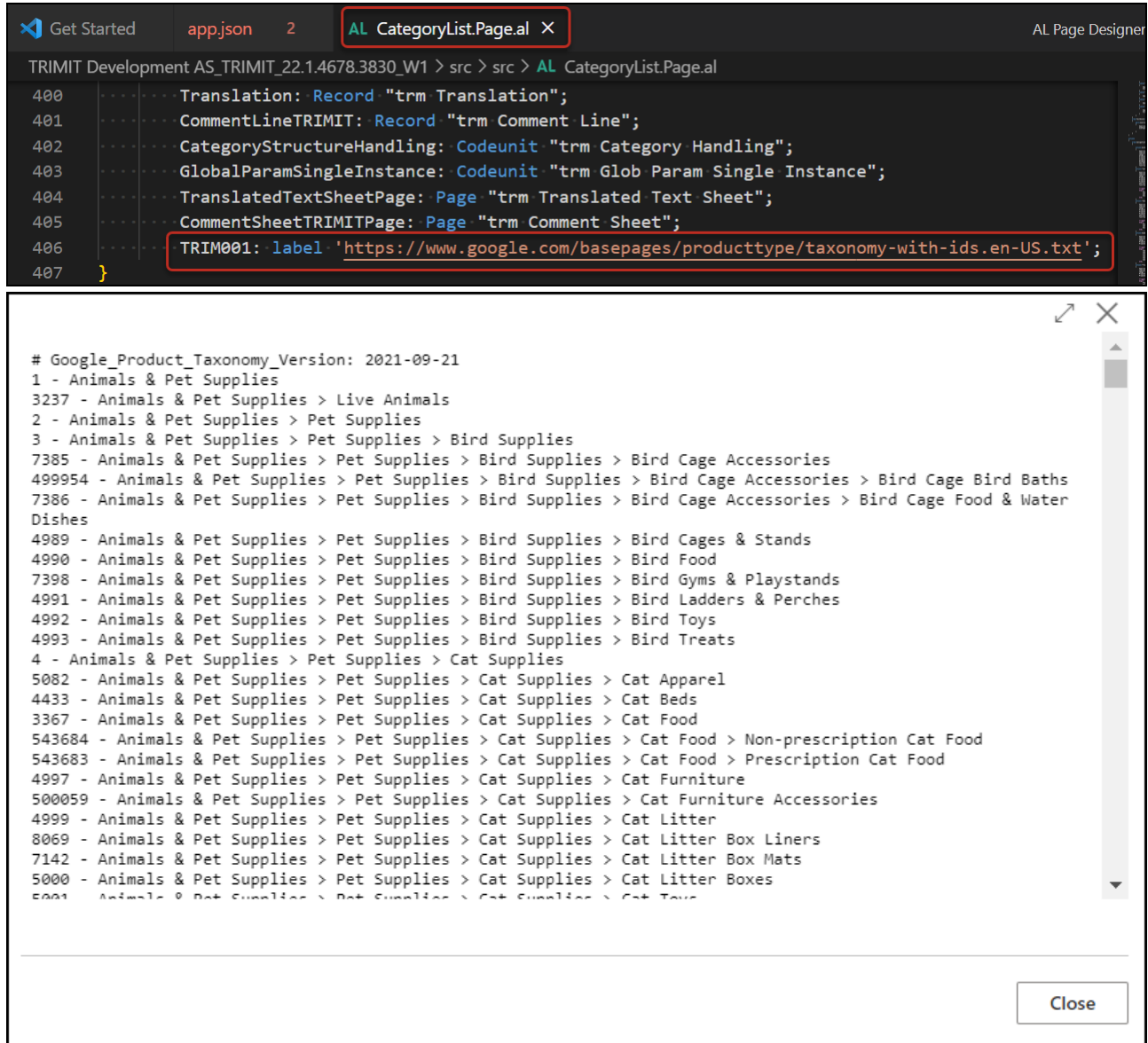
## PRE-GENERATE CATEGORY DATA

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 AL Page Designer interface. The top bar indicates the file is 'AL CategoryList.Page.al'. The code editor shows the following code:

```

400 ..... Translation: Record "trm Translation";
401 ..... CommentLineTRIMIT: Record "trm Comment Line";
402 ..... CategoryStructureHandling: Codeunit "trm Category Handling";
403 ..... GlobalParamSingleInstance: Codeunit "trm Glob Param Single Instance";
404 ..... TranslatedTextSheetPage: Page "trm Translated Text Sheet";
405 ..... CommentSheetTRIMITPage: Page "trm Comment Sheet";
406 ..... TRIM001: label 'https://www.google.com/basepages/producttype/taxonomy-with-ids.en-US.txt';
407 }

```

Below the code editor, a list of Google Product Taxonomy categories is displayed, starting with:

```

# Google_Product_Taxonomy_Version: 2021-09-21
1 - Animals & Pet Supplies
3237 - Animals & Pet Supplies > Live Animals
2 - Animals & Pet Supplies > Pet Supplies
3 - Animals & Pet Supplies > Pet Supplies > Bird Supplies
7385 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Cage Accessories
499954 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Cage Accessories > Bird Cage Bird Baths
7386 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Cage Accessories > Bird Cage Food & Water Dishes
4989 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Cages & Stands
4990 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Food
7398 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Gyms & Playstands
4991 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Ladders & Perches
4992 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Toys
4993 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Treats
4 - Animals & Pet Supplies > Pet Supplies > Cat Supplies
5082 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Apparel
4433 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Beds
3367 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Food
543684 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Food > Non-prescription Cat Food
543683 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Food > Prescription Cat Food
4997 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Furniture
500059 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Furniture Accessories
4999 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Litter
8069 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Litter Box Liners
7142 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Litter Box Mats
5000 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Litter Boxes
5001 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Toys

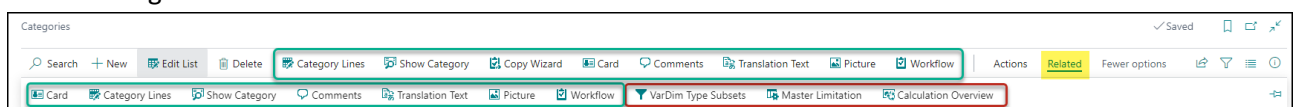
```

A 'Close' button is visible at the bottom right of the list.

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

## RELATED ON CATEGORIES PAGE

After clicking **Edit List**:



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 - B2B\_W\_JACKETS

Search

+ New

Edit List

Delete

All Category Lines

Related

Fewer options

| Type     | No.  | Matrix Limitation | Expand On Overview | Description    | Logo Placement | Visual Configurati... | Configurati... filters Y-axis | Allow Bulk Sale on We... | Filter Delivery Period | Cat... Lines 2           | Gift Card                | Customer Club Level | Alternative Sorting | Effective Date | Expiry Date | Handle Item as | Sales Status |
|----------|------|-------------------|--------------------|----------------|----------------|-----------------------|-------------------------------|--------------------------|------------------------|--------------------------|--------------------------|---------------------|---------------------|----------------|-------------|----------------|--------------|
| → Matrix | 2200 |                   | Yes                | Grace Bomber   | No             | No                    | Yes                           | <input type="checkbox"/> |                        | <input type="checkbox"/> | <input type="checkbox"/> | Level 0             | 0                   |                |             | Matrix         | Sellable     |
| Matrix   | 2210 |                   | Inherited          | Poppy Blazer   | No             | No                    | Yes                           | <input type="checkbox"/> |                        | <input type="checkbox"/> | <input type="checkbox"/> | Level 0             | 0                   |                |             | Matrix         | Sellable     |
| Matrix   | 2220 |                   | Inherited          | Charlotte Coat | No             | No                    | Yes                           | <input type="checkbox"/> |                        | <input type="checkbox"/> | <input type="checkbox"/> | Level 0             | 0                   |                |             | Matrix         | Sellable     |
| Matrix   | 2230 |                   | Inherited          | Jessica Coat   | No             | No                    | Yes                           | <input type="checkbox"/> |                        | <input type="checkbox"/> | <input type="checkbox"/> | Level 0             | 0                   |                |             | Matrix         | Sellable     |

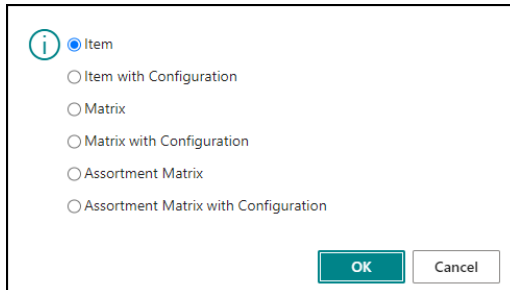
## DESCRIPTION OF THE FIELDS

### 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 | <p>With this <b>Type</b> you can create a level which can carry a Sub Structure.</p> <p>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 into <i>Men</i> and <i>Women</i>.</p>                                                                                                                                                                                                                                                                                                                                                                          |
| Category              | <p>With this <b>Type</b>, you can select an already defined <b>Category</b> as a Sub Structure.</p> <p>This enables the usage of Categories in many levels and different Category Structures.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Item                  | <p>With this <b>Type</b>, you can select a flat <b>Item</b>.</p> <p>An Item Level has no Sub Levels directly.</p> <p>Via <b>Related/Next Level</b> 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>.</p> <div> <div> <div> <div></div> <div>Accessories</div> </div> <div> <div></div> <div>Complimentary Items</div> </div> <div> <div></div> <div>Related bought Items</div> </div> </div> <div> <div>OK</div> <div>Cancel</div> </div> </div> <p>These options are used on the B2C and B2B Webshops to promote Masters/Items under the specified conditions.</p> |
| Matrix                | <p>With this <b>Type</b> you can only select <b>Masters</b> with an attached <b>Matrix</b>.</p> <p>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.</p> <p>A Matrix Level has no Sub Levels directly.</p> <p>Via <b>Related/Next Level</b> 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>.</p>                                                                                  |
| Assortment Matrix     | <p>With this <b>Type</b> you can only select <b>Masters</b> with related <b>Assortments</b>.</p> <p>The Assortment Items will be shown in a Matrix.</p> <p>An Assortment Matrix Level has no Sub Levels directly.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

|                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                | <p>Via <b>Related/Next Level</b> 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>.</p>                                                                                                                                                                                                                                                                                                                                                                         |
| Create Variant Combinations    | <p>With this <b>Type</b> you can select <b>Masters</b>.</p> <p>The Structure level itself will at runtime automatically create and show all Valid Combinations as Items.</p> <p>A Create Variant Combinations Level has no Sub Levels directly.</p> <p>Via <b>Related/Next Level</b> 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>.</p> <p><b>NOTE:</b> If at runtime the possible Combinations are hundreds or more – performance may decrease.</p> |
| Collection                     | <p>With this <b>Type</b> you can select <b>Collections</b>.</p> <p>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.</p> <div data-bbox="526 824 1038 1113">  </div> <p>This selection will also be filled in <a href="#">Handle Item as</a>.</p>                                                                                                                                                       |
| Global Dimension 1, 2          | <p>These <b>Types</b> allows runtime filtering on <b>Global Dimension Codes</b>.</p> <p>All Items/Masters related to the selected Global Dimension Codes Value will be shown on this Category Structure Level.</p>                                                                                                                                                                                                                                                                                                                                                                                                     |
| Statistics Group 1, 2, 3, 4, 5 | <p>These <b>Types</b> allows filtering on <b>Item Statistics Group Values</b>.</p> <p>At runtime, the Category level is populated either by Items or Masters with the related value.</p>                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Period Code                    | <p>This <b>Type</b> allows filtering on a specific <b>Shipment Date Code</b>.</p> <p>All Items/Masters related to the Shipment Date Code are inserted at the Category level.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Collection from Category       | <p>This <b>Type</b> allows you to automatically take the <b>Collection</b> 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 <b>Type Collection for Category</b>.</p> <p>You still need to choose one of the following options – just as with <b>Type Collection</b>.</p>                                                                                                                            |

|                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |  |
|-----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
|                                                                       |  <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Item</li> <li><input type="radio"/> Item with Configuration</li> <li><input type="radio"/> Matrix</li> <li><input type="radio"/> Matrix with Configuration</li> <li><input type="radio"/> Assortment Matrix</li> <li><input type="radio"/> Assortment Matrix with Configuration</li> </ul> <div style="display: flex; justify-content: flex-end; gap: 10px;"> <span style="background-color: #007060; color: white; padding: 2px 5px; border: 1px solid #007060;">OK</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">Cancel</span> </div> |  |
| This selection will also be filled in <a href="#">Handle Item as.</a> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |  |

#### 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 2023” 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 2023” 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**.

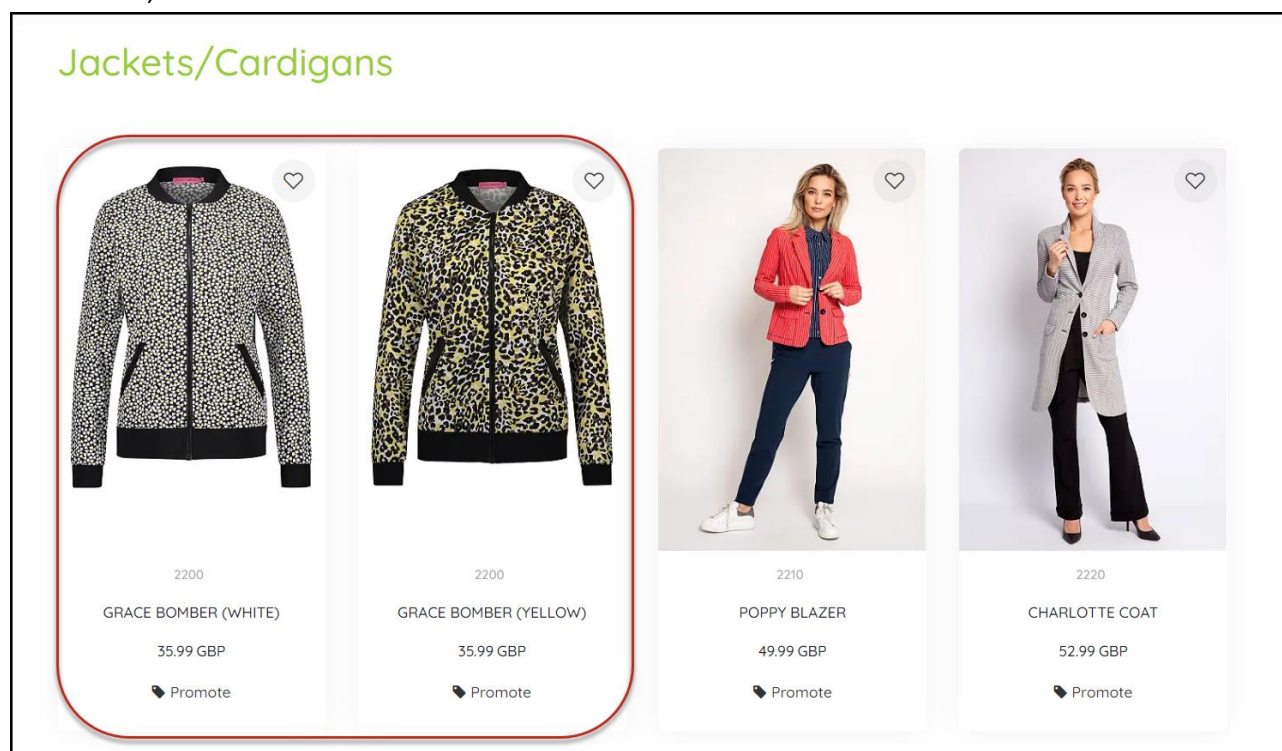
#### EXPAND ON OVERVIEW

Expanding the Overview means that in the Product Overview Page, not the Masters, but the Masters+First Variant (typically the Colors) will be shown.

You can choose between the following three options:

|           |                                                                               |
|-----------|-------------------------------------------------------------------------------|
| Inherited | The field <b>Expand On Overview</b> from the overlying level will be taken.   |
| Yes       | You want the Product Overview Page to show the Master+First Variant Products. |
| No        | You simply want the Master Pictures to be shown in the Product Overview Page. |

If set to **Yes**, it could look as follows:



#### DESCRIPTION

This Field is 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.

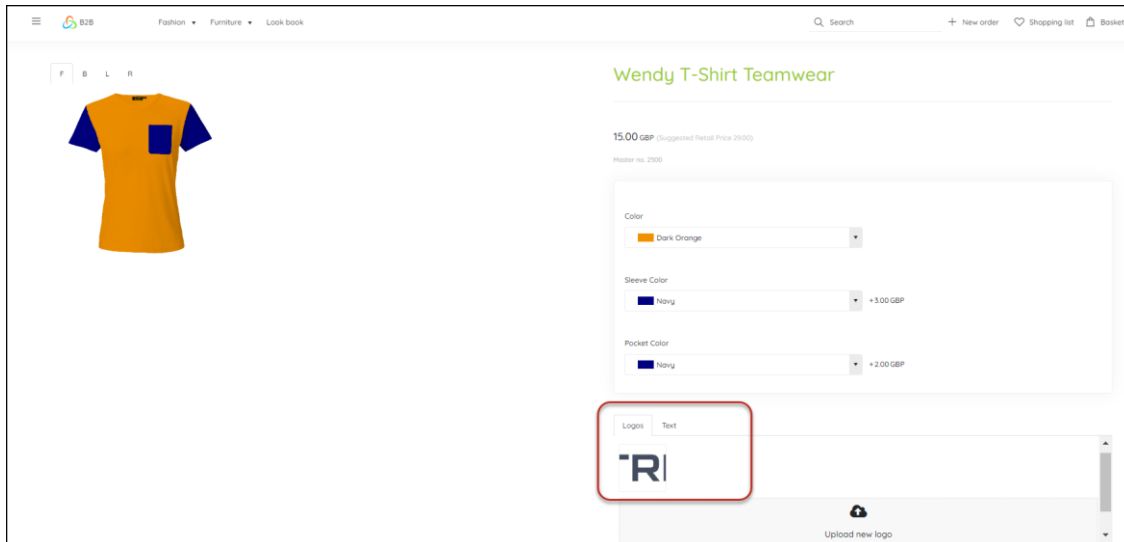
This **Description** is only used in the Structure if no Description is found on the **No.** itself.

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).

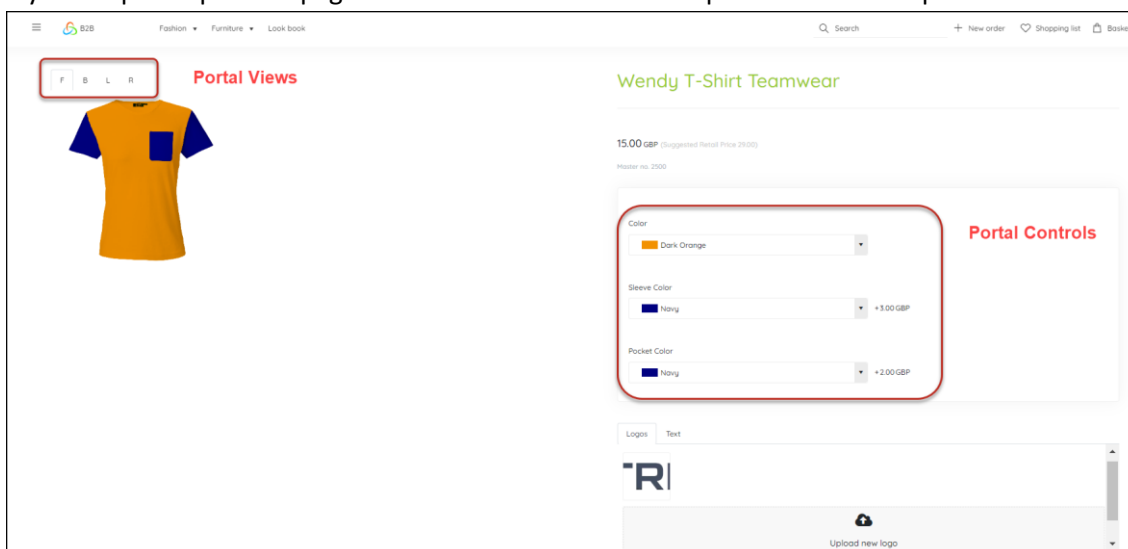
## LOGO PLACEMENT

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

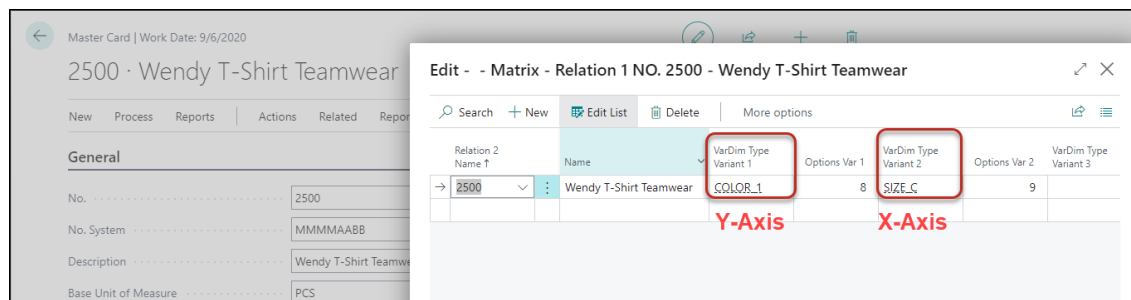
Related to product visual configuration. If set to Yes, then it will be possible to view product views and layers on portal product page and see visual reflection of options selected in portal controls.



## 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.

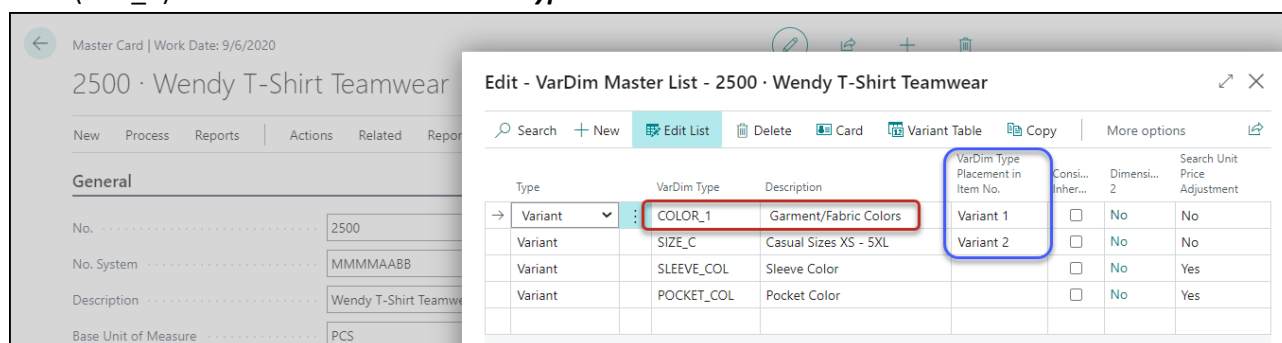
I.e., everything but the last VarDim Type in the **Matrix - Relation 1** List of the Master (via **Actions, Matrix, Matrix, Matrix**):



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.

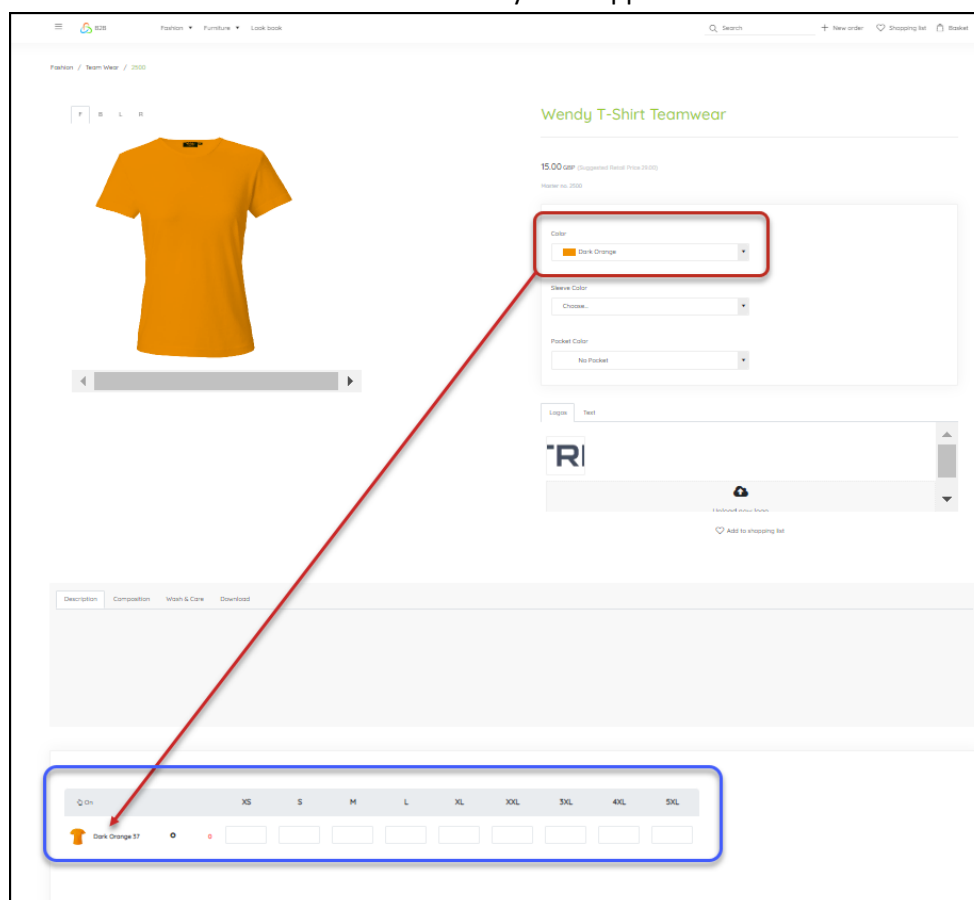
Sizes (SIZE\_C) is set to Variant 2 in **VarDim Type Placement in Item No** column.



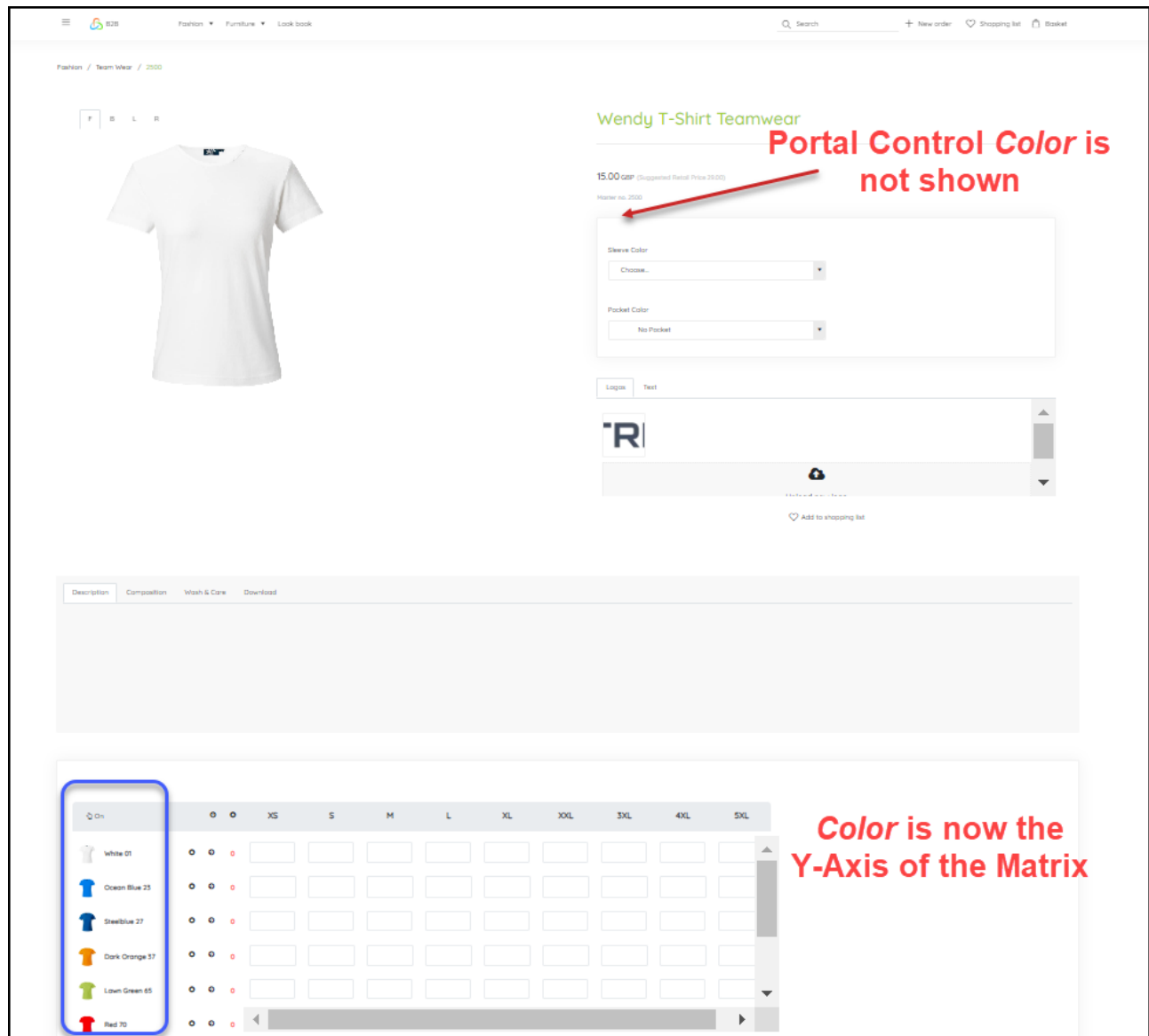
Portal Product page.

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

Sleeve Color: Choose...

Pocket Color: No Pocket

Logos: Text

Color is now the Y-Axis of the Matrix

| Color          | 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.<br>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 <b>Item</b> 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 <b>Item</b> 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 <b>Master</b> 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 <b>Master</b> is sold as a Matrix showing all Assortment combinations.                                                                                    | SA, B2B       |



|                               |                                                                                                                                                     |         |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| Matrix With Configuration     | This product is a <b>Master</b> 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 <b>Master</b> 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.

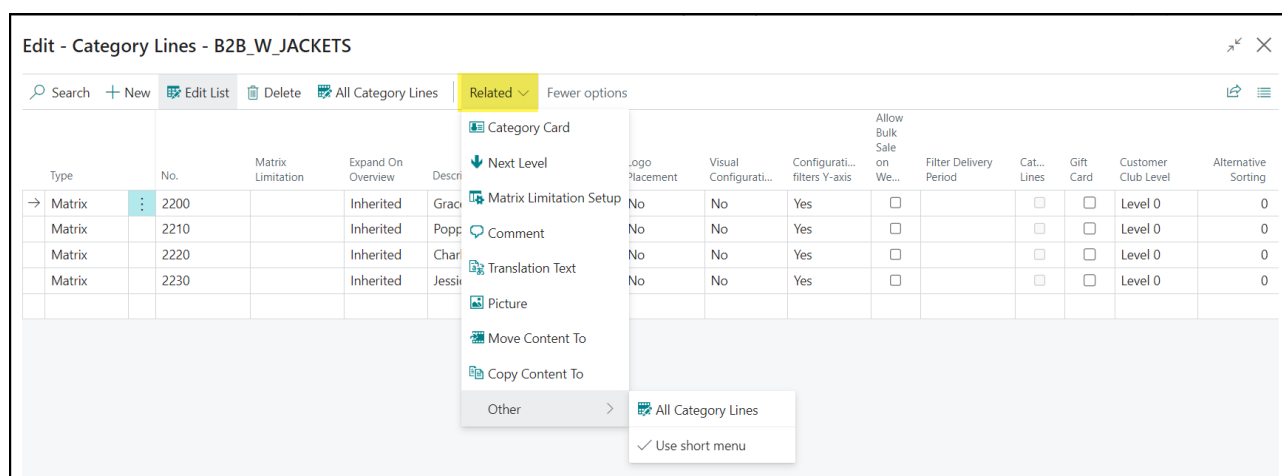
#### DESCRIPTION 2

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

#### 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**.

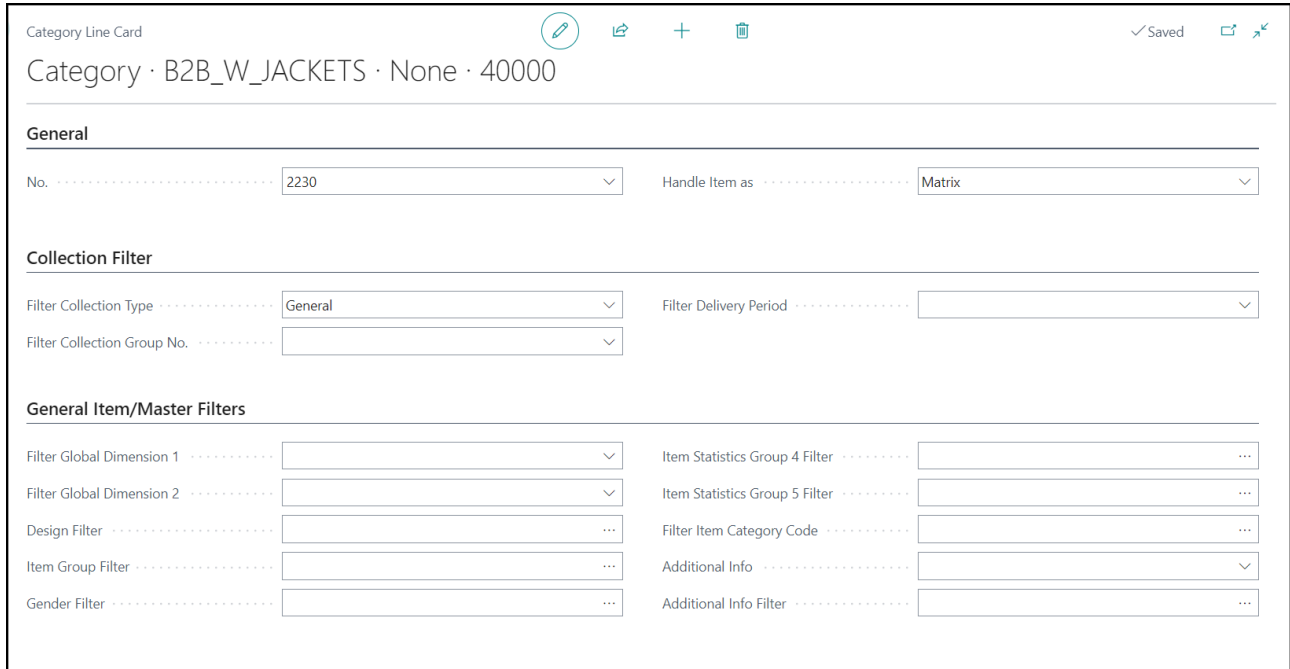
#### RELATED ON CATEGORY LINES PAGE



| Type   | No.  | Matrix Limitation | Expand On Overview | Description | Logo Placement | Visual Configurati... | Configurati... filters Y-axis | Allow Bulk Sale on We... | Filter Delivery Period | Cat... Lines             | Gift Card                | Customer Club Level | Alternative Sorting |
|--------|------|-------------------|--------------------|-------------|----------------|-----------------------|-------------------------------|--------------------------|------------------------|--------------------------|--------------------------|---------------------|---------------------|
| Matrix | 2200 |                   | Inherited          | Grac...     | No             | No                    | Yes                           | <input type="checkbox"/> |                        | <input type="checkbox"/> | <input type="checkbox"/> | Level 0             | 0                   |
| Matrix | 2210 |                   | Inherited          | Pop...      | No             | No                    | Yes                           | <input type="checkbox"/> |                        | <input type="checkbox"/> | <input type="checkbox"/> | Level 0             | 0                   |
| Matrix | 2220 |                   | Inherited          | Char...     | No             | No                    | Yes                           | <input type="checkbox"/> |                        | <input type="checkbox"/> | <input type="checkbox"/> | Level 0             | 0                   |
| Matrix | 2230 |                   | Inherited          | Jessi...    | No             | No                    | Yes                           | <input type="checkbox"/> |                        | <input type="checkbox"/> | <input type="checkbox"/> | Level 0             | 0                   |

## CATEGORY CARD

This will open the Card of the **Category Line**.



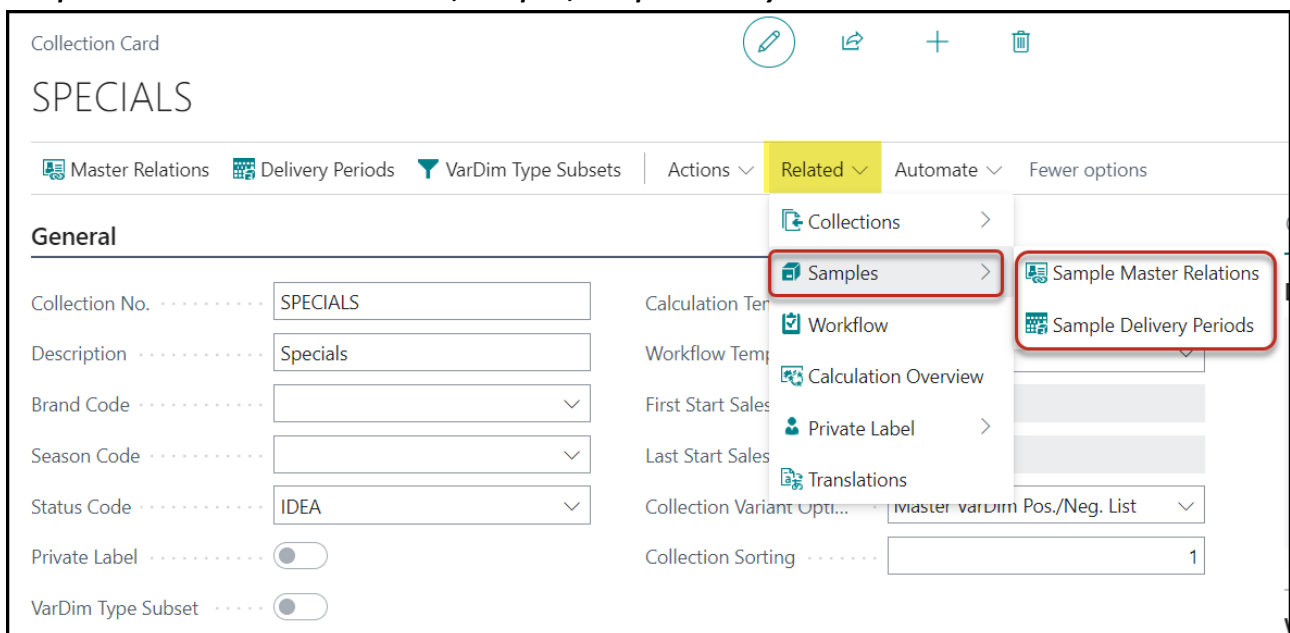
## FILTER COLLECTION TYPE

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.

**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.

**FILTER ITEM CATEGORY CODE**

Using the **Item Category Code** for filtering will create the matching subset of Items/Masters.

**ADDITIONAL INFO**

You can enter a VarDim Type that is used for the **Additional Info** of the Items/Masters, and this will filter the matching subset based on the **Additional Info Filter**.

**ADDITIONAL INFO FILTER**

You can enter the Value of a VarDim Type set in **Additional Info** for filtering to create the matching subset of Items/Masters.

I.e., **Additional Info** is set to *SLEEVE\_LEN (Sleeve Length)* and **Additional Info Filter** is set to *0.5 (Half Sleeve)*. Therefore, for the current Category Line, it will filter on all Items/Masters that have **Additional Info** for the Sleeve Length set to Half Sleeve.

**NOTE**

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

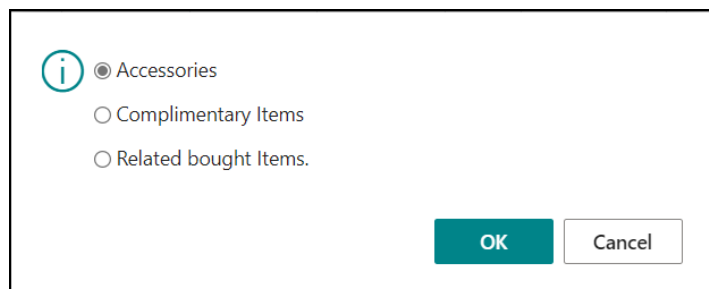
### MATRIX LIMITATION RELATION

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

### NEXT LEVEL

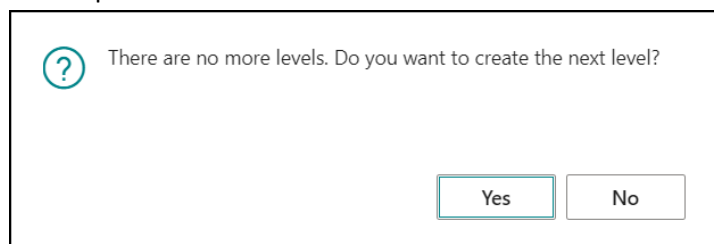
This action will take you to the next Level with relationship to the current **Category Line**.

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*.



### 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.

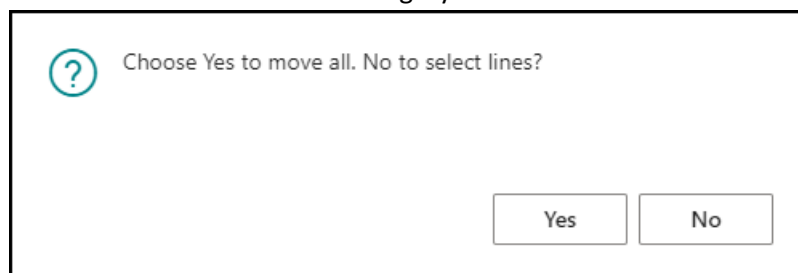
## MOVE CONTENT TO

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

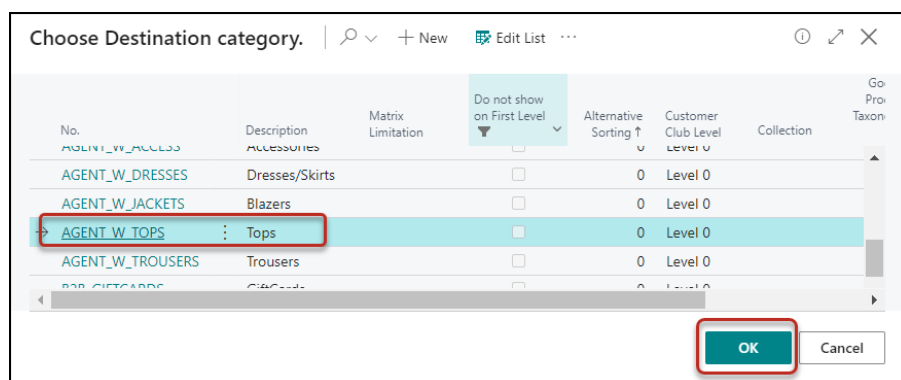
Even when standing on a Matrix Category Line, it would copy all Category Lines of the current Category!!

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

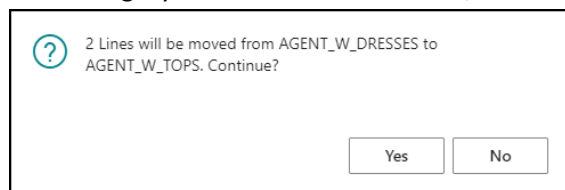
To select the content of the Category to be moved click **No**:



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



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



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 |
|-----------------------------------------------------|-----|-------------------|-------------|----------------|----------------------|------------------------------|----------------------------|
| <input checked="" type="radio"/> Statistics Group 2 | 155 |                   | Dresses     | No             | No                   | Yes                          | <input type="checkbox"/>   |
| <input type="radio"/> Statistics Group 2            | 230 |                   | Skirts      | No             | No                   | Yes                          | <input type="checkbox"/>   |

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.

## ALL CATEGORY LINES

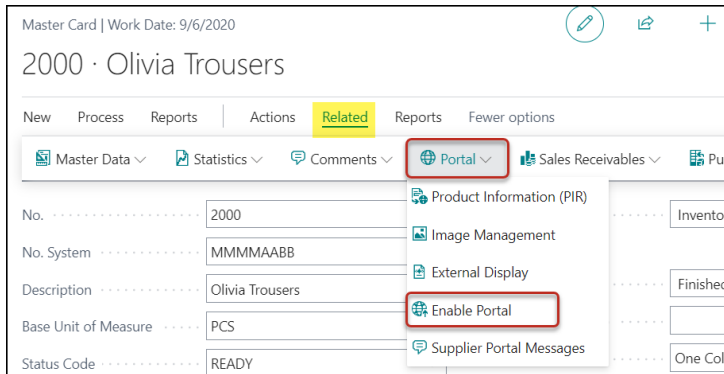
This action will show **all** Category Lines without any Filters.

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

| Category Lines   Work Date: 9/6/2020                                                          |               |          |                  |                   |                         |                |                       |                               |                          |                        |           |
|-----------------------------------------------------------------------------------------------|---------------|----------|------------------|-------------------|-------------------------|----------------|-----------------------|-------------------------------|--------------------------|------------------------|-----------|
| <div> <div>Search</div> <div>Edit List</div> <div>Delete</div> <div>More options</div> </div> |               |          |                  |                   |                         |                |                       |                               |                          |                        |           |
| 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                           | <input type="checkbox"/> |                        |           |
| AGENT                                                                                         | Category      | Category | AGENT_FURNITURE  |                   | Furniture               | No             | No                    | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_F_CABINETS                                                                              | Category      | Item     | 3300             |                   | Storage Cabinet Nemesis | No             | Yes                   | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_F_CHAIRS                                                                                | Category      | Item     | 3000             |                   | Chair Zeus              | No             | Yes                   | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_F_CHAIRS                                                                                | Category      | Item     | 3010             |                   | Chair Hades             | No             | Yes                   | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_F_CHAIRS                                                                                | Category      | Item     | 3020             |                   | Chair Poseidon          | No             | Yes                   | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_F_SOFAS                                                                                 | Category      | Item     | 3200             |                   | Sofa Helios 2 Seater    | No             | Yes                   | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_F_SOFAS                                                                                 | Category      | Item     | 3210             |                   | Sofa Helios 3 Seater    | No             | Yes                   | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_F_SOFAS                                                                                 | Category      | Item     | 3220             |                   | Sofa Apollo 2,5 Seater  | No             | Yes                   | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_F_SOFAS                                                                                 | Category      | Item     | 3230             |                   | Sofa Apollo 3 Seater    | No             | Yes                   | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_F_TABLES                                                                                | Category      | Item     | 3100             |                   | Dining Table Artemis    | No             | Yes                   | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_F_TABLES                                                                                | Category      | Item     | 3110             |                   | Side Table Hera         | No             | Yes                   | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_F_TABLES                                                                                | Category      | Item     | 3120             |                   | Coffee Table Athena     | No             | Yes                   | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_FASHION                                                                                 | Category      | Category | AGENT_W_TROUSERS |                   | Trousers                | No             | No                    | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_FASHION                                                                                 | Category      | Category | AGENT_W_TOPS     |                   | Tops                    | No             | No                    | Yes                           | <input type="checkbox"/> |                        |           |
| AGENT_FASHION                                                                                 | Category      | Category | AGENT_W_JACKETS  |                   | Blazers                 | No             | No                    | Yes                           | <input type="checkbox"/> |                        |           |

## ENABLE PORTAL FROM MASTER

In the **Master Card/List**, there is 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) ..... Inventor

Image Management

External Display

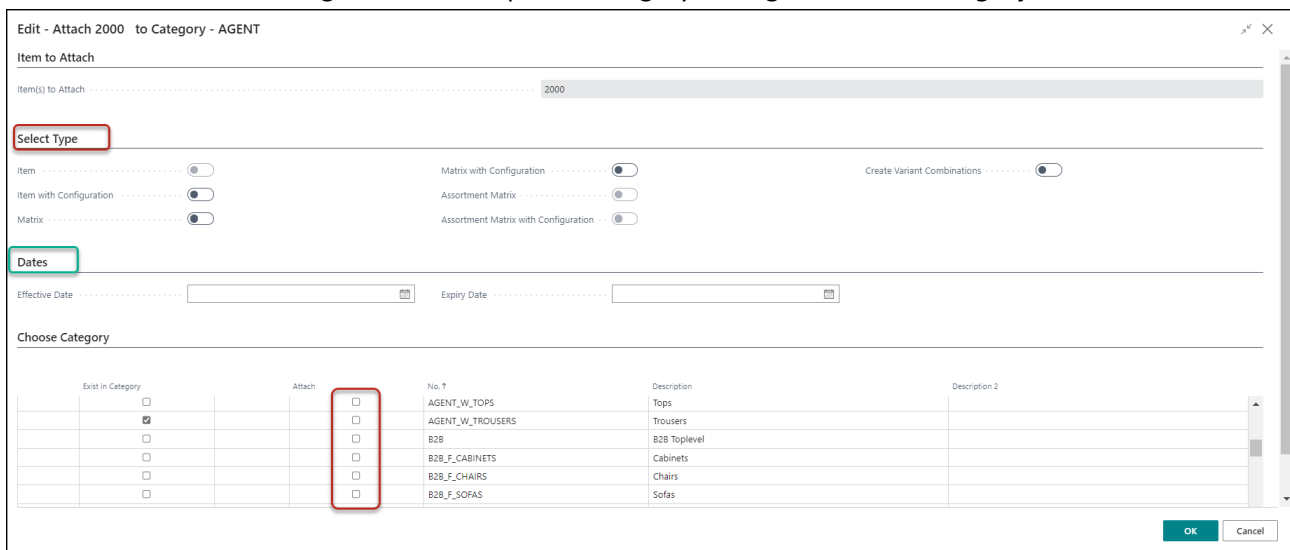
**Enable Portal**

Supplier Portal Messages

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 ..... ☐

Item with Configuration ..... ☐

Matrix ..... ☐

Matrix with Configuration ..... ☐

Assortment Matrix ..... ☐

Assortment Matrix with Configuration ..... ☐

Create Variant Combinations ..... ☐

**Dates**

Effective Date .....

Expiry Date .....

Choose Category

| Exist in Category                   | Attach                   | No. ↑            | Description  | Description 2 |
|-------------------------------------|--------------------------|------------------|--------------|---------------|
| <input type="checkbox"/>            | <input type="checkbox"/> | AGENT_W_TOPS     | Tops         |               |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | AGENT_W_TROUSERS | Trousers     |               |
| <input type="checkbox"/>            | <input type="checkbox"/> | B2B              | B2B Toplevel |               |
| <input type="checkbox"/>            | <input type="checkbox"/> | B2B_F_CABINETS   | Cabinets     |               |
| <input type="checkbox"/>            | <input type="checkbox"/> | B2B_F_CHAIRS     | Chairs       |               |
| <input type="checkbox"/>            | <input type="checkbox"/> | 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.

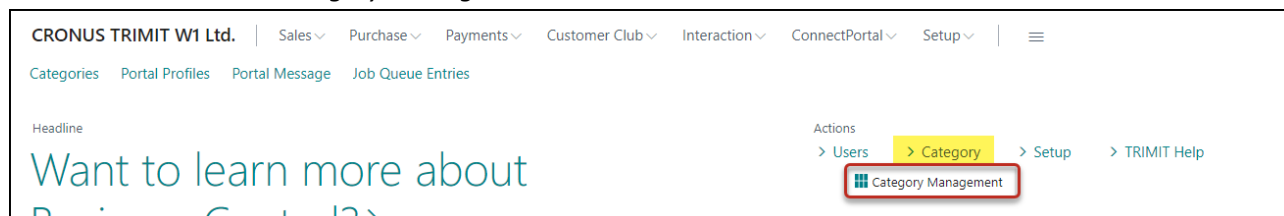


# CATEGORY MANAGEMENT TOOL

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                   | <input type="checkbox"/> |
| B2B_W_TOPS   | Matrix | 2100  | Lily Blouse |               |                |             | 0                   | <input type="checkbox"/> |
| B2C_W_TOPS   | Matrix | 2100  | Lily Blouse |               |                |             | 0                   | <input type="checkbox"/> |

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                   | <input type="checkbox"/> |
| B2B_W_TOPS   |      | Matrix | 2100        | Lily Blouse   |                |             | 0                   | <input type="checkbox"/> |
| B2C_W_TOPS   |      | Matrix | 2100        | Lily Blouse   |                |             | 0                   | <input type="checkbox"/> |

## 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**.

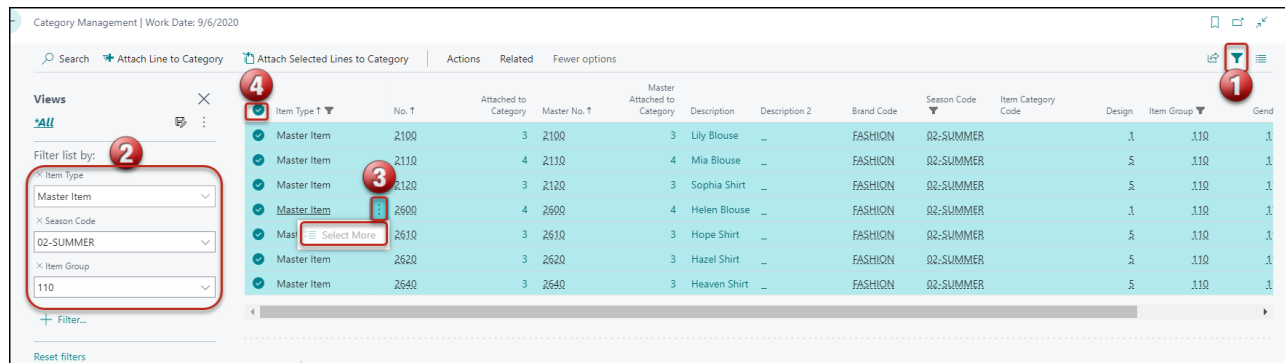
For information on this page see [Category](#).

## 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**.



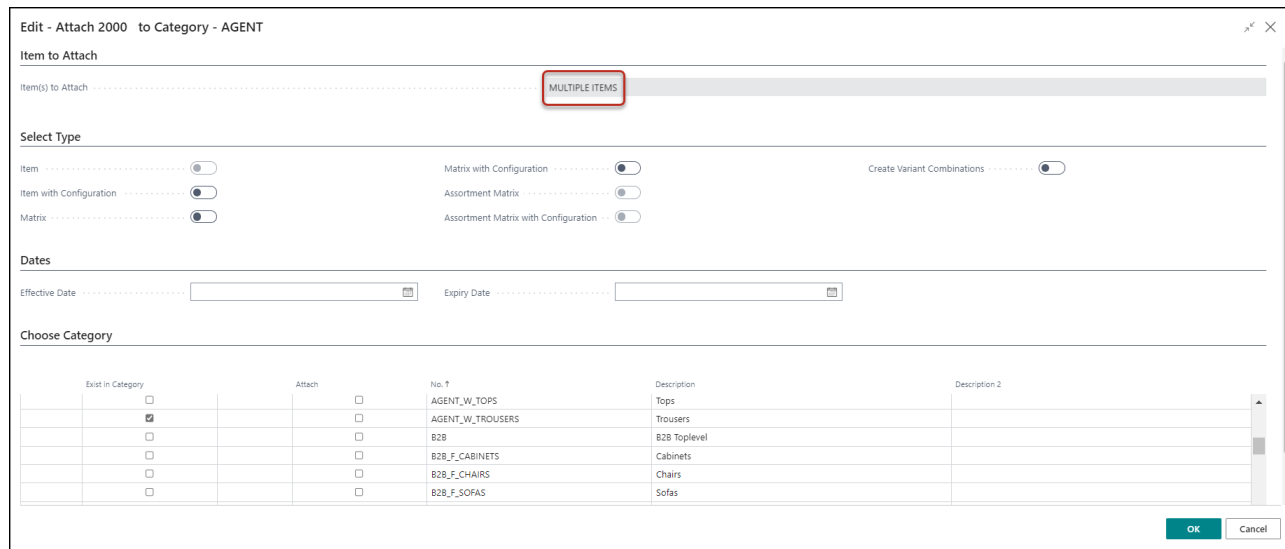
Category Management | Work Date: 9/6/2020

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

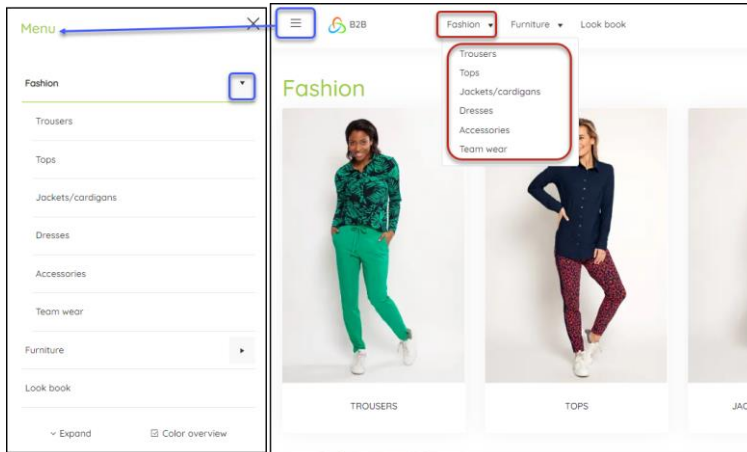
| Exist in Category                   | Attach                   | No. 1            | Description  | Description 2 |
|-------------------------------------|--------------------------|------------------|--------------|---------------|
| <input type="checkbox"/>            | <input type="checkbox"/> | AGENT_W_TOPS     | Tops         |               |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | AGENT_W_TROUSERS | Trousers     |               |
| <input type="checkbox"/>            | <input type="checkbox"/> | B2B              | B2B Toplevel |               |
| <input type="checkbox"/>            | <input type="checkbox"/> | B2B_F_CABINETS   | Cabinets     |               |
| <input type="checkbox"/>            | <input type="checkbox"/> | B2B_F_CHAIRS     | Chairs       |               |
| <input type="checkbox"/>            | <input type="checkbox"/> | 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 | Category Lines Attached             |
| AGENT                                                                                                                    | Sales Agent Toplevel |                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                       | 0 Level 0           |             | 0                          | <input checked="" type="checkbox"/> |
| AGENT_F_CABINETS                                                                                                         | Cabinets             |                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                       | 0 Level 0           |             | 0                          | <input type="checkbox"/>            |
| AGENT_F_CHAIRS                                                                                                           | Chairs               |                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                       | 0 Level 0           |             | 0                          | <input type="checkbox"/>            |
| AGENT_F_SOFAS                                                                                                            | Sofas                |                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                       | 0 Level 0           |             | 0                          | <input type="checkbox"/>            |
| AGENT_F_TABLES                                                                                                           | Tables               |                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                       | 0 Level 0           |             | 0                          | <input type="checkbox"/>            |
| AGENT_FASHION                                                                                                            | Fashion              |                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                       | 0 Level 0           |             | 0                          | <input type="checkbox"/>            |

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 into **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 ...
Allow Change of Delivery Period
Inventory Profile Setup
SALESAGENT
Price Info on Matrix
None
Hide Available Qty.
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
This is Business Central running with the TRIMIT App

Actions
> 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 <span>▼</span> | 2000           | Customer 2000   | B2B         | 4/8/2022 3:09 PM | <input type="checkbox"/>            |                    |
| Customer                  | CW00041        | Kitty Bisseling | B2C         | 4/8/2022 3:09 PM | <input type="checkbox"/>            |                    |
| Customer                  | 2000           | InstoreCustomer | B2C-INSTORE | 4/8/2022 3:09 PM | <input type="checkbox"/>            |                    |
| Vendor                    | 2300           | Vendor 2300     | SUPPLIER    | 4/8/2022 3:09 PM | <input type="checkbox"/>            |                    |
| Salesperso...             | JR             | John Roberts    | AGENT_FASH  | 4/8/2022 3:09 PM | <input type="checkbox"/>            |                    |
| Business C...             | KBI@TRIMIT.... | kbi@trimit.com  |             | 4/8/2022 3:09 PM | <input checked="" type="checkbox"/> | 4/8/2022           |
| Business C...             | KBI@TRIMIT.... | InSite User     | INSITE      | 4/8/2022 3:09 PM | <input checked="" type="checkbox"/> | 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 Posting Lines Threshold

Show on Web Available Disable Signature in Checkout

Create Web Orders as Order Skip Credit Card Payment

# APPENDIX

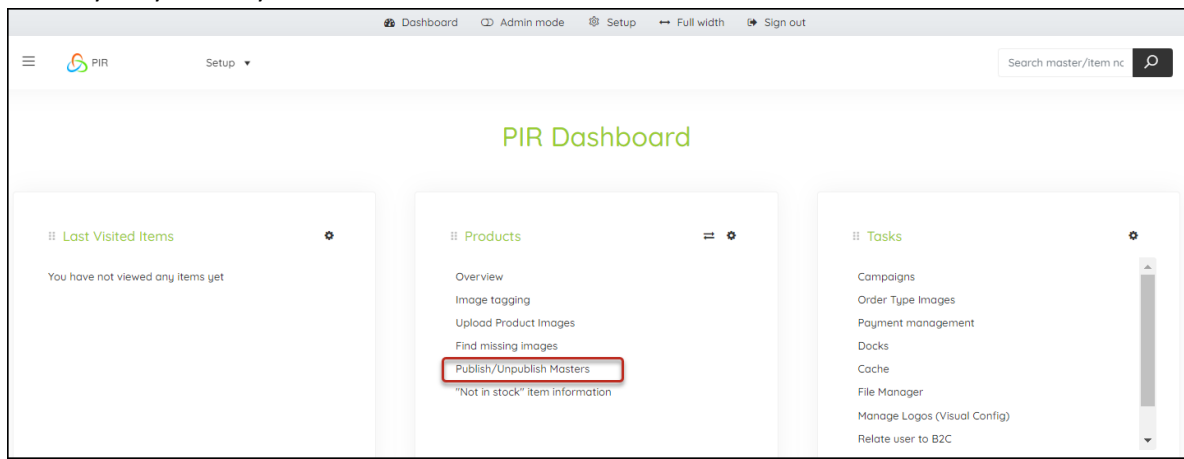
Here you can find examples of using Category Management features.

## FILTER ITEMS IN PORTALS CATEGORIES

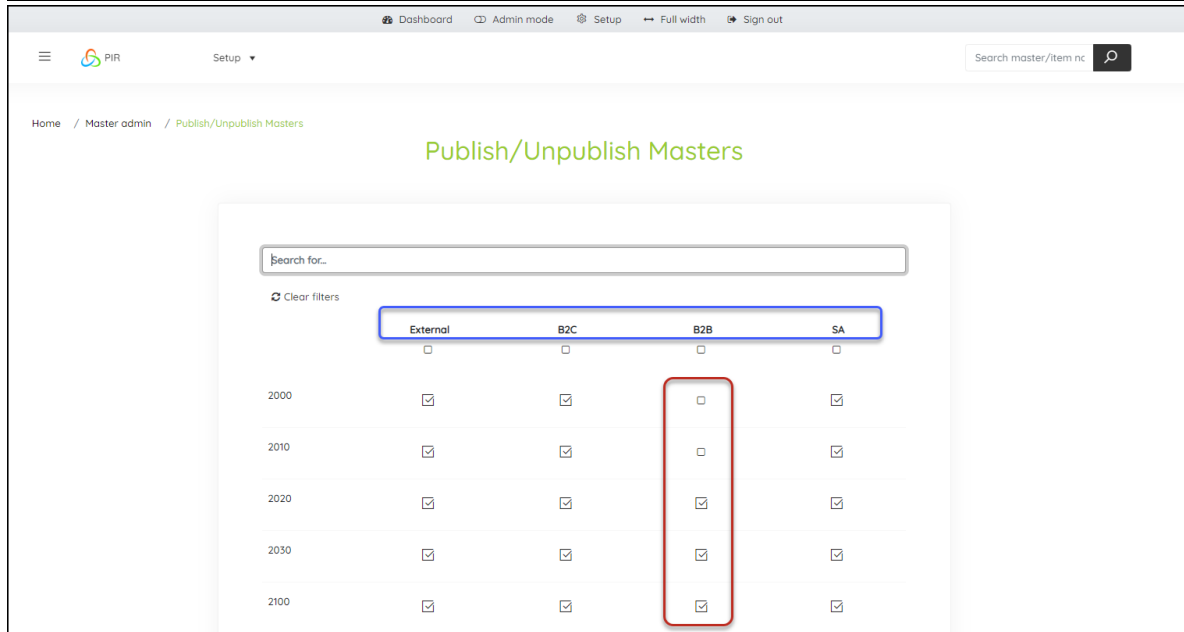
Here is described a way to set a Filter on Items being synchronized with the TRIMIT Portals.

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.



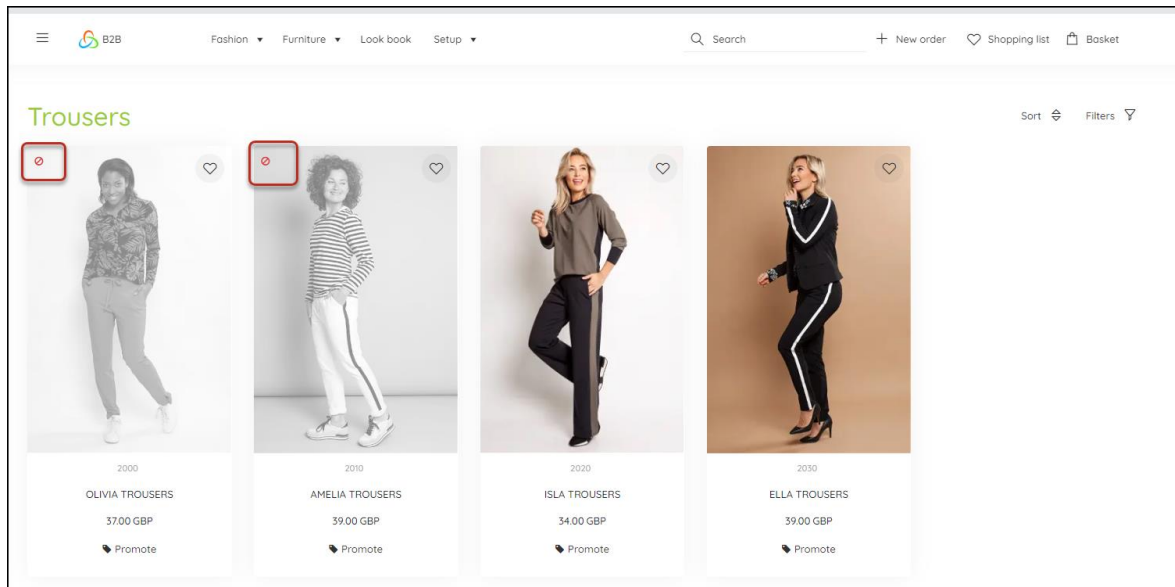
The screenshot shows the PIR Dashboard with a sidebar menu. The 'Products' menu is expanded, and the 'Publish/Unpublish Masters' option is highlighted with a red box.



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

|      | External                            | B2C                                 | B2B                                 | SA                                  |
|------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| 2000 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| 2010 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| 2020 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 2030 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 2100 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

- 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.

