



WHITE PAPER

TRIMIT COLLECTION MANAGEMENT 23.1

This document contains information about the Collection Management functionality in TRIMIT 23.1 for Microsoft Dynamics 365 Business Central 2023, Wave 1 (W1).

This includes Collections, Delivery Periods, Shipment Groups, Private Label, Matrix Limitations, Status Codes, and special fields in the Order Type.

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INTRODUCTION

Managing Collections puts a company for many challenges, especially in the Fashion Industry. That is why in this White Paper many examples will show colors/sizes, but what is applicable for colors/sizes can of course be used for all VarDim Types of a Master.

You can have seasonal Masters/Items (only bought, produced, and sold in 1 season), NOOS Master/Items (Never-Out-Of-Stock; they will be bought, produced, and sold in several seasons) and/or Private Label Masters/Items (only sold to specific Customers or Countries).

In addition, the shipments of Masters can be differentiated into several Delivery Periods.

That is why TRIMIT developed functionality to manage your collections: **TRIMIT Collection Management**. This extra functionality contains:

- Collections
- (Collection) Delivery Periods
- Shipment Groups
- Private Label
- Matrix Limitation
- Status Code

You need to determine which parts of the functionality suits best.

Some might only use **Status Code** to determine that Masters can only be sold in a specific Period.

Some might only use **Private Label** because they only purchase/produce what the Customer wants.

Some might set up **Collections** to use extra filters when entering Sales Orders and have related Delivery Periods for the several Shipment Dates within a Collection.

Some might set up **Shipment Groups** without any connection to Collections and enter a default Shipment Group in an Order Type.

Some might use the **Matrix Limitation** to be sure that for NOOS Masters they only see the colors that are applicable for that moment in time.

You can use them all at the same time for different Masters. However, you must keep in mind what hierarchy is applicable in certain combinations:

- **Status Code** on a Master overrules any other set up. If a Master is – according to its Status Code – not available for Sales Orders, you cannot enter the Master in a Sales Line. This can be specified on several levels (Master, Color or Y-Axis, Item).
- **Matrix Limitation** can make sure that the Matrix of a Master will be reduced to specific colors/sizes. The other colors/sizes of a Master will not be shown, so you cannot enter quantities on those combinations.
- **Private Label** can make sure that Masters/Items can only be sold to specific Customers (this will be checked with the Sell-to Customer, Bill-to Customer, Company Group and Chain) or in specific Countries. When entering Sales Orders of another Customer or Country these Masters/Items will not be shown.
- **Collections** can make sure that only a specific group of Masters/Items can be sold in a Sales Order or bought in a Purchase Order.

- **(Collection) Delivery Periods** can make sure that the delivery of a Collection will take place on specific pre-defined Shipment Dates for only a specific group of Masters/Items.
- **Shipment Groups** can make sure that only a specific group of Masters/Items can be sold in a Sales Order or bought in a Purchase Order.

TRIMIT enables many possibilities to manage your Collections.

Now it is up to you to determine what construction works best for you.

SOME SET UP EXAMPLES AND POSSIBILITIES

STATUS CODE

In the specification of a **Status Code**, you can determine if Masters can be used in a Sales Order or Purchase Order and even specify a specific Period for it.

The Status Code cannot only be attached to a Master but also to colors of a Master (or Y-Axis) and/or sizes.

I.e., **Status Code APPROVED** is set up so you can buy the Masters but cannot sell the Masters yet. **Status Code READY** is set up so you can buy and sell the Masters.

In a Collection, you can also enter a Status Code to determine if the Collection itself can be chosen in a Sales-/Purchase Header

MATRIX LIMITATION

In a Sales-/Purchase Line you can enter a Matrix Limitation. This enables you to filter on the Lines and Columns for the Matrix of a Master.

You are also able to create **Matrix Limitation Setups**, so you can select a pre-defined combination of filters in the Sales-/Purchase Line.

I.e.: Of all the 50 colors that are possible for T-Shirts, you only want to use the colors *Red, White, Blue, Black* and *Pink* for all the Masters. This makes sure that you will only see the Lines with these five colors in the Matrix.

COLLECTION

What a Collection means is up to the user: It can be a Season or a part of the Season, but it can also be that you want to divide your Masters into different Item Groups.

You can specify which Masters and even which colors/sizes of a Master are part of a Collection.

I.e.: The **Collection SS-CY** is a grouping of all the Masters that can be bought and/or sold for Spring/Summer Current Year or **Collection MEN** is a grouping of all the Men's Garments.

VARDIM TYPE SUBSET OF A COLLECTION

You can also specify which variants (i.e., colors) of a VarDim Type (i.e., color group) can be used for a Collection.

This means that you can determine that some colors can be used in a Winter Collection and other colors in a Summer Collection.

I.e.: From a specific VarDim Type that is used for colors, the colors *Black*, *Grey*, *Purple*, and *Blue* can be sold during a Winter Collection and the colors *Black*, *White*, *Yellow*, and *Red* can be sold in the Summer Collection. This is then valid for all the Masters with this specific VarDim Type within this specific Collection.

DELIVERY PERIOD OF A COLLECTION

Per Collection, it is possible to connect several Delivery Periods for the different pre-defined Shipment Dates within a Collection. Per Delivery Period, you can specify which Masters – and even which colors/sizes – will be delivered on a specific Shipment Date.

When using the Delivery Periods related to a Collection, you need to determine if you want to connect the Masters and/or colors/sizes to the Collection itself or to the Delivery Periods to make it easier to manage. You can however also connect Masters to both Collection and Delivery Periods, but based on the other fields in i.e., the Order Type, it does not mean that all combinations are now valid.

When setting up Delivery Periods related to Collections, it is best to only connect Masters/Items to the Collection + Delivery Periods, and no Masters/Items to the Collection itself because they will be overruled by the connected Masters/Items to a Collection + Delivery Period.

Then Sales Lines with Masters connected only to the Collection, will get the first Shipment Date equal to or later than the Shipment Date of the Sales Header, unless there is a connection between the Master/Item and a specific Delivery Period: in that case it will get the Shipment Date of the Collection/Delivery Period if it is equal to or later than the Shipment Date of the Sales Header

I.e.: For a Summer Collection there are three Delivery Periods: *January*, *February*, and *March*. In *January*, the T-Shirts with long sleeves will be delivered, in *February* the T-Shirts with short sleeves and in *March* the Tops.

SHIPMENT GROUPS

Besides the structure of Delivery Periods per Collection, it is also possible to work the other way around; the Shipment Groups are leading.

In that case, you might not even setup Collections, but only Shipment Groups.

I.e.: In *January*, a part of your Collections Men, Women and Kids will be delivered, in *February* another part of the same Collections. In that case, you enter a Shipment Group in an Order Type, so only Masters related to that Shipment Group of all the Collections can be entered in the Sales Order.

PRIVATE LABEL COLLECTION

A Collection can also be used to specify the so-called Private Label Collection of a Customer (this will be checked with the Sell-to Customer, Bill-to Customer, Company Group and Chain) or Country. In that case, only specific Customers or Countries can use this specific Collection in a Sales Header.

If you however want to accomplish that specific Masters or Items can only be bought by some Customers or Countries, you need to set this up via the Master (or Customer or Country) itself.

I.e.: If specific Masters (or colors of Masters) can only be sold to Customer 2020, then you can set up a Private Label Collection and connect Customer 2020 to this Collection.

This specific Collection can only be chosen in a Sales Order when the Customer is *2020* (or all the Sell-to Customers of Bill-to Customer *2020*, or all members of the Company Group *2020*, or all the members of the Chain *2020*).

The Masters in this Collection are however also available for other Customers unless you specify in the Master that it is a Private Label Master for Customer *2020*. In that case, it cannot be sold to other Customers.

PRICES PER COLLECTION, PER SHIPMENT GROUP OR PER ORDER TYPE

You are also able to set up Sales- (or Purchase) Prices per Collection, Shipment Group or Order Type – or any other Dimension.

I.e.: **Order Type Summer 2023** is connected to **Collection Summer 2023** and the price of a Master is *10,00*. If the same Master would be sold in an after Sales Order for *Winter 2022*, it would have **Order Type After Sales 2016** that will be connected to **Collection After Sales 2022** and the price for the same Master is *7,00*.

ORDER TYPE

On a Sales-/Purchase Document you can select an Order Type with a special Collection and Delivery Period, or a Shipment Group related to it.

This means that only Masters (or specific colors/sizes of Masters) can be selected on the Sales-/Purchase Document.

I.e.: If you create an **Order Type Summer 2023** with a filter for **Collection No. Summer 2023**, you are only able to select Masters that are connected to this Collection or to the Delivery Periods of this Collection.

Therefore, the possibilities are endless to make sure that only specific Masters/Items can be selected for a Sales-/Purchase Document.

It is not mandatory to set up the Collections, Delivery Periods or Shipment Groups.

You can also choose only to use the Status Code on the Masters (and/or colors/sizes) to make sure that old Masters cannot be sold anymore, or the Matrix Limitations so only specific colors can be sold.

The functionality described is the functionality as of **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 Collection Management contains the following objects:

Collection Management, Private Label, Matrix Limitation and Status Code use the following objects:

The tables

6036317 trm Temp Collect Master Relat
6036683 trm Order Type
6037027 trm Shipment Group
6037033 trm Matrix Limitation Setup
6037034 trm Matrix Limit Master Relat
6037035 trm Collection
6037036 trm Delivery Period
6037037 trm Collection Master Relation
6037038 trm Private Label
6037039 trm VarDim Type Subset
6037194 trm Status Code

The pages

6036682 trm Order Type Card
6036683 trm Order Types List
6036805 trm Collections FactBox
6036818 trm Delivery Period FactBox
6037158 trm Collection Maintenance
6037159 trm Collection Deliv Periods
6037162 trm VarDim Type Subset
6037164 trm Private Labels Private Labels
6037165 trm Collection List
6037166 trm Delivery Periods
6037167 trm Collection Master Relat
6037168 trm Temp. Shipment Groups
6037169 trm Temp. Collection List
6037170 trm Collection Card
6037175 trm Matrix Limit Setup List
6037176 trm Matrix Limit Master Relat
6037177 trm Shipment Groups
6037192 trm Status Code Card
6037198 trm Status Code List

Codeunit

6036683 trm Order Type Handling
6037031 trm Collection Handling

Besides these special objects, there are also changes in several existing objects because of fields that have been added or changed. Beneath is a list of some of the Collections related fields in existing tables:

Table 9 Country/Region

- Field 6037002: **trm Private Labels Exist**

Table 18 Customer

- Field 6037002: **trm Private Labels Exist**

Table 27 Item

- Field 6036814: **trm Private Label Master**
- Field 6036815: **trm Private Label**
- Field 6036816: **trm Master Private Label**

Table 36 Sales Header

- Field 6036962: **trm Order Type**
- Field 6036963: **trm Collection No.**

Table 37 Sales Line

- Field 6036962: **trm Period Code**
- Field 6036963: **trm Collection No.**

Table 38 Purchase Header

- Field 6036962: **trm Order Type**
- Field 6036963: **trm Collection No.**

Table 39 Purchase Line

- Field 6036962: **trm Period Code**
- Field 6036963: **trm Collection No.**

Table 98 General Ledger Setup

- Field 6037211: **trm Collection Dimension**
- Field 6037212: **trm Sales Price Search Dim.**
- Field 6037213: **trm Purch. Price Search Dim.**
- Field 6037214: **trm Shipment Group Dim.**
- Field 6037215: **trm Order Type Dim.**

Table 110 Sales Shipment Header

- Field 6036962: **trm Order Type**
- Field 6036963: **trm Collection No.**

Table 111 Sales Shipment Line

- Field 6036962: **trm Period Code**
- Field 6036963: **trm Collection No.**

Table 112 Sales Invoice Header

- Field 6036962: **trm Order Type**
- Field 6036963: **trm Collection No.**

Table 113 Sales Invoice Line

- Field 6036962: **trm Period Code**
- Field 6036963: **trm Collection No.**

Table 114 Sales Cr.Memo Header

- Field 6036962: **trm Order Type**
- Field 6036963: **trm Collection No.**

Table 115 Sales Cr.Memo Line

- Field 6036962: **trm Period Code**
- Field 6036963: **trm Collection No.**

Table 120 Purch. Rcpt. Header

- Field 6036962: **trm Order Type**
- Field 6036963: **trm Collection No.**

Table 121 Purch. Rcpt. Line

- Field 6036962: **trm Period Code**
- Field 6036963: **trm Collection No.**

Table 122 Purch. Inv. Header

- Field 6036962: **trm Order Type**
- Field 6036963: **trm Collection No.**

Table 123 Purch. Inv. Line

- Field 6036962: **trm Period Code**
- Field 6036963: **trm Collection No.**

Table 124 Purch. Cr. Memo Hdr.

- Field 6036962: **trm Order Type**
- Field 6036963: **trm Collection No.**

Table 125 Purch. Cr. Memo Line

- Field 6036962: **trm Period Code**
- Field 6036963: **trm Collection No.**

Table 311 Sales & Receivables Setup

- Field 6037221: **trm Skip TransfColl from Mstr**
- Field 6037222: **trm Delivery Period Handling**
- Field 6037224: **trm Order Type Mandatory**

Table 312 Purchase & Payables Setup

- Field 6037222: **trm Skp Transf Coll.frm Master**
- Field 6037223: **trm Delivery Period Handling**
- Field 6037224: **trm Order Type Mandatory**

Table 313 Inventory Setup

- Field 6037416: **trm Collection Var based on**
- Field 6037417: **trm Create Coll. Relation Aut**

Table 7002 Sales Price

- Field 6036949: **trm Dimension Prices**
- Field 6036950: **trm Dimension Code Filter**
- Field 6036951: **trm Dimension Value Filter**

Table 7012 Purchase Price

- Field 6036949: **trm Dimension Prices**
- Field 6036950: **trm Dimension Code Filter**
- Field 6036951: **trm Dimension Value Filter**

Table 6037183 trm Workflow Templates

- Field 100: **Use for** includes options for *Collection* and *Shipment Group*

Table 6037192 trm Workflow

- Field 58: **Shipment Group**
- Field 59: **Collection No.**

COLLECTIONS OR SHIPMENT GROUPS

A customer can choose in which way they want to make use of our Collection Management:

- Do they want to work with Collections? Where a Collection might be a Season? In addition, even divide the Collection into several Delivery Periods?
- Do they want to work with Shipment Groups with specific Shipment Dates?

We think that a customer is working according to one of the 2 options mentioned above.

The real difference in handling Collection Management:

Collection	Shipment Group
Master (with specific VarDim Type Values) (table 6037037 Collection Master Relation)	Master (with specific VarDim Type Values) (table 6037034 Matrix Limit. Master Relation)
VarDim Type Subsets (table 6037039 VarDim Type Subset)	VarDim Type Subsets – via Matrix Limitation (table 6037039 VarDim Type Subset)
Can be selected in Order Type	Can be selected in Order Type
Can be a Dimension, and if Dimension: can be used in Sales-/Purchase Prices	Can be a Dimension, and if Dimension: can be used in Sales-/Purchase Prices
Can be simple 'filter field' in Master Card	Can be simple 'filter field' in Master Card
Can have specific Calculation Template	Can have a specific Calculation Template
Can show overview of Calculations of related Masters	Can show overview of Calculations of related Masters
Can have a Workflow	Can have a Workflow
Can set default Workflow for related Masters	
Delivery Periods per Collection	
Can be set as Private Label Collection	
Can set Status Codes on several levels	
Can be set as Sample Collection	
Can be chosen in Wizard when creating Masters	
Can be chosen in Sales-/Purchase Order Header	
Can be chosen in Order Types	Can be chosen in Order Types

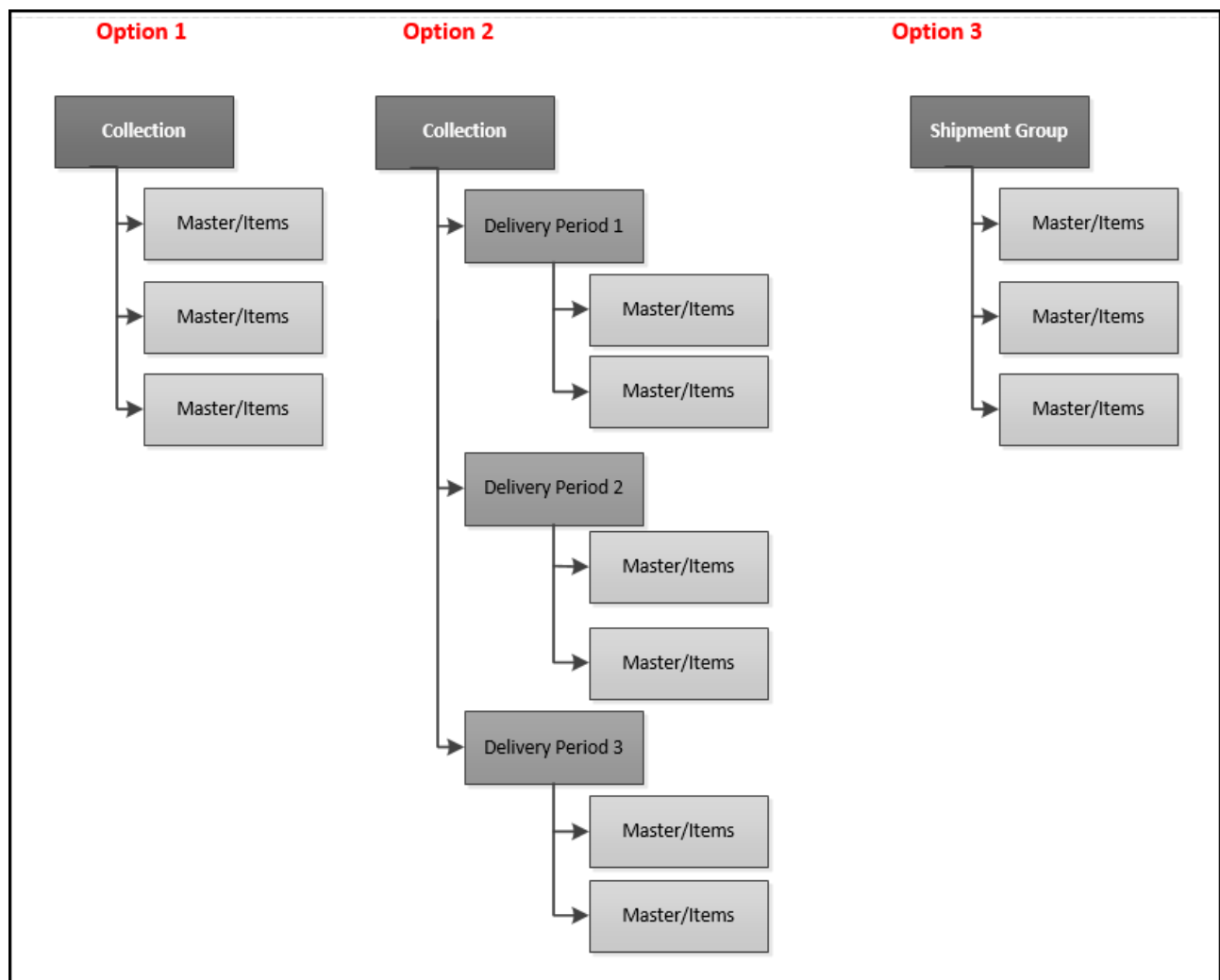
Collection versus Shipment Group

This also means that a customer can choose between 3 different setups for using the Collection Management:

1. Only use Collections with related Masters/Items
2. Use Collections and related Delivery Periods with related Masters/Items
3. Use Shipment Groups with related Masters/Items

It is possible to use all 3 setups at the same time, but in that case, it is difficult to keep track of what is happening in the Sales-/Purchase Order, and how do you want the Order Type to handle/react in an Order?

So, our advice: explain the 3 setups to the customer and choose the best option to use for all Masters.



Three options to work with Collection Management

SETUPS

To start using the Collection Management functionality you can set up the Collections (with or without Delivery Periods) or the Shipment Groups. Assuming the customer want to use option 1 or 2 from the previous page, he needs to create the Collections first.

You can also use the Collections as a financial Dimension.

This gives you the opportunity to use the Collections also as a filter for your financial Analysis or Account Schedules and to split the postings on G/L Accounts into the Collections. As well as creating Sales Budgets on Collections. This is however not mandatory.

(This is not only applicable for the Collections, but also for the Shipment Groups and the Order Types).

NOTE

If you want to use the Collections/Shipment Groups/Order Types as a financial Dimension, make sure you create the Dimension and fill the **General Ledger Setup** before creating Collections/Shipment Groups/Order Types!

DIMENSION

You can create a financial Dimension to be used for the Collections (for Shipment Groups and for Order Types).

This can be done via **Search Dimensions**.

Dimensions								
Search + New Edit List Delete Dimension Actions Fewer options								
Code ↑	Name	Code Caption	Filter Caption	Description	Blocked	Dimension Sales Order	Dimension Purchase Order	Dimension Production Order
AREA	Area	Area Code	Area Filter		☐			
BUSINESSGROUP	Business Group	Businessgroup Code	Businessgroup Filter		☐			
→ COLLECTION	Collection	Collection Code	Collection Filter		☐	From Purchase Header		
CUSTOMERGROUP	Customer Group	Season Code	Season Filter		☐			
DEPARTMENT	Department	Brand Code	Brand Filter		☐			
ORDERTYPE	Order Type	Order Type Code	Order Type Filer		☐	From Purchase Header		
PURCHASER	Purchaser	Purchaser Code	Purchaser Filter		☐			
SALESCAMPAIGN	Sales campaign	Salescampaign Code	Salescampaign Filter		☐			
SALESPERSON	Salesperson	Salesperson Code	Salesperson Filter		☐			
SHIPMENTGROUP	Shipment Group	Shipment Group Code	Shipment Group Filter		☐			

Dimensions

DIMENSION SALES ORDER

This field determines which Dimension Value should be taken for the Sales Lines:

You can choose between the following three options:

Empty	Dimension Value will be determined according to standard BC
From Sales Header	The Dimension Value will be filled based on the Value in the Sales Header
From Item No.	The Dimension Value will be filled based on the Value of the Item No. in the Sales Line.

NOTE

If the Dimension would also be the **Global Dimension 1** or **Global Dimension 2**, the corresponding Parameters in the **Sales & Receivables Setup** will overwrite the setting in the **Dimension Sales Order** for the Dimension of the Sales Lines.

DIMENSION PURCHASE ORDER

This field determines which Dimension Value should be taken for the Purchase Lines:

You can choose between the following four options:

Empty	Dimension Value will be determined according to standard BC.
Inheritance	The Dimension Value will be filled based on the Value in a related Sales Line or Production Order Component Line.
From Purchase Header	The Dimension Value will be filled based on the Value in the Purchase Header
From Item No.	The Dimension Value will be filled based on the Value of the Item No. in the Purchase Line.

NOTE

If the Dimension would also be the **Global Dimension 1** or **Global Dimension 2**, the corresponding Parameters in the **Purchase & Payables Setup** will overwrite the setting in the **Dimension Purchase Order** for the Dimension of the Purchase Lines.

DIMENSION PRODUCTION ORDER

This field determines which Dimension Value should be taken for the Production Order Component Lines:

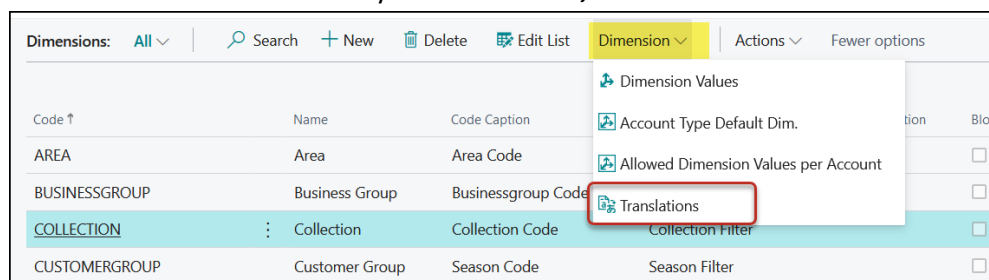
You can choose between the following three options:

Empty	Dimension Value will be determined according to standard NAV.
Inheritance	The Dimension Value will be filled based on the Value in a related Sales Line or related Production Order Component Line.
From Item No.	The Dimension Value will be filled based on the Value of the Item No. in the Production Order Component Line.

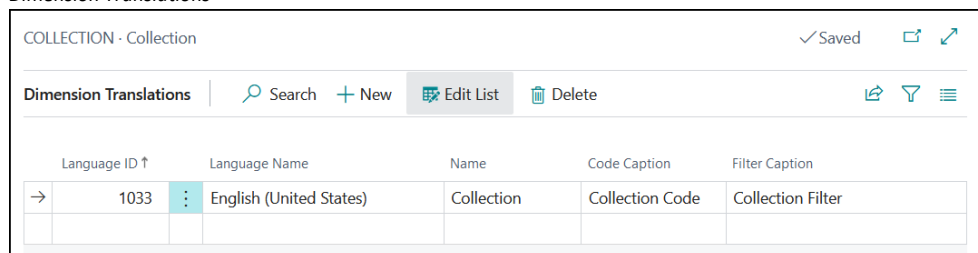
NOTE

If the Dimension would also be the **Global Dimension 1** or **Global Dimension 2**, the corresponding Parameters in the **Production Setup** will overwrite the setting in the **Dimension Production Order** for the Dimension of the Production Order Component Lines.

When setting up a Dimension for the Collections, Shipment Groups or Order Types: do not forget the translation. This can be done by click **Dimension, Translations**.



Dimension Translations



Dimension Translations

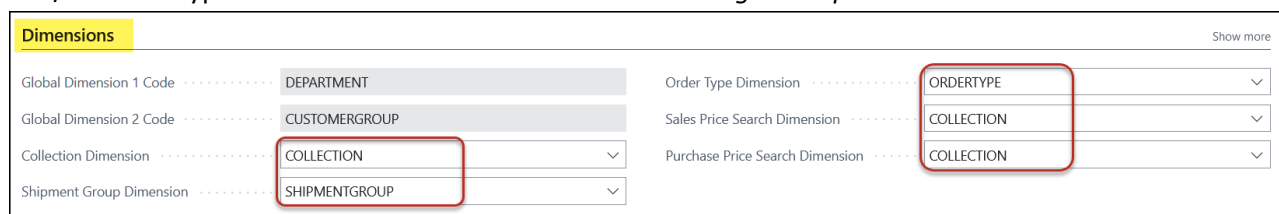
NOTE

Do not enter the **Dimension Values** yet! When a TRIMIT Collection is created, the **Dimension Value** is created automatically if this Dimension is also filled as the **Collection Dimension** in the **General Ledger Setup**. It only works one way. Therefore, if you create Values manually for the Dimensions **no** TRIMIT Collections will be created.

The same happens for the Shipment Groups and Order Types – at least if you have filled the **Shipment Group Dimension** and **Order Type Dimension** in the **General Ledger Setup** for it.

GENERAL LEDGER SETUP

You need to tell the system which financial Dimensions will be used for the Collections, Shipment Groups and/or Order Types. This can be done via **Search General Ledger Setup** on the FastTab **Dimensions**.



Dimensions		Show more
Global Dimension 1 Code	DEPARTMENT	Order Type Dimension
Global Dimension 2 Code	CUSTOMERGROUP	Sales Price Search Dimension
Collection Dimension	COLLECTION	Purchase Price Search Dimension
Shipment Group Dimension	SHIPMENTGROUP	

General Ledger Setup

DESCRIPTION OF FIELDS

COLLECTION DIMENSION

In this Parameter, you can enter the Dimension that will be used for the Collections of TRIMIT.

If this Parameter is filled, the **Collection Dimension Value** will be created automatically when you create a **Collection No.** The value of the **Collection No.** will be used as **Dimension Value Code**.

A collection can be seen as a Season or a group of Masters (Men's, Women's, and Kids Collection), but can also be used for Private Label Masters.

SHIPMENT GROUP DIMENSION

In this Parameter, you can enter the Dimension that is used for your Delivery Periods or Shipment Groups of TRIMIT – part of Collection Management.

If this Parameter is filled, the **Shipment Group Dimension** will be created automatically when you create a **Delivery Period** or a **Shipment Group**. The value of the **Delivery Period** or **Shipment Group** will be used as **Dimension Value Code**.

ORDER TYPE DIMENSION

In this Parameter, you can enter the Dimension that is used for your Order Types of TRIMIT.

If this Parameter is filled, the **Order Type Dimension Value** will be created automatically when you create an **Order Type**. The value of the **Order Type** will be used as **Dimension Value Code**.

SALES PRICE SEARCH DIMENSION

In this Parameter, you can select a Dimension for which the search of a Sales Price should start with.

I.e.: If you select the Dimension **COLLECTION**, it presumes that you will set up Sales Prices per Collection, and that you want the price search to start searching for an applicable Sales Price using the Collection in the Sales Line.

PURCHASE PRICE SEARCH DIMENSION

In this Parameter, you can select a Dimension for which the search of a Purchase Price should start with. I.e.: If you select the Dimension *COLLECTION*, it presumes that you will set up Purchase Prices per Collection, and that you want the price search to start searching for an applicable Purchase Price using the Collection in the Purchase Line.

NOTE

You should enter the **Collection Dimension**, **Shipment Group Dimension** and **Order Type Dimension** if you want to make financial analysis or budgets based on the financial Dimensions.

NOTE

If you – in general - use Sales-/Purchase Prices per Collection, it is useful to enter the Parameters in the General Ledger Setup. If it is only applicable for specific Order Types: leave these Parameters in the General Ledger Setup blank.

SALES & RECEIVABLES SETUP

There are three Parameters that have influence on the functionality of TRIMIT Collection Management. They can be filled via **Search Sales & Receivables Setup**

Registration

General

Show Only Lines with Outstanding Qu... ☐

Default Type Sales Lines Matrix

Order Type Mandatory No

Totals in Sales Subpages No

Sales Header

Retain Quote by Order No

Approve Change of Posting Date Ask if existing Posting Date differs from Work Date (D)

Ready for

Automatically Set Ready for Shipping ... ☐

Automatically Set Ready for Invoicing ... ☐

Approve Ready for Shipping When Qty. to Ship is Changed (Default Yes)

Sales Lines

Posting Description for G/L Entry Posting Description for Sales Header

Posting Description for Customer Led... Posting Description for Sales Header

VarDim

Skip Creation of VarDim Order No

VarDim Search String Separator None

Fixed Format Master Search String 0

Order Variant Description No

Sales Line Description 2 Separator None

Matrix/Assortment List

Default Collapse Matrix ☒

Use Existing Matrix ☐

Show Matrix only on Demand ☐

Info on Matrix X-Axis None

Min. Cells Check On Demand 50

Default Matrix Distribution Method Multiple

Delivery Period Handling Search Delivery Period

Skip Transfer of Collection and Period ... ☒

Sales & Receivables Setup

ORDER TYPE MANDATORY

This Parameter determines if entering an **Order Type** in a Sales Order is mandatory.

You can choose between the following two options:

No	Entering an Order Type is not mandatory.
Yes	Entering an Order Type is mandatory.

DELIVERY PERIOD HANDLING

This Parameter determines which Masters to be shown by a **lookup** from a Sales Line. It is also essential to the *TRIMIT Collection Management* regarding the correlation between the Collection No., Period Code (Delivery Period or Shipment Group) and **Shipment Date** of the Sales Line.

If the corresponding field in an **Order Type** of the Sales Header has not been set to *Based on Setup*, it will overrule the setup of this Parameter in the Sales & Receivables Setup.

If no **Order Type** will be used in a Sales Header, this Parameter will always be applicable.

You can choose between the following three options:

Search Delivery Period	Search Delivery Period means that the program will automatically find the first possible Delivery Period of a Collection No. All Masters related to some of the Delivery Periods in the Collection No. will be shown by lookup, and in the matrix the VarDim Variant Options related to the Delivery Periods will be displayed. If a Master is only related directly to the Collection No., it will also be shown by lookup. However, as soon as the Master has been related to Delivery Periods as well, it will only be available in those Delivery Periods and with the VarDim Variant Options related to those Delivery Periods. The Period Code of the Sales Line will be set to the first possible with a Start Sales Delivery Period equal to or later than the Shipment Date of the Sales Header. If the Master / Item is also related to a Delivery Period earlier than the current Shipment Date of the Sales Header, the Period Code of the Sales Line will be set to earliest Period Code after the Shipment Date of the Sales Header, even though the Master / Item is not related to it. The principle is, that a Master related to a Delivery Period and with the specified VarDim Variant Options, will also be available in all later Delivery Periods. The Shipment Date of the Sales Line will be transferred from the Start Sales Delivery Period of the Delivery Period table unless the Requested Delivery Date or Promised Delivery Date in the Sales Header is a later Date. In that case, this Date will be taken for the Shipment Date of the Sales Line.
Specify Delivery Period	Specify Delivery Period means that you specify which Delivery Period of a Collection should be used. All Masters related to the Collection No. (or to the Collection No. + Delivery Code) will be shown in the lookup, but in the matrix, only the VarDim Variant Options related to the chosen Delivery Period will be displayed. However, be also aware of the influence of the Limit Matrix to Specified Period field in an Order Type. If a Master is only related directly to the Collection No. and the Limit Matrix to Specified Period field is <i>No</i>, the Master will also be shown by lookup. However, as soon as the Master has been related to Delivery Periods as well, it will only be available in those Delivery Periods and with the VarDim Variant Options related to those Delivery Periods.

	And when this field is <i>No</i>, also VarDim Variant Options connected to earlier Delivery Periods will be shown in the lookup. When the Limit Matrix to Specified Period field is <i>Yes</i>, a Master only related directly to the Collection No. will not be available. If you do not specify the Delivery Period on the Order Type, a list of the possible Delivery Periods will pop up when you create a Sales Line enabling you to select one of them. If only one Delivery Period is available, it will automatically be used. The Period Code of the Sales Line will be set to the specified or selected and the Shipment Date will be transferred from the Start Sales Delivery Period of the Delivery Period table unless the Requested Delivery Date or Promised Delivery Date in the Sales Header is a later Date. In that case, this Date will be taken for the Shipment Date of the Sales Line.
None	If you set this Parameter to None, it means that the <i>TRIMIT Collection Management</i> is deactivated. However, in combination with a Collection No. in an Order Type, only Masters related either directly to the Collection No. or to one of the related Delivery Periods would be shown by lookup and in the matrix only the VarDim Variant Options related to the Collection or the related Delivery Periods will be displayed. In other words, you will have a filter by lookup but no Collection Management, so you will also be able to create Sales Lines with Masters that are not related to the Collection No. of an Order Type.

NOTE

If the customer does not want to work with TRIMIT Collection Management, the last option of this Parameter is most applicable.

If the customer choose option 1 (only Collections), *Search Delivery Period* is most applicable.

If the customer choose option 2 (Collections and Delivery Periods), *Search Delivery Period* or *Specify Delivery Period* are most applicable; only if they want to Specify Delivery Period manually you should choose *Specify Delivery Period*.

If the customer chooses for option 3 (only Shipment Groups), *Search Delivery Period* is most applicable.

SKIP TRANSFER COLLECTION AND DELIVERY PERIOD FROM MASTER

This Parameter determines if the Collection and Delivery Period (which could be the **Collection Delivery Period** if the Collection No. is filled or the **Shipment Group** if the Collection No. is not filled) from the Master Card will be copied into the Sales Lines. A checkmark in this field means that no Collection and/or Delivery Period of the Master will be copied in the Sales Line.

If the **Delivery Period Handling** is set to *Search Delivery Period* or *Specify Delivery Period*, you must enter a checkmark in this Parameter and therefore set it to *Yes*.

NOTE

Keep in mind, that the Collection, Delivery Period and Shipment Group of an Order Type will overwrite the Collection and Delivery Period of the Master in a Sales Line.

PURCHASES & PAYABLES SETUP

There are three Parameters that influence the functionality of TRIMIT Collection Management. They can be filled via **Search Purchases & Payables Setup**

Registration

General

Show Only Lines with Outstanding Qu... ☐

Reuse Vendor Shipment No. ☐

Default Type Purchase Lines

Order Type Mandatory

Totals in Purchase Subpages

Purchase Header

Filter Purchase Order Search

Approve Change of Posting Date

Purchase Lines

Posting Description for G/L Entry

VarDim

Variant Management

Order Variant Description

Matrix/Assortment List

Default Collapse Matrix ☒

Use Existing Matrix ☐

Show Matrix only on Demand ☐

Default Matrix Distribution Method

Delivery Period Handling

Skip Transfer of Collection and Period ... ☒

Purchases & Payables Setup

ORDER TYPE MANDATORY

This Parameter determines if entering an **Order Type** in a Purchase Order is mandatory.

You can choose between the following two options:

No	Entering an Order Type is not mandatory.
Yes	Entering an Order Type is mandatory.

DELIVERY PERIOD HANDLING

This Parameter determines which Masters to be shown by a **lookup** from a Purchase Line. It is also essential to the *TRIMIT Collection Management* regarding the correlation between the Collection No., Period Code (Delivery Period or Shipment Group) and **Expected Receipt Date** of the Purchase Line.

If the corresponding field in an **Order Type** of the Purchase Header has not been set to *Based on Setup*, it will overrule the setup of this Parameter in the Purchases & Payables Setup.

If no **Order Type** will be used in a Purchase Header, this Parameter will always be applicable.

You can choose between the following three options:

Search Delivery Period	Search Delivery Period means that the program will automatically find the first possible Delivery Period of a Collection No. All Masters related to some of the Delivery Periods in the Collection No. will be shown by lookup, and in the matrix the VarDim Variant Options related to the Delivery Periods will be displayed. If a Master is only related directly to the Collection No., it will also be shown by lookup. However, as soon as the Master has been related to Delivery Periods as well, it will only be available in those Delivery Periods and with the VarDim Variant Options related to those Delivery Periods.
------------------------	---

	The Period Code of the Purchase Line will be set to the first possible with a Start Purchase Delivery Period equal to or later than the Expected Receipt Date of the Purchase Header. If the Master / Item is also related to a Delivery Period earlier than the current Expected Receipt Date of the Purchase Header, the Period Code of the Purchase Line will be set to earliest Period Code after the Expected Receipt Date of the Purchase Header, even though the Master / Item is not related to it. The principle is, that a Master related to a Delivery Period and with the specified VarDim Variant Options, will also be available in all later Delivery Periods. The Expected Receipt Date of the Purchase Line will be transferred from the End Purchase Delivery Period of the Delivery Period table unless the Requested Receipt Date or Promised Receipt Date in the Purchase Header is a later Date. In that case, this Date will be taken for the Expected Receipt Date of the Purchase Line.
Specify Delivery Period	Specify Delivery Period means that you specify which Delivery Period of a Collection No. should be used. All Masters related to the Collection No. (or to the Collection No. + Delivery Code) will be shown in the lookup, but in the matrix, only the VarDim Variant Options related to the chosen Delivery Period will be displayed. However, be also aware of the influence of the Limit Matrix to Specified Period field in an Order Type. If a Master is only related directly to the Collection No. and the Limit Matrix to Specified Period field is <i>No</i>, the Master will also be shown by lookup. However, as soon as the Master has been related to Delivery Periods as well, it will only be available in those Delivery Periods and with the VarDim Variant Options related to those Delivery Periods. And when this field is <i>No</i>, also VarDim Variant Options connected to earlier Delivery Periods will be shown in the lookup. When the Limit Matrix to Specified Period field is <i>Yes</i>, a Master only related directly to the Collection No. will not be available. If you do not specify the Delivery Period on the Order Type, a list of the possible Delivery Periods will pop up when you create a Purchase Line enabling you to select one of them. If only one Delivery Period is available, it will automatically be used. The Period Code of the Purchase Line will be set to the specified or selected and the Expected Receipt Date will be transferred from the End Purchase Delivery Period of the Delivery Period table unless the Requested Receipt Date or Promised Receipt Date in the Purchase Header is a later Date. In that case, this Date will be taken for the Expected Receipt Date of the Purchase Line.
None	If you set this Parameter to None, it means that the <i>TRIMIT Collection Management</i> is deactivated.

	However, in combination with a Collection No. in an Order Type, only Masters related either directly to the Collection No. or to one of the related Delivery Periods would be shown by lookup and in the matrix only the VarDim Variant Options related to the Collection or the related Delivery Periods will be displayed. In other words, you will have a filter by lookup but no Collection Management so you will also be able to create Purchase Lines with Masters that are not related to the Collection of an Order Type.
--	--

SKIP TRANSFER COLLECTION AND DELIVERY PERIOD FROM MASTER

This Parameter determines if the Collection and Delivery Period from the Master Card will be copied into the Purchase Lines. A checkmark in this field means that no Collection and/or Delivery Period of the Master will be copied in the Purchase Line.

If the **Delivery Period Handling** is set to *Search Delivery Period* or *Specify Delivery Period*, you must enter a checkmark in this Parameter and therefore set it to *Yes*.

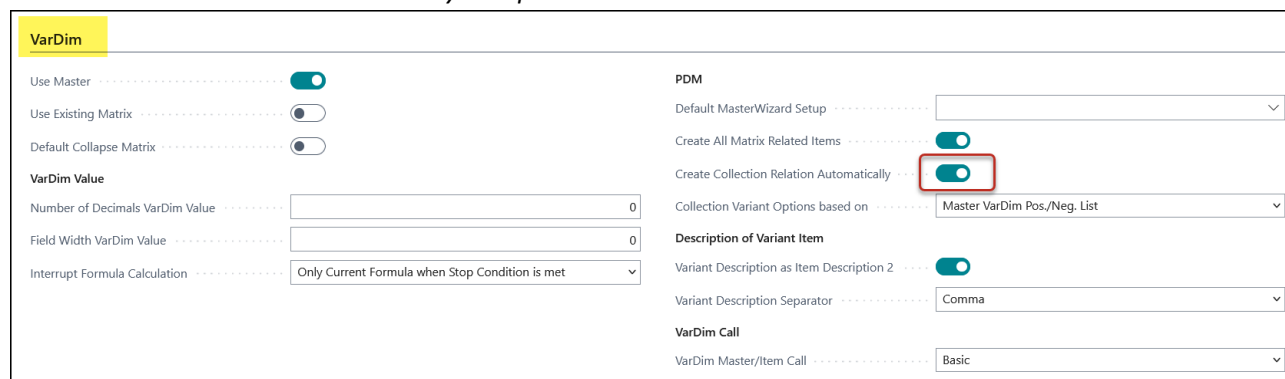
NOTE

Keep in mind, that the Collection, Delivery Period and Shipment Group of an Order Type will overwrite the Collection and Delivery Period of the Master in a Purchase Line.

INVENTORY SETUP

You need to tell the system that you want to create Collection Relations automatically for your Master.

This can be done via **Search Inventory Setup** on the FastTab **VarDim**.



The screenshot shows the 'VarDim' setup form. On the left, under 'VarDim Value', there are fields for 'Number of Decimals VarDim Value' (0), 'Field Width VarDim Value' (0), and a dropdown for 'Interrupt Formula Calculation' (Only Current Formula when Stop Condition is met). On the right, under 'PDM', there is a dropdown for 'Default MasterWizard Setup'. Below that, the 'Create Collection Relation Automatically' toggle switch is checked and highlighted with a red box. Other settings include 'Create All Matrix Related Items' (checked), 'Collection Variant Options based on' (Master VarDim Pos./Neg. List), 'Description of Variant Item' (Variant Description as Item Description 2), 'Variant Description Separator' (Comma), 'VarDim Call' (Basic), and 'VarDim Master/Item Call' (Basic).

Inventory Setup – FastTab VarDim

CREATE COLLECTION RELATION AUTOMATICALLY

With this Parameter, you can decide that the first **Collection Master Relation** shall be created automatically when you create a **Master**.

If you give this Parameter a checkmark, a record will automatically be created in the **Collection Master Relation** table when you fill in the **Collection No.** field of the Master Card.

When you also fill in the **Delivery Period** field, a Collection Master Relation attached to this Collection and Delivery Period will be created as well.

If you do not want to create the **Collection Master Relations** or want to do it manually, you can just leave this Parameter unchecked and no Collection Master Relations will be created automatically.

If no checkmark is entered, you can still make the connections manually. If you do not do this it means that, you are using these fields (Collection No. and Period Code in the Master) only as Filters, but do not want to make use of the full Collection Management functionality.

It can also mean that you will always create your Collection Master Relations by connecting Masters through the Collection Card.

NOTE

If you only enter a **Period Code** in the Master – without any Collection – no relationship will be created to that **Shipment Group** regardless the content of the Parameter above. You always need to do this manually via the Master List/Card or via the Shipment Group itself.

COLLECTIONS VARIANT OPTIONS BASED ON

This Parameter determines which colors/sizes/etc. you can select if you create the **Collection Master Relations**. It will be overruled by the same Field in the individual Collections.

You can choose between the following two options:

Master VarDim Pos./Neg. List	The Options Var 1-9 you can choose for a specific Collection Master Relations depends on the possible variants that are related to the Master.
Collection VarDim Type Subset	The Options Var 1-9 you can choose for a specific Collection Master Relations depends on the possible variants that have been selected via the VarDim Type Subset of the Collection.

CREATING COLLECTIONS

Setting up Collections can be done in three separate ways.

- 1) Collection Based
 - a. Create Collection No.
 - b. Create the Masters
 - c. Go to the Collection No. again and connect the Masters to the Collection No.
- 2) Master Based
 - a. Create a Collection No.
 - b. When creating the Masters connect the Collection to the Master by entering the Collection No. in the Master Card.
- 3) By Master Wizard
 - a. Create a Collection No.
 - b. When creating new Masters by using the Master Wizard, enter the Collection No. where it belongs to.

The first way can be used for seasonal Masters as well as for NOOS (Never out of Stock) Masters. In that case, a Master can be connected to different Collections very easily.

The second way of setting up Collections can specifically be used for seasonal Masters.

If you would create Collections per Season, a Master would be only part of 1 Season and therefore of one Collection.

In that case, it is easy to enter a Collection No. and even a Delivery Period on the Master Card to connect a complete Master to a Collection.

If you use the Master Wizard for creating new Masters, you can make use of the third way of creating Collections. In this case, it is already known when creating new Master to which Collection No. it belongs. This will be used for seasonal Masters.

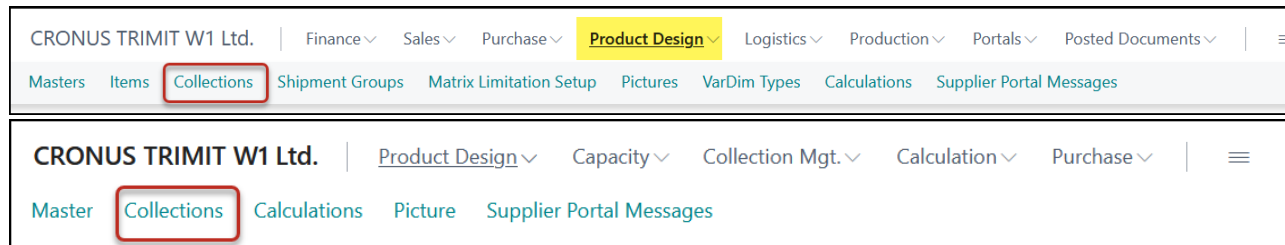
You can use all the separate ways alternately. You do not have to choose for one of the 3.

NOTE

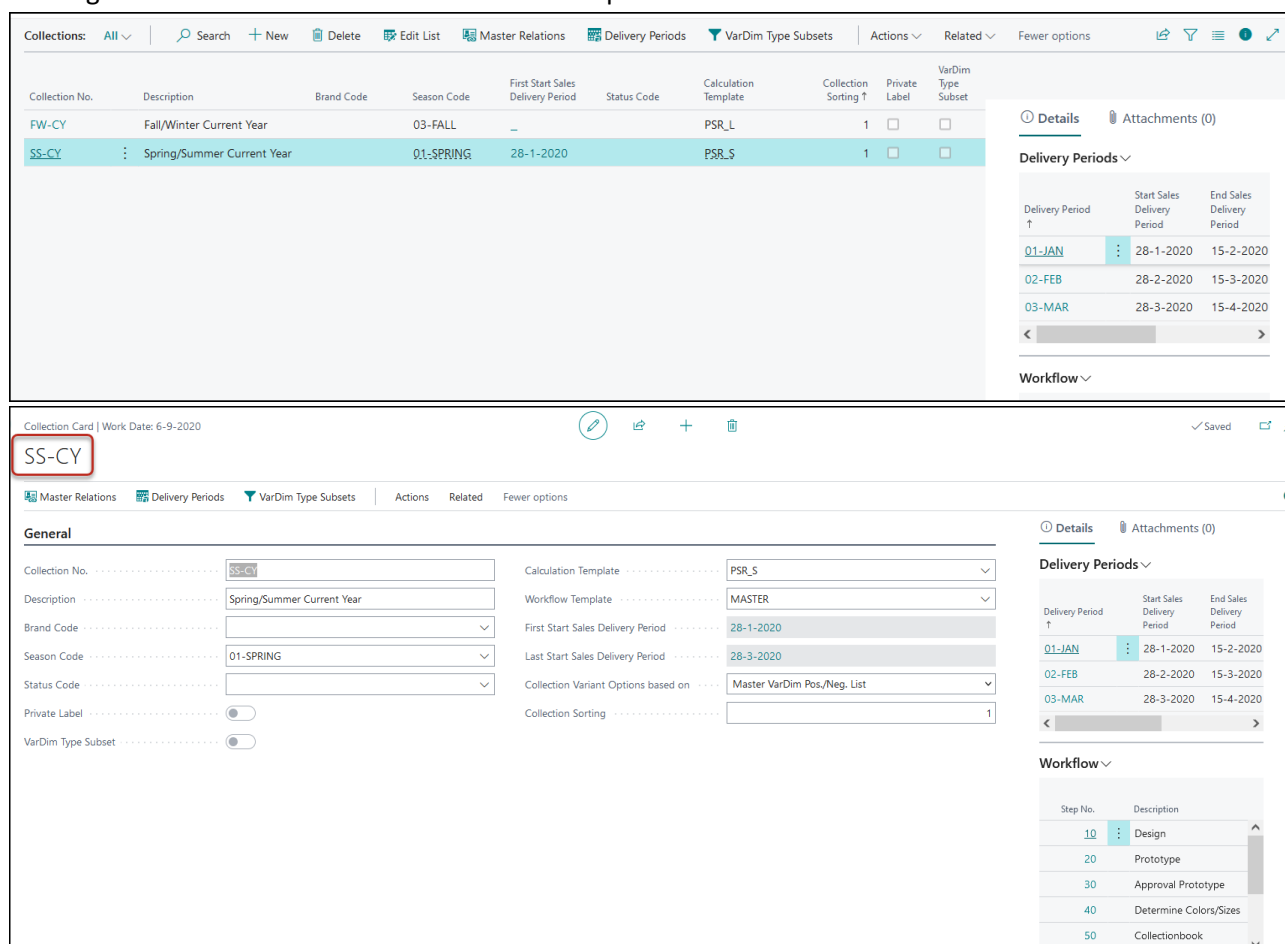
Keep in mind however, that if you want to make use of Collections + Delivery Periods (option 2 of page 9) or of Shipment Groups (option 3 of page 9) you can only connect Masters according to the first way described on this page, because the second and third way of connecting Masters to a Collection are not handling the Shipment Groups.

COLLECTIONS

You can create the Collections via **Search Collections**, or when using the **TRIMIT Small Business** Role Center by clicking **Product Design, Collections** or when using the **TRIMIT PDM/Design** Role Center by clicking **Collections**.



Clicking **+ New** or click on the **Collection No.** will open the **Collection Card**:



Collection Card

DESCRIPTION OF THE FIELDS

COLLECTION NO.

This is the Code for the Collection.

If the **Collection Dimension** is filled in the General Ledger Setup, the system will also create a Dimension Value for this Dimension with the same code as your new Collection No.

GLOBAL DIMENSIONS

The **Global Dimension 1 Code** (Caption = *Brand Code* in the Demo Company) and **Global Dimension 2 Code** (Caption = *Season Code* in the Demo Company) can be filled.

By default, this value will be transferred to the corresponding field in the following situations:

- When you create a new Master by use of the Master Wizard and fill in the **Collection No.** field, the **Global Dimension 1 (or 2) Code** of the **Collection No.** will by default be transferred to the **Global Dimension 1 (or 2) Code** field of the Master.
Afterwards you can manually change the **Global Dimension 1 (or 2) Code** of the Master, unless the **Global Dimension 1 (or 2) Code** is used as **Collection Dimension**.
- When you enter a **Collection No.** into the **Collection No.** field of an existing Master, the **Global Dimension 1 (or 2) Code** of the Collection No. will by default be transferred to the **Global Dimension 1 (or 2) Code** field of the Master, provided that a value has not already been filled into the Master.
Afterwards you can manually change the **Global Dimension 1 (or 2) Code** of the Master, unless the **Global Dimension 1 (or 2) Code** is used as **Collection Dimension**.
- When you enter a **Collection No.** into the **Collection No.** field of a Sales Header, the **Global Dimension 1 (or 2) Code** of the Collection No. will by default be transferred to Sales Lines of the Type *Item*, unless the **Global Dimension 1 (or 2) Code Sales Order** has been set to *From Item No.* in the Sales & Receivables Setup.
Afterwards you can manually change the **Shortcut Dimension 1 (or 2) Code** of the Sales Line, unless the **Global Dimension 1 (or 2) Code** is used as **Collection Dimension**.
- When you enter a **Collection No.** into the **Collection No.** field of a Purchase Header, the Global Dimension 1 (or 2) Code of the Collection will by default be transferred to Purchase Lines of the Type *Item*, unless the **Global Dimension 1 (or 2) Purchase Order** has been set to *From Item No.* in the Purchases & Payables Setup.
Afterwards you can manually change the **Shortcut Dimension 1 (or 2) Code** of the Purchase Line, unless the **Global Dimension 1 (or 2) Code** is used as **Collection Dimension**.

STATUS CODE

You can enter a **Status Code** for the Collection No.

However, it is also possible to connect a Workflow to the Collection. If you would approve a Step of this Workflow, the **Assign Status Code** of this Step in the Workflow will overwrite the **Status Code** of the Collection No.

The Status Code of a Collection No. makes sure, that i.e., you cannot choose old Collections anymore in Sales-/Purchase Orders or cannot choose upcoming Collections yet because they are still under construction.

PRIVATE LABEL

It is possible to set a Collection No. as a **Private Label** Collection by connecting **Customers** (this will be checked with the Sell-to Customer, Bill-to Customer, Company Group and Chain) and/or **Countries** to the Collection No. Such a Collection No. can then only be chosen in a Sales Order if the Customer or Sell-To Customer Country is connected to the Collection No.

This field is a calculated field (showing *Yes* or *No*) indicating if one or more Private **Labels** are related to the Collection No.

VARDIM TYPE SUBSET

It is possible to set specific **VarDim Type Subsets** (part of the Values within a VarDim Type) for a Collection No.

This field is a calculated field (showing *Yes* or *No*) indicating if one or more VarDim Type Subsets are related to the Collection No.

CALCULATION TEMPLATE

You can enter a **Calculation Template** for the Collection No. that can be used to create Calculations for all the related Masters instantly.

More regarding the Calculations can be found in the **White Paper – TRIMIT Calculations**

WORKFLOW TEMPLATE

The information of the **Workflow Template** is comparable with the Collection **Workflow** that will be described later (see [Workflow](#)).

When you create a new Master using the Wizard, you can enter a **Collection No.** for this new Master and to copy the Workflow from the Template Number (Master). A checkmark in **Copy Workflow** means that the Workflow of the Template Number (Master) will be copied into the new Master.

If you do not have a checkmark in **Copy Workflow** but do have a **Workflow Template** on the **Collection No.** for the new Master, the Steps of that Workflow Template will be copied into the new Master.

In that case, the Code of the **Collection No.** will also be filled in the Lines of the Workflow for the new Master. This also means, that if you Close a Step with an **Assign Status Code**, the **Status Code** of the **Collection Master Relation** will be changed; not the **Status Code** of the **Master** itself!

Workflow for trm Master: 2011 | Work Date: 6-9-2020 ✓ Saved

Search + New Edit List Delete Create from Template Copy Comments More options

Step No.	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Closing Date	Closed by Type	Closed By	Assign Status Code	Collection No.
→ 10	Idea (Story Board)	22-3-2020	User Group	DESIGN	☐		User		IDEA	SS-CY
20	Design	5-4-2020	User Group	DESIGN	☐		User			SS-CY
30	Proto Sample	3-5-2020	Vendor		☐		User			SS-CY
40	Quality Check Proto Sample	10-5-2020	User Group	DESIGN	☐		User		APPROVED	SS-CY
50	Fit Sample	14-6-2020	Vendor		☐		User			SS-CY
60	Quality Check Fit Sample	21-6-2020	User Group	DESIGN	☐		User			SS-CY
70	Ordering Salesmen Samples	28-6-2020	User Group	PURCHASE	☐		User			SS-CY
80	Salesmen Samples Received	30-8-2020	User Group	LOGISTICS	☐		User			SS-CY
90	Start Pre-Sales	6-9-2020	User Group	SALES	☐		User		READY	SS-CY

Workflow based on Workflow Template of Collection SS-CY

NOTE

This **Workflow Template** will be different from the Collection Workflow: the Steps you need to carry out for a total Collection No. can also include i.e., Promotion Activities or changing your Website where this Workflow Template will have Master related Steps.

NOTE

Be aware that if you use the **Workflow Template** in the **Collection No.**, the Step with the **Deadline Date Formula** in the Workflow Template will result in the Work Date for the Step in the actual created new Master Workflow, because you are not able to enter manually a Date for this **Deadline Date Formula** *OD*.

FIRST START SALES DELIVERY PERIOD

This field is a calculated field showing the earliest **Start Sales Delivery Period** related to the current Collection No. based on connected **Delivery Periods**.

If this field is empty, no **Delivery Periods** are related to the Collection No.

You cannot enter a **First Start Sales Delivery Period** manually.

LAST START SALES DELIVERY PERIOD

This field is a calculated field showing the latest **Start Sales Delivery Period** related to the current Collection No. based on connected **Delivery Periods**.

If this field is empty, no **Delivery Periods** are related to the Collection No.

You cannot enter a **Last Start Sales Delivery Period** manually.

COLLECTION VARIANT OPTIONS BASED ON

This field determines which Colors/Sizes/etc. you can select if you create the **Collection Master Relations**. It will overrule the corresponding Parameter in the Inventory Setup.

You can choose between the following two options:

Master VarDim Pos./Neg. List	The Options Var 1-9 you can choose for a specific Collection Master Relations depends on the possible Variants that are related to the Master.
Collection VarDim Type Subset	The Options Var 1-9 you can choose for a specific Collection Master Relations depends on the possible variants that have been selected via the VarDim Type Subset of the Collection.

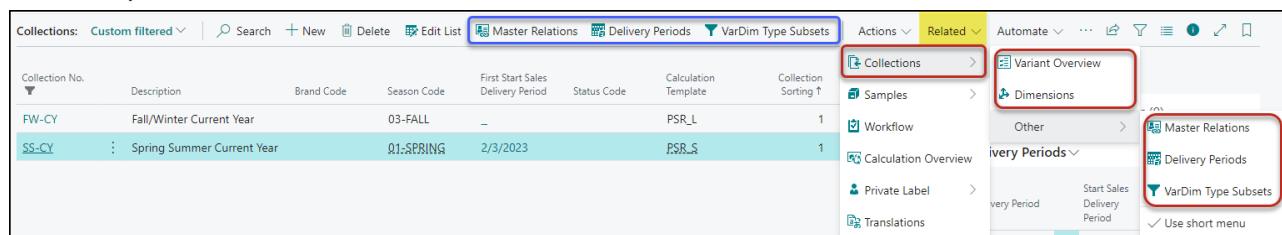
SORTING

In this field, an Integer can be filled to sort and show the Collections in another sorting as simply by the Code of the Collection.

The default is 1.

RELATED ON THE COLLECTION LIST/CARD

RELATED, COLLECTIONS



*Related, Collections – **Variant Overview** is only on the Collections List, not on the Collection Card.*

VARIANT OVERVIEW (ONLY ON THE LIST)

Via clicking **Related, Collections, Variant Overview**, you can get an overview of Masters related to the Collection No. and the Variants of a specific VarDim Type of the Masters.

It can also be found via **Search Master Variant Overview**

I.e., it can give you an overview, which Colors (or other Variants) of Masters might be part of a Collection No., so you are able to see if your Collection is equally divided over the Colors (Variants), instead of 50 % red, and only 50% of other colors.

Edit - Master Variant Overview

Search Update Master Card More options

Filter Type Matrix Show all Options Only Used
VarDim Type COLOR_1 Show in Cell Exist
Collection Filter SS-CY

No.	Description	Description 2	Group Master	01 - White [1]	20 - Royal Blue [4]	21 - Light Blue [2]	25 - Navy [2]	30 - Yellow [3]	35 - Orange [2]	37 - Dark Orange [1]	60 - Forest Green [4]	65 - Lawn Green [2]	70 - Red [4]	73 - Pink [2]	75 - Magenta [2]	80 - Purple [1]	99 - Black [3]
→ 2000	Olivia Trousers				1		1	1	1		1		1				
2011	Trouser		1														1
2100	Lily Blouse				1	1		1	1	1	1	1	1	1	1	1	1
2110	Mia Blouse							1			1		1	1			
2120	Sophia Shirt				1	1											1
2300	Daisy Dress				1		1				1	1	1		1		

< >

Close

DESCRIPTION OF THE FILTER SETTINGS

FILTER TYPE

You can choose between the following two options:

Matrix	This will show the Variants of the VarDim Type
Assortment	This will only show the Assortments of the VarDim Type

If you change the content of this filter, you need to click **Update**.

VARDIM TYPE

You need to enter a **VarDim Type** for which you want to see the Matrix Overview.

If you change the content of this filter, you need to click **Update**.

COLLECTION FILTER

You can enter the **Collection No.** for which you want the Matrix Overview shown.

If you do not enter a **Collection No.**, you will simply see ALL Masters.

If you change the content of this filter, you need to click **Update**.

SHOW ALL OPTIONS

You can choose between the following three options:

Only Used	This will only show the Variants of the Masters that are part of the Collection Filter in the columns.
All on Masters	This will only show all the Variants of the Masters in the columns.
All	This will show all the Variants of the chosen VarDim Type in the columns.

If you change the content of this filter, you need to click **Update**.

If you have chosen *All on Masters* or *All*, and the Variant of the Master is not part of the **Collection Filter** an Asterisk (*) will be shown in the Matrix Overview.

SHOW IN CELL

You can choose between the following two options:

Exist	You will see a one (1) in the Matrix Overview if the Variant is applicable based on the filters.
Variant Name	This will see the name of Variant for the Master (i.e., <i>White</i>) in the Matrix Overview if the Variant is applicable based on the filters.

MASTER RELATIONS (OR CTRL+F11)

Via clicking **Master Relations**, you can connect Masters (with selected Variants) to a Collection No.
How to connect Masters to a Collection No. will be described in [Connecting Masters](#)

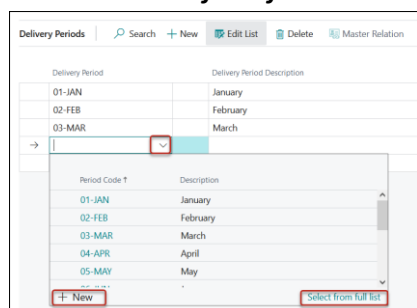
DELIVERY PERIODS (OR SHIFT+F11)

Via clicking **Delivery Periods**, you can create and maintain the **Delivery Periods** of a Collection No.

If you want to use **TRIMIT Collection Management Option 2** (page 9) where a Collection No. is divided into several **Delivery Periods**, you need to connect the **Delivery Periods** first to the Collection No.

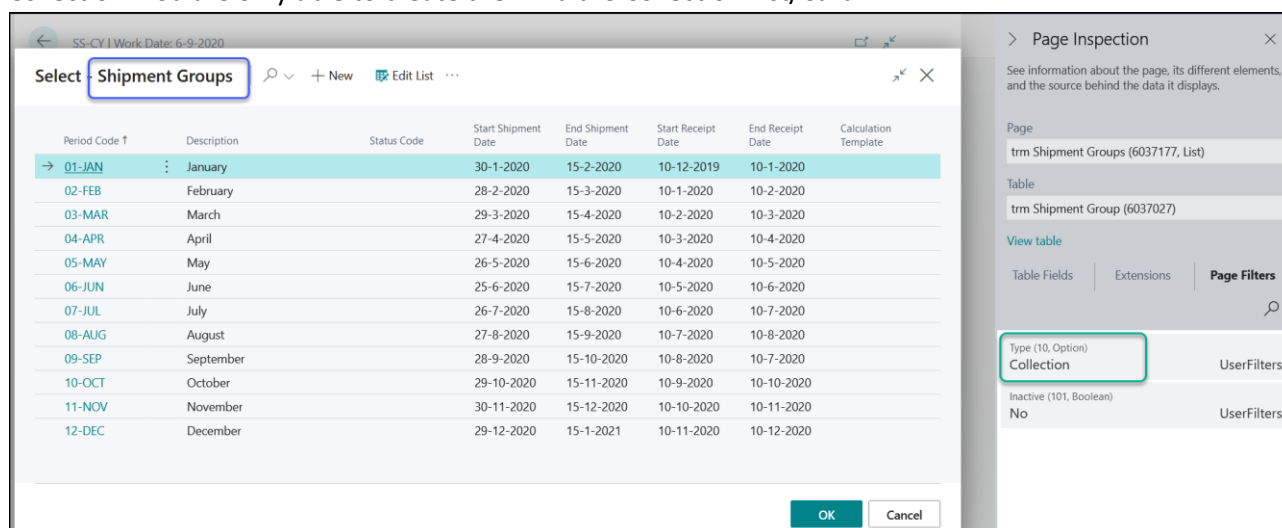
Afterwards, you can connect Masters and/or Master Variants to the **Delivery Periods** (see [Master Relations to a Collection Delivery Period](#))

You can maintain and create a specific **Delivery Period** by clicking in the field **Delivery Period** and click **+ New** or **Select from full list**.



Look up Delivery Period

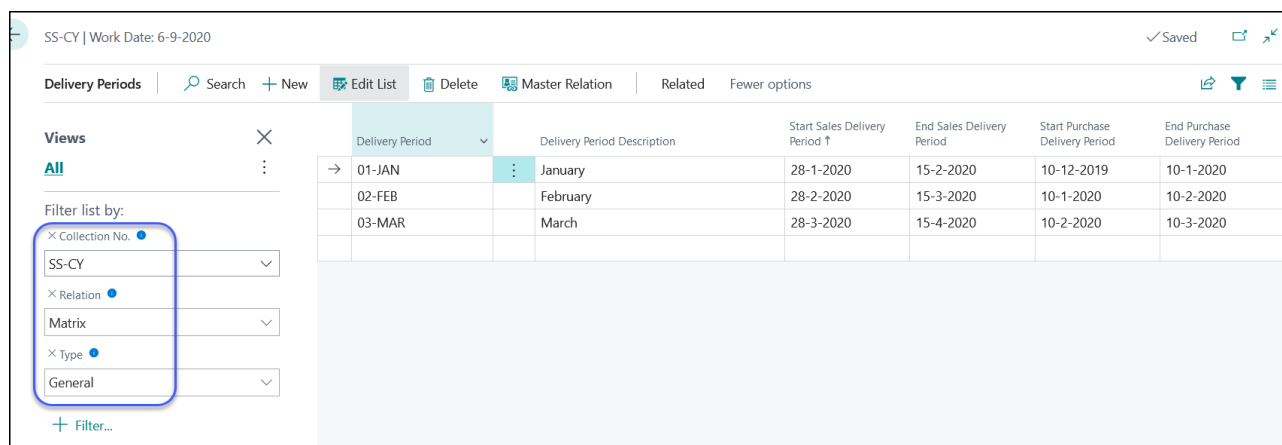
Although the page is called **Shipment Groups** the filter is set to **Type = Collection**: the so-called **Delivery Periods**. These are also the only **Period Codes** you can select from the table: the ones with **Type = Collection**. You are only able to create them via the Collection List/Card.



Period Code	Description	Status Code	Start Shipment Date	End Shipment Date	Start Receipt Date	End Receipt Date	Calculation Template
01-JAN	January		30-1-2020	15-2-2020	10-12-2019	10-1-2020	
02-FEB	February		28-2-2020	15-3-2020	10-1-2020	10-2-2020	
03-MAR	March		29-3-2020	15-4-2020	10-2-2020	10-3-2020	
04-APR	April		27-4-2020	15-5-2020	10-3-2020	10-4-2020	
05-MAY	May		26-5-2020	15-6-2020	10-4-2020	10-5-2020	
06-JUN	June		25-6-2020	15-7-2020	10-5-2020	10-6-2020	
07-JUL	July		26-7-2020	15-8-2020	10-6-2020	10-7-2020	
08-AUG	August		27-8-2020	15-9-2020	10-7-2020	10-8-2020	
09-SEP	September		28-9-2020	15-10-2020	10-8-2020	10-7-2020	
10-OCT	October		29-10-2020	15-11-2020	10-9-2020	10-10-2020	
11-NOV	November		30-11-2020	15-12-2020	10-10-2020	10-11-2020	
12-DEC	December		29-12-2020	15-1-2021	10-11-2020	10-12-2020	

Delivery Periods (Shipment Groups) for Collections (Dates can be different)

If you select a **Shipment Group** with **Type = Collection** you are still able to change the Description and Dates for this specific Collection **Delivery Period**.



Delivery Period	Delivery Period Description	Start Sales Delivery Period ↑	End Sales Delivery Period	Start Purchase Delivery Period	End Purchase Delivery Period
01-JAN	January	28-1-2020	15-2-2020	10-12-2019	10-1-2020
02-FEB	February	28-2-2020	15-3-2020	10-1-2020	10-2-2020
03-MAR	March	28-3-2020	15-4-2020	10-2-2020	10-3-2020

Fig. 17 Delivery Periods for Collections SS-CY

The **Start Sales Delivery Period** of an applicable **Delivery Period** in a Sales Line will determine the **Shipment Date** and is therefore also the Date for the Availability.

The **End Purchase Delivery Period** of an applicable **Delivery Period** in a Purchase Line will determine the **Expected Receipt Date** and is therefore also the Date for the Availability.

The other two dates (**End Sales Delivery Period** and **Start Purchase Delivery Period**) are only informative and have no meaning in the rest of the system.

You could use them in customized Documents like Sales Order Confirmation or Purchase Order.

NOTE

If you need new **Delivery Periods** to be connected to Collections, you need to create them via the above page of the **Delivery Periods** by using the lookup on the field **Delivery Period** and press **New**.

Only then it becomes a Shipment Group with **Type** = *Collection* and can be connected to a Collection.

A Shipment Group created via **Search Shipment Groups** will get **Type** = *Shipment Group* and cannot be connected to a Collection!

VARDIM TYPE SUBSETS (F7)

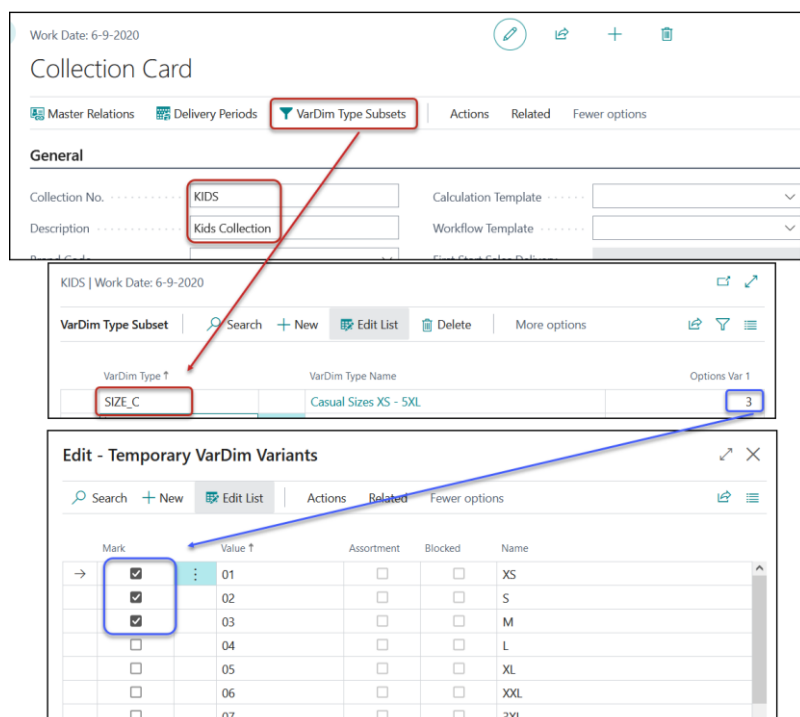
Via clicking **VarDim Type Subsets**, you can create subsets of Variants per **VarDim Type** with **Type Variant**.

The setup of the **VarDim Type Subset** only has an effect when you create new Masters by use of the Wizard. If you select a Collection No. for the new Master for which Subsets have been created, you are only able to choose Values (i.e., Colors and Sizes) that are in the Subsets.

If you would create a Master manually and would enter a Collection No. in the Card, the Subsets will be disregarded; you are able to choose any Value of the VarDim Types.

This could mean that for a Summer Collection you only want to use the bright Colors of a Color table and for a Winter Collection only can use the darker Colors of the same Color table.

Alternatively, for a Kids Collection *KIDS* you only can use the sizes XS, S and M from Size Table *SIZE_C* as shown in the example below.



VarDim Type Subset of Collections KIDS and VarDim Type SIZE_C

Besides the filtering on Variants that can be used when copying a Master by Wizard, the **VarDim Type Subset** will also filter the Variants (Matrix) when entering a Sales Line for a Master in a Sales Order with a specific Collection No.

In that case, only the Variants selected in the **VarDim Type Subset** can be chosen.

DESCRIPTION OF THE FIELDS

VARDIM TYPE

You can enter a **VarDim Type** for which you want to enter a limited number of Values. The **VarDim Type Name** is shown automatically.

OPTIONS VAR1

Press **Alt+Arrow Down** to see the total list of the Values of the **VarDim Type**. Choose the Values that are valid for this Collection No. and **VarDim Type** by putting a checkmark in front of the Value.

If you press the **OK** button you will see, that in the field of **Options Var1** the number of chosen Values (in the picture above 3) will be shown.

If **Options Var1** has the value 0, it means that simply none of the Values are valid.

DIMENSIONS (CTRL+SHIFT+D)

Via clicking **Dimensions**, you can see the Global Dimensions (Brand and Season) that you have already connected to the Collection No., and the Dimension **Collection** (because of the **Collection Dimension** in the **General Ledger Setup**) will be filled with the Collection No.

You are also able to connect more financial Dimensions to the Collection.

That means that if you create Masters by Wizard and enter the Collection No., these Dimensions will also be copied into the Dimensions of the Master.

I.e., for the Collection SS-CY:

Collection **SS-CY** | Work Date: 6-9-2020 ✓ Saved

Default Dimensions | Search + New Edit List Delete

Dimension Code ↑	Dimension Value Code	Value Posting	Allowed Values Filter
→ COLLECTION	SS-CY		-

Dimensions of Collection SS-CY

RELATED, SAMPLES

Collection Card

SS-CY

Master Relations Delivery Periods VarDim Type Subsets Actions Related Automate Fewer options

General

Collection No. SS-CY

Description Spring Summer Current Year

Collections

Samples

Workflow

Sample Master Relations

Sample Delivery Periods

When selecting an Order Type in a Sales-/Purchase Order it is also possible to state that the Order Type is used for Samples.

This means that if you enter a Collection No. in a Sales-/Purchase Order, and you have a checkmark in the field **Samples** of the Order Type, that only Masters (or variants of Masters) that are connected to a Collection using **Sample Master Relations** or **Sample Delivery Periods** will be shown and accepted in the Sales-/Purchase Order.

Via clicking **Samples, Sample Master Relations** (comparable with **Master Relations**), you can connect Masters/Variants to the Sample Collection.

Via clicking **Samples, Sample Delivery Periods** (comparable to **Delivery Periods**), you can connect **Delivery Periods** to the Sample Collection, and afterwards the Masters/Variants per **Delivery Period**.

RELATED, WORKFLOW

Via clicking **Related, Workflow**, you can connect a specific Workflow to your Collection No. to be able to track the different Steps that have to be carried out for the Collection No.

Workflow for trm Collection: SS-CY | Work Date: 6-9-2020 ✓ Saved

Search + New Edit List Delete Create from Template Copy Comments More options

Step No.	Depending on Steps	Awaiting Previous	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Closing Date	Closed by Type	Closed By	Assign Status Code	Collection No.
→ 10	0	☐	Design	1-7-2019	User		☐		User		IDEA	SS-CY
20	0	☐	Prototype	17-7-2019	User		☐		User			SS-CY
30	20	☒	Approval Prototype	10-8-2019	User		☐		User			SS-CY
40	0	☐	Determine Colors/Sizes	15-8-2019	User		☐		User		APPROVED	SS-CY
50	40	☒	Collectionbook	31-8-2019	User		☐		User		READY	SS-CY
60	40	☒	Marketing	30-9-2019	User		☐		User			SS-CY
70	40	☒	Sales	30-11-2019	User		☐		User			SS-CY
80	50	☒	Website	31-12-2019	User		☐		User			SS-CY

DESCRIPTION OF THE FIELDS

STEP NO.

Enter a number for the Step. It is always beneficial to jump by 10 between each Step. This provides the option of inserting a Step at a later point and places it at the desired spot in the list.

DEPENDING ON STEPS

This field is not by default in the page; you need to add it manually if you want to see it.

You can lock for closing the current Step if the beforehand Step has yet to be approved.

AWAITING PREVIOUS

This field is not by default in the page; you need to add it manually if you want to see it.

This field is automatically set by the system if the **Depending on Steps** is filled. This field will get a checkmark if the **Depending on Step No.** is not approved yet.

DESCRIPTION

Description for this Step No.

DEADLINE

Enter a date at which the activity should be closed (finished).

RESPONSIBLE ID TYPE

This is the Type of the **Responsible ID** entry.

You can choose between the following three options:

User	Responsible ID will be a User of the system.
User Group	Responsible ID will be a User Group in the system.
Vendor	Responsible ID will be a Vendor in the system.
Customer	Responsible ID will be a Customer in the system.

NOTE

Usually, the Type will be *User* or *User Group* for all the Steps.

The Type *Vendor* can be used if you want the **Step** also be visible on the **TRIMIT Supplier Portal**, but this is not applicable for the Workflow of the Collections, only for the Workflow of individual Masters.

The Type *Customer* is not yet implemented in the portals. You could use it however i.e., for a Private Label Collection. In that case, you could use the Type *Customer* to emphasize that the Customer should approve the Step.

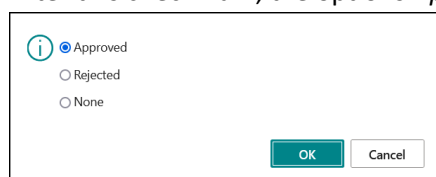
RESPONSIBLE ID

Here you choose the User, User Group, Customer or Vendor responsible for approving the Step depending on the previous field **Responsible ID Type**.

CLOSED

The person responsible for the Step enters a checkmark when it is *Closed* (finished).

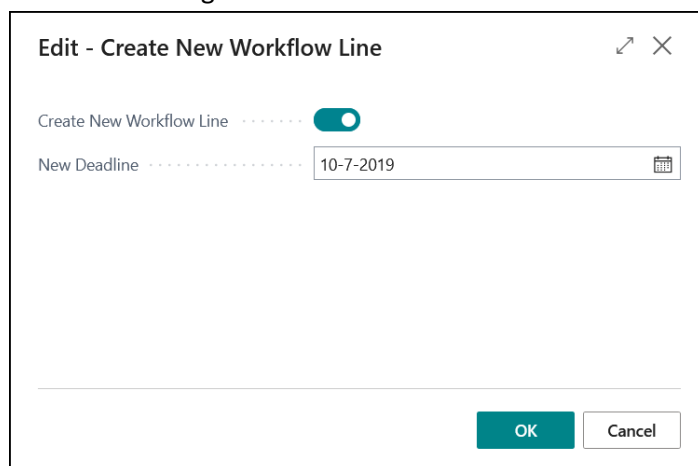
After this checkmark, the options *Approved*, *Rejected* and *None* will be shown.



In case of *Approved*, the **Closed Date** will automatically be filled, the **Closed by Type** will automatically be filled with *User*, the **Closed By** will be filled with the User ID of the person that entered the checkmark on the field **Closed**, and a checkmark will be placed in the field **Approved**.

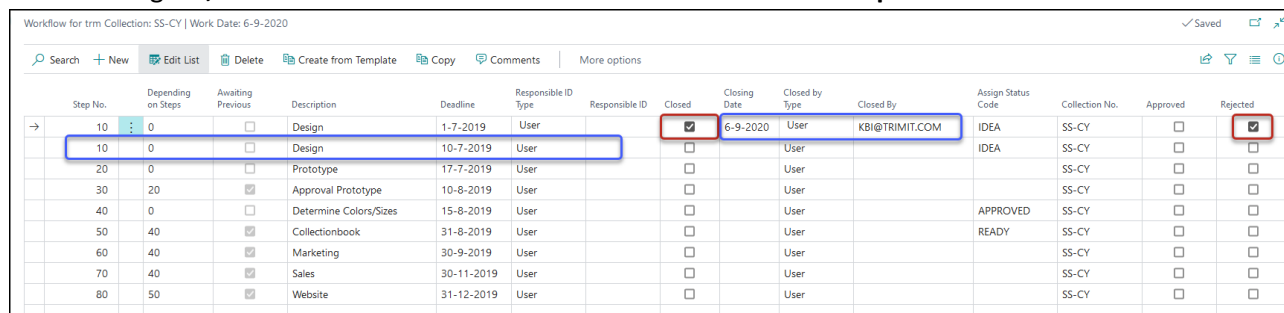
In case of *Rejected*, the **Closed Date** will automatically be filled, the **Closed by Type** will automatically be filled with *User*, the **Closed By** will be filled with the User ID of the person that entered the checkmark on the field **Closed**, and a checkmark will be placed in the field **Rejected**.

But also, a dialog page will open, where you can decide if you want to **Create New Workflow Line** with a **New Deadline** again:



The dialog box titled "Edit - Create New Workflow Line" contains a toggle switch for "Create New Workflow Line" which is currently turned on. Below it, there is a text field for "New Deadline" with the value "10-7-2019" and a calendar icon. At the bottom right, there are "OK" and "Cancel" buttons.

After clicking **OK**, a new Workflow Line will be created with the same **Step No.**



Step No.	Depending on Steps	Awaiting Previous	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Closing Date	Closed by Type	Closed By	Assign Status Code	Collection No.	Approved	Rejected
10	0	☐	Design	1-7-2019	User		☒	6-9-2020	User	KBI@TRIMIT.COM	IDEA	SS-CY	☐	☒
10	0	☐	Design	10-7-2019	User		☐		User		IDEA	SS-CY	☐	☐
20	0	☐	Prototype	17-7-2019	User		☐		User			SS-CY	☐	☐
30	20	☒	Approval Prototype	10-8-2019	User		☐		User			SS-CY	☐	☐
40	0	☐	Determine Colors/Sizes	15-8-2019	User		☐		User		APPROVED	SS-CY	☐	☐
50	40	☒	Collectionbook	31-8-2019	User		☐		User		READY	SS-CY	☐	☐
60	40	☒	Marketing	30-9-2019	User		☐		User			SS-CY	☐	☐
70	40	☒	Sales	30-11-2019	User		☐		User			SS-CY	☐	☐
80	50	☒	Website	31-12-2019	User		☐		User			SS-CY	☐	☐

In case of *None*, the **Closed Date** will automatically be filled, the **Closed by Type** will automatically be filled with *User* and the **Closed By** will be filled with the User ID of the person that entered the checkmark on the field **Closed**.

NOTE

If you want to emphasize that the Customer has approved this Step of i.e., a Private Label Collection you can change the **Closed by Type** and **Closed by** manually.

If a Vendor via the TRIMIT Supplier Portal approves a Workflow Step, **Closed by Type** will be filled with *Vendor* and **Closed By** will be filled by the Vendor.

The fields **Approved** and **Rejected** are not in the page by default; you need to add them.

ASSIGN STATUS CODE

You can set some benchmarks. If a Step with an **Assign Status Code** is approved the Status will also be shown as the **Status Code** of the Collection No. – even when you may have changed the **Status Code** of a Collection manually it will be overwritten.

APPROVED

This field will automatically be set by the system if you **Close** the step with an *Approve*.

This field is not by default in the page.

REJECTED

This field will automatically be set by the system if you **Close** the step with *Rejected*.

This field is not by default in the page.

COLLECTION NO.

This will by default be filled with the **Collection No.** for which this Workflow was created.

This field is not by default in the page.

SHIPMENT GROUP

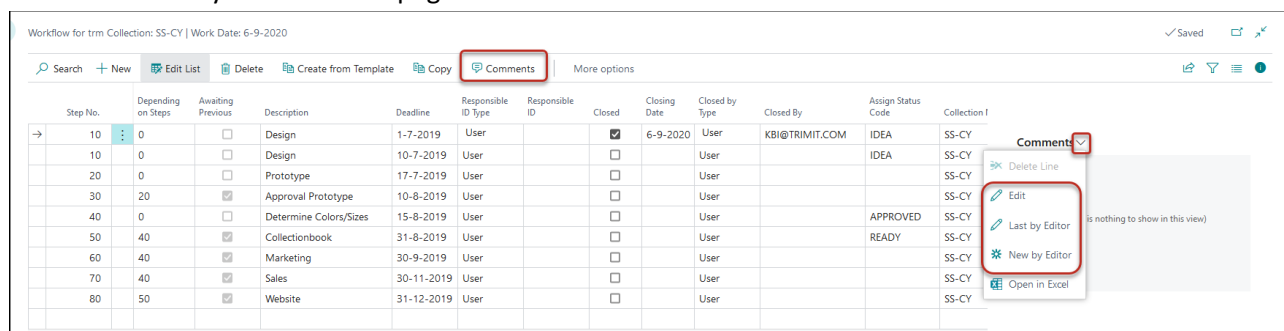
If a Step in the Workflow of a Collection is specifically mending for a **Delivery Period**, you can enter the Delivery Period here.

This field is not by default in the page.

COMMENT

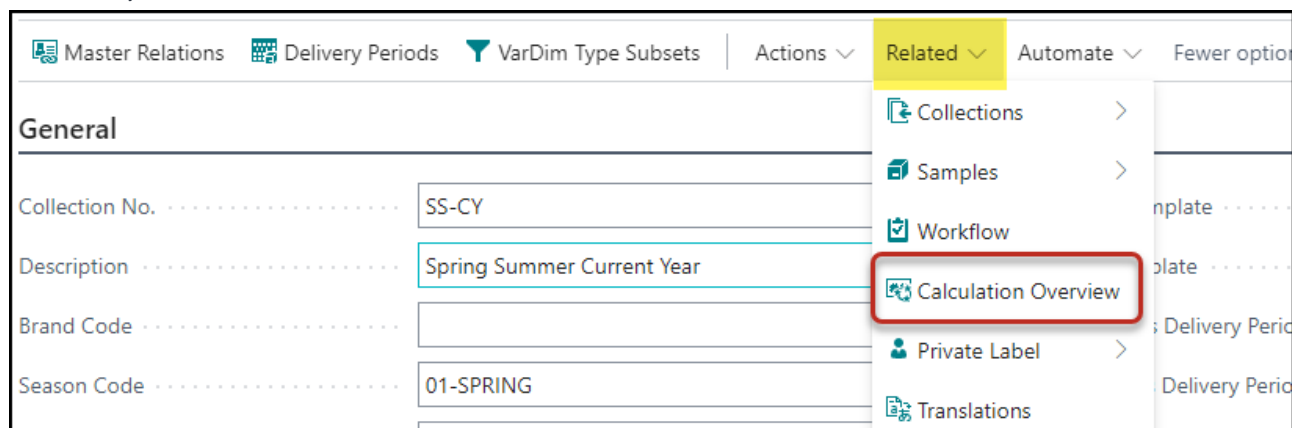
You can write a comment to the specific Step by clicking **Comments** or via the FactBox **Comments**. This comment will typically be used to explain why this line is not Approved, etc.

This field is not by default in the page.



Step No.	Depending on Steps	Awaiting Previous	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Closing Date	Closed by Type	Closed By	Assign Status Code	Collection I
10	0	☐	Design	1-7-2019	User		☒	6-9-2020	User	KBH@TRIMIT.COM	IDEA	SS-CY
10	0	☐	Design	10-7-2019	User		☐		User		IDEA	SS-CY
20	0	☐	Prototype	17-7-2019	User		☐		User			SS-CY
30	20	☒	Approval Prototype	10-8-2019	User		☐		User			SS-CY
40	0	☐	Determine Colors/Sizes	15-8-2019	User		☐		User		APPROVED	SS-CY
50	40	☒	Collectionbook	31-8-2019	User		☐		User		READY	SS-CY
60	40	☒	Marketing	30-9-2019	User		☐		User			SS-CY
70	40	☒	Sales	30-11-2019	User		☐		User			SS-CY
80	50	☒	Website	31-12-2019	User		☐		User			SS-CY

RELATED, CALCULATION OVERVIEW



General	
Collection No.	SS-CY
Description	Spring Summer Current Year
Brand Code	
Season Code	01-SPRING

Via clicking **Related, Calculation Overview**, you can get an overview of existing Calculations for the Masters in the Collection. You are even able to create new Calculations via this page.

For more details on the **Calculation Overview**, see the **White Paper – TRIMIT Calculations**.

Calculation Overview | Work Date: 6-9-2020
✓ Saved

Search
Calculation
Next Overview Setup
Actions
Related
Fewer options

General

Called from **Collection**
Calculation Template Filter PSR_S
Specified for SS-CY
Overview Setup ALL
More Templates Used

Exist	No. ↑	Version No. ↑	Description	Status Code	Brand Code	Season Code	Design	Item Group	Gender	Item Statistics Group 4	Item Statistics Group 5	Loc...	Purchase Price	Purchase Costs %	Unit Cost	Sales Costs %	Sales Marg %
☒	2000	S	Olivia Trousers	READY	FASHION		1	210	110	0	10	☐	12.17	10%	13,39	5%	80%
☒	2011	S	Trouser	READY	FASHION	01-SPRING	1	210	110	0	20	☐	21.41	10%	23,55	5%	80%
☒	2100	S	Lily Blouse		FASHION	02-SUMMER	1	110	110	0	20	☐	16.47	10%	18,12	5%	80%
☒	2110	S	Mia Blouse		FASHION	02-SUMMER	5	110	110	0	20	☐	22.50	10%	24,75	5%	80%
☒	2120	S	Sophia Shirt	READY	FASHION	02-SUMMER	5	110	110	0	20	☐	11.72	10%	12,90	5%	80%
☒	2300	S	Daisy Dress		FASHION	02-SUMMER	1	155	110	0	30	☐	26.34	10%	28,97	5%	80%
→ ☒	4710	S	Scarlett Shoe		SHOES		5	320	110	0	40	☐	25.83	10%	28,42	5%	80%

Creation Values

Creation Calculation Template PSR_S
Creation Version No. S

RELATED, PRIVATE LABEL

You can set a Collection as a **Private Label** Collection by connecting Customer(s) and/or Country/Region(s) to it.

Master Relations
Delivery Periods
VarDim Type Subsets
Actions
Related
Automate
Fewer options

General

Collection No. SS-CY
Description Spring Summer Current Year
Brand Code
Season Code 01-SPRING

Collections
Samples
Workflow
Calculation Overview
Private Label
Translations
Customer
Country/Region

CUSTOMER

Via clicking **Related, Private Label, Customer**, you can specify the current Collection as a Private Label Collection specific for one or more Customers (this will be checked with the Sell-to Customer, Bill-to Customer, Company Group and Chain). I.e., Collection *PLSS* is only applicable for Customer *2020 Sportswear A/S*.

If this **Customer No.** is a *Bill-to Customer, Chain* or *Company Group* it also means that it is a Private Label Collection for the connected members (Customers) to this *Bill-to Customer, Chain* or *Company Group*.

Private Labels | Work Date: 6-9-2020

Search

+ New

Edit List

Delete

Views

×

All

⋮

Filter list by:

× Relation Name 2

PLSS

×

× Relation Type 1

Customer

×

× Relation Type 2

Collection

×

+ Filter...

Relation Name 1 ↑

→

2020

⋮

Relation 1 Description

Sportswear A/S, Viborg

COUNTRY/REGION

Via clicking **Related**, **Private Label**, **Country/Region**, you can specify the current Collection as a Private Label Collection specific for one or more Country/Regions. I.e., Collection *PLFW* is only applicable for Sell-To Customers with the Country/Region *DK Denmark*

Private Labels | Work Date: 6-9-2020

Search

+ New

Edit List

Delete

Views

×

All

⋮

Filter list by:

× Relation Name 2

PLFW

×

× Relation Type 1

Country/Region

×

× Relation Type 2

Collection

×

Relation Name 1 ↑

→

DK

⋮

Relation 1 Description

Denmark

Connecting one or more Customers means that if you select the **Collection No.** on a Sales Document (direct in the fields **Collection No.** or via the **Order Type**), you are only able to choose this specific Collection No. if the Sell-To Customer, Bill-To Customer, Chain or Company Group is connected to that Collection.

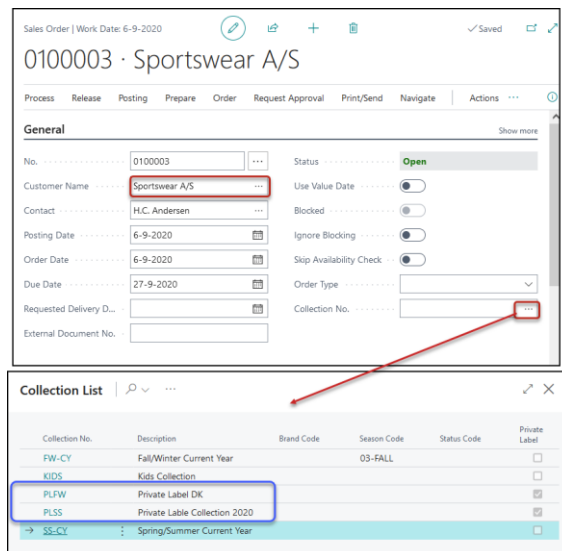
Connecting one or more Country/Regions means that if you select the **Collection No.** on a Sales Document (direct in the fields **Collection No.** or via the **Order Type**); you are only able to choose this specific Collection No. if the Country/Region of the Sell-To Customer is connected to that Collection.

An Example:

Customer 2020 is connected to Collection No. **PLSS**.

If I want to enter a Sales Order for Customer 2020 and press **Alt+Arrow Down** on the Collection No. field the Collection List is shown including the **PLSS** Collection.

If I would have a Sales Order for Customer 2000 and press **Alt+Arrow Down** on the Collection No. field the Collection List does not include the **PL** Collections.



Sales Order | Work Date: 6-9-2020

0100003 · Sportswear A/S

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions

General

No. 0100003 Status Open

Customer Name Sportswear A/S Use Value Date

Contact H.C. Andersen Blocked

Posting Date 6-9-2020 Ignore Blocking

Order Date 6-9-2020 Skip Availability Check

Due Date 27-9-2020 Order Type

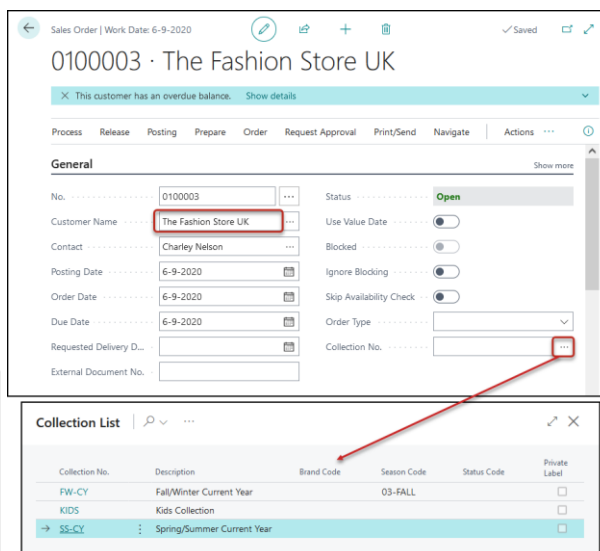
Requested Delivery D. External Document No.

Collection No.

Collection List

Collection No.	Description	Brand Code	Season Code	Status Code	Private Label
FW-CY	Fall/Winter Current Year		03-FALL		
KIDS	Kids Collection				
PLFW	Private Label DK				
PLSS	Private Label Collection 2020				
SS-CY	Spring/Summer Current Year				

Collections for Customer 2000



Sales Order | Work Date: 6-9-2020

0100003 · The Fashion Store UK

✖ This customer has an overdue balance. Show details

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions

General

No. 0100003 Status Open

Customer Name The Fashion Store UK Use Value Date

Contact Charley Nelson Blocked

Posting Date 6-9-2020 Ignore Blocking

Order Date 6-9-2020 Skip Availability Check

Due Date 6-9-2020 Order Type

Requested Delivery D. External Document No.

Collection No.

Collection List

Collection No.	Description	Brand Code	Season Code	Status Code	Private Label
FW-CY	Fall/Winter Current Year		03-FALL		
KIDS	Kids Collection				
SS-CY	Spring/Summer Current Year				

Collections for Customer 2020

NOTE

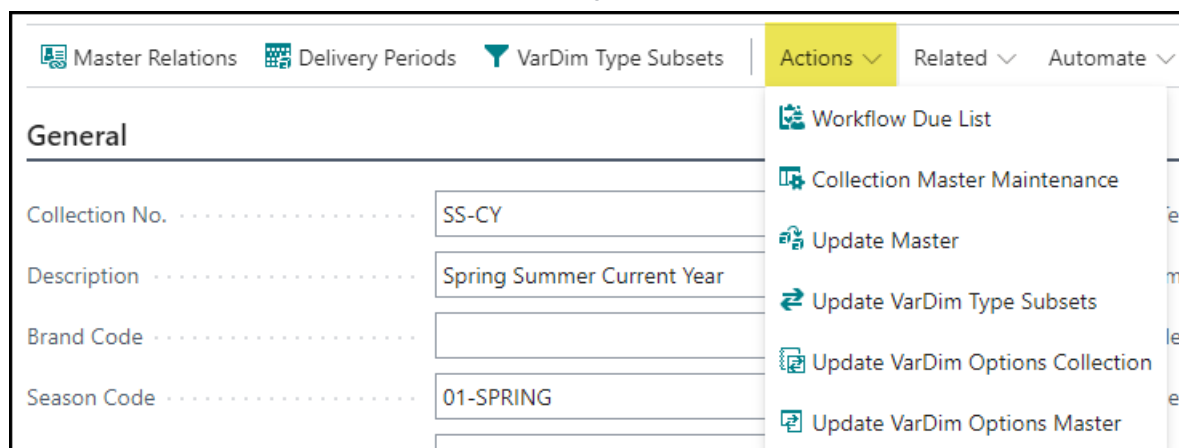
If you do this in the Demo Company, you might not see all “PL” Collections because of the Status Code of the Collections that is not available for Sales Orders. In that case: delete the Status Code of the two “PL” Collections, so you can see these Collections if you enter a Sales Order for Customer 2020.

This means that Collections with specific Customers/Countries attached can only be chosen in Sales Documents of these specific Customers/Countries.

If you want to make sure however that these Masters (connected to a Private Label Collection) can only be sold to these specific Customers/Countries, you need to connect the Customer/Country as Private Label to the Master itself (see [Private Label](#)).

Another way of setting this up would be to have all the Masters sold based on Collections and not connecting these specific Private Label Masters to other Collections.

ACTIONS ON THE COLLECTION LIST/CARD



The screenshot shows the 'Actions' dropdown menu for a collection card. The menu options are:

- Workflow Due List
- Collection Master Maintenance
- Update Master
- Update VarDim Type Subsets
- Update VarDim Options Collection
- Update VarDim Options Master

The collection card details are:

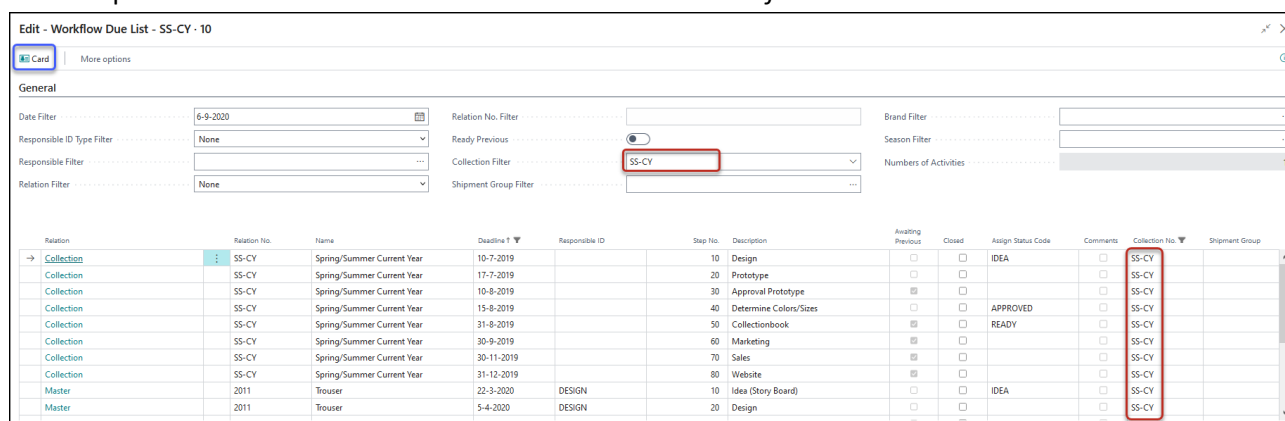
- Collection No.: SS-CY
- Description: Spring Summer Current Year
- Brand Code:
- Season Code: 01-SPRING

ACTIONS, WORKFLOW DUE LIST

By clicking **Actions, Workflow Due List**, you can open the page of the **Workflow Due List**, which will show you all the Steps of the present Collection No. (in the below figure field **Collection No.** in the Workflow Lines is SS-CY) that are not approved yet based on all the filters.

To get a complete overview of all the Workflow Steps you can simply change the filters.

It is also possible to see the **Workflow Due List** via **Search Workflow Due List**



The screenshot shows the 'Edit - Workflow Due List - SS-CY - 10' page. The 'Card' view is selected. The filters are:

- Date Filter: 6-9-2020
- Relation No. Filter:
- Brand Filter:
- Responsible ID Type Filter: None
- Ready Previous:
- Season Filter:
- Responsible Filter:
- Collection Filter: SS-CY
- Numbers of Activities: 17
- Relation Filter: None
- Shipment Group Filter:

The table below shows the workflow steps:

Relation	Relation No.	Name	Deadline ↑	Responsible ID	Step No.	Description	Awaiting Previous	Closed	Assign Status Code	Comments	Collection No.	Shipment Group
Collection	SS-CY	Spring/Summer Current Year	10-7-2019		10	Design	☐	☐	IDEA		SS-CY	
Collection	SS-CY	Spring/Summer Current Year	17-7-2019		20	Prototype	☐	☐			SS-CY	
Collection	SS-CY	Spring/Summer Current Year	10-8-2019		30	Approval Prototype	☐	☐			SS-CY	
Collection	SS-CY	Spring/Summer Current Year	15-8-2019		40	Determine Colors/Sizes	☐	☐	APPROVED		SS-CY	
Collection	SS-CY	Spring/Summer Current Year	31-8-2019		50	Collectionbook	☐	☐	READY		SS-CY	
Collection	SS-CY	Spring/Summer Current Year	30-9-2019		60	Marketing	☐	☐			SS-CY	
Collection	SS-CY	Spring/Summer Current Year	30-11-2019		70	Sales	☐	☐			SS-CY	
Collection	SS-CY	Spring/Summer Current Year	31-12-2019		80	Website	☐	☐			SS-CY	
Master	2011	Trouser	22-3-2020	DESIGN	10	Idea (Story Board)	☐	☐	IDEA		SS-CY	
Master	2011	Trouser	5-4-2020	DESIGN	20	Design	☐	☐			SS-CY	

DESCRIPTION OF THE FILTER FIELDS

DATE FILTER

In this Filter, you can limit your activities to a given Date.

RESPONSIBLE ID TYPE FILTER

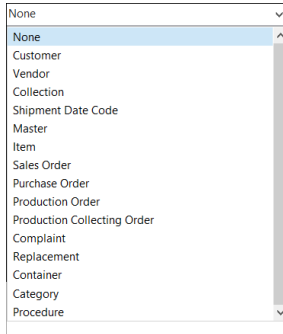
When coming in this page via the **Collection** the default is *None*. However, you can also filter on *User, User Group, Vendor, and Customer*

RESPONSIBLE FILTER

The Filter for the **Responsible ID Type Name** can be entered here.

RELATION FILTER

This field determines what related Steps you want to see. A Workflow can be related to many subjects:



RELATION NO. FILTER

If you selected a **Relation Filter** (besides *None*), you can also filter on a specific value.

I.e., Collection or Master.

READY PREVIOUS

With a checkmark in this field, you determine that you only want to see the steps, from which the previous Step is already approved.

COLLECTION FILTER

This Filter will be applicable to field **Collection No.** in the Workflow Lines.

I.e., if you have a Workflow connected to a Master, in the Steps you can determine that these Steps are related to a specific Collection No. (extra field in the Lines of the Workflow). If the **Relation Filter** is *Master* and you enter this **Collection Filter**, only these collection-related Steps of the Workflows of the Masters will be shown. It will however also show the Steps related to the **Collection SS-CY** itself.

SHIPMENT GROUP

This Filter will be applicable to field **Shipment Group** in the Workflow Lines.

I.e., if you have a Workflow connected to a Master, in the Steps you can determine that these Steps are related to a specific **Collection No.** and **Delivery Period** (if the **Collection Filter** is also filled) or to a specific **Shipment Group** (if the **Collection Filter** is not filled). If the **Relation Filter** is *Master*, and you enter this **Shipment Group Filter**, only these Shipment Group-related Steps of the Workflows of the Masters will be shown.

GLOBAL DIMENSION 1 (BRAND) FILTER

Here you can enter a Filter regarding the Brand. This filter will be checked with the Brand in the Steps.

GLOBAL DIMENSION 2 (SEASON) FILTER

Here you can enter a Filter regarding Seasons. This filter will be checked with the Season in the Steps.

NUMBER OF ACTIVITIES

Shows the number of open Steps of Workflows based on the Filters.

NOTE

If you are in a line, with pressing **Shift+F7**, or click **Card**, you will move directly into the appropriate Card of i.e., Collection, Master, Container, etc.

ACTIONS, COLLECTION MASTER MAINTENANCE

By clicking **Actions, Collection Master Maintenance**, you get an overview of Masters related to the **Collection No.** and/or **Collection Delivery Period** in which you are also able to make new Master Relations. After you have created the Collections and connected the Masters/Variants to it directly or to the Delivery Periods or Samples (see [Connecting Masters](#)) you can get this overview.

Edit - Collection Maintenance

Search
New
Edit List
Delete
More options

Share
List
Info

Show

Exist

No. ↑	Description	GENERAL	01-JAN	02-FEB	03-MAR
2000	Olivia Trousers		*	*	*
2011	Trouser	*			
2100	Lily Blouse		*	*	*
2110	Mia Blouse			*	
2120	Sophia Shirt		*	*	*
2300	Daisy Dress		*	*	*
→ 4710	Scarlett Shoe			*	

This page will show you (from **Collection SS-CY**) the **Delivery Periods** (**01-JAN**, **02-FEB** and **03-MAR**) and shows all the related Masters to the Collection in *General* or to the specific **Delivery Periods**.

You are also able to connect new Masters (**No.**) to the Collection simply by adding a new Line.

If the Master should also be connected to one of the mentioned **Delivery Periods**, you can enter a one (1) in the cell of the shown matrix, or zero (0) if you want to delete the Master again from a **Delivery Period**.

In every cell, you can press **Alt+Arrow Down** to see the details of the **Master Relation** to the Collection and Delivery Period.

The field **Show** determines what will be shown in the cells:

Exist	In the cells, you will see an Asterisk (*) if the relation exists.
ShipmentDate	In the cells, you will see the Start Sales Delivery Period of the Delivery Period of the Column if the relation exists.
ReceiptDate	In de cells, you will see the End Purchase Delivery Period of the Delivery Period of the Column if the relation exists.
Limitation	In the cells, you will see the VarDim Type on which there might be a Limitation for the Values entered of the Delivery Period of the Column if the relation exists.

Show ShipmentDate

No. ↑	Description	GENERAL	01-JAN	02-FEB	03-MAR
2000	Olivia Trousers		28-01-20	28-02-20	28-03-20
2011	Trouser	28-01-20			
→ 2100	⋮ Lily Blouse		28-01-20	28-02-20	28-03-20
2110	Mia Blouse			28-02-20	
2120	Sophia Shirt		28-01-20	28-02-20	28-03-20
2300	Daisy Dress		28-01-20	28-02-20	28-03-20
4710	Scarlett Shoe			28-02-20	

Show

Limitation

No. ↑	Description	GENERAL	01-JAN	02-FEB	03-MAR
2000	Olivia Trousers		COLOR_1	COLOR_1	COLOR_1
2011	Trouser				
→ 2100	Lily Blouse		COLOR_1	COLOR_1	COLOR_1
2110	Mia Blouse				
2120	Sophia Shirt		COLOR_1	COLOR_1	COLOR_1
2300	Daisy Dress		COLOR_1	COLOR_1	COLOR_1
4710	Scarlett Shoe				

ACTIONS, UPDATE MASTER

If you have entered/changed a **VarDim Type Subset** on a Collection, and the field **Collection Variant Options based on** of the Collection is set to *Collection VarDim Type Subset*, this function will be able to add extra new **Variants** to all the Masters connected to the Collection based on the content of the **VarDim Type Subset**.



The function will update each Master related to the Collection.

I.e., if you have a Collection with a **VarDim Type Subset** with the colors *White, Blue* and *Navy* and the field **Collection Variant Options based on** is *Collection VarDim Type Subset*, and you would use the **Update Master**, then all Masters connected to this Collection will get the colors *White, Blue* and *Navy*.

NOTE

This action can lead to errors in the system if your Masters have **Bill of Materials**, with **Search Tables** related to your Components. Because you need to go through all the Masters connected to the Collection to make sure that the new Colors/Sizes/etc. are also updated/added in your Search Tables of the Bill of Materials.

Use this Action only if you want extra Variants added to your Masters, and if you do not have Search Tables in your BOM. Otherwise, you can get errors and the process of updating your Masters can be interrupted.

ACTIONS, UPDATE VARDIM TYPE SUBSETS

This Action can only be executed if the field **Collection Variant Options based on** is not set to *Collection VarDim Type Subset*.

In that case, it will create the **VarDim Type Subsets** based on the Variants of the related Masters/Variants to the Collection.



This function create/update the VarDim Type Subset for the Collection SS-CY.

I.e., Master *2010* has two colors from **VarDim Type COLOR_1** and 7 sizes from *SIZE_EU* and is the only Master connected to a Collection. If now you would run this Action **Update VarDim Type Subsets**, the system will create the **VarDim Type Subset** on your Collection:

VDTS Work Date: 6-9-2020			✓ Saved			
VarDim Type Subset			Search	+ New	Edit List	Delete
			More options			
	VarDim Type ↑	VarDim Type Name	Options Var 1			
→	COLOR_1	Garment/Fabric Colors	2			
	SIZE_EU	European Sizes 36 - 60	7			

ACTIONS, UPDATE VARDIM OPTIONS COLLECTIONS

The Action **Update VarDim Options Collection** will go through the Collection/Master Relations and add the **Option Var 1 – 9** to the individual Collection/Master Relations based on the Variants of the Master.



This function creates VarDim options for each collection/master relation where no limitation is set up.

I.e., Master **2010** has two colors from **VarDim Type COLOR_1** and 7 sizes from **SIZE_EU** and is the only Master connected to a Collection without the **Options Var1** and **Options Var2** filled. If now you would run this Action **Update VarDim Options Collections** the system will create the **Options Var1**, and **Options Var2** in the **Collection Master Relations** based on the Variants of the Master:

Before:

VDTS Work Date: 6-9-2020									
Collection Master Relations									
Search New Edit List Delete Process Reports More options									
No. ↑	Master Description	Status Code	Priv... Label, Mas...	Wor... Exist	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	VarDim Type Variant 3
→ 2010	Amelia Trousers		☐	☐	COLOR_1	0	SIZE_EU	0	

After:

Collection Master Relations									
Search New Edit List Delete Process Reports More options									
No. ↑	Master Description	Status Code	Priv... Label, Mas...	Wor... Exist	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	VarDim Type Variant 3
→ 2010	Amelia Trousers		☐	☐	COLOR_1	2	SIZE_EU	7	

ACTIONS, UPDATE VARDIM OPTIONS MASTER

If you have entered/changed a **VarDim Type Subset** on a Collection, and the field **Collection Variant Options based on** of the Collection is set to *Collection VarDim Type Subset*, this function will be able to add extra new **Variants** to your Masters based on the content of the **VarDim Type Subset**.



This function update the list of VarDim variant options for each master related to the Collection. The update is based on the Collection VDTs matrix variant subsets.

Yes

No

I.e., if you have a Collection with a **VarDim Type Subset** with the colors *White, Blue* and *Navy* and the field **Collection Variant Options based on** is *Collection VarDim Type Subset*, and you would use the ***Update VarDim Options Master***, then all Masters connected to this Collection will get the colors *White, Blue* and *Navy*.

NOTE

This action can lead to errors in the system if your Masters have **Bill of Materials**, with **Search Tables** related to your Components. Because you need to go through all the Masters connected to the Collection to make sure that the new colors/sizes/etc. are also updated/added in your Search Tables of the Bill of Materials.

Use this Action only if you want extra Variants added to your Masters, and if you do not have Search Tables in your BOM. Otherwise, you can get errors and the process of updating your Masters can be interrupted.

CONNECTING MASTERS

VIA THE COLLECTION

After you have created the Collections Nos. and have created the Masters, you can connect the Masters to the Collection(s). This can be done directly to the **Collection** or to the **Delivery Periods** of a Collection.

If Masters (or variants of Masters) of a Collection will be shipped in different Delivery Periods (or Drops) you can create so called **Delivery Periods** related to that Collection.

Masters (or variants of Masters) can be connected to the Collection directly and/or to the Delivery Period Codes of a Collection.

When entering Sales-/Purchase Orders, the information of the **Collection** will determine what Masters/VarDim Variants are possible to enter on the lines. If you also use the **Delivery Periods**, their related information will determine what Masters/VarDim Variants are possible to enter on the lines. In this case, you will have to use **Order Type** because it is the only way to take both Collection and a single Delivery Period in consideration.

To determine what is possible, the Parameter in **Sales & Receivables Setup**, **Purchase & Payables Setup**, and the **Order Type** (Delivery Period Handling) sets the rules.

When a Collection Master Relation has been created, you have the possibility of restricting which VarDim Variants to be included. Basically, the Collection Master Relation will contain the VarDim Variants defined by the **VarDim Positive/Negative List** of the Master. This is indicated by blank **Options Var** fields.

NOTE

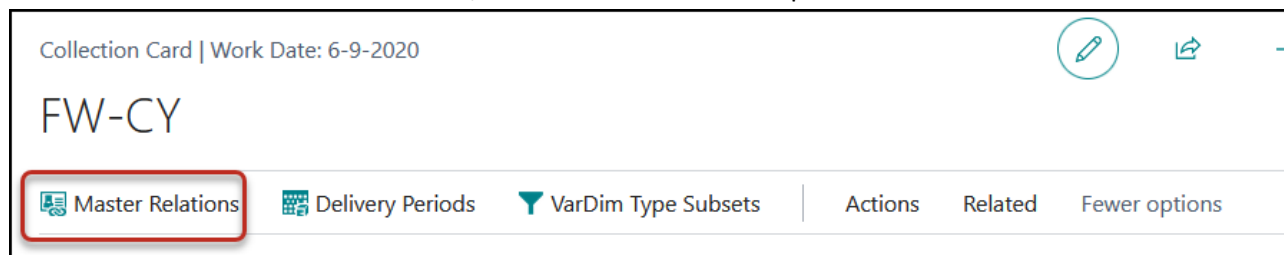
Keep in mind that if a Master is connected directly to the **Collection** and to the **Collection/Delivery Periods** only the chosen variants in the Collection/Delivery Periods will be shown in a Sales Order, if you have the Collection No. filled in the header as a filter.

For each VarDim Type you can further reduce the number of VarDim Variants that you want to include in a specific Collection Master Relation.

This is done by marking the VarDim Variants you want to include, and the **Options Var** fields will then show the number of VarDim Variants included in the **positive list of the Collection Master Relation**.

MASTER RELATIONS VIA COLLECTION

In the Collection List or Collection Card, click **Master Relations** or press **Ctrl+F11**.



Collection Card | Work Date: 6-9-2020

FW-CY

Master Relations Delivery Periods VarDim Type Subsets Actions Related Fewer options

For the Collection **FW-CY** it looks like this:

FW-CY										
Collection Master Relations										
Search New Edit List Delete Home Reports More options										
Master Card Bill of Materials Composition Care Label Additional Info Measurement Chart Workflow Additional Comments										
No. ↑	Master Description	Status Code	Private Label, Master	Workflow Exist	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	VarDim Type Variant 3	
→ 2020	Isla Trousers		☐	☐	COLOR_1	0	SIZE_EU	0		
2110	Mia Blouse		☐	☒	COLOR_1	0	SIZE_C	0		
2200	Grace Bomber		☐	☒	COLOR_1	0	SIZE_US	0		
2210	Poppy Blazer		☐	☐	COLOR_1	0	SIZE_US	0		
2310	Freya Dress		☐	☒	COLOR_1	0	SIZE_EU	0		

DESCRIPTION OF THE FIELDS

NO.

You can select the Matrix Master that will be connected to the Collection. The **Master Description** will be shown automatically as well as the different **VarDim Types** that are connected to the Master.

STATUS CODE

This field is related to the Workflow of the Master in which the **Collection No.** is filled and is normally maintained in the Workflow, but the value can be changed directly on the Collection Master Relation. The usage of a Master – based on this Status Code - is then only afflicted if the Master is chosen within this Collection.

PRIVATE LABEL, MASTER

A *checkmark* will be shown if the Master is connected to specific Private Label.

WORKFLOW EXIST

A *checkmark* will be shown if a Workflow is connected to the Master.

VARDIM TYPE VARIANT 1 - 9

The VarDim Type(s) that is (are) connected to the Master will be shown automatically.

OPTIONS VARDIM 1 – 9

Pressing **Alt+Arrow Down** will show the list of Variants. With a **checkmark** in front of a Value, you determine that this Color/Size/Length/etc. will be part of this Collection.

If all the Values are applicable for this Collection, you do not have to mark any value. The system will know that all the Values will be applicable, and this field will be empty.

Edit - Temporary VarDim Variants

Search + New Edit List Actions Related Fewer options

Undo

Mark Standard Values

Mark All

Remove Marks

Show Marked/All

Mark	Value ↑	Asso...	Short Name	Name
→	30		Yellow	Yellow
	60		Forest	Forest Green
	70		Red	Red
	73		Pink	Pink

There are several FactBoxes that can give you insight regarding the chosen Values, but they are not shown by default; you need to add them via **Personalization**.

In the FactBoxes **Variant 1**, **Variant 2**, and **Variant 3** you can see which Values you have chosen.

In the FactBox **Collections**, you can see to which **Collections** (and **Delivery Periods**) this Master is related.

In the FactBox **Delivery Periods**, you can see to which **Delivery Periods** this Master is related in this specific Collection.

FW-CY | Work Date: 6-9-2020

Collection Master Relations Search New Edit List Delete Process Reports More options

No. ↑	Master Description	Status Code	Private Label Master	Workflow Exist	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	VarDim Type Variant 3	Options Var 3
2020	Isla Trousers				COLOR_1	0	SIZE_EU	0		0
2110	Mia Blouse				COLOR_1	0	SIZE_C	0		0
2200	Grace Bomber				COLOR_1	0	SIZE_US	0		0
2210	Poppy Blazer				COLOR_1	0	SIZE_US	0		0
2310	Freya Dress				COLOR_1	0	SIZE_EU	0		0

Variant 1

COLOR_1

Garment/Fabric Colors

Picture	Value ↑	Alternative Description
	30	Yellow
	60	Forest Green
	70	Red
	73	Pink

Collections

Collection No. ↑	Delivery Period ↑	Status Code	Blot...
FW-CY			
SS-CY	02-FEB		

Delivery Periods

Collection No. ↑	Delivery Period ↑	Status Code	Blot...
FW-CY			

HOME IN THE COLLECTION MASTER RELATIONS

Collection Master Relations Search New Edit List Delete Home Reports Actions Related Reports Automate Fewer options

Master Card Bill of Materials Composition Care Label Additional Info Measurement Chart Workflow Additional Comments Matrix Limit Master Relations Positive List Copy Values

MASTER CARD

This will show the Master Card of the Master you are standing on.

BILL OF MATERIALS

This will show the Bill of Materials of the Master you are standing on.

ADDITIONAL INFO

Composition, Care Label, Additional Info

This will show respectively the Composition, the Care Labels, or the Additional Info of the Master you are standing on.

MEASUREMENT CHART

This will show the Measurement Chart of the Master you are standing on.

WORKFLOW

This will show the Workflow of the Master you are standing on.

ADDITIONAL COMMENTS

This will show the Additional Comments of the Master you are standing on.

MATRIX LIMIT. MASTER RELATIONS

This will show the **Limitation Codes** that you might have connected to the Master you are standing on.

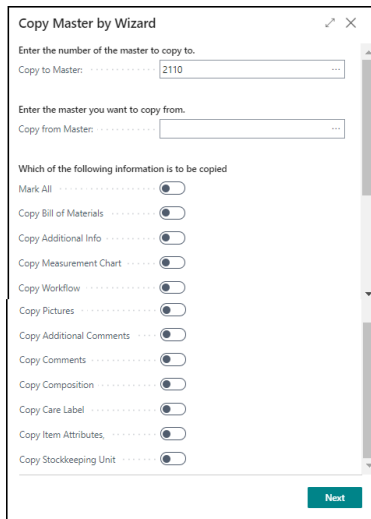
See [Matrix Limitation](#)

POSITIVE LIST

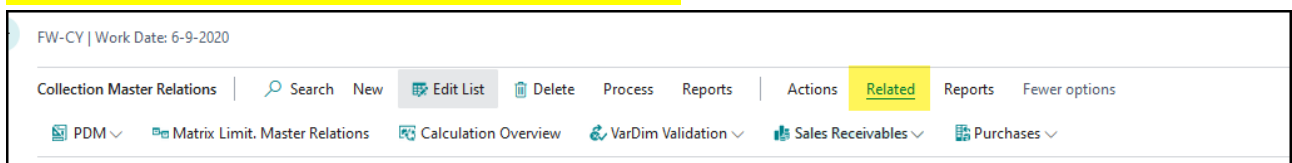
This will show the selected Values for **Options Var 1 – Options Var 5** for this Collection.

COPY VALUES

You can **Copy Values** from 1 Master to another Master and select the Information you want to copy.



RELATED IN THE COLLECTION MASTER RELATIONS



CALCULATION OVERVIEW

This will show the **Calculation Overview** but only for the Master you are standing on.

VARDIM VALIDATION, SHOW MATRIX

This will show the Matrix of the Master you are standing on based on the chosen **Options Var 1 - 9**.

VARDIM VALIDATION, POSITIVE LIST

This will show the chosen **Options Var 1 – 9**

If you have not chosen specific Values, the **Positive List** will be empty and not showing all the options based on the Variants of the Master. I.e.:

2000 Positive Work Date: 6-9-2020						
VarDim Positive/Negative List Search + New Edit List Delete More options						
VarDim Type ↑	Value ↑	Description	Alternative Description	Alternative Short Description	Ass	
→ COLOR_1	30	Yellow	Yellow	Yellow		
COLOR_1	35	Orange	Orange	Orange		

VARDIM VALIDATION, MATRIX Y-AXIS

Will show the **Matrix Y-Axis** based on the chosen **Options Var 1 – 9**

If you have not chosen specific Values, the **Matrix Y-Axis** will be empty and not showing all the options based on the Variants of the Master. I.e.:

Matrix Item Lines Work Date: 6-9-2020													
Search + New Edit List Delete More options													
VarDim Type Variant 1	Status Code	Invalid Combination	Variant 1	Variant 1 Name	VarDim Type Variant 2	Variant 2	Variant 2 Name	VarDim Type Variant 3	Variant 3	Variant 3 Name	VarDim Type Variant 4	Variant 4	Variant 4 Name
→ SHOE_COLOR		☐	004	Cognac.Printed.Leather.Normal Width	SHOE_SURF	02	Printed	SHOE_SOLE	1	Leather	SHOE_WIDTH	G	Normal Width
SHOE_COLOR		☐	004	Cognac.Printed.Rubber.Normal Width	SHOE_SURF	02	Printed	SHOE_SOLE	2	Rubber	SHOE_WIDTH	G	Normal Width

SALES RECEIVABLES, SALES PRICES

This will show all **Sales Prices** of the Master – not only related to the current **Collection**.

SALES RECEIVABLES, LINE DISCOUNT

This will show the **Line Discount** of the Master.

PURCHASES, VENDORS

This will show the **Items Vendor Catalog** of the Master.

PURCHASES, PURCHASE PRICES

This will show all **Purchase Prices** of the Master – not only related to the current **Collection**.

ACTIONS IN THE COLLECTION MASTER RELATIONS

FW-CY Work Date: 6-9-2020									
Collection Master Relations Search New Edit List Delete Process Reports Actions Related Reports Fewer options									
Variant Overview Create Workflow Maintenance Wizard									

VARIANT OVERVIEW

Same page as in the Collection List. See [Variant Overview](#)

CREATE WORKFLOW

Based on a **Workflow Template**, you can create a Workflow specifically for the current Collection and Master in the Collection Master Relations.

Edit - Get Workflow from Template

Template Code

MASTER

Calculate from Date

Collection

FW-CY

OK

Cancel

MAINTENANCE, UPDATE VARDIM OPTIONS COLLECTION

See [Actions, Update VarDim Options Collections](#)

MAINTENANCE, UPDATE VARDIM OPTIONS MASTER

See [Actions, Update VarDim Options Master](#)

MAINTENANCE, CREATE ITEMS

This action will create all the Items of the Master you are standing on after confirming the message.

?

This function create all Item's related to the Master. If the Item is an assortment the related BOM is created as well.

Yes

No

WIZARD, NEW MASTER BY WIZARD

You can create new Masters by Wizard.

See **White Paper – TRIMIT Master Wizard and Copy Info** for more details.

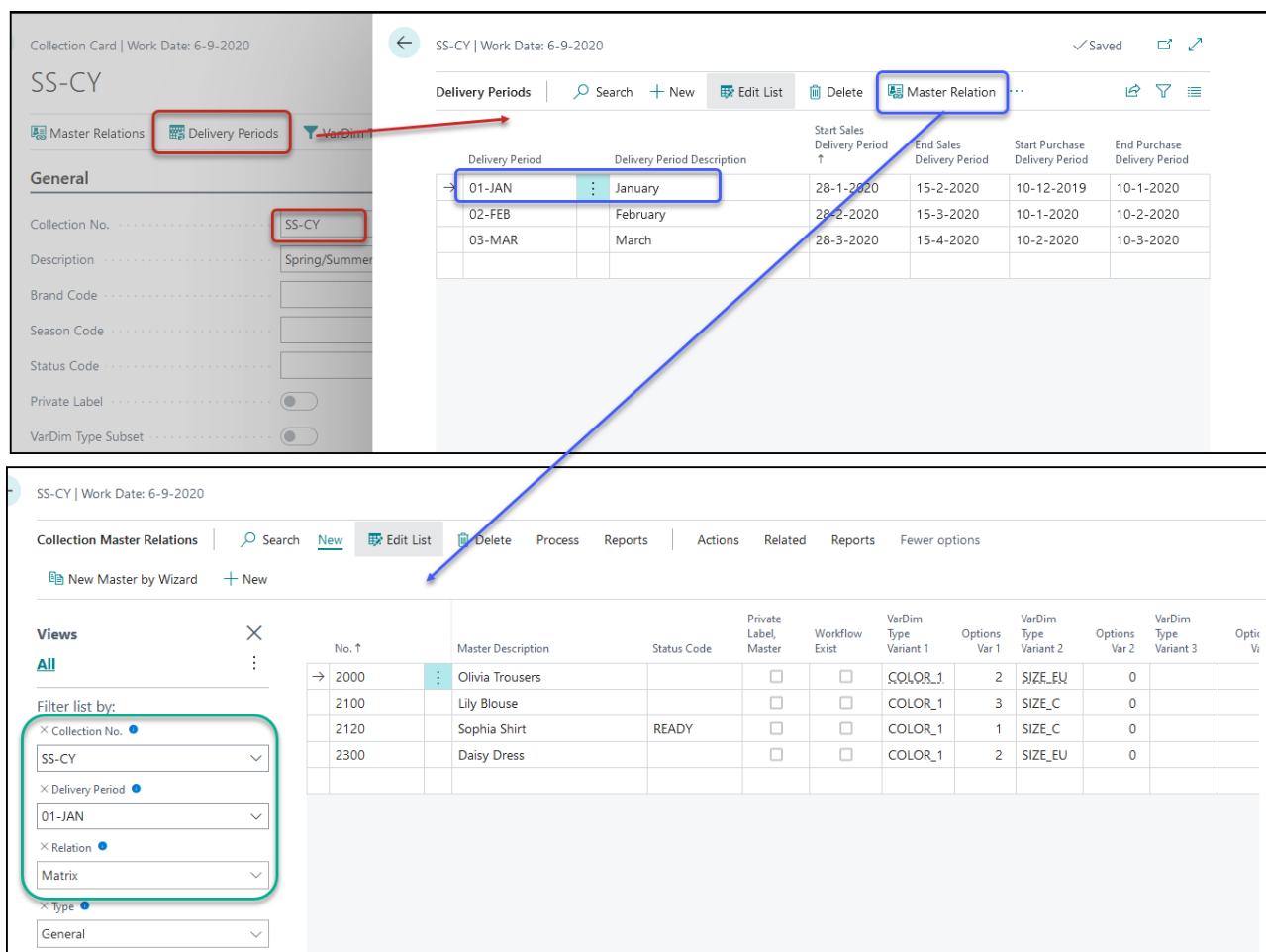
WIZARD, COPY VALUES

You can copy information from another Master to the current Master.

See **White Paper – TRIMIT Master Wizard and Copy Info** for more details.

MASTER RELATIONS TO A COLLECTION DELIVERY PERIOD

If a Collection is shipped to customers at different Dates, a list of Collection **Delivery Periods** can be created for each Collection, and for each Delivery Period you can connect **Masters** (or specific Variants of Masters) to it.



The screenshot displays the TRIMIT Collection Management interface. The top section shows the 'SS-CY' collection card with a 'Delivery Periods' tab selected. A red box highlights the 'Delivery Periods' tab, and a blue box highlights the 'Master Relation' tab. A red arrow points from the 'Delivery Periods' tab to the 'Master Relation' tab. The 'Master Relation' tab shows a table with columns: Delivery Period, Delivery Period Description, Start Sales Delivery Period, End Sales Delivery Period, Start Purchase Delivery Period, and End Purchase Delivery Period. The table contains three rows: 01-JAN (January), 02-FEB (February), and 03-MAR (March). A blue box highlights the '01-JAN' delivery period, and a blue arrow points from it to the 'Collection Master Relations' table below.

The 'Collection Master Relations' table has columns: No. ↑, Master Description, Status Code, Private Label, Master, Workflow Exist, VarDim Type Variant 1, Options Var 1, VarDim Type Variant 2, Options Var 2, VarDim Type Variant 3, and Options Var 3. The table contains four rows: 2000 (Olivia Trousers), 2100 (Lily Blouse), 2120 (Sophia Shirt), and 2300 (Daisy Dress). The 'Status Code' for the Sophia Shirt is 'READY'.

The 'Filter list by:' section on the left shows the following filters: Collection No. (SS-CY), Delivery Period (01-JAN), Relation (Matrix), and Type (General).

Maintaining these **Collection Master Relations** is the same as described before in [Master Relations via Collection](#). In the **Filter** of this page, you can see the **Collection SS-CY** and the **Delivery Period 01-JAN**. This means that using a Collection and a related Delivery Period in an Order Type, you are only able to choose the connected Masters on a Collection Delivery Period on the Sales Line (depending on the Parameters for **Delivery Period Handling**). This will be more described in [Order Type in the Sales Header](#)

Within Collection Management of TRIMIT, it is however also possible to ignore the Collections and use only the **Shipment Groups** (comparable to the Delivery Periods of a Collection).

This means that you can attach Masters and/or VarDim Type Subsets to a **Shipment Group** and use the **Shipment Group** in an Order Type to limit the possible Masters that can be entered in a Sales Order at a specific moment in time.

This will be explained in [Shipment Group](#)

VIA THE MASTER FIELDS

After you have created the Collections – and Delivery Periods for the Collections if necessary –, you are able to connect a Master directly to a Collection and to a specific Delivery Period, simply by entering the fields in the Master Card.

This is an effortless way to connect complete Masters to a specific Collection and a specific Delivery Period if you are manually creating Masters using the Master Card.

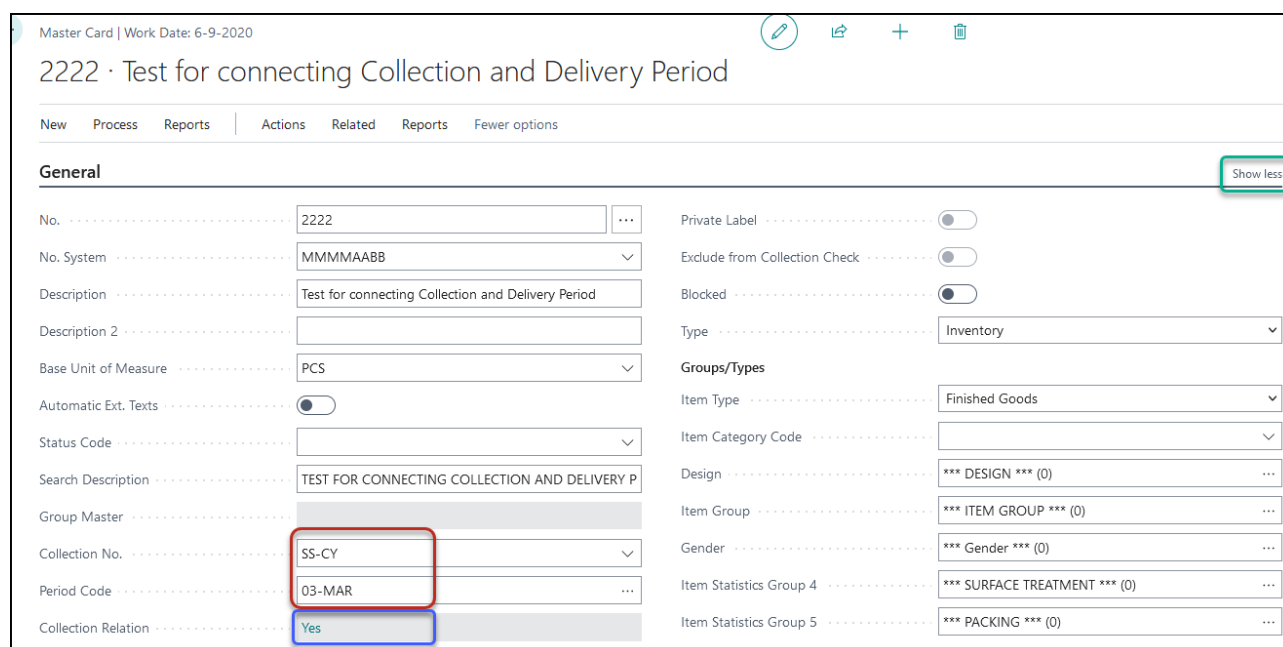
The connection between the Master and the Collection will however only be established if the Parameter **Create Collection Relation Automatically** in the Inventory Setup is set to Yes.

An example:

I want to create a new **Master 2222** with **VarDim Types** *COLOR_1* (select all colors) and *SIZE_C* (select all sizes that are not Assortments) and I want to connect it to **Collection No. SS-CY** and **Delivery Period 03-MAR**. I simply enter the **Collection No.** and the **Delivery Period** in the Master Card.

Before you can enter these fields, you must be sure, that the VarDim Master is filled and that you selected the Values of the VarDim Types (via **Actions, Matrix, Matrix, Matrix**) that you connected! Otherwise, no Collection/Master relation will be created and the content of the field **Collection No.** and/or **Delivery Period** will only be handled as filter fields for your Master.

Additional, make sure you click **Show more fields** – in the FastTab **General** of the Master Card.



Master Card | Work Date: 6-9-2020

2222 · Test for connecting Collection and Delivery Period

New Process Reports Actions Related Reports Fewer options

General Show less

No. 2222

No. System MMMMAABB

Description Test for connecting Collection and Delivery Period

Description 2

Base Unit of Measure PCS

Automatic Ext. Texts

Status Code

Search Description TEST FOR CONNECTING COLLECTION AND DELIVERY P

Group Master

Collection No. SS-CY

Period Code 03-MAR

Collection Relation Yes

Private Label

Exclude from Collection Check

Blocked

Type Inventory

Groups/Types

Item Type Finished Goods

Item Category Code

Design *** DESIGN *** (0)

Item Group *** ITEM GROUP *** (0)

Gender *** Gender *** (0)

Item Statistics Group 4 *** SURFACE TREATMENT *** (0)

Item Statistics Group 5 *** PACKING *** (0)

After leaving the Master Card and going in again (or press **F5**) you will also see that the field **Collection Relation** will be set to Yes.

Based on the Parameter **Create Collection Relation Automatically** in the Inventory Setup also the Collection Master Relations will be created. For the example of **Master 2222**, it would mean that only one record would have been created in the **Collection Master Relations**:

- Master + Collection + Delivery Period

If you also want to be sure, that only some of the colors/sizes are applicable for Collection SS-CY and Delivery Period 03-MAR you can click **Process, Collections**.

Master Card

2222 · Testing for connecting Collection and Delivery Period

New **Home** Reports | Actions ▾ Related ▾ Reports ▾ Automate ▾ Fewer options

 Bill of Materials
  Measurement Chart
  Care Label
  Additional Info
  Additional Comments
  VarDim Master
  Collections
  Inventory Profile

 Workflow
  Composition
  Sustainability
  Additional Tags
  Copy Values
  Attributes
  Item List
  Statistics

Collection Master Relations

Search New ▾ **Edit List** Delete Home Reports | More options

 Master Card
  Bill of Materials
  Composition
  Care Label
  Additional Info
  Measurement Chart
  Workflow
  Additional Comments
  Matrix Limit. Master

Collection No. ↑	Delivery Period ↑	Master Description	Status Code	Private Label, Master	Workflow Exist	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	VarDim Type Variant 3	Options Var 3
→ SS-CY	03-MAR	Test for connectin...		☐	☐	COLOR_1	0	SIZE_C	0		0

Here you can press **Alt+Arrow Down** on the **Options Var1-9** to select only specific Colors/Sizes/etc.

NOTE

Of course, you are also able to make any other connection between a Master and Collections/Delivery Periods via the same page **Collection Master Relations** that can be opened via clicking **Process, Collections** in the Master List/Card and then click **Edit** in the FactBoxes.

VIA THE MASTER ACTIONS

After you have created the Collections – and Delivery Periods for the Collections if necessary -, you are able to connect a Master directly to a Collection and to specific Delivery Period (s), simply by entering the fields in the page by clicking **Process, Collections** in the Master List or Card.

Master Card

2100 · Lily Blouse

New **Home** Reports | Actions ▾ Related ▾ Reports ▾ Automate ▾ Fewer options

 Bill of Materials
  Measurement Chart
  Care Label
  Additional Info
  Additional Comments
  VarDim Master
  Collections
  Inventory Profile
  Product Information (PIR)

 Workflow
  Composition
  Sustainability
  Additional Tags
  Copy Values
  Attributes
  Item List
  Statistics
  Image Management

Collection Master Relations | Work Date: 6-9-2020

Search New ▾ **Edit List** Delete Process Reports | Actions Related Reports Fewer options

New Master by Wizard + New

Collection No. ↑	Delivery Period ↑	Master Description	Status Code	Private Label, Master	Workflow Exist	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	VarDim Type Variant 3	Options Var 3	Options Var 4	Options Var 5
→ SS-CY	01-JAN	Lily Blouse		☐	☐	COLOR_1	3	SIZE_C	0		0	0	0
SS-CY	02-FEB	Lily Blouse		☐	☐	COLOR_1	4	SIZE_C	0		0	0	0
SS-CY	03-MAR	Lily Blouse		☐	☐	COLOR_1	5	SIZE_C	0		0	0	0

Variant 1 ▾

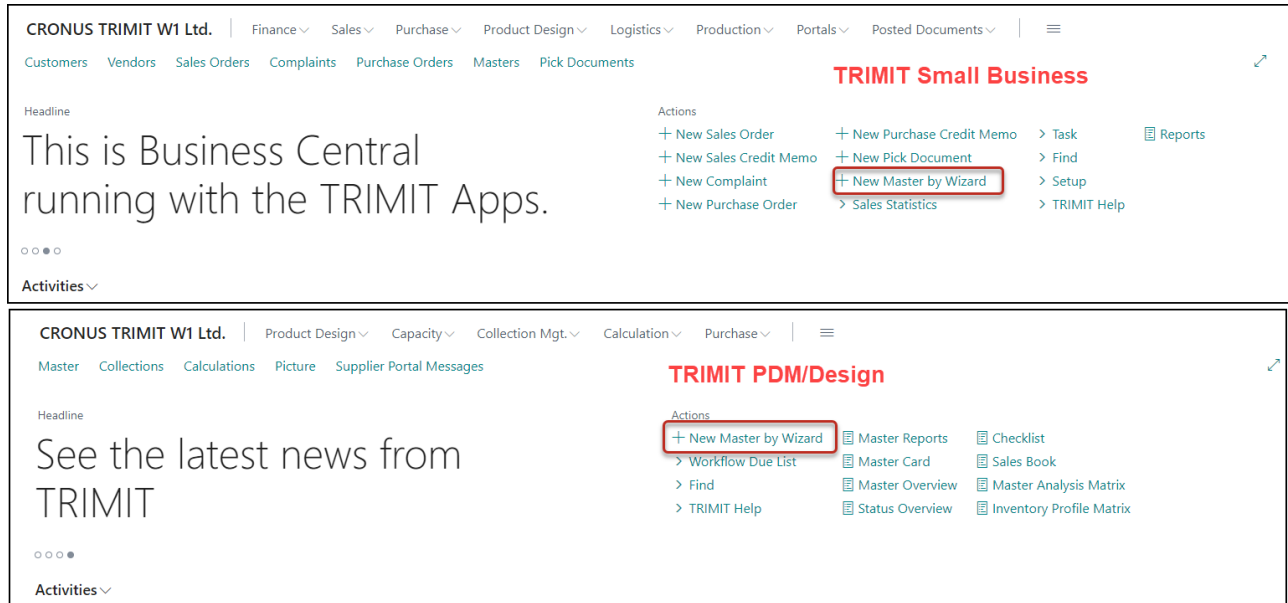
COLOR_1 Garment/Fabric Colors

Picture	Value ↑	Alternative Description
	21	Light Blue
	30	Yellow
	73	Pink

After entering the **Collection No.** (and **Delivery Period**) you have the same fields and Related Information and Actions as already described in [Master Relations via Collection](#)

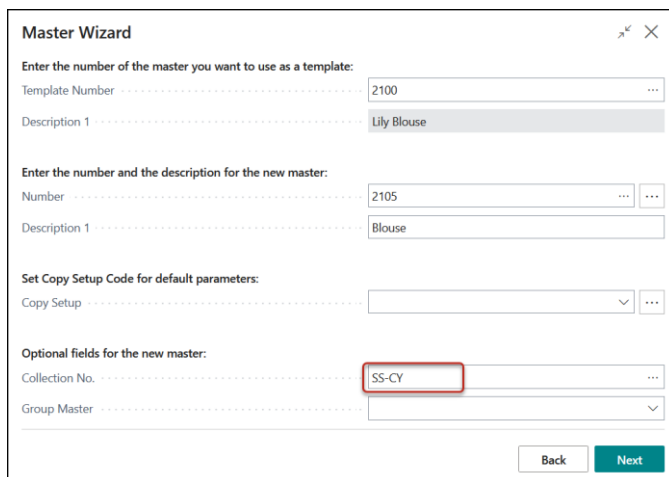
VIA THE MASTER WIZARD

The Master Wizard can be used via the Master List/Card or directly via the **TRIMIT Small Business** Role Center or the **TRIMIT PDM/Design** Role Center.



The top screenshot shows the 'TRIMIT Small Business' role center. The 'Actions' menu is open, and the 'New Master by Wizard' option is highlighted. The bottom screenshot shows the 'TRIMIT PDM/Design' role center. The 'Actions' menu is open, and the 'New Master by Wizard' option is highlighted.

After you have created the Collections - and the Delivery Periods if necessary - you can create new Masters using the Wizard and connect them directly to a Collection. Simply by entering a **Collection No.** in the Wizard.



The screenshot shows the 'Master Wizard' form. The 'Collection No.' field is highlighted with a red box. The form includes fields for 'Template Number', 'Description 1', 'Number', 'Description 1', 'Copy Setup', and 'Optional fields for the new master'.

The field **Collection No.** can also be filled based on a chosen **Copy Setup**.

If there is a **Template Workflow** connected to the selected **Collection No.** and you would have a checkmark in **Copy Workflow** it means, that the Workflow of the **Template Number** (Master) will be copied.

If you do not have a checkmark in **Copy Workflow**, the **Template Workflow** of the **Collection No.** will be copied into the Workflow of the new Master.

Master Wizard

Copy the following informations.

Mark All
Copy Bill of Materials
Copy Additional Info
Copy Measurement Chart
Copy Workflow
Copy Master Pictures
Copy Additional Comments
Copy Sustainability Info
Copy Composition
Copy Care Label
Copy Item Attributes
Copy Additional Tags
Copy Stockkeeping Unit

Workflow for Master: 2105

Search

New

Edit List

Delete

Create from Template

Copy

Comments

More options

Step No.

Description

Deadline

Responsible ID Type

Responsible ID

Clos...

Closing Date

Closed by Type

Closed By

Assign Status Code

Collection No.

Shipment Group

10	Idea (Story Board)	7/17/2022	User Group	DESIGN			User		IDEA	SS-CY	
20	Design	7/31/2022	User Group	DESIGN			User			SS-CY	
30	Proto Sample	8/28/2022	Vendor				User			SS-CY	
40	Quality Check Proto Sample	9/4/2022	User Group	DESIGN			User		APPROVED	SS-CY	
50	Fit Sample	10/9/2022	Vendor				User			SS-CY	
60	Quality Check Fit Sample	10/16/2022	User Group	DESIGN			User			SS-CY	
70	Ordering Salesmen Samples	10/23/2022	User Group	PURCHASE			User			SS-CY	
80	Salesmen Samples Received	12/25/2022	User Group	LOGISTICS			User			SS-CY	
90	Start Pre-Sales	1/1/2023	User Group	SALES			User		READY	SS-CY	

In both cases, the **Collection No.** in the Workflow Activities will be filled automatically with the **Collection No.** that was entered in the Wizard, but when the Workflow is created based on the Collection, the **Deadline** of **OD** will be based on the Work Date.

If you would have connected a **VarDim Type Subset** to the selected Collection No. for the VarDim Types of the new Master, it also means, that you can only select the values that are in the Subset for the new Master.

NOTE

The Lines in the Workflow are shown **red** because the **Deadline** is before the Work Date.

PRIVATE LABEL

INTRODUCTION

Some fashion companies create a basic program (group of Items in a season) but allow their Customers to make alterations. If the alterations are many or if the Customer (re)designs the product, the specific Master can be considered as a new Master. If the alterations are minimal, then companies can consider working with generic Master BOMs (based on formula's), which are Customer/ Order specific. Creating Customer specific garments is called **Private Labeling** in the fashion industry.

Also in the furniture industry, the Customer can, in many cases, configure their specific Item, which might make it necessary to specify an Item as a Private Label Item.

We have seen that we can set a Collection as a **Private Label Collection** by connecting Customers/Countries to that Collection. This means that these Private Label Collections can only be chosen in a Sales Order if the Customer/Country of the Sales Order is connected to this Private Label Collection. This does not mean however that the Masters/Items connected to such a Private Label Collection are not available for other Customers/Countries.

Therefore, the functionality regarding Private Label is more than only the Private Label Collection. You are also able to set up Private Label without any usage of the Collections.

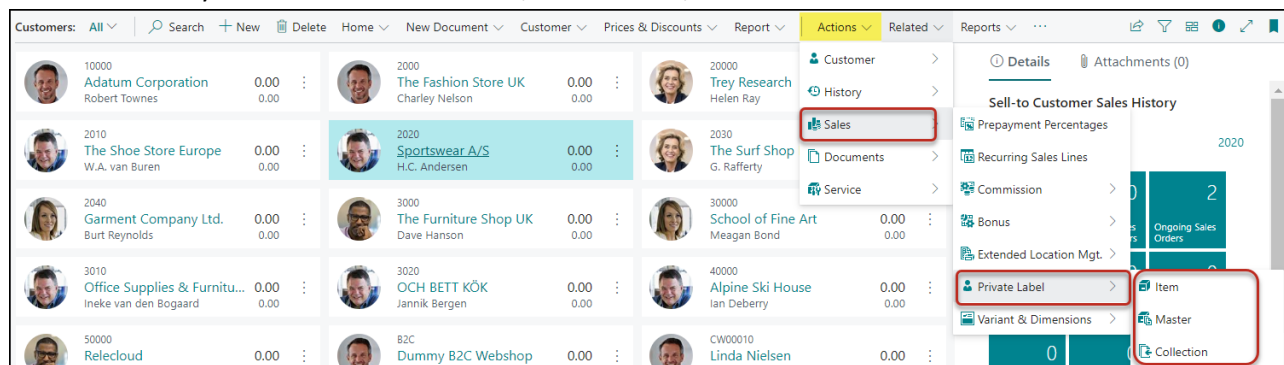
A Private Label can be set up for one or more Countries/Regions and/or for one or more Customers. A Private Label can be set up for one or more Items or Masters. In these situations, the Private Label functionality means exclusivity of Items or Masters for specific Customers or Countries/Regions.

The Private Label connection can be made from:

- Customers
- Countries/Regions
- Masters
- Items
- Collections as described already earlier in [Private Label](#)

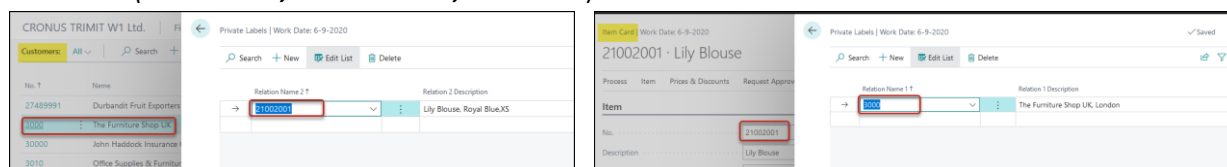
HOW TO SET UP PRIVATE LABEL FOR A CUSTOMER

A Private Label can be set up for a Sell-to Customer, a Bill-to Customer, a Company Group and/or a Chain. The connection you can make is with Items, Masters and/or Collections.



If you connect a Private Label Item (Master and/or Collection) to a Customer, you can also see this connection in the Item, Master, or Collection.

*I.e.: If I connect Item 21002001 to Customer 3000 in the Customer Card, I can also see in Item Card of 21002001 (via **Actions, Private Label, Customer**) that there is a Private Label connection to Customer 3000.*



This can be setup via the Customer Card and via the Customers List.

This means that (assuming this is the only connection) this Item can only be sold to this Customer and to no one else.

Exception is of course if the Customer 3000 turns out to be a Bill-to Customer, Company Group or Chain with several Sell-to Customers connected. In that case, this Item can be sold to all the Sell-to Customers from this Bill-to Customer, Company Group or Chain.

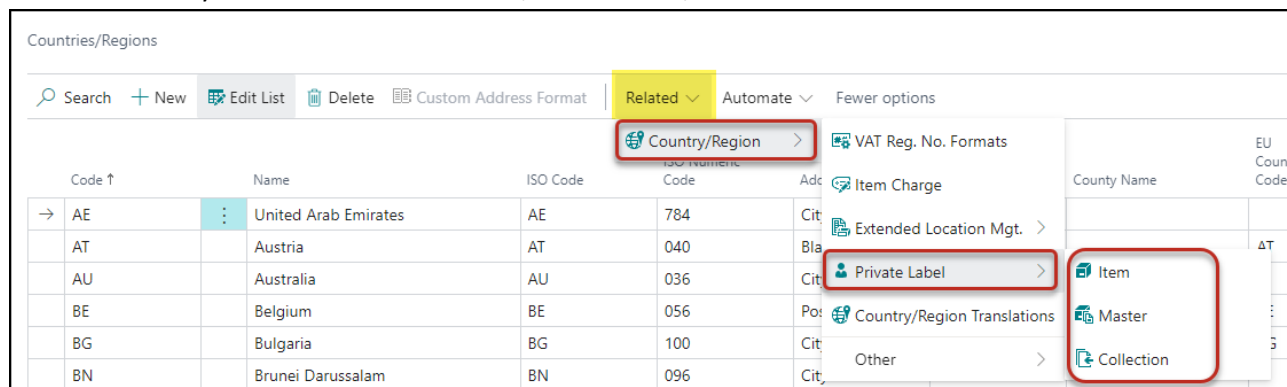
If you have connected Private Label Items, Masters and/or Collections to a Customer the Field **Private Labels Exist** on the FastTab **Misc. Parameters** of the Customer will have a **checkmark**.

Misc. Parameters		Show less	
Our Account No.		Priority	0
Territory Code	LND	Customer Allocation Priority	0
Customer Statistics Group	0	Formula Sales Header	
Sell-to Type		Private Labels Exist	☒
Sell-to Group			

HOW TO SET UP PRIVATE LABEL FOR A COUNTRY/REGION

A Private Label can be set up for a Country/Region.

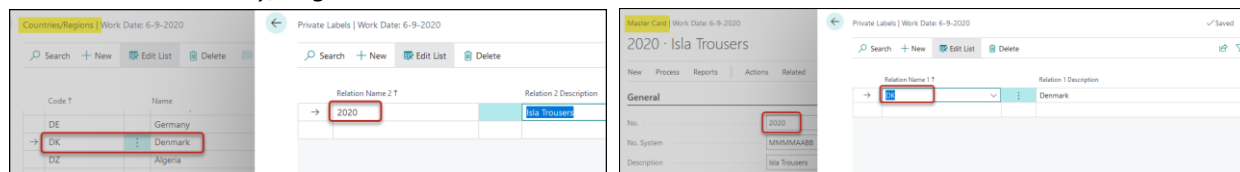
The connection you can make is with Items, Masters and/or Collections.



The screenshot shows the 'Countries/Regions' interface. The 'Related' dropdown menu is open, showing 'Country/Region' as the selected option. The 'Private Label' dropdown menu is also open, showing 'Item', 'Master', and 'Collection' as options. The 'Country/Region' dropdown menu is highlighted with a red box, and the 'Private Label' dropdown menu is also highlighted with a red box.

If you connect a Private Label Item (Master and/or Collection) to a Country/Region, you can also see this connection in the Item, Master, or Collection Card.

*I.e.: If I connect Master 2020 to Country/Region DK in the Country/Region Card, I can also see in Master Card of 2020 (via **Actions, Collections, Private Label, Country/Region**) that there is a Private Label connection to Country/Region DK.*



The four screenshots illustrate the connection between Country/Region DK and Master 2020. The first screenshot shows the Country/Region card for DK. The second screenshot shows the Private Labels card for DK. The third screenshot shows the Master card for 2020. The fourth screenshot shows the Private Labels card for 2020.

This means that (assuming this is the only connection) this Master can only be sold to Sell-to Customer or Bill-to Customers with this Country/Region DK and to no one else.

If you have connected Private Label Items, Masters and/or Collections to a Country/Region the Field **Private Labels Exist** Countries/Regions will have a *checkmark*.

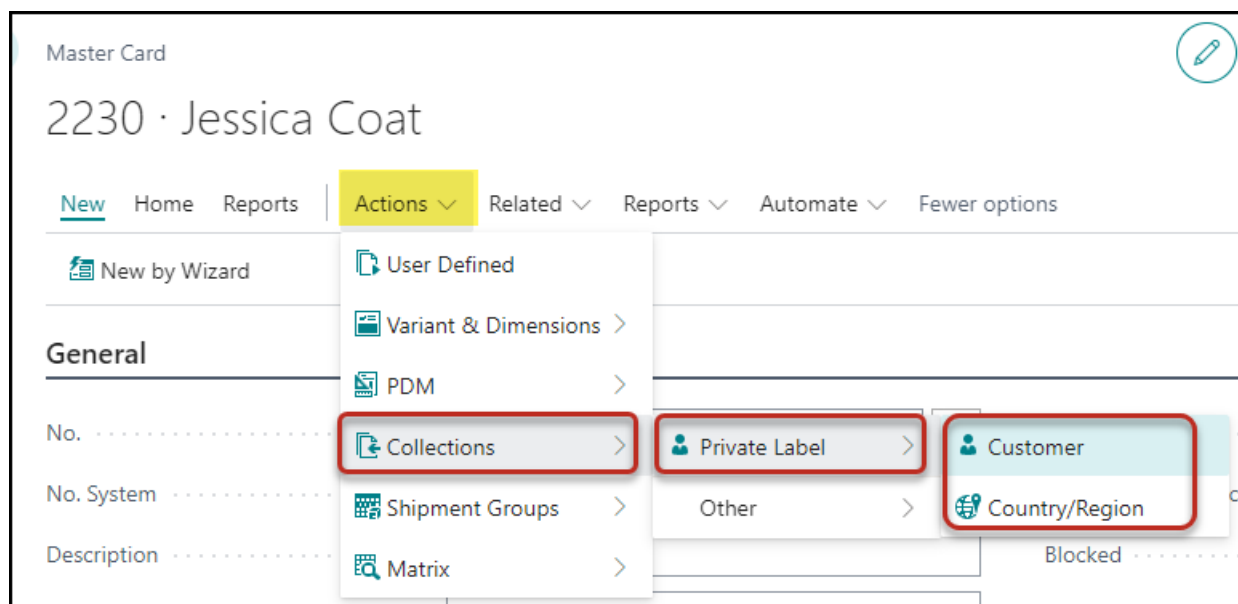
Code T	Name	ISO Code	ISO Numeric Code	Address Format	Contact Address Format	County Name	EU Country/Region Code	Intrastat Code	VAT Scheme	Private Labels Exist	Translations
CY	Cyprus			Post Code+City	After Company Name		CY	CY	CY-VAT	☐	0
CZ	Czech Republic			Post Code+City	After Company Name		CZ	CZ	CZ-VAT	☐	0
DE	Germany			Blank Line+Post Code+City	After Company Name		DE	DE	DE-VAT	☐	0
DK	Denmark			Post Code+City	After Company Name		DK	DK	DK-SE	☒	0
DZ	Algeria			Post Code+City	After Company Name					☐	0
EE	Estonia			Post Code+City	After Company Name		EE	EE	EE-VAT	☐	0
EL	Greece			Post Code+City	After Company Name		EL	EL		☐	0
ES	Spain			Post Code+City	After Company Name		ES	ES	ES-VAT	☐	0

HOW TO SET UP PRIVATE LABEL FOR A MASTER

A Private Label can be set up for a Master.

The connection you can make is with Customers and/or Countries/Regions.

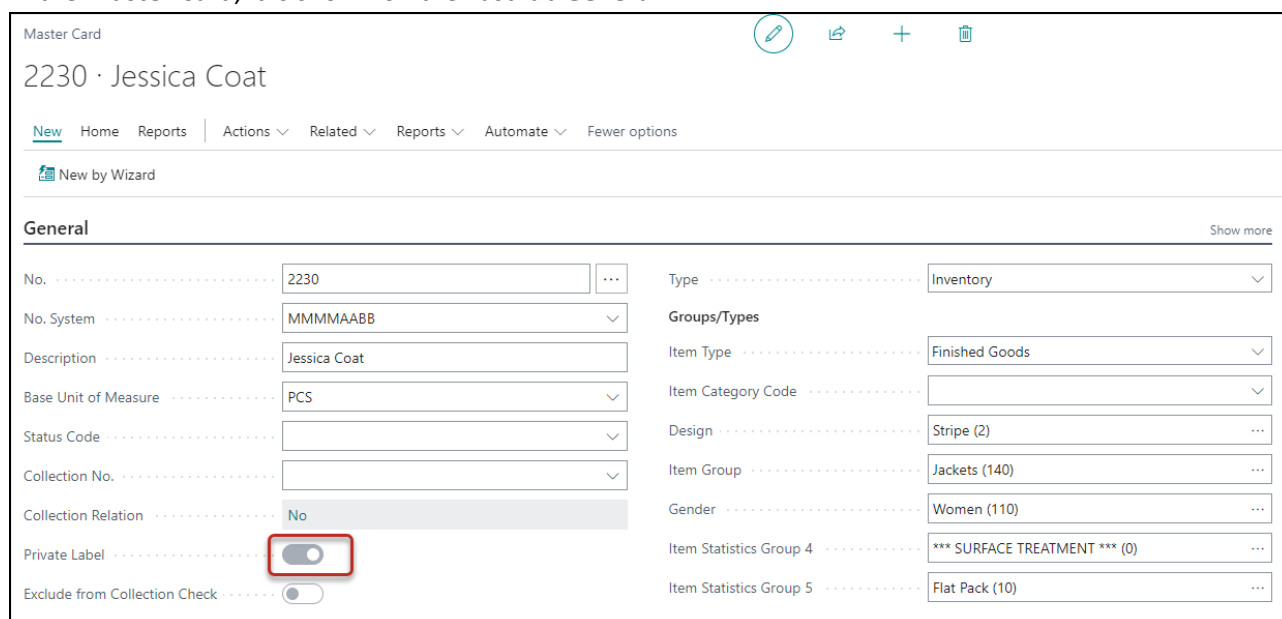
This can be done in the **Master Card** and in the **Masters List**.



If you connect a Customer or a Country/Region to a Private Label Master, you can also see this connection in the Customer Card or the Country/Region.

If you have connected Customers or Countries/Regions to this Private Label Master, the Field **Private Label** in the Master Card will have a Yes.

In the **Master Card**, it is shown on the FastTab **General**.



In all underlying Items of this Master, you can also see that the Master is a Private Label Master and connected to a Customer or Country/Region:

Sale	
Unit List Price	0.00
Private Label	☐
Master Private Label	☒
Price Calculation	
Unit Price Calculation Method	Price List
Management Level Unit Price	0
VarDim Addition to Unit Price	No
Commission / Bonus	
Item Commission Group	
Item Bonus Group	

The field **Private Label** of the Item however can still be *No*. But the field **Master Private Label** of this Item is now *Yes*, because of the Private Label Customer or Country/Region that has been connected to the Master.

HOW TO SET UP PRIVATE LABEL FOR AN ITEM

A Private Label can be set up for an Item.

The connection you can make is with Customers and/or Countries/Regions.

Items					
Search New Manage Home Item Prices & Discounts Attributes Report Actions Related Reports SmartList Automate					
Master Care Label Additional Info Additional Comments User Defined Composition Sustainability Additional Tags Adjust Inventory Variant & Dimensions PDM Private Label History					Customer Country/Region
No. ↑	Item Type ▼	Description	Description 2	Master No. ▼	
22302704	Finished Goods	Jessica Coat	Steelblue,4	2230	
22302706	Finished Goods	Jessica Coat	Steelblue,6	2230	

If you connect a Customer or a Country/Region to a Private Label Item, you can also see this connection in the Customer Card or the Country/Region.

If you have connected Customers or Countries/Regions to this Private Label Item, the Field **Private Label** in the Item Card will have a *Yes*.

Sale	
Unit List Price	0.00
Private Label	☒
Master Private Label	☐
Price Calculation	
Unit Price Calculation Method	Price List
Management Level Unit Price	0
VarDim Addition to Unit Price	No
Commission / Bonus	
Item Commission Group	
Item Bonus Group	

Now the individual Item is connected to a Customer or Country/Region, so **Private Label** is now *Yes*.

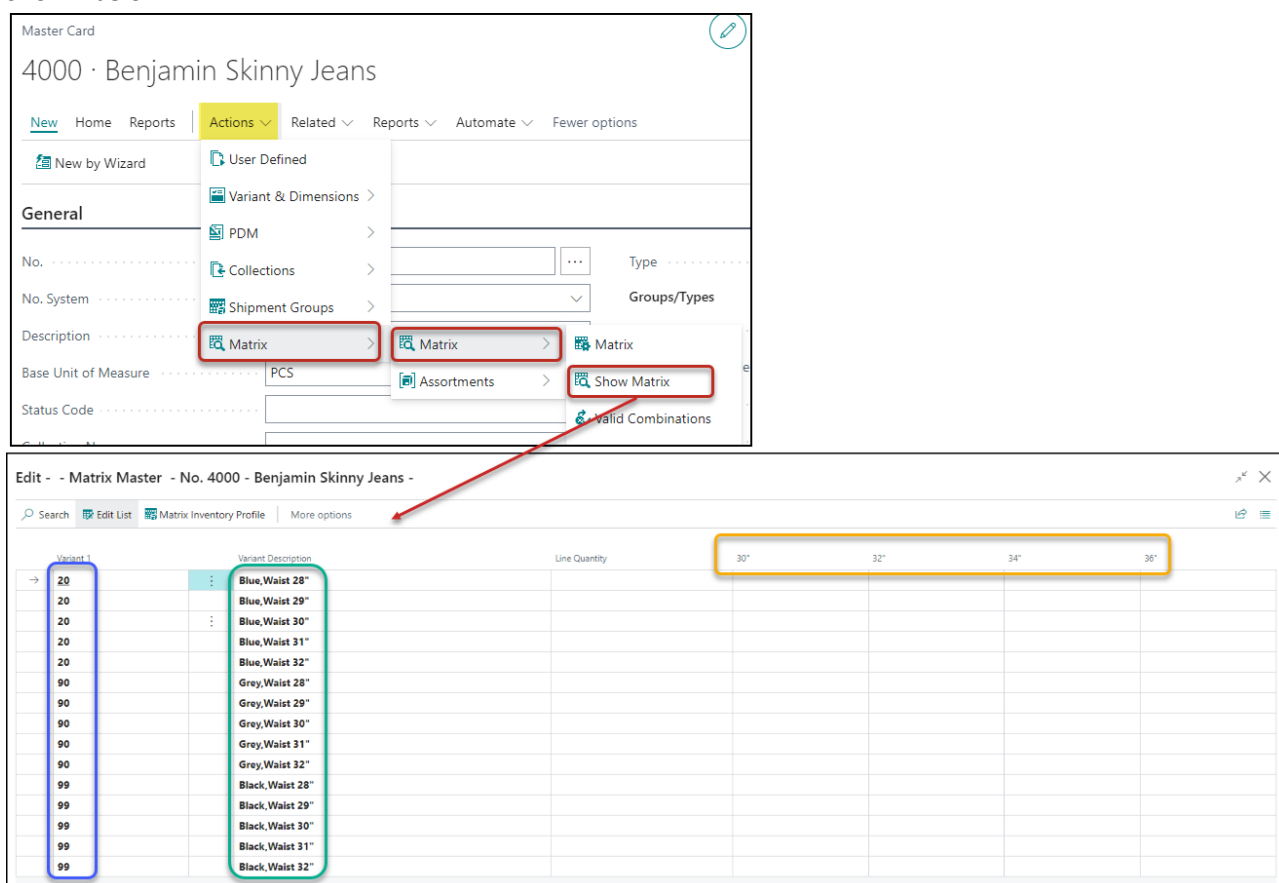
MATRIX LIMITATION

INTRODUCTION

When a Master with one and up to nine VarDim Types is created, a Matrix and an Assortment Matrix can be related to the Master. For each VarDim Type any number of Values can be related.

The Values related to the last VarDim Type connected in the VarDim Master of a Master, will always be shown on the X-Axis (columns) in the Matrix, and the Values related to the other VarDim Types will be shown as combinations on the Y-Axis (lines) in the Matrix.

It means that the size of the Matrix (via **Actions, Matrix, Matrix, Show Matrix** or click **Ctrl+M** in the Master Card) will be defined as the number of rows (in this example Colors + Waists) and columns (Lengths) as shown below.



Master 4000 has 3 VarDim Types: *Color, Waist, Length*.

In the Matrix, Column **Variant 1** shows the Values of the *Color*. But the **Variant Description** combines the *Color* and the *Waist*. The *Length* (the last VarDim Type in the VarDim Master) is shown in the Columns of the Matrix.

In some situations, it is desirable or even necessary to limit the number of rows and/or columns for a Matrix:

- If a Master is available in more Collections, the variants and the number of variants can differ from one Collection to another. That is described in [Options VarDim 1 – 9](#). In the section, [Use of Matrix](#)

[Limitation in connection with Collections](#) it will be described how Matrix Limitation could work together with Collections.

- If a Master is available in an enormous number of variants and a Customer only want to order some of the variants, it could be desirable to limit the Matrix for these variants.
- Some variants are only available in special situations, like a Campaign or on the Web.

MATRIX LIMITATION IN AN ORDER LINE

In a Sales Line and in a Purchase Line it is possible to limit a Matrix by entering the **Matrix Limitation** in the Line.

NOTE

If you add the field **Matrix Limitation** to the Line via **Personalization**, you need to close the page/open the page. Otherwise, the functionality of the **Matrix Limitation** will not work properly.

When the **Matrix Limitation** is visible in the page a limited Matrix can be created for a Master by filling in a string. The string may include the following three elements separated by a comma:

1. **Master No.** This must be the first element creating a Matrix Line but may be omitted maintaining an existing Matrix Line.
2. **Y-Axis.** This string is used to limit the first VarDim Type of the Y-Axis in the Matrix and is entered as a standard table filter. If the Master No. is entered in this string, it will be the second element in the limitation string. Otherwise, it will be the first element.
3. **X-Axis.** This string is used to limit the X-Axis in the Matrix and is entered the same way as the string limiting the Y-Axis. If the Master No. is entered in this string, it will be the third element in the limitation string. Otherwise, it will be the second element.

NOTE

If the Y-Axis of the Matrix contains more VarDim Types (i.e., Color and Waist of a Jeans), you can only use a filter for the first VarDim Type (i.e., Colors). If you do want to have a Matrix Limitation for the Color and the Waist, you need to create and use a **Matrix Limitation Setup** with a VarDim Type Subset (see [How to create and maintain a VarDim Type Subset](#)).

Below an example for creating a Matrix, using a Matrix Limitation is shown.

Master **2100 Lily Blouse** contains 12 Colors and 7 Sizes. The complete Matrix would look like this:

Edit - Sales Order 0100004 - No. 2100 - Lily Blouse -										
Search New Edit List Process Actions Related Fewer options										
Variant 1	Variant Description	Line Quantity	XS	S	M	L	XL	XXL	3XL	
→ 20	Royal Blue									
21	Light Blue									
30	Yellow									
35	Orange									
37	Dark Orange									
60	Forest Green									
65	Dark Green									
70	Red									
73	Pink									
75	Magenta									
80	Purple									
99	Black									

If you want to create a new Matrix Line for Master **2100** and you only want the Colors **30-60** and only the Sizes **S-XL**, you can enter **2100,30..60,02..05**

2100 *for the Master*
30..60 *for a filter on the Colors*
02..05 *for a filter on the Sizes*

Lines Manage Line Order Fewer options					
Exp... Mat...	Type	Matrix Limitation	No.	Description	
→ ☐	Matrix	2100,30..60,02..05			

The Matrix will now look like this:

Edit - - Sales Order 0100001 - No. 2100 - Lily Blouse -							
Search Edit List Matrix Inventory Profile More options							
Variant 1	Variant Description	Line Quantity	S	M	L	XL	
→ 30	Yellow		[0]	[0]	[0]	[0]	
35	Orange		[36]	[64]	[65]	[37]	
37	Dark Orange		[0]	[0]	[0]	[0]	
60	Forest Green		[2]	[3]	[4]	[4]	

If you only want to limit the Columns (Sizes), you still need to enter the Color limitation:

Lines Manage Line Order Fewer options					
Exp... Mat...	Type	Matrix Limitation	No.	Description	
→ ☐	Matrix	2100,01..99,02..04 06			

The Matrix will now look like this:

Edit - - Sales Order 0100001 - No. 2100 - Lily Blouse -							
Search Edit List Matrix Inventory Profile More options							
Variant 1	Variant Description	Line Quantity	S	M	L	XXL	
→ 20	Royal Blue		[24]	[48]	[47]	[11]	
21	Light Blue		[1]	[1]	[1]	[1]	
30	Yellow		[0]	[0]	[0]	[0]	
35	Orange		[36]	[64]	[65]	[16]	
37	Dark Orange		[0]	[0]	[0]	[0]	
60	Forest Green		[2]	[3]	[4]	[3]	
65	Lawn Green		[0]	[2]	[3]	[2]	
70	Red		[30]	[68]	[57]	[2]	
73	Pink		[0]	[0]	[0]	[0]	
75	Magenta		[2]	[2]	[3]	[1]	
80	Purple		[2]	[3]	[3]	[1]	
99	Black		[19]	[0]	[0]	[0]	

If I want to maintain an existing Matrix Line, I only need to enter the Limitation for the Lines and Columns of the Matrix.

I.e.: If I only want to change quantities in an existing Matrix Line for the colors 40 and 90, I can use the following Matrix Limitation: 20/99,02..05

20/99 *For the Colors*

02..05 *For the Sizes*

Lines					
Manage Line Order Fewer options					
Exp... Mat...	Type	Matrix Limitation	No.	Description	
→ ☐	Matrix	20/99,02..05	2100	Lily Blouse	

The Matrix will now look like this:

Edit - - Sales Order 0100001 - No. 2100 - Lily Blouse -							
Search Edit List Matrix Inventory Profile More options							
Variant 1	Variant Description	Line Quantity	S	M	L	XL	
→ 20	Royal Blue		[24]	[48]	[47]	[22]	
99	Black		[19]	[0]	[0]	[0]	

MATRIX LIMITATION SETUP (LIMITATION CODES)

It is possible to create standard **Matrix Limitation Setups** that can be used in the **Matrix Limitation** in an Order Line and in an Order Type.

It will also automatically be created and connected to a **Shipment Group** with Type = *Shipment Group* if you create a Shipment Group (Delivery Period).

HOW TO CREATE A MATRIX LIMITATION SETUP

Open the page via **Search Matrix Limitation Setup List**

Matrix Limitation Setup List				
Search + New Edit List Delete Related Automate Fewer options				
Limitation Code	Description	Master Relation	VarDim Type Subset	
2130_B2C	Limitation for 2130 on B2C,	Yes	☐	
DROP1	Delivery Period 1	Yes	☐	
DROP2	Delivery Period 2	Yes	☐	
DROP3	Delivery Period 3	Yes	☐	
DROP4	Delivery Period 4	Yes	☐	
→ MLS_S	Summer Colors	No	☒	
MLS_W	Winter Colors	No	☒	

DESCRIPTION OF THE FIELDS

LIMITATION CODE

A unique code for the **Matrix Limitation Setup**.

Because Masters and Values for VarDim Types will usually start with Numbers, it is best to take a special character at the beginning of the Limitation Code, so it will not interfere with the Master Numbers that you use or with the Values you have in the VarDim Types.

DESCRIPTION

Description for this Matrix Limitation Setup.

MASTER RELATION

This is a calculated field showing if any Masters have been related to the Matrix Limitation Setup.

VARDIM TYPE SUBSET

This is a calculated field showing if any VarDim Type Subsets have been related to the Matrix Limitation Setup.

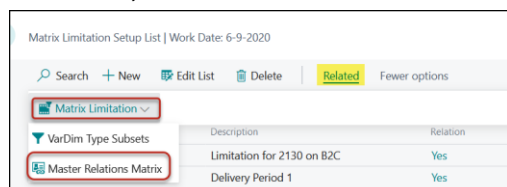
LIMITATION SORTING

You can enter your own sorting for the different Matrix Limitation Setups besides the usual sorting based on the alphabet.

This field is not by default in the page but can be chosen.

HOW TO CREATE AND MAINTAIN A MASTER RELATION

A Master Relation can be set up for both Matrix (press **Ctrl+F11**) and Assortment Matrix via **Related, Matrix Limitation, Matrix Relations Matrix**.



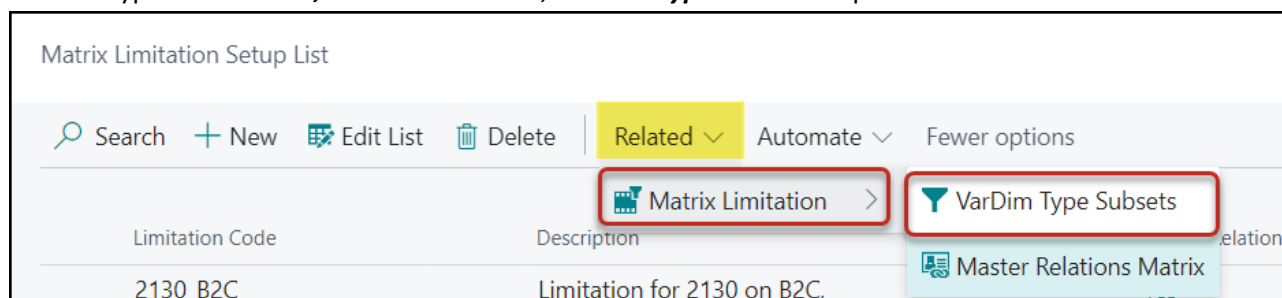
Description	Relation
Limitation for 2130 on B2C	Yes
Delivery Period 1	Yes

You only need to create a Master Relation if you want to filter specific variants of a Master.

The way to create/maintain the Master Relation is the same as when you connected Masters to a Collection (see [Masters Relations via Collection](#)).

HOW TO CREATE AND MAINTAIN A VARDIM TYPE SUBSET

Related to each Matrix Limitation Setup, it is possible to create a Subset of variants for any number of VarDim Types via **Related, Matrix Limitation, VarDim Type Subsets** or press **F7**.



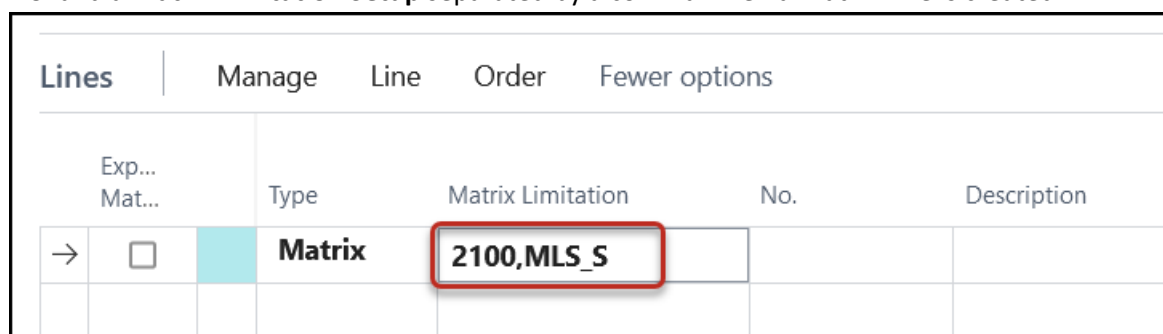
Limitation Code	Description	Relation
2130_B2C	Limitation for 2130 on B2C,	

The way to create/maintain the VarDim Type Subset is the same as when you connected VarDim Type Subsets to a Collection (see [VarDim Type Subsets \(F7\)](#)).

HOW TO USE A MATRIX LIMITATION SETUP

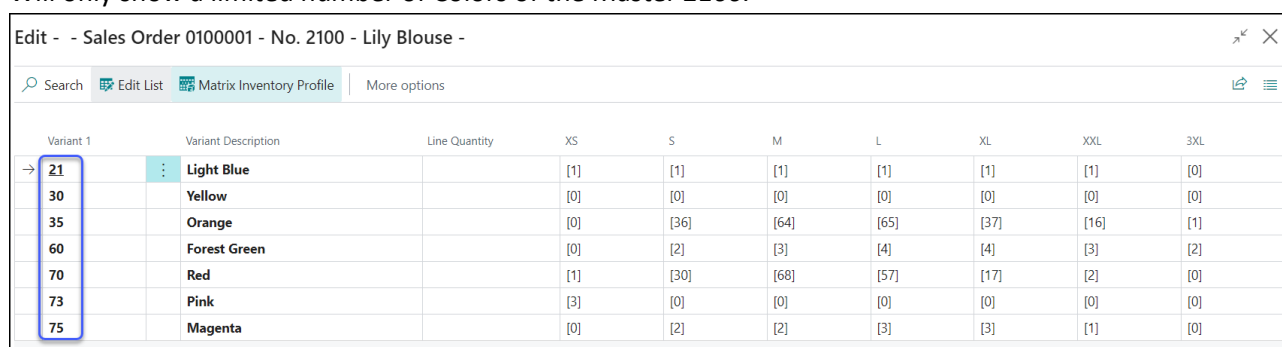
IN THE MATRIX LIMITATION FIELD OF AN ORDER LINE

Instead of defining a string in the **Matrix Limitation** field in an Order Line as described in the section [Matrix Limitation in an Order Line](#) a **Matrix Limitation Setup** can be used. In this case, the string will only consist of one element (a **Matrix Limitation Setup** when editing an existing Matrix Line) or two elements (the **Master No.** and a **Matrix Limitation Setup** separated by a comma when a Matrix Line is created.



Exp...	Mat...	Type	Matrix Limitation	No.	Description
→	☐	Matrix	2100,MLS_S		

Will only show a limited number of Colors of the Master 2100.

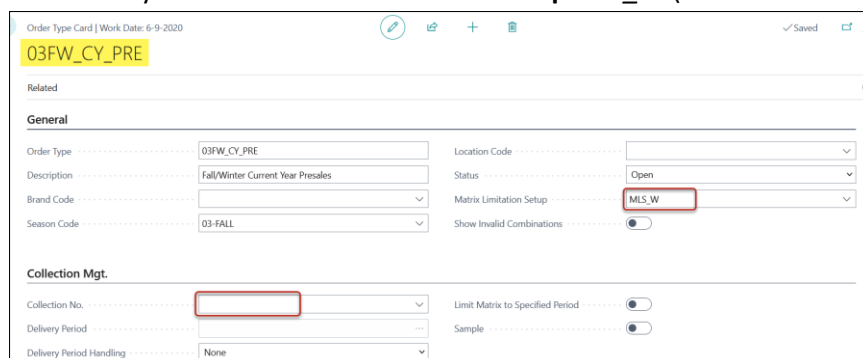


Variant 1	Variant Description	Line Quantity	XS	S	M	L	XL	XXL	3XL
21	Light Blue		[1]	[1]	[1]	[1]	[1]	[1]	[0]
30	Yellow		[0]	[0]	[0]	[0]	[0]	[0]	[0]
35	Orange		[0]	[36]	[64]	[65]	[37]	[16]	[1]
60	Forest Green		[0]	[2]	[3]	[4]	[4]	[3]	[2]
70	Red		[1]	[30]	[68]	[57]	[17]	[2]	[0]
73	Pink		[3]	[0]	[0]	[0]	[0]	[0]	[0]
75	Magenta		[0]	[2]	[2]	[3]	[3]	[1]	[0]

MATRIX LIMITATION SETUP IN AN ORDER TYPE

A **Matrix Limitation Setup** can also be added to an Order Type. (**Search Order Type**).

I.e.: we only enter the **Matrix Limitation Setup** **MLS_W** (and not a Collection) in **Order Type 03FW_CY_PRE**.



Order Type Card | Work Date: 6-9-2020

03FW_CY_PRE

Related

General

Order Type: 03FW_CY_PRE Location Code:

Description: Fall/Winter Current Year Presales Status: Open

Brand Code: Matrix Limitation Setup: MLS_W

Season Code: 03-FALL Show Invalid Combinations: ☐

Collection Mgt.

Collection No.: Limit Matrix to Specified Period: ☐

Delivery Period: Sample: ☐

Delivery Period Handling: None

In that case by choosing this **Order Type** in a Sales-/Purchase Order the Matrix Limitation Setup will automatically be used when creating new Matrix Lines and when maintaining existing Matrix Lines.

So i.e., for **Master 2100**:

Mark	Value 1	Assortment	Blocked	Name	2100
☐	00	☐	☐	Mixed Colors	
☐	01	☐	☐	White	
☐	02	☐	☐	No Color	
☐	03	☐	☐	Light Blue	
☐	04	☐	☐	No Pocket	
☒	20	☐	☐	Royal Blue	
☒	21	☐	☐	Light Blue	
☐	23	☐	☐	Ocean Blue	
☐	25	☐	☐	Navy	
☐	27	☐	☐	Steelblue	
☒	30	☐	☐	Yellow	
☒	35	☐	☐	Orange	
☒	37	☐	☐	Dark Orange	
☐	40	☐	☐	Brown	
☐	50	☐	☐	Sand	
☒	60	☐	☐	Forest Green	
☒	65	☐	☐	Dark Green	
☒	70	☐	☐	Red	
☐	72	☐	☐	Fire Red	
☒	73	☐	☐	Pink	
☒	75	☐	☐	Magenta	
☒	80	☐	☐	Purple	
☐	90	☐	☐	Grey	
☐	92	☐	☐	Charcoal	
☒	99	☐	☐	Black	

Mark	Value 1	Assortment	Blocked	Name	MLS_W
☐	00	☐	☐	Mixed Colors	
☐	01	☐	☐	White	
☐	02	☐	☐	No Color	
☐	03	☐	☐	Snow	
☐	04	☐	☐	No Pocket	
☒	20	☐	☐	Royal Blue	
☐	21	☐	☐	Light Blue	
☐	23	☐	☐	Ocean Blue	
☒	25	☐	☐	Navy	
☒	27	☐	☐	Steelblue	
☐	30	☐	☐	Yellow	
☐	35	☐	☐	Orange	
☒	37	☐	☐	Dark Orange	
☒	40	☐	☐	Brown	
☐	50	☐	☐	Sand	
☐	60	☐	☐	Forest Green	
☒	65	☐	☐	Lawn Green	
☐	70	☐	☐	Red	
☐	72	☐	☐	Fire Red	
☐	73	☐	☐	Pink	
☐	75	☐	☐	Magenta	
☒	80	☐	☐	Purple	
☐	90	☐	☐	Grey	
☒	92	☐	☐	Charcoal	
☒	99	☐	☐	Black	

Sales Order
0100002 · The Fashion Store UK

Home Prepare Print/Send Request Approval Order Actions Related Automate Fewer options

Post Release Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document Workflow Portal Payment Extra Order Info

General

No. 0100002 External Document No. Status Open

Customer Name The Fashion Store UK Use Value Date Blocked Ignore Blocking Skip Availability Check Order Type 03FW_CY_PRE Collection No.

Contact Charley Nelson Posting Date 1/1/2023 VAT Date 1/1/2023 Order Date 1/1/2023 Due Date 9/30/2020 Requested Delivery Date 8/31/2020

Lines Manage Line No. 1 Description 2100 Lily Blouse M2100 Thread 100% Cotton

Exp. Mat. Type Matrix 2100

Location Code Quantity Unit of Measure Code Unit Price Excl. VAT Unit Cost (LCY) Line Discount % Line Amount Excl. VAT Qty. to Ship

Variant 1	Variant Description	Line Quantity	XS	S	M	L	XL	XXL	3XL
20	Royal Blue								
37	Dark Orange								
65	Lawn Green								
80	Purple								
99	Black								

USE OF MATRIX LIMITATION SETUP IN COMBINATION WITH COLLECTIONS

If a **Matrix Limitation Setup** is used in combination with a **Collection No.**, the Limitation will be set for the variants available in the Collection.

I.e., in the Collection **FW-CY**, the Master **2100** is available in 5 Colors as shown below.

FW-CY Work Date: 6-9-2020										
Collection Master Relations										
New Master by Wizard + New										
No. 1	Master Description	Status Code	Private Label, Master	Workflow Exist	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	VarDim Type Variant 3	Options Var 3
2020	Isla Trousers		☒	☐	COLOR_1	0	SIZE_EU	0		0
2110	Mia Blouse		☐	☐	COLOR_1	0	SIZE_C	0		0
2200	Grace Bomber		☐	☐	COLOR_1	0	SIZE_US	0		0
2210	Poppy Blazer		☐	☐	COLOR_1	0	SIZE_US	0		0
2310	Freya Dress		☐	☐	COLOR_1	0	SIZE_EU	0		0
4700	Roger Brogue	READY	☐	☐	SHOE_C...	1	SHOE_S...	1	SHOE_S...	2
→ 2100	Lily Blouse		☐	☐	COLOR_1	5	SIZE_G	0		0

Picture

Value ↑

Alternative Description

20

Royal Blue

65

Dark Green

70

Red

80

Purple

99

Black

The Matrix Limitation *MLS_W* is set to limit the number of colors in VarDim Type *COLOR_1* as shown below.

Matrix Limitation Setup List Work Date: 6-9-2020										
Matrix Limitation										
VarDim Type Subsets										
DROD1										
DROD2										
DROD3										
DROD4										
MLS_S										
→ MLS_W										

Edit - Temporary VarDim Variants										
Search + New Edit List Actions Related Fewer options										
Undo Mark Standard Values Mark All Remove Marks Show Marked All										
Mark	Value ↑	Apparent	Blocked	Name						
→	00	☐	☐	Mixed Colors						
	01	☐	☐	White						
	02	☐	☐	No Color						
	03	☐	☐	Snow						
	04	☐	☐	No Pocket						
	20	☐	☐	Royal Blue						
	21	☐	☐	Light Blue						
	23	☐	☐	Ocean Blue						
	25	☐	☐	Navy						
	27	☐	☐	Steelblue						
	30	☐	☐	Yellow						
	35	☐	☐	Orange						
	37	☐	☐	Dark Orange						
	40	☐	☐	Brown						
	50	☐	☐	Sand						
	60	☐	☐	Forest Green						
	65	☐	☐	Lawn Green						
	70	☐	☐	Red						
	72	☐	☐	Fire Red						
	75	☐	☐	Pink						
	75	☐	☐	Magenta						
	80	☐	☐	Purple						
	90	☐	☐	Grey						
	92	☐	☐	Charcoal						
	99	☐	☐	Black						

If we now fill the Collection *FW_CY* and the Matrix Limitation Setup *MLS_W* in the Order Type *03FW_CY-PRE*

Order Type Card Work Date: 6-9-2020										
03FW_CY_PRE										
Related										
General										
Order Type	03FW_CY_PRE					Location Code				
Description	Fall/Winter Current Year Presales					Status	Open			
Brand Code						Matrix Limitation Setup	MLS_W			
Season Code	03-FALL					Show Invalid Combinations	☐			
Collection Mgt.										
Collection No.	FW-CY					Limit Matrix to Specified Period	☐			
Delivery Period						Sample	☐			
Delivery Period Handling	Search Delivery Period									

The result is that Master *2100* only will be available in four colors as shown below.

General Show more

No.	0100011	Status	Open
Customer Name	The Fashion Store UK	Use Value Date	☐
Contact	Charley Nelson	Blocked	☐
Posting Date	6-9-2020	Ignore Blocking	☐
Order Date	6-9-2020	Skip Availability Check	☒
Due Date	30-9-2020	Order Type	03FW_CY_PRE
Requested Delivery Date	31-8-2020	Collection No.	FW-CY
External Document No.			

No. ↑	Description
2100	Lily Blouse

Lines | Manage | Line | Order | Fewer options

Exp... Mat...	Type	Matrix Limitation	+ New	Select from full list	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. VAT	Qty
→	☐	Matrix	2100									

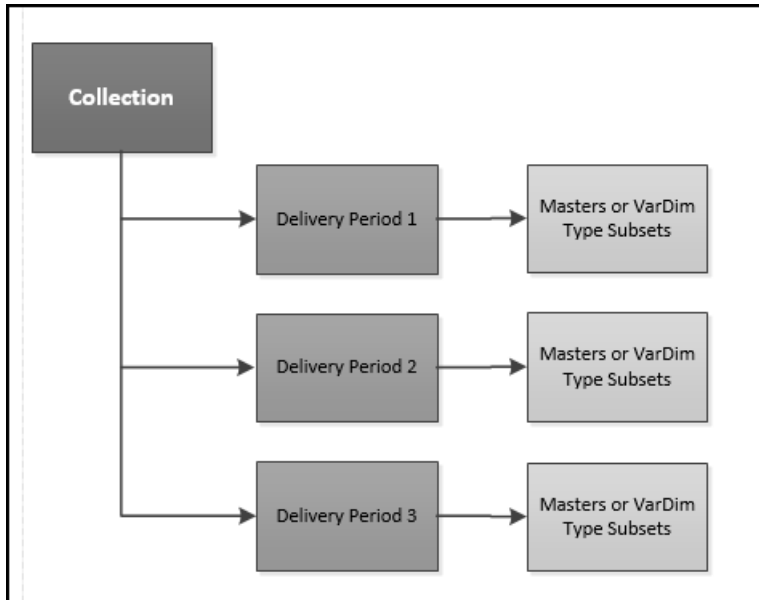
Edit - Sales Order 0100011 - No. 2100 - Lily Blouse -

Search New Edit List Process Actions Related Fewer options

Variant 1	Variant Description	Line Quantity	XS	S	M	L	XL	XXL	3XL
→ 20	Royal Blue								
65	Dark Green								
80	Purple								
99	Black								

SHIPMENT GROUP

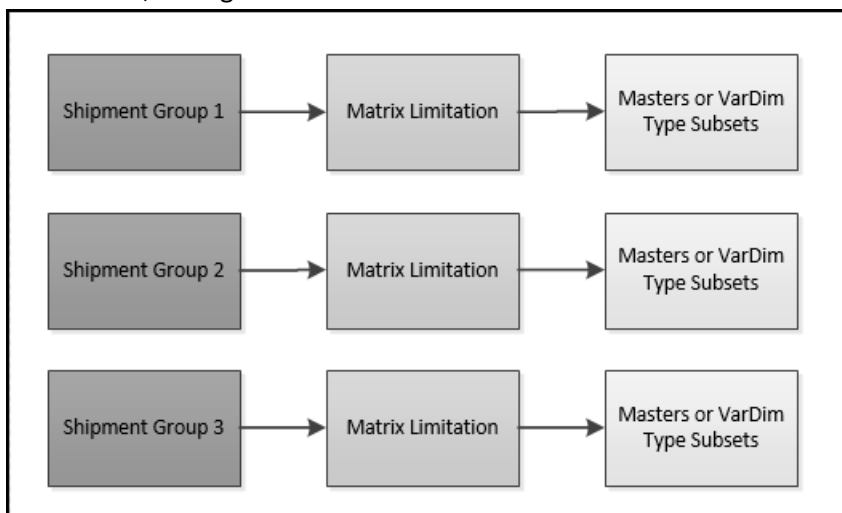
We have seen that we can use the **Delivery Periods** as part of a Collection in [Master Relations to a Collection Delivery Period](#).



It is however not mandatory to use the Collections; you are also able to use only the **Shipment Groups**. I.e., In *January* Masters with long sleeves will be shipped, in *February* Masters with short sleeves, in *March* all the Tops. In this case, it does not matter if a Long Sleeve is from the Men's collection or from the Women's collection.

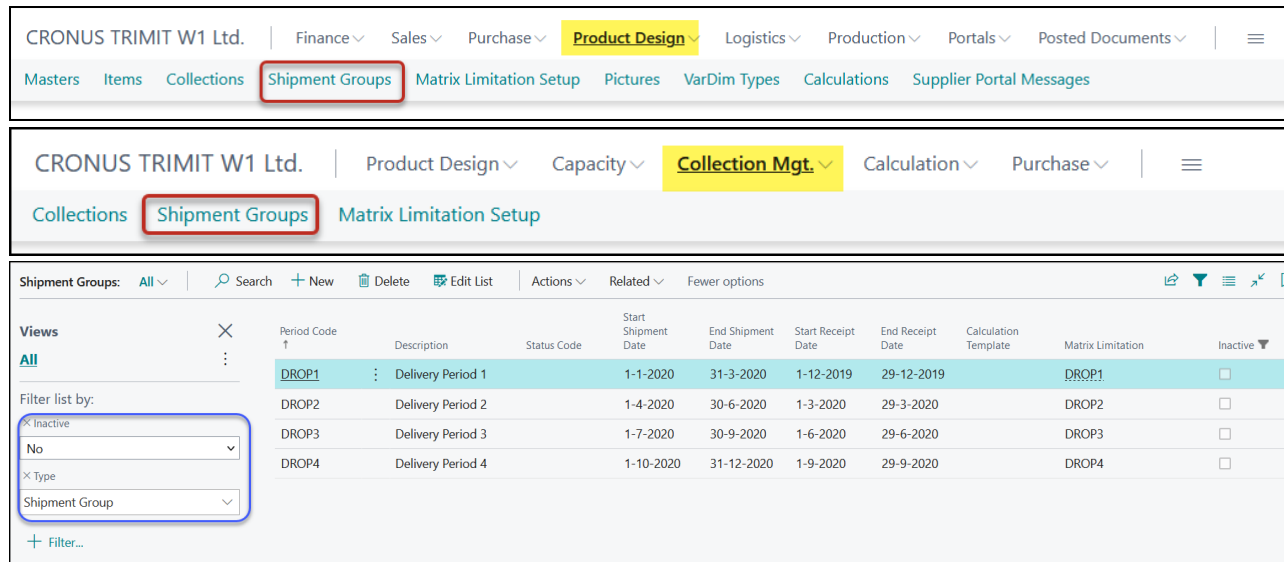
Therefore, instead of 1 Collection with 3 different Delivery Periods you only want to use the 3 Shipment Groups: This setup is also possible in TRIMIT Collection Management.

In that case, the figure would look like:



CREATING AND MAINTAINING SHIPMENT GROUPS

Via **Search Shipment Group** or when using the **TRIMIT Small Business** Role Center by clicking **Product Design, Shipment Groups** or when using the **TRIMIT PDM/Design** Role Center by clicking **Collection Mgt., Shipment Groups**, you can create and maintain the Shipment Groups that are not related to Collections.



The screenshot shows the TRIMIT interface with the 'Product Design' role center selected. The 'Shipment Groups' link is highlighted in the navigation menu. Below the navigation menu, the 'Collection Mgt.' role center is also visible. The main content area displays the 'Shipment Groups' list with columns for Period Code, Description, Status Code, Start Shipment Date, End Shipment Date, Start Receipt Date, End Receipt Date, Calculation Template, Matrix Limitation, and Inactive. The list contains four rows: DROP1, DROP2, DROP3, and DROP4. A filter dropdown is open on the left, showing 'Inactive' set to 'No' and 'Type' set to 'Shipment Group'.

Period Code	Description	Status Code	Start Shipment Date	End Shipment Date	Start Receipt Date	End Receipt Date	Calculation Template	Matrix Limitation	Inactive
DROP1	Delivery Period 1		1-1-2020	31-3-2020	1-12-2019	29-12-2019		DROP1	☐
DROP2	Delivery Period 2		1-4-2020	30-6-2020	1-3-2020	29-3-2020		DROP2	☐
DROP3	Delivery Period 3		1-7-2020	30-9-2020	1-6-2020	29-6-2020		DROP3	☐
DROP4	Delivery Period 4		1-10-2020	31-12-2020	1-9-2020	29-9-2020		DROP4	☐

DESCRIPTION OF THE FIELDS

NOTE

Make sure the **Filter** for the **Type** is set to **Shipment Group** if you want to create Shipment Groups that can be used stand alone. Otherwise, the Type might be set to **Collection**, and you will not see it anymore is the pre-filtered page!

PERIOD CODE

A unique code for this **Shipment Group**.

In the example above, they are setup as months with specific **Shipment Dates** and **Receipts Dates**.

DESCRIPTION

Description for this Shipment Group.

The **Start Sales Delivery Period** of an applicable **Period Code** in a Sales Line will determine the **Shipment Date** and is therefore also the Date for the Availability.

The **End Purchase Delivery Period** of an applicable **Period Code** in a Purchase Line will determine the **Expected Receipt Date** and is therefore also the Date for the Availability.

The other two dates (**End Sales Delivery Period** and **Start Purchase Delivery Period**) are only informative and have no meaning in the rest of the system.

You could use them in customized Documents like Sales Order Confirmation or Purchase Order.

START SHIPMENT DATE

You can enter a **Start Shipment Date**. This **Start Shipment Date** will be copied into the Sales Document/Lines if the Shipment Group is selected in an Order Type and this Order Type is selected in the

Sales Document or if you enter the **Shipment Group** directly into a Sales Line (in the field **Period Code**). It is therewith also applicable for the Availability of the Items.

END SHIPMENT DATE

You can enter an **End Shipment Date**. This End Shipment Date is only informative and will have no meaning in the rest of the system.

You could use it in customized reports like Sales Order Confirmation.

START RECEIPT DATE

You can enter a **Start Receipt Date**. This Start Receipt Date is only informative and will have no meaning in the rest of the system.

You could use it in customized reports like Purchase Order.

END RECEIPT DATE

This **End Receipt Date** will be copied into the Purchase Document/Lines if the Shipment Group is selected in an Order Type and this Order Type is selected in the Purchase Document or if you enter the **Shipment Group** directly into a Purchase Line (in the field **Period Code**). It is therewith also applicable for the Availability of the Items.

CALCULATION TEMPLATE

You can enter a **Calculation Template** for the Shipment Group that can be used to create Calculations for all the related Masters instantly.

More about the Calculations can be found in the *White Paper – TRIMIT Calculations*

MATRIX LIMITATION

This field is not by default in the page, but you can add it.

If you create a **Shipment Group** via the Role Centers, where it will get **Type = Shipment Group** automatically, the system will automatically create a **Matrix Limitation Setup** with the same Code.

If the Code is already present, you need to select a Matrix Limitation Setup yourself.

Only by using a **Matrix Limitation Setup**, you can use the **Shipment Group** (outside the Collection/Delivery Period) as a filter for Items.

How to setup the **Matrix Limitation Setup** can be read in [MATRIX LIMITATION](#)

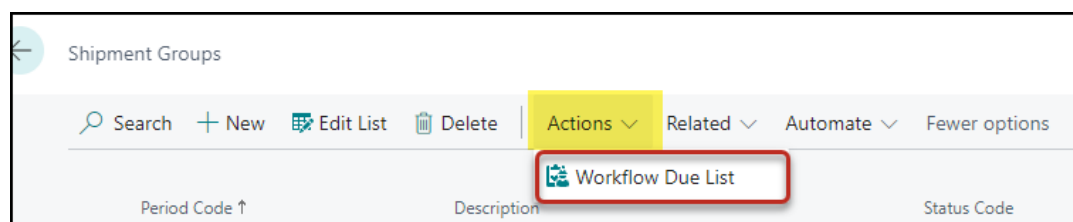
INACTIVE

A checkmark in **Inactive** means that this Shipment Group cannot be used anymore. This Shipment Group will not be shown anymore if you press **Alt+Arrow Down** for a lookup of the Shipment Groups.

This field is not by default shown in the page.

However, you can see in the Filter of the page, that only the **Shipment Groups** with the field **Inactive** is *No* are shown.

ACTIONS OF THE SHIPMENT GROUP



WORKFLOW DUE LIST

Edit - Workflow Due List

Card
Related
Fewer options

General

Date Filter: 6-9-2020
Responsible ID Type Filter: None
Collection Filter:
Responsible Filter:
Shipment Group Filter: DROP1
Relation Filter: None
Brand Filter:
Relation No. Filter:
Season Filter:
Ready Previous:
Numbers of Activities: 0

Relation	Relation No.	Name	Deadline ↑	Responsible ID	Step No.	Description	Awai... Prev...	Closed	Assign Status Code	Com...	Collection No.	Shipment Group
(There is nothing to show in this view)												

Close

Works the same way as already described in [Workflow Due List](#) but now with a pre-defined filter for the **Shipment Group Filter** of the current **Shipment Group**

RELATED OF THE SHIPMENT GROUP

Shipment Groups

Search
New
Edit List
Delete
Actions
Related
Automate
Fewer options

Period Code ↑	Description
→ DROP1	Calculation Overview
DROP2	Delivery Period 2
DROP3	Delivery Period 3
DROP4	Delivery Period 4

Period Code
Calculation
Translations
Dimensions
Master Relations
Show Inactive
Workflow

The **Period Code, Dimensions** has already been described in detail in [Dimensions \(Ctrl+Shift+D\)](#).

The **Period Code, Workflow** has already been described in detail in [Workflow](#)

The **Calculation, Calculation Overview**, has already been described in detail in [Calculation Overview \(Ctrl+Shift+C\)](#).

Their function is comparable for the **Shipment Group**.

PERIOD CODE, MASTER RELATIONS

You can connect Masters/Items to a Shipment Group via **Related, Period Code, Master Relations**

The way to create/maintain the Master Relations is the same as when you connected Masters to a Collection (see [Master Relations via Collection](#)).

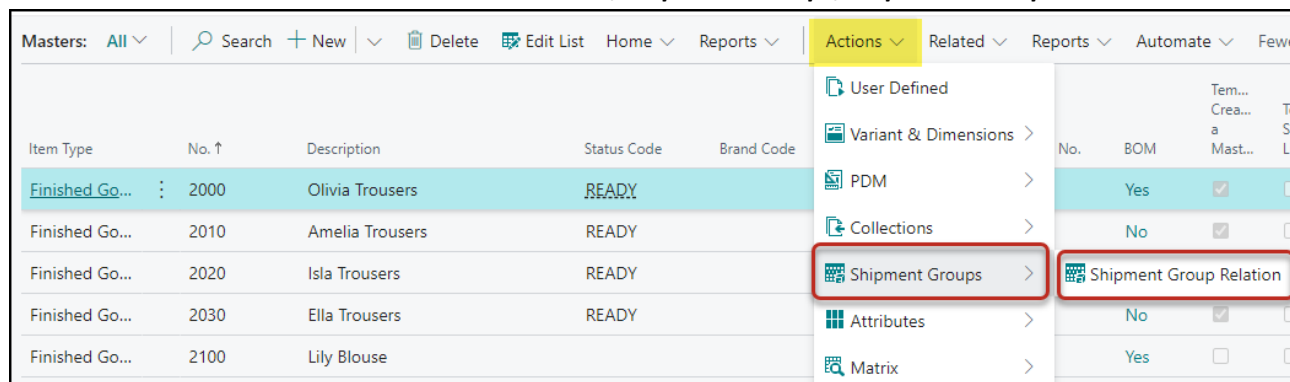
Matrix Limitation Master Relations | Work Date: 6-9-2020

Saved

Search
New
Edit List
Delete
Actions
Related
Fewer options

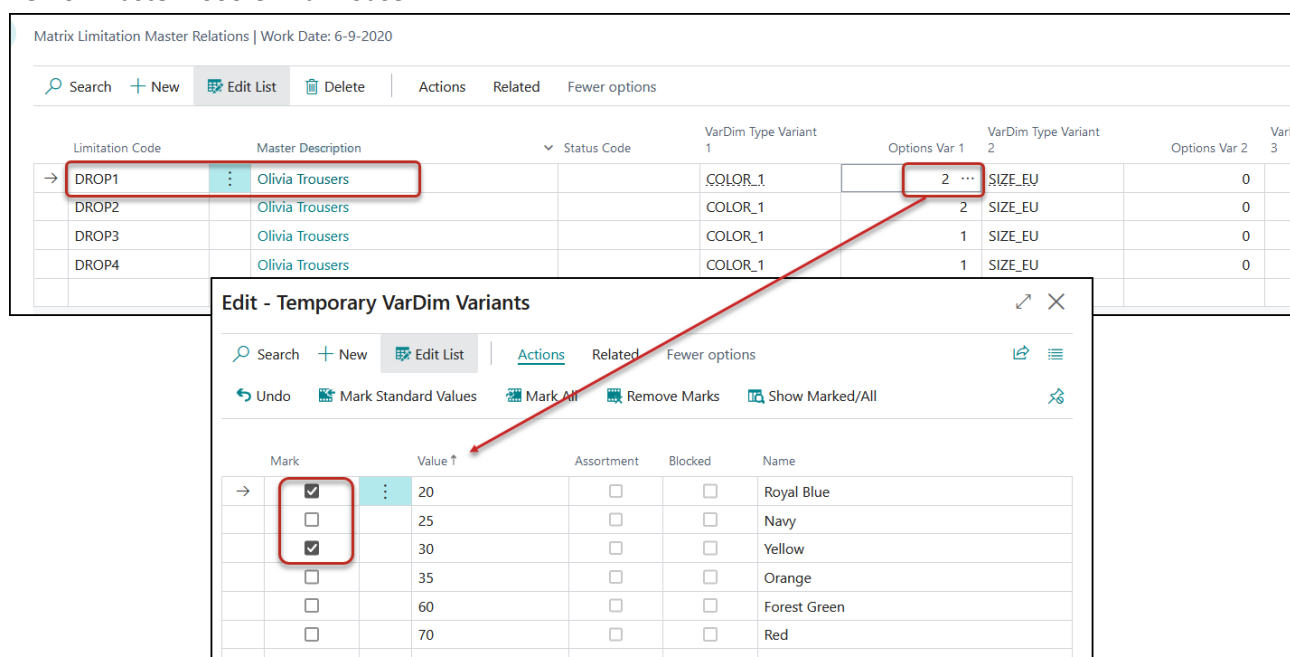
Master No. ↑	Master Description	Status Code	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	VarDim Type Variant 3	Options Var 3
→ 2000	Olivia Trousers		COLOR_1	2	SIZE_EU	0		0
2210	Poppy Blazer		COLOR_1	2	SIZE_US	0		0

Instead of connecting Masters/Items to a Shipment Group via the Shipment Groups, it is also possible to connect it via the Master List and Card: via **Actions, Shipment Groups, Shipment Group Relation**



Item Type	No. ↑	Description	Status Code	Brand Code
Finished Go...	2000	Olivia Trousers	READY	
Finished Go...	2010	Amelia Trousers	READY	
Finished Go...	2020	Isla Trousers	READY	
Finished Go...	2030	Ella Trousers	READY	
Finished Go...	2100	Lily Blouse		

I.e. for Master *2000 Olivia Trouser*:



Limitation Code	Master Description	Status Code	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	VarDim Type Variant 3	Options Var 3
DROP1	Olivia Trousers		COLOR_1	2	SIZE_EU			0
DROP2	Olivia Trousers		COLOR_1	2	SIZE_EU			0
DROP3	Olivia Trousers		COLOR_1	1	SIZE_EU			0
DROP4	Olivia Trousers		COLOR_1	1	SIZE_EU			0

Mark	Value ↑	Assortment	Blocked	Name
☒	20	☐	☐	Royal Blue
☐	25	☐	☐	Navy
☒	30	☐	☐	Yellow
☐	35	☐	☐	Orange
☐	60	☐	☐	Forest Green
☐	70	☐	☐	Red

NOTE - 1

As you might see, the connection of Masters to a Shipment Group is created via the **Matrix Limitation Setups**. There is no table Shipment Group Master Relations; there is only a table **6037034 trm Matrix Limit Master Relat** in which the Master Relations to a Matrix Limitation Setup is written/maintained. That is also the reason the system will always automatically create a Matrix Limitation Setup, the moment you create a Shipment Group with Type = *Shipment Group*.

NOTE - 2

You cannot change the **Type** of a Shipment Group manually (besides via AL directly in the table). The **Type** of the Shipment Group is automatically set based on how you created the Shipment Group: via the Collections – Type will be set to *Collection* – or via the Role Centers Shipment Groups – Type will be set to *Shipment Group*.

NOTE – 3

If you delete a Shipment Group with Type = *Shipment Group* to which a Matrix Limitation Setup is connected, the Matrix Limitation Setup with the same code will also be deleted, as well as all the Master Relations and VarDim Type Subsets related to that Matrix Limitation Setup.

PERIOD CODE, SHOW INACTIVE

The field **Inactive** of the **Shipment Group** is not shown by default in the page of the **Shipment Groups**. You need to add it manually if you want to see this field.

With this Action, all **Shipment Groups** will be shown with **Inactive** = *No* and **Inactive** = *Yes*.

VARDIM TYPE SUBSETS

You cannot connect **VarDim Type Subsets** directly to a Shipment Group, but only via the **Matrix Limitation Setup** (see [How to create and maintain a VarDim Type Subset](#))

STATUS CODE

INTRODUCTION

A Status Code is used to control which processes are possible at any given time for an Order Type, Collection, Master, or Item.

If a Status Code is related to an **Order Type**, the Order Type will only be shown in a lookup List and can only be entered in a Sales Document, if the Status Sales is valid for Sales Documents.

If a Status Code is related to an **Order Type**, the Order Type will only be shown in a lookup List and can only be entered in a Purchase Document, if the Status Purchase is valid for Purchase Documents.

If a Status Code is related to a **Collection**, the Collection will only be shown in a lookup List and can only be entered in a Sales-/Purchase Document, if the Status Code is valid for Sales-/Purchase Documents.

If a Status Code is related to a **Master**, the Master will only be shown in a lookup List and can only be entered in a Sales-/Purchase Document if the Status Code is valid for Sales-/Purchase Documents.

If a Status Code is related to an **Item**, the Item will only be shown in a lookup List and can only be entered in a Sales-/Purchase Document if the Status Code is valid for Sales-/Purchase Documents.

BLOCK FOR ALL PROCESSES

FOR A COMPLETE ITEM OR MASTER

It is possible to block an Item or a complete Master for all processes with the Field **Blocked** that is on the FastTab **General** of the Item Card and Master Card (after clicking **Show more**).

Master Card






2000 · Olivia Trousers

[New](#)
[Home](#)
[Reports](#)
[Actions](#)
[Related](#)
[Reports](#)
[Automate](#)
[Fewer options](#)

New by Wizard

General

Show less

No. 2000 ...

No. System MMMMAABB ...

Description Olivia Trousers

Description 2

Base Unit of Measure PCS ...

Automatic Ext. Texts ☐

Status Code READY ...

Search Description OLIVIA TROUSERS

Group Master

Collection No. SS-CY ...

Period Code 01-JAN ...

Collection Relation Yes

Private Label ☐

Exclude from Collection Check ☐

Blocked ☒

Type Inventory ...

Groups/Types

Item Type Finished Goods ...

Item Category Code

Design One Color (1) ...

Item Group Trousers (210) ...

Gender Women (110) ...

Item Statistics Group 4 *** SURFACE TREATMENT *** (0) ...

Item Statistics Group 5 Flat Pack (10) ...

Item Card

20002036 · Olivia Trousers

Home Item Prices & Discounts Actions Related Automate Fewer options

Composition Sustainability Additional Tags Master Adjust Inventory Apply Template Bill of Materials

Care Label Additional Info Additional Comments Copy Item Create Stockkeeping Unit Inventory Profile

Item

Show less

No. 20002036

Description Olivia Trousers

Description 2 Royal Blue.36

Master No. 2000

Blocked

Type Inventory

Base Unit of Measure PCS

Last Date Modified 3/31/2023

GTIN

Item Category Code

Design One Color (1)

Item Group Trousers (210)

Gender Women (110)

Item Statistics Group 4 *** SURFACE TREATMENT *** (0)

Item Statistics Group 5 Flat Pack (10)

Exclude from Collection Check

Service Item Group

Automatic Ext. Texts

Common Item No.

Purchasing Code

Variant Mandatory if Exists Default (No)

FOR SOME COMBINATIONS OF A MASTER - 1

When working with Matrix Masters you are also able to block all processes for individual combinations of the Master. This can be done by using **Valid Combinations** in the Matrix of a Master.

You can get there by going in the Master Card to **Actions, Matrix, Matrix, Valid Combinations**

Master Card

4000 · Benjamin Skinny Jeans

New Home Reports Actions Related Reports Automate Fewer options

New by Wizard

General

No.

No. System

Description

Description 2

Base Unit of Measure PCS

Automatic Ext. Texts

Status Code

User Defined

Variant & Dimensions

PDM

Collections

Shipment Groups

Matrix

Matrix

Assortments

Matrix

Show Matrix

Valid Combinations

Matrix Y-Axis

Private Label

Exclude from Collection Check

I.e.: For Master 4000, Waists 28 and 29 cannot have Length 36 and Waist 32 cannot have Length 30.

Edit - - Matrix Master - No. 4000 - Benjamin Skinny Jeans -							
Search Edit List Matrix Inventory Profile More options							
Variant 1	Variant Description		Line Quantity	30"	32"	34"	36"
→ 20	:	Blue, Waist 28"		+	+	+	-
20		Blue, Waist 29"		+	+	+	-
20		Blue, Waist 30"		+	+	+	+
20		Blue, Waist 31"		+	+	+	+
20		Blue, Waist 32"		-	+	+	+
90		Grey, Waist 28"		+	+	+	-
90		Grey, Waist 29"		+	+	+	-
90		Grey, Waist 30"		+	+	+	+
90		Grey, Waist 31"		+	+	+	+
90		Grey, Waist 32"		-	+	+	+
99		Black, Waist 28"		+	+	+	-
99		Black, Waist 29"		+	+	+	-
99		Black, Waist 30"		+	+	+	+
99		Black, Waist 31"		+	+	+	+
99		Black, Waist 32"		-	+	+	+

If the cursor is placed in a cell and 0 is entered to set the combination to invalid a Minus Sign “-” is shown. If 1 is entered to set the combination to valid, a Plus Sign “+” is shown.

NOTE

You should only set the **Valid Combinations** when you start-up with a Master, not when you already have entered Orders for the Master, in which the combinations could already be used.
After setting the **Valid Combination** to “-”, you will not see any quantities anymore that still might be present in open Orders. In case you already have Orders, use the **Status Code**, to block specific processes.

FOR SOME COMBINATIONS OF A MASTER - 2

When working with Matrix Masters you are also able to block all processes for individual combinations of the Master. This can be done by using **Valid Combinations** in the Matrix of a Master.

You can get there by going in the Master Card to **Actions, Matrix, Matrix, Matrix** (or press **Ctrl+Shift+M**)

Master Card

4000 · Benjamin Skinny Jeans

New Home Reports

Actions

Related

Reports

Automate

Fewer options

New by Wizard

User Defined

Variant & Dimensions >

PDM >

Collections >

Shipment Groups >

Matrix >

Assortments >

Private Label

Exclude from Collection Check

Valid Combinations

Matrix Y-Axis

General

No.

No. System

Description

Description 2

Base Unit of Measure

Automatic Ext. Texts

Matrix

Matrix

Matrix

Show Matrix

Inventory

Finished G

And then click **Related, Matrix Master, Matrix Cells**

Edit - - Matrix - Relation 1 NO. 4000 - Benjamin Skinny Jeans

Search + New Edit List Delete Related Fewer options

Matrix Master

Positive List
Matrix Y-Axis
Matrix Cells
Test Matrix Cells Line No.
Valid Combinations
Status Codes
Availability Check
Calculate Unit Price
Test Unit Cost
Create/Maintain Assortment
Quantity in Matrix

Relation 2 Name ↑	Name	Variant 1	Option	Var 2	VarDim Ty
→ 4000	Benjamin Skinny Jeans	COLOR_1		5	SIZE_L

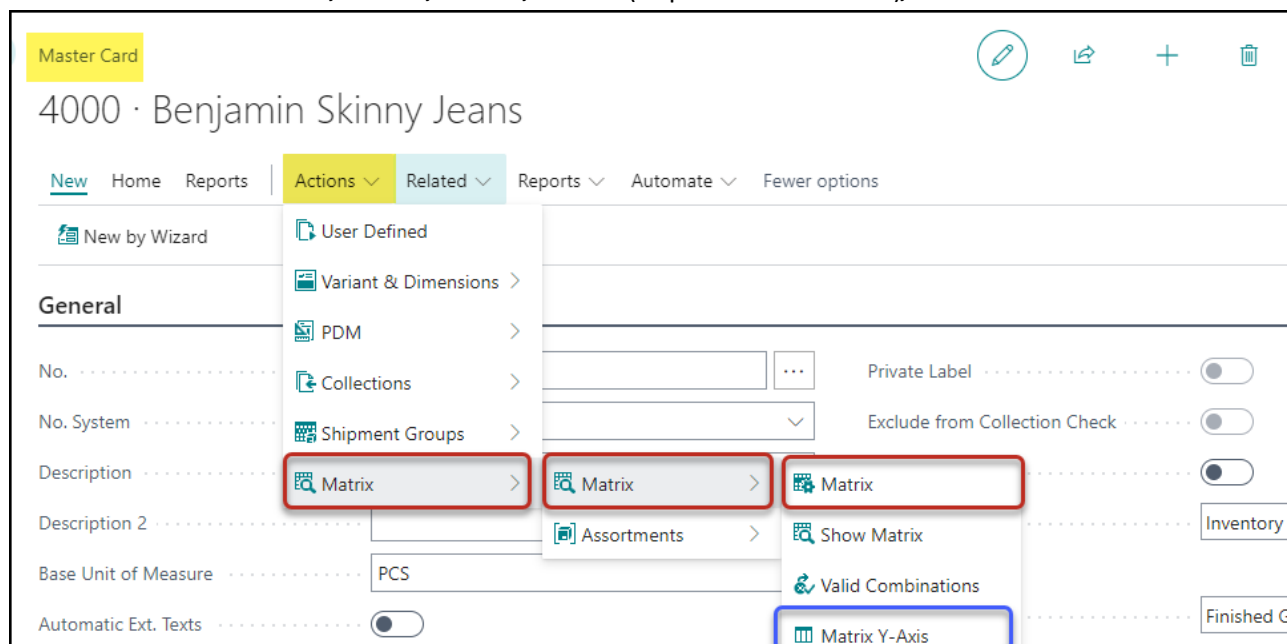
Matrix Item Nos.													
Search Edit List													
VarDim Y-Axis ↑	Variant Table ↑	Variant No. ↑	New Line No.	Assortment Matrix VarDim Type	Created Item No.	Status Code	Related Assortment	Invalid Combination	Skip Availability Check	Skip Calculation of Unit Price	Skip Test Unit Cost		
→ 40002028		25	30	705	4000202830		☐	☐	☐	☐	☐		
40002028		25	32	788	4000202832		☐	☐	☐	☐	☐		
40002028		25	34	871	4000202834		☐	☐	☐	☐	☐		
40002028		25	36	954	4000202836		☐	☒	☐	☐	☐		
40002029		25	30	1327	4000202930		☐	☐	☐	☐	☐		
40002029		25	32	1410	4000202932		☐	☐	☐	☐	☐		
40002029		25	34	1493	4000202934		☐	☐	☐	☐	☐		
40002029		25	36	1576	4000202936		☐	☒	☐	☐	☐		
40002030		25	30	1949	4000203030		☐	☐	☐	☐	☐		
40002030		25	32	2032	4000203032		☐	☐	☐	☐	☐		

In this case, you need to know your codes, because no Descriptions are shown.

But what you entered in [For some Combinations of a Master - 1](#) will also be shown in this page.

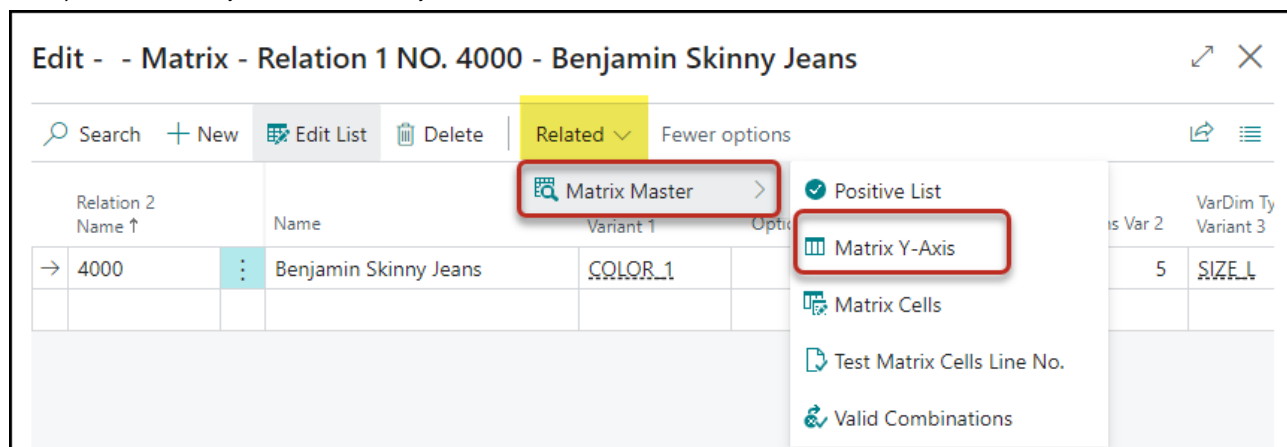
FOR SOME Y-AXIS OF A MASTER

It is also possible to block complete Y-Axis (lines of the Matrix, i.e., Colors). You can get there by going in the Master Card to **Actions, Matrix, Matrix, Matrix** (or press **Ctrl+Shift+M**),



The screenshot shows the Master Card for '4000 · Benjamin Skinny Jeans'. The 'Actions' menu is open, and the 'Matrix' option is selected. The 'Matrix Y-Axis' option is highlighted with a blue box. The 'Matrix' option is also highlighted with a red box. The 'Matrix Y-Axis' option is also highlighted with a red box. The 'Matrix Y-Axis' option is also highlighted with a red box.

Now, click **Related, Matrix Master, Matrix Y-Axis**.



The screenshot shows the 'Edit - Matrix - Relation 1 NO. 4000 - Benjamin Skinny Jeans' window. The 'Related' menu is open, and the 'Matrix Master' option is selected. The 'Matrix Y-Axis' option is highlighted with a red box. The 'Matrix Y-Axis' option is also highlighted with a red box. The 'Matrix Y-Axis' option is also highlighted with a red box.

In the Master List/Card you could also go directly to **Actions, Matrix, Matrix, Matrix Y-Axis**.

Matrix Item Lines ✓ Saved  

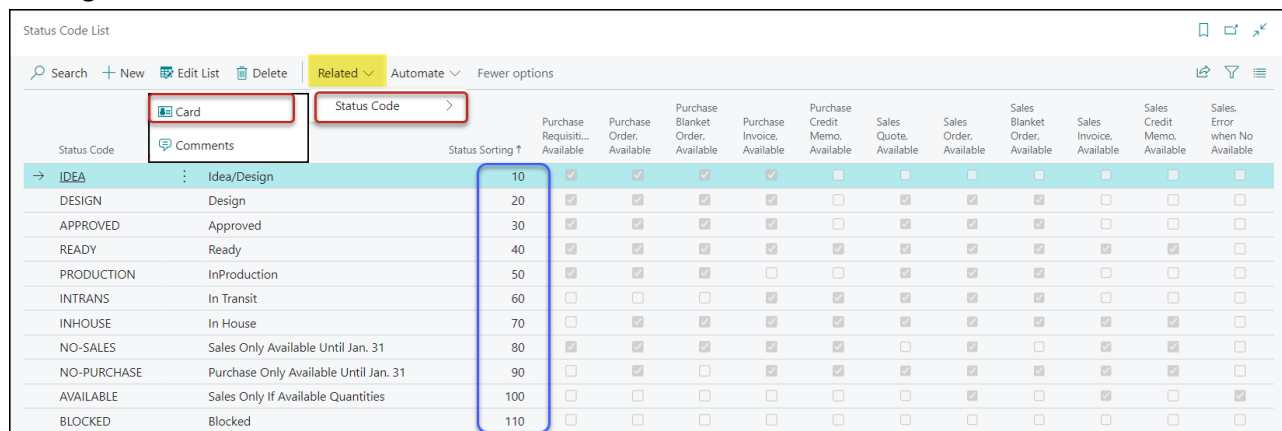
 Search
  New
  Edit List
  Delete
 More options   

VarDim Type Variant 1	Status Code	Invalid Combination	Variant 1	Variant 1 Name	VarDim Type Variant 2	Variant 2	Variant 2 Name
→ COLOR_1	:	☐	20	Blue,Waist 28"	SIZE_W	28	Waist 28"
COLOR_1		☐	20	Blue,Waist 29"	SIZE_W	29	Waist 29"
COLOR_1		☐	20	Blue,Waist 30"	SIZE_W	30	Waist 30"
COLOR_1		☐	20	Blue,Waist 31"	SIZE_W	31	Waist 31"
COLOR_1		☐	20	Blue,Waist 32"	SIZE_W	32	Waist 32"
COLOR_1		☐	90	Grey,Waist 28"	SIZE_W	28	Waist 28"
COLOR_1		☐	90	Grey,Waist 29"	SIZE_W	29	Waist 29"
COLOR_1		☐	90	Grey,Waist 30"	SIZE_W	30	Waist 30"
COLOR_1		☐	90	Grey,Waist 31"	SIZE_W	31	Waist 31"
COLOR_1		☐	90	Grey,Waist 32"	SIZE_W	32	Waist 32"
COLOR_1		☐	99	Black,Waist 28"	SIZE_W	28	Waist 28"
COLOR_1		☐	99	Black,Waist 29"	SIZE_W	29	Waist 29"
COLOR_1		☐	99	Black,Waist 30"	SIZE_W	30	Waist 30"
COLOR_1		☐	99	Black,Waist 31"	SIZE_W	31	Waist 31"
COLOR_1		☐	99	Black,Waist 32"	SIZE_W	32	Waist 32"

By entering a checkmark in **Invalid Combination**, all the combinations with the Y-Axis (in this example the Color and the Waist) will be blocked for all processes.

HOW TO CREATE AND MAINTAIN A STATUS CODE

A **Status Code** is created and maintained via **Search Status Codes**. The Status Codes will be shown in **Status Sorting** order.



Status Code	Comments	Status Sorting ↑	Purchase Requisition Available	Purchase Order Available	Purchase Blanket Order Available	Purchase Invoice Available	Purchase Credit Memo Available	Sales Quote Available	Sales Order Available	Sales Blanket Order Available	Sales Invoice Available	Sales Credit Memo Available	Sales Error when No Available
→ IDEA	Idea/Design	10	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐
DESIGN	Design	20	☒	☒	☒	☒	☐	☒	☒	☒	☐	☐	☐
APPROVED	Approved	30	☒	☒	☒	☒	☐	☒	☒	☒	☐	☐	☐
READY	Ready	40	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐
PRODUCTION	InProduction	50	☒	☒	☒	☐	☐	☒	☒	☒	☐	☐	☐
INTRANS	In Transit	60	☐	☐	☐	☒	☒	☒	☒	☒	☐	☐	☐
INHOUSE	In House	70	☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐
NO-SALES	Sales Only Available Until Jan. 31	80	☒	☒	☒	☒	☐	☐	☐	☐	☒	☒	☐
NO-PURCHASE	Purchase Only Available Until Jan. 31	90	☐	☒	☐	☒	☒	☒	☒	☒	☒	☒	☐
AVAILABLE	Sales Only If Available Quantities	100	☐	☐	☐	☐	☐	☐	☒	☐	☒	☐	☒
BLOCKED	Blocked	110	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

The fields **Purchase Requisition Available**, **Purchase Order Available**, **Purchase Blanket Order Available**, **Purchase Invoice Available** and **Purchase Credit Memo Available** determines whether an Item, Master, Collection or Order Type can be used in a Purchase Document.

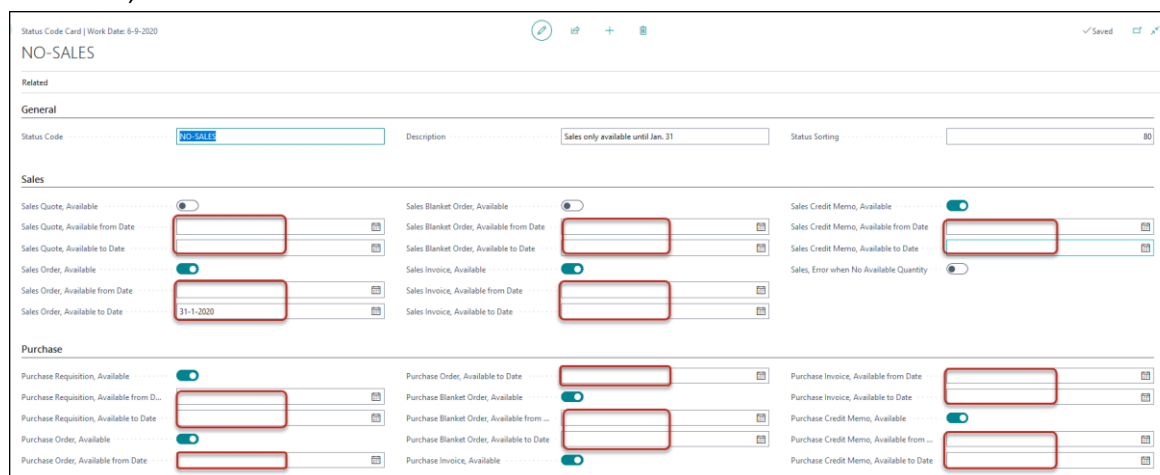
The fields **Sales Quote Available**, **Sales Order Available**, **Sales Blanket Order Available**, **Sales Invoice Available** and **Sales Credit Memos Available** determine whether an Item, Master, Collection or Order Type can be used in a Sales Document.

The field **Sales, Error when No Available Quantity** makes sure that if you enter a Quantity in a Sales Line or Matrix Cell, and enter a higher Quantity as is available, the entry of this Quantity is not accepted. You will get an error message and need to change the Quantity.

If you go to the Card of a Status Code (click **Related**, **Status Code**, **Card**, or **Shift+F7**), you are also able to enter a **From Date** and a **To Date** for each of the checkmarks mentioned above.

This offers the opportunity to 'open' a Status Code for a process only for a certain period.

The entries of these Dates will be checked with the **Work Date** when you want to enter an Order Type, Collection, Master or Item in Sales or Purchase.



Status Code Card | Work Date: 6-9-2020

NO-SALES

Related

General

Status Code: NO-SALES Description: Sales only available until Jan. 31 Status Sorting: 80

Sales

Sales Quote, Available: ☐ Sales Blanket Order, Available: ☐ Sales Credit Memo, Available: ☒

Sales Quote, Available from Date: Sales Blanket Order, Available from Date: Sales Credit Memo, Available from Date:

Sales Quote, Available to Date: Sales Blanket Order, Available to Date: Sales Credit Memo, Available to Date:

Sales Order, Available: ☒ Sales Invoice, Available: ☒ Sales, Error when No Available Quantity: ☐

Sales Order, Available from Date: Sales Invoice, Available from Date:

Sales Order, Available to Date: 31-1-2020 Sales Invoice, Available to Date:

Purchase

Purchase Requisition, Available: ☒ Purchase Order, Available to Date: Purchase Invoice, Available from Date:

Purchase Requisition, Available from Date: Purchase Blanket Order, Available: ☒ Purchase Invoice, Available to Date:

Purchase Requisition, Available to Date: Purchase Blanket Order, Available from Date: Purchase Credit Memo, Available: ☒

Purchase Order, Available: ☒ Purchase Blanket Order, Available to Date: Purchase Credit Memo, Available from Date:

Purchase Order, Available to Date: Purchase Invoice, Available: ☒ Purchase Credit Memo, Available to Date:

RELATING A STATUS CODE

A **Status Code** can be related to:

- Item, Master, Y-Axis of a Master, Matrix Cell of a Master
- Collection, Collection Master Relation, Collection Master Relations Y-Axis
- Collection/Delivery Period Master Relations, Collection/Delivery Period Master Relations Y-Axis
- Shipment Group Master Relations Y-Axis
- Order Type

When searching for a **Status Code** in a process to determine of a specific Item/Master can be sold/purchased, the search will be done in the following order:

- A Status Code related to an Item No (I.e., a T-Shirt in a specific Color/Size).
- A Status Code related to the Y-Axis in the Collection Matrix related to the Master (I.e., the color White of a T-Shirt within Collection SS-CY)
- A Status Code related to the Y-Axis in the general Matrix (I.e., color White of a T-Shirt)
- A Status Code related to the Collection Master Relation (I.e., a T-Shirt within Collection SS-CY)
- A Status Code related to the Master (I.e., all the colors/sizes of a Master)
- A Status Code related to the Collection (I.e., SS-CY)

NOTE

Where you see **Collection**, you could also read **Collection/Delivery Period** or **Shipment Group**. However, this depends on if you have a **Period Code** filled in the Sales-/Purchase Line.

TO A COLLECTION

A **Status Code** can be related to a Collection (**Search Collections**) by filling in a **Status Code** in the field **Status Code** as shown below.

Collections: All ▾ 🔍 Search + New 🗑 Delete 📋 Edit List 📄 Master Relations 📅 Delivery Periods ⚙ VarDim Ty									
Collection No. ↑	Description	Brand Code	Season Code	First Start Sales Delivery Period	Status Code	Calculation Template	Collection Sorting	Priv... Label	Var... Type Sub...
FW-CY	Fall/Winter Current Year		03-FALL	—	APPROVED	PSR_L	1	☐	☐
FW-LY	Fall/Winter Last Year			—	AVAILABLE		1	☐	☐
FW-NY	Fall/Winter Next Year			—	IDEA		1	☐	☐
SS-CY	Spring/Summer Current Year			28-1-2020	READY	PSR_S	1	☐	☐
SS-LY	Spring/Summer Last Year			—	BLOCKED		1	☐	☐
SS-NY	Spring/Summer Next Year			—	DESIGN		1	☐	☐

I.e., the **Status Code** *IDEA* for Collection *FW-NY* means, that you cannot select Collection *FW-NY* yet for Sales- or Purchase Documents based on the checkmarks in the **Status Code**.

TO A MASTER RELATION

A **Status Code** can be related to a Master Relation (of Collection, Delivery Period) by filling in a **Status Code** in the field **Status Code** as shown below.

A **Status Code** on a **Collection Master Relation** can be entered on several levels in the **Collections**:

- Click **Master Relations**
- Click **Delivery Period** and then click **Master Relation**
- Click **Related, Samples, Sample Master Relations**
- Click **Related, Samples, Sample Delivery Periods** and then click **Master Relation**
- But also, via the **Master Card**, by clicking **Process, Collections**

If the **Status Code** states, that the Master Relations is not available for Sales Order, this will only have its effect if the Collection is entered in the Header of the Sales Order and you want to enter a specific Master that is related to that Collection, or if the **Delivery Period** is filled in the **Order Type** of a Sales Header, or if the field **Sample** of the **Order Type** has a checkmark.

FW-CY										
Collection Master Relations										
Master Card Composition Additional Info Workflow Matrix Limit. Master Relations Copy Values Bill of Materials Care Label Measurement Chart Additional Comments Positive List										
No. ↑	Master Description	Status Code	Priv... Label, Mas...	Wor... Exist	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	VarDim Ty Variant 3	
2020	Isla Trousers		☒	☐	COLOR_1	0	SIZE_EU	0		
2110	Mia Blouse		☐	☒	COLOR_1	0	SIZE_C	0		
2200	Grace Bomber		☐	☒	COLOR_1	0	SIZE_US	0		
2210	Poppy Blazer		☐	☐	COLOR_1	0	SIZE_US	0		
2310	Freya Dress		☐	☒	COLOR_1	0	SIZE_EU	0		
→ 4700	Roger Brogue	IDEA	☐	☐	SHOE_COLOR	0	SHOE_SIZE	0	SHOE_S	

I.e., the **Status Code** **IDEA** for Collection **FW-CY** and Master **4700** means that Master **4700** cannot be sold yet for Collection **FW-CY**.

TO A MASTER RELATION MATRIX Y-AXIS

A **Status Code** can be related to a **Matrix Y-Axis** by filling in a Status Code in the field **Status Code** as shown below.

This is however only possible if you have selected specific **Option Var 1** for the Master Relation.

A **Status Code** on a **Y-Axis of a Master Relation** can be entered on several levels in the **Collections**:

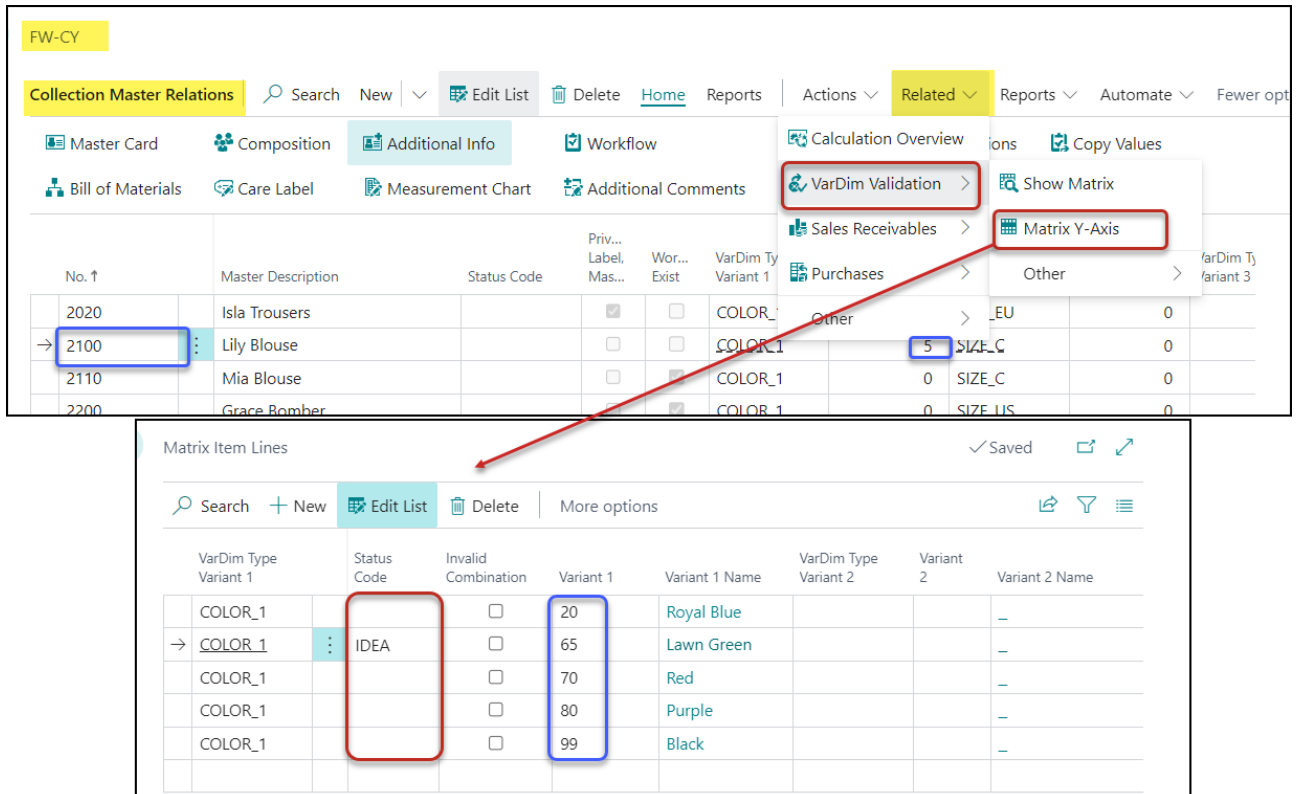
- Click **Master Relations** and then **Related, VarDim Validation, Matrix Y-Axis**
- Click **Delivery Periods** and then **Master Relations** and then **Related, VarDim Validation, Matrix Y-Axis**
- Click **Related, Samples, Sample Master Relations** and then **Related, VarDim Validation, Matrix Y-Axis**
- Click **Related, Samples, Sample Delivery Periods** and then click **Master Relation** and then **Related, VarDim Validation, Matrix Y-Axis**

A **Status Code** on a **Y-Axis of a Master Relation** can also be entered on the **Shipment Groups**:

- Click **Related, Period Code, Master Relations** and then **Actions, Functions, Matrix Y-Axis**

I.e.: For the Collection **FW-CY** and the Master **2100**, I want the Color **65 Lawn Green** to be blocked because it is still an **IDEA** for this Collection.

In the Collection Card, click **Master Relations** and then on **Related, VarDim Validation, Matrix Y-Axis**



The screenshot shows the 'FW-CY' Collection Card with the 'Master Relations' tab selected. The 'Related' dropdown menu is open, showing 'VarDim Validation' and 'Matrix Y-Axis'. The 'Matrix Item Lines' table is displayed below, showing the status of various color variants.

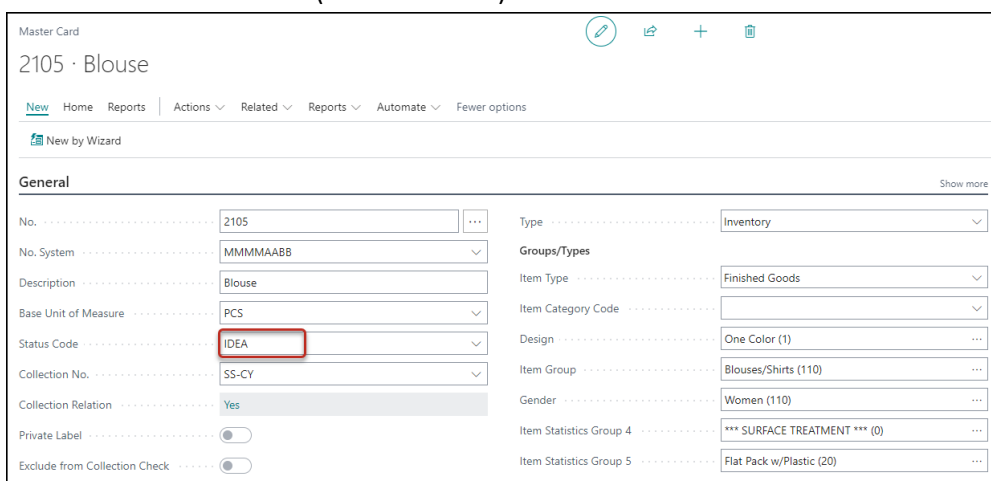
VarDim Type Variant 1	Status Code	Invalid Combination	Variant 1	Variant 1 Name	VarDim Type Variant 2	Variant 2	Variant 2 Name
COLOR_1		☐	20	Royal Blue			—
COLOR_1	IDEA	☐	65	Lawn Green			—
COLOR_1		☐	70	Red			—
COLOR_1		☐	80	Purple			—
COLOR_1		☐	99	Black			—

NOTE

This is however only possible if you already selected only some Colors for this Collection/Master.
If all Colors are applicable (**Options Var 1 is 0**) it is not possible. Then you should first select all the Colors for this Collection/Master before you can set to **Status Code** for some of the Colors.

TO A MASTER

A **Status Code** can be related directly to a Master by filling a Status Code in the field **Status Code** as shown below in the Master Card (**Search Master**).



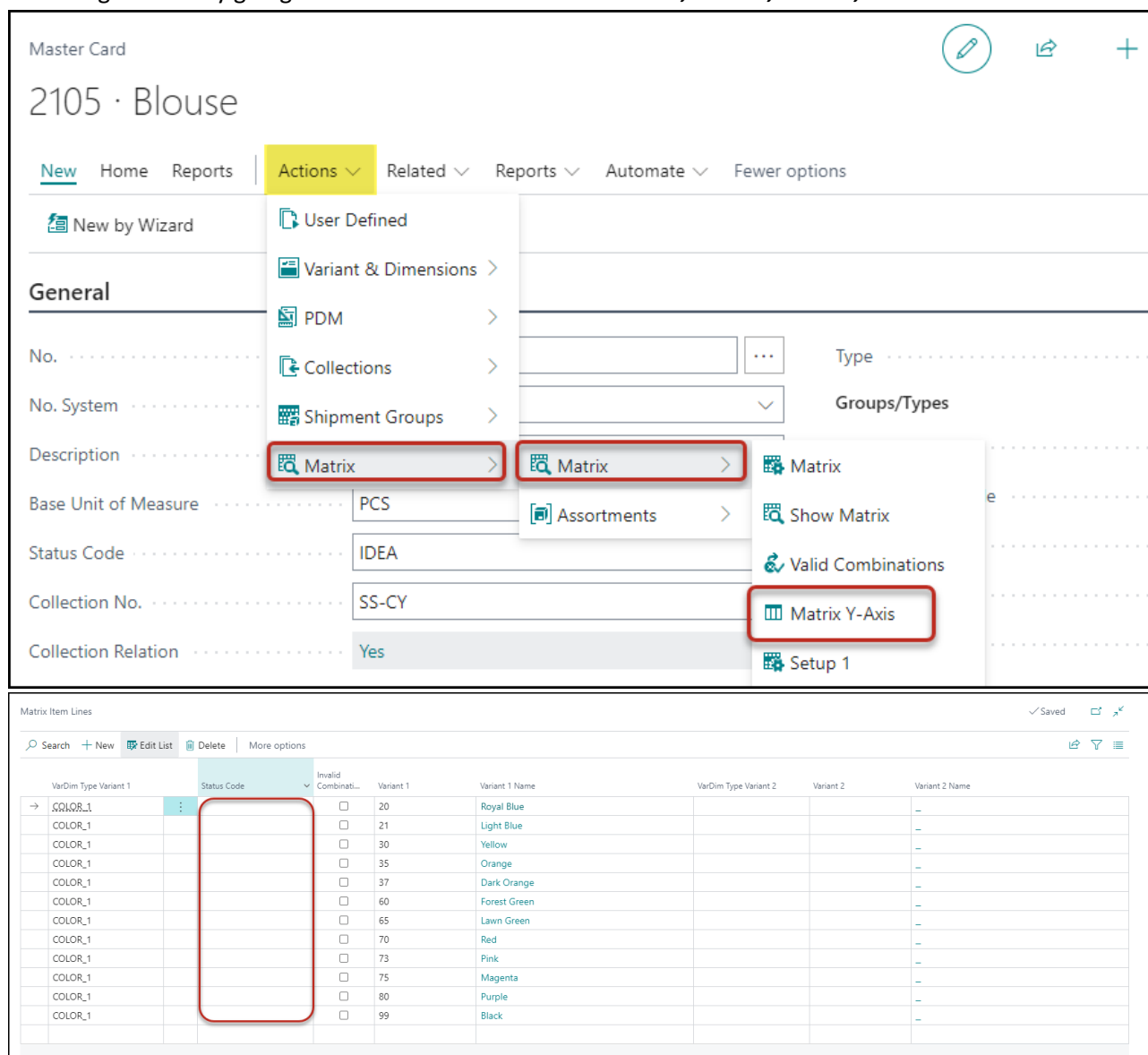
The screenshot shows the Master Card for '2105 · Blouse'. The 'Status Code' field is highlighted with a red box and contains the value 'IDEA'.

General	
No.	2105
No. System	MMMMMAABB
Description	Blouse
Base Unit of Measure	PCS
Status Code	IDEA
Collection No.	SS-CY
Collection Relation	Yes
Private Label	☐
Exclude from Collection Check	☐
Type	Inventory
Groups/Types	Finished Goods
Item Type	One Color (1)
Item Category Code	Blouses/Shirts (110)
Design	Women (110)
Item Statistics Group 4	*** SURFACE TREATMENT *** (0)
Item Statistics Group 5	Flat Pack w/Plastic (20)

TO A MASTER MATRIX Y-AXIS

Alternative a **Status Code** can be related to the Master **Matrix Y-Axis** by filling in a Status Code in the field **Status Code** as shown below.

You can get there by going in the Master Card and click **Actions, Matrix, Matrix, Matrix Y-Axis**.



The screenshot shows the 'Master Card' for '2105 · Blouse'. The 'Actions' menu is open, and the 'Matrix' option is selected. The 'Matrix Y-Axis' option is highlighted in the sub-menu. The 'Status Code' field is set to 'IDEA'.

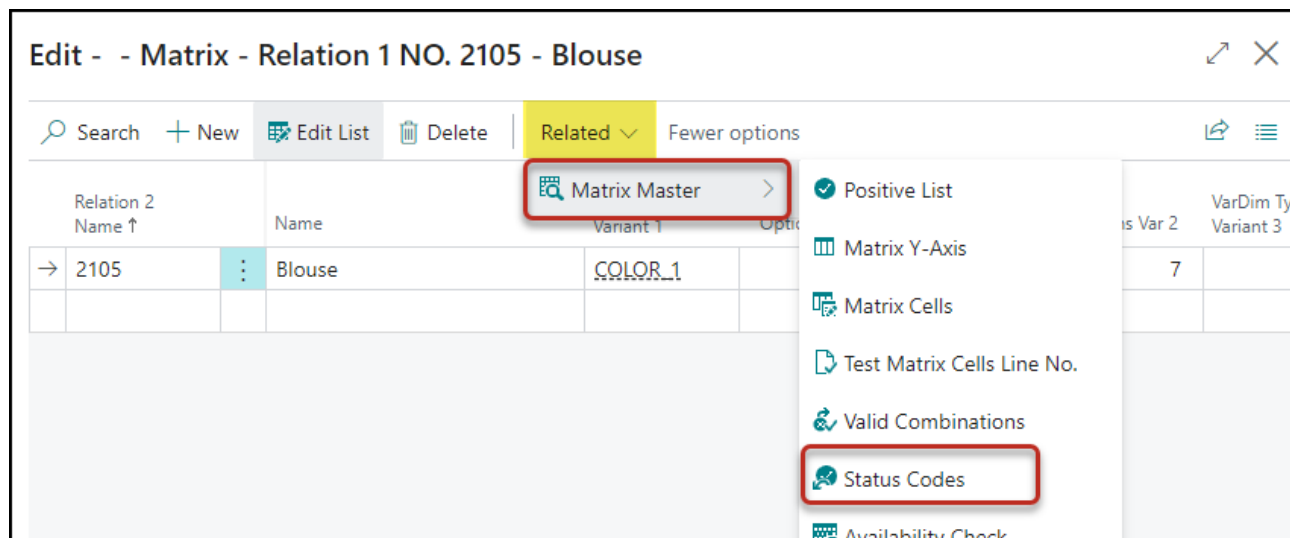
Below the Master Card, the 'Matrix Item Lines' table is displayed. The table has columns for 'VarDim Type Variant 1', 'Status Code', 'Invalid Combinati...', 'Variant 1', 'Variant 1 Name', 'VarDim Type Variant 2', 'Variant 2', and 'Variant 2 Name'. The 'Status Code' column is highlighted with a red box.

VarDim Type Variant 1	Status Code	Invalid Combinati...	Variant 1	Variant 1 Name	VarDim Type Variant 2	Variant 2	Variant 2 Name
→ COLOR_1		☐	20	Royal Blue			-
COLOR_1		☐	21	Light Blue			-
COLOR_1		☐	30	Yellow			-
COLOR_1		☐	35	Orange			-
COLOR_1		☐	37	Dark Orange			-
COLOR_1		☐	60	Forest Green			-
COLOR_1		☐	65	Lawn Green			-
COLOR_1		☐	70	Red			-
COLOR_1		☐	73	Pink			-
COLOR_1		☐	75	Magenta			-
COLOR_1		☐	80	Purple			-
COLOR_1		☐	99	Black			-

TO A MASTER MATRIX CELL VIA THE MATRIX

A **Status Code** can be related to a general **Matrix Cell** of a Master by filling in a Status Code in the Matrix as shown below.

You can get there by going in the Master Card and click **Actions, Matrix, Matrix, Matrix** (or press **Ctrl+Shift+M**), and then click **Related, Matrix Master, Status Codes**.



Edit - - Matrix - Relation 1 NO. 2105 - Blouse

Search + New Edit List Delete Related Fewer options

Relation 2 Name ↑ Name Variant 1 Opti

→ 2105 : Blouse COLOR_1

Matrix Master

Positive List

Matrix Y-Axis

Matrix Cells

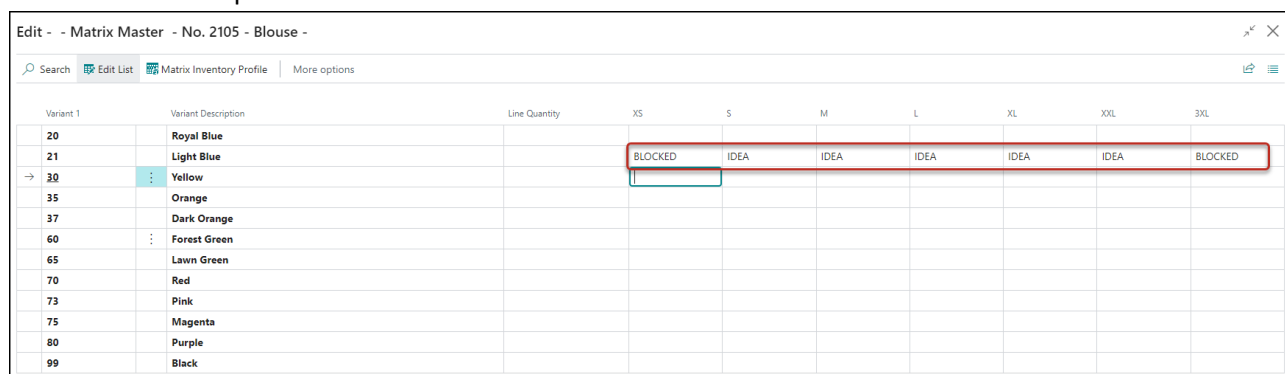
Test Matrix Cells Line No.

Valid Combinations

Status Codes

Availability Check

I.e., In every cell, you can enter a different **Status Code**, but you need to know the exact **Status Code** – you cannot use a lookup.



Edit - - Matrix Master - No. 2105 - Blouse

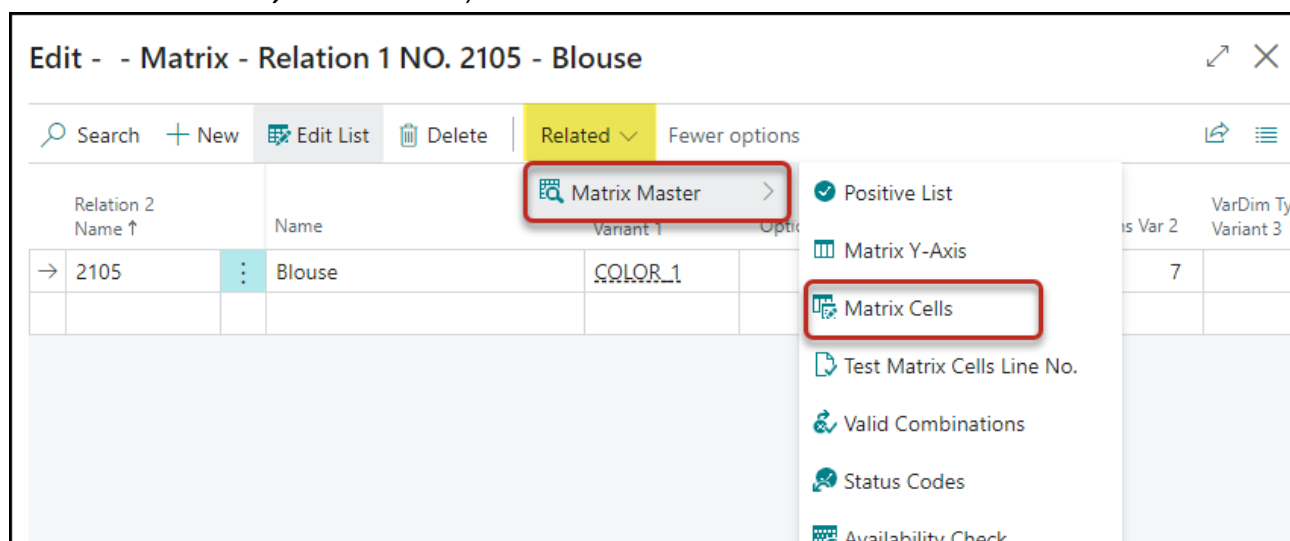
Search Edit List Matrix Inventory Profile More options

Variant 1	Variant Description	Line Quantity	XS	S	M	L	XL	XXL	3XL
20	Royal Blue								
21	Light Blue		BLOCKED	IDEA	IDEA	IDEA	IDEA	IDEA	BLOCKED
30	Yellow								
35	Orange								
37	Dark Orange								
60	Forest Green								
65	Lawn Green								
70	Red								
73	Pink								
75	Magenta								
80	Purple								
99	Black								

TO A MASTER MATRIX CELL

A **Status Code** can be related to a general **Matrix Cell** of a Master by filling in a **Status Code** in list page as shown below:

You can get there by going in the Master Card click **Actions, Matrix, Matrix, Matrix** (or press **Ctrl+Shift+M**), and then click **Related, Matrix Master, Matrix Cells**



Edit - - Matrix - Relation 1 NO. 2105 - Blouse

Search + New Edit List Delete Related Fewer options

Relation 2 Name ↑ Name Variant 1 Opti

→ 2105 : Blouse COLOR_1

Matrix Master

Positive List

Matrix Y-Axis

Matrix Cells

Test Matrix Cells Line No.

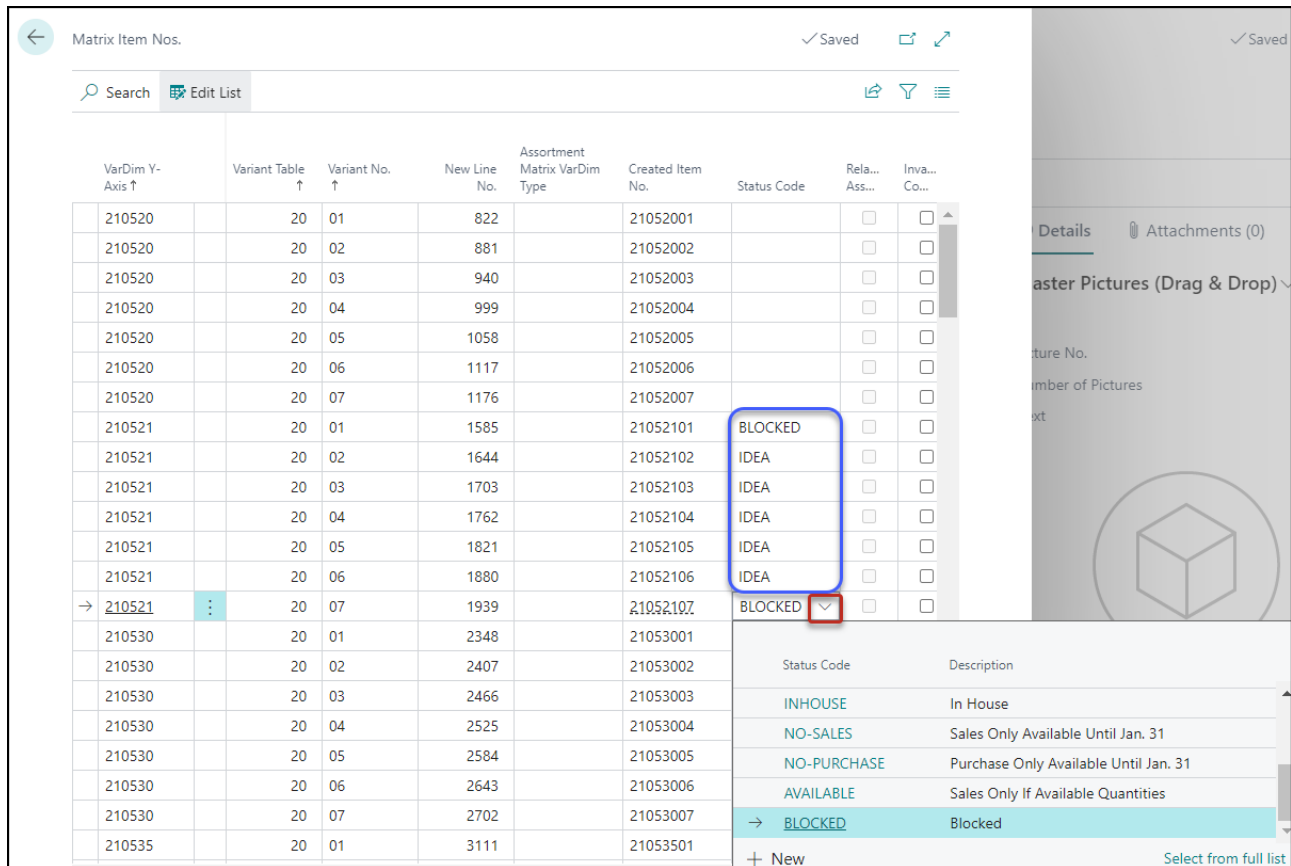
Valid Combinations

Status Codes

Availability Check

Now you can use a lookup to choose the right **Status Code** for a Matrix Cell.

But there are no Descriptions for the specific **Created Item No.**

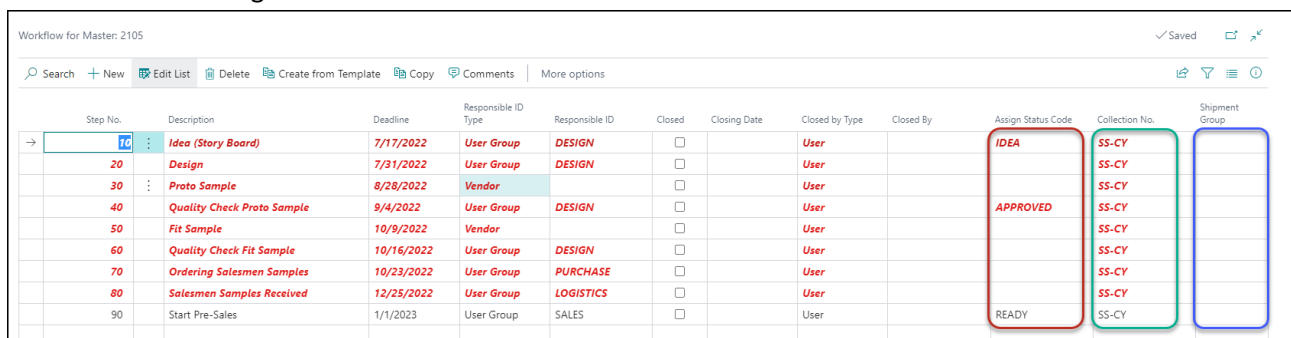


VarDim Y-Axis ↑	Variant Table ↑	Variant No. ↑	New Line No.	Assortment Matrix VarDim Type	Created Item No.	Status Code	Rela... Ass...	Inva... Co...
210520	20	01	822		21052001			
210520	20	02	881		21052002			
210520	20	03	940		21052003			
210520	20	04	999		21052004			
210520	20	05	1058		21052005			
210520	20	06	1117		21052006			
210520	20	07	1176		21052007			
210521	20	01	1585		21052101	BLOCKED		
210521	20	02	1644		21052102	IDEA		
210521	20	03	1703		21052103	IDEA		
210521	20	04	1762		21052104	IDEA		
210521	20	05	1821		21052105	IDEA		
210521	20	06	1880		21052106	IDEA		
210521	20	07	1939		21052107	BLOCKED		
210530	20	01	2348		21053001			
210530	20	02	2407		21053002			
210530	20	03	2466		21053003			
210530	20	04	2525		21053004			
210530	20	05	2584		21053005			
210530	20	06	2643		21053006			
210530	20	07	2702		21053007			
210535	20	01	3111		21053501			

HOW TO UPDATE THE STATUS CODE BY USING A WORKFLOW

Besides entering/changing a **Status Code** directly in a Master or Collection, it is also possible to use an attached (TRIMIT) Workflow.

In the Steps of a Workflow, you can enter an **Assign Status Code**. If you would approve a Step with an **Assign Status Code**, the Status Code of the Master or Master/Collection or Master/Collection/Delivery Period will also change.



Step No.	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Closing Date	Closed by Type	Closed By	Assign Status Code	Collection No.	Shipment Group
10	Idea (Story Board)	7/17/2022	User Group	DESIGN			User		IDEA	SS-CY	
20	Design	7/31/2022	User Group	DESIGN			User			SS-CY	
30	Proto Sample	8/28/2022	Vendor				User			SS-CY	
40	Quality Check Proto Sample	9/4/2022	User Group	DESIGN			User		APPROVED	SS-CY	
50	Fit Sample	10/9/2022	Vendor				User			SS-CY	
60	Quality Check Fit Sample	10/16/2022	User Group	DESIGN			User			SS-CY	
70	Ordering Salesmen Samples	10/23/2022	User Group	PURCHASE			User			SS-CY	
80	Salesmen Samples Received	12/25/2022	User Group	LOGISTICS			User			SS-CY	
90	Start Pre-Sales	1/1/2023	User Group	SALES			User		READY	SS-CY	

This is applicable for the **Workflow of a Master**:

- regarding the **Status Code** of a complete Master (if Master is not connected to a Collection)
- regarding the **Status Code** of the **Master Relations** of a Collection (if Master is connected to a Collection, and the field **Collection No.** is filled in the Workflow)
- regarding the **Status Code** of the **Master Relations** of a Collection/Delivery Period (if the Master is connected to a Collection and Delivery Period, and the fields **Collection No.** and **Shipment Group** are filled in the Workflow)

This is applicable for the **Workflow of a Collection**:

- regarding the **Status Code** of a complete Collection

This is applicable for the **Workflow of the Container**:

- regarding the **Status Code** of a complete Container

If you are using the **Collection Master Relations**, a change of a **Status Code** because of approving a Workflow Step of a **Master** with a Collection No. filled in the Step, will not update the Status Code in the Master, but only update the Status Code in the specific **Collection Master Relation**.

If you are using the **Collection Master Relations** related to a specific Delivery Period, a change of a Status Code because of approving a Workflow Step of a **Collection**, will not change the Status Code in the Collection Master Relations of that Delivery Period.

HOW STATUS CODES ARE CHECKED IN ORDERS

COLLECTIONS

I.e.: If the **Status Code** in the Collection says it is not available for Sales-/Purchase Orders, it means that you cannot enter the **Collection No.** in the Sales-/Purchase Header (directly or via an Order Type).

COLLECTION MASTER RELATIONS

I.e.: If the **Status Code** in a Collection Master Relation (via Collections, Delivery Periods or Sample Master Relation) says it is not available for Sales Order, it means that the Master (and all related Items) cannot be chosen in the Order Lines if the **Collection No.** (and **Delivery Period**) is filled with the specific Collection (and Delivery Period) in the Sales Line (directly or via an Order Type).

SHIPMENT GROUP MASTER RELATIONS

I.e.: If the **Status Code** in a Shipment Group Master Relation Y-Axis (via Shipment Groups) says it is not available for Sales Order, it means that the Master/Y-Axis (and all related Items) cannot be chosen in the Order Lines if the **Shipment Group** is filled with the specific Shipment Group in the Order Type of the Sales Order.

MASTER

I.e.: If the **Status Code** in the Master says it is not available for Sales Order, it means that you cannot enter the Master (and all related Items) in the Sales Lines.

NEW ORDER MATRIX

If the **Invalid Combination** has been set or the **Status Code** of a specific Cell in the Matrix says that it is not available, the Cells will be shown in an Order Matrix (Sale and Purchase) with a Minus-sign “-“ as shown below and it will not be possible to enter any value in the cell. I.e.:

If you have a **Status Code** of a specific **Y-Axis**, the whole Line will not be shown in the Matrix.

- Master 4000 has **Invalid Combinations** for Waist 28 and 29, Length 36 and for Waist 32 and Length 30 (the red circles)
- Master 4000, **Y-Axis** Blue/Waists 29 and 30 got **Status Code** *IDEA* so will not be shown (see green circle)
- Master 4000 Waist 40/Length 34 or 36, got **Status Code** *IDEA* (the blue circles)

Edit - - Sales Order 0100012 - No. 4000 - Benjamin Skinny Jeans -

Search New Edit List Process Actions Related Fewer options

Variant 1	Variant Description	Line Quantity	30"	32"	34"	36"
→ 20	Blue, Waist 28"					-
20	Blue, Waist 31"					
20	Blue, Waist 32"		-			
90	Grey, Waist 28"					-
90	Grey, Waist 29"					-
90	Grey, Waist 30"					
90	Grey, Waist 31"					
90	Grey, Waist 32"		-			
99	Black, Waist 28"					-
99	Black, Waist 29"					
99	Black, Waist 30"			-	-	
99	Black, Waist 31"					
99	Black, Waist 32"		-			

If the Field **Invalid Combination** has been set or a not available **Status Code** has been entered for one or more Y-Axis Lines (i.e., Colors), the Y-Axis Lines will not be shown in an Order Matrix (Sale and Purchase), unless the Field **Show Invalid Combinations** in the Order Type of the Order has been set to Yes as shown below.

Order Type Card | Work Date: 6-9-2020

10AFTERSALES

Related

General

Order Type 10AFTERSALES Location Code
Description Aftersales Status Open
Brand Code Matrix Limitation Setup
Season Code Show Invalid Combinations ☒

EXISTING ORDERS MATRIX

If the **Invalid Combination** has been set or a not available **Status Code** has been entered or the Item field **Blocked** has been set after the Order has been created, the cells will be shown with Minus-sign "-" and the Quantity in brackets as shown below. In this situation, it is only allowed to fill in a zero.

Be aware that if the Field **Invalid Combination** has been set to Yes for a whole Y-Axis Line, the Field **Show Invalid Combinations** in the Order Type of the Order must be set to Yes, otherwise you do not know that you might have entered quantities on a color that is now not available anymore.

Edit - - Sales Order 0100012 - No. 4000 - Benjamin Skinny Jeans -

Search New Edit List Process Actions Related Fewer options

Variant 1	Variant Description	Line Quantity	30"	32"	34"	36"
→ 20	Blue, Waist 28"					-
20	Blue, Waist 31"	12	2	4	4	2
20	Blue, Waist 32"	5	-	1	2	2
90	Grey, Waist 28"	5	- [1]	- [2]	- [2]	-
90	Grey, Waist 29"					-
90	Grey, Waist 30"					
90	Grey, Waist 31"					

PRICES PER COLLECTION

As shown earlier in [Sales Price Search Dimension](#) and [Purchase Price Search Dimension](#) in the General Ledger Setup these Parameters influences the sorting when searching for a Sales-/Purchase Price.

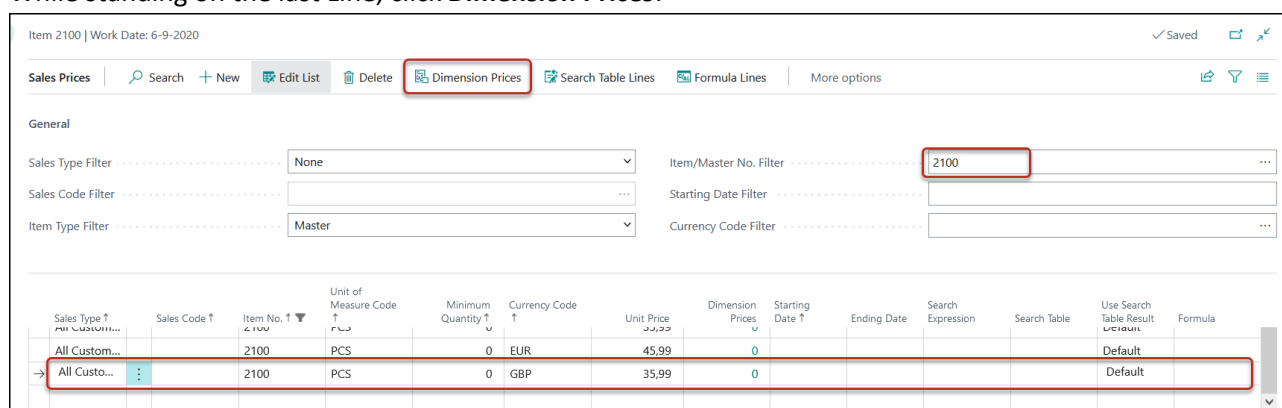
This opens the opportunity to setup different Prices for (i.e.) Collections.

To clarify how this works we will look at an example:

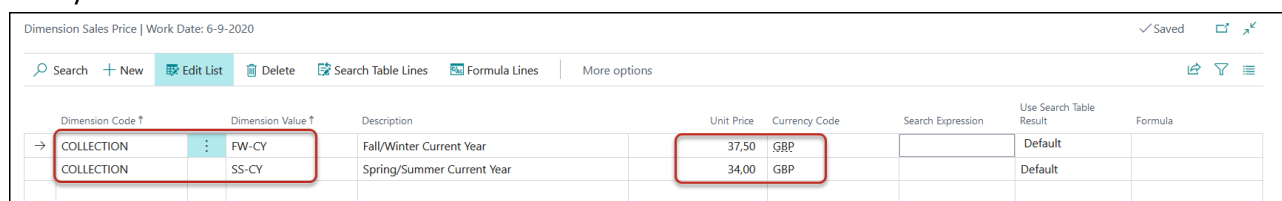
Master 2100 is part of Collection *SS-CY (Spring/Summer Current Year)* and of *FW-CY (Fall/Winter Current Year)*. If we would sell it for *SS-CY*, it would cost 34 GBP and for *FW-CY* it would cost 37,50 GBP.

In the Master Card, go to **Relates, Sales Receivables, Sales Prices**.

While standing on the last Line, click **Dimension Prices**.



Now you can enter the **Unit Price**



In the above example, we used the **Dimension COLLECTION**, but you can of course use any other Dimension as well (like *Order Type*, so prices in Presales and prices in Aftersales might differ) if you have entered this Dimension in the field **Sales Price Search Dimension** of the General Ledger Setup.

NOTE

You can only choose 1 Dimension for which you can specify different Sales Prices and/or Purchase Prices via the fields in the General Ledger Setup.

Therefore, you cannot use different prices per Order Type Dimension and Collection Dimension.

If you would have a Sales Order with **Collection No.** is **SS-CY**, the **Unit Price** would become **34,00**.

Sales Order | Work Date: 6-9-2020

0100013 · The Fashion Store UK

✕ This customer has an overdue balance. Show details

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

General Show more

Customer Name The Fashion Store UK Status Open

Contact Charley Nelson Use Value Date ☐

Posting Date 6-9-2020 Blocked ☐

Order Date 6-9-2020 Ignore Blocking ☐

Due Date 6-9-2020 Skip Availability Check ☐

Requested Delivery Date Order Type

External Document No. Collection No. SS-CY

Lines | Manage Line Order Fewer options

Exp... Mat...	Type	Matrix Limitation	No.	Description	Description 2	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. VAT	Qt.
→	☐	Matrix	2100	Lily Blouse		BLUE	6	PCS	34,00				204,00	

If you would have a Sales Order with **Collection No.** is **FW-CY**, the **Unit Price** would become **37,50**.

Sales Order | Work Date: 6-9-2020

0100014 · The Fashion Store UK

✕ This customer has an overdue balance. Show details

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

General Show more

No. 0100014 Status Open

Customer Name The Fashion Store UK Use Value Date ☐

Contact Charley Nelson Blocked ☐

Posting Date 6-9-2020 Ignore Blocking ☐

Order Date 6-9-2020 Skip Availability Check ☐

Due Date 6-9-2020 Order Type

Requested Delivery Date Collection No. FW-CY

External Document No.

Lines | Manage Line Order Fewer options

Exp... Mat...	Type	Matrix Limitation	No.	Description	Description 2	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. VAT	Qt.
→	☐	Matrix	2100	Lily Blouse		BLUE	6	PCS	37,50				225,00	

ORDER TYPE

One of the most important fields on the Sales-/Purchase Order regarding Collection Management is the **Order Type**. Many fields in the Order Type will influence fields for the Sales-/Purchase Header and for the behavior on the Sales-/Purchase Lines.

Via **Search Order Types**, you can open the list of the Order Types.

Order Types Work Date: 9/6/2020																	
Search + New Edit List Delete Edit View More options																	
Order Type ↑	Description	Collecti... No.	Shipment Group	Matrix Limitation Setup	Sample	Status Sales	Status Purchase	Skip Campaign Unit Prices	Shipment Date	Item Group	Requested Delivery Date	Location Code	Brand Code	Season Code	Brand Filter	Sea... Filter	Availability Check
→ 01FW_LY_PRE	Fall/Winter Last Year Presales				☐	Closed	Closed	☐	9/30/2019	0	8/31/2019			00-FALL			Skip
02SS_CY_PRE	Spring/Summer Current Year Presales	SS-CY			☐	Open	Open	☐		0				02-SUMMER			Skip
03FW_CY_PRE	Fall/Winter Current Year Presales				☐	Open	Open	☐	9/30/2020	0	8/31/2020			03-FALL			Skip
04SS_NY_PRE	Spring/Summer Next Year Presales				☐	Closed	Closed	☐	3/31/2020	0	2/25/2021			12-SUMMER			Skip
05FW_NY_PRE	Fall/Winter Next Year Presales				☐	Closed	Closed	☐	9/30/2021	0	8/31/2021			13-FALL			Skip
10AFTERSALES	After-sales				☐	Open	Open	☐		0							Yes
B2B	B2B Webshop Orders				☐	Open	Open	☐		0				02-SUMMER			
B2B_FASH	B2B Fashion Webshop Orders				☐	Open	Open	☐		0			FASHION	02-SUMMER			
B2B_FURN	B2B Furniture Webshop Orders				☐	Open	Open	☐		0			FURNITURE	02-SUMMER			
B2C	B2C Webshop Orders				☐	Open	Open	☐		0		BLUE		01-SPRING			Yes
B2C_FASH	B2C Fashion Webshop Orders				☐	Open	Open	☐		0		BLUE	FASHION	01-SPRING			Yes
B2C_FURN	B2C Furniture Webshop Orders				☐	Open	Open	☐		0		BLUE	FURNITURE	01-SPRING			Yes
SA	Sales Agent Portal Orders				☐	Open	Open	☐		0				02-SUMMER			Skip
SA_FASH	Sales Agent Portal Fashion Orders				☐	Open	Open	☐		0			FASHION	02-SUMMER			Skip
SA_FURN	Sales Agent Portal Furniture Orders				☐	Open	Open	☐		0			FURNITURE	02-SUMMER			Skip
SAMPLES	Samples				☒	Open	Open	☐		0							Skip

On the **Order Type Card** (click **Edit**) there are several fields regarding Collection Management.

FASTTAB GENERAL

Order Type Card

02SS_CY_PRE

Related Automate

General

Order Type

02SS_CY_PRE

Status Sales

Open

Description

Spring/Summer Current Year Presales

Status Purchase

Open

Brand Code

Matrix Limitation Setup

Season Code

Show Invalid Combinations

Location Code

DESCRIPTION OF THE FIELDS

STATUS SALES

Here you can enter a **Status Code** which determines if this **Order Type** can be chosen in Sales Documents.

STATUS PURCHASE

Here you can enter a **Status Code** which determines if this **Order Type** can be chosen in Purchase Documents.

MATRIX LIMITATION SETUP

Here you can enter a **Matrix Limitation Setup**. This **Matrix Limitation Setup** will influence the Master/Items that can be selected in an Order with this specific Order Type.

SHOW INVALID COMBINATIONS

A checkmark in this field makes sure that you will still see all the Y-Axis lines (i.e., colors) in a Matrix of an Order Line in which there were quantities entered. In the columns you will see a Minus “-” sign if this specific Y-Axis is blocked (based on Matrix Limitation, Status Code, Valid Combinations or Collections)

FASTTAB COLLECTION MGT.

Collection Mgt.	
Collection No.	SS-CY
Delivery Period	
Delivery Period Handling	Search Delivery Period

DESCRIPTION OF THE FIELDS

COLLECTION NO.

Here you can enter a **Collection No.** for this Order Type. This **Collection No.** will influence the Master/Items that can be selected in an Order with this specific Order Type.

If the chosen **Collection No.** also has Global Dimension 1 and/or 2, the Global Dimensions of the Collection will overwrite the Global Dimensions of the Order Type (i.e., Brand Code and Season Code) but afterwards they can be changed manually except for one situation. If one of the Global Dimensions is used as **Collection Dimension**, it cannot be changed afterwards.

You cannot fill in this field if you have set the [Collection Filter Type](#) on the FastTab **Filters** to *Collection Filter*.

DELIVERY PERIOD

Here you can enter a **Delivery Period** after you have entered a **Collection No.** This **Delivery Period** will influence the Master/Items that can be selected in an Order with this specific Order Type.

You can only choose the **Delivery Periods** that are connected to the **Collection No.**

You cannot enter a value into this field if either the **Shipment Date** field on the FastTab **Sales** or the [Shipment Group Filter](#) field on the FastTab **Filters** has been filled.

DELIVERY PERIOD HANDLING

This field determines which Masters to be shown by a lookup from a Sales-/Purchase Line. It is also essential to the **TRIMIT Collection Management** regarding the correlation between the Collection No., Period Code (Delivery Period or Shipment Group) and Shipment Date of the Sales Line or Expected Receipt Date of the Purchase Line.

This field of the Order Type will overrule the Parameter in the **Sales & Receivables Setup** or **Purchase & Payables Setup**. If no **Order Type** will be used in a Sales-/Purchase Header, the Parameters in the Setups will always be applicable.

You can choose between the following four options:

<empty>	This option indicates that the TRIMIT Collection Management is deactivated. However, in combination with a Collection No. in the header of an Order, only Masters related either directly to the Collection No. or to one of the related Delivery Periods would be shown by lookup and in the matrix only the VarDim Variant Options related to the Collection No. or the related Delivery Periods will be displayed. In other words you will have a filter by lookup but no Collection Management so you will also be able to create Order Lines with Masters which are not related to the Collection No.
Based on Setup	The behavior will be according to the Parameter Delivery Period Handling in the Sales & Receivables Setup (for Sales) or the Purchase & Payables Setup (for Purchase)
Search Delivery Period	Search Delivery Period means that the program will automatically find the first possible Delivery Period. With this option, you should enter the Collection No. and leave the Delivery Period field empty of the Order Type. All Masters related to some of the Delivery Periods in the Collection No. will be shown by lookup and in the matrix, the VarDim Variant Options related to the Delivery Periods will be displayed. If a Master is only related directly to the Collection No., it will also be shown by lookup. However, as soon as the Master has been related to Delivery Periods as well, it will only be available in those Delivery Periods and with the VarDim Variant Options related to those Delivery Periods. The Period Code of the Sales-/Purchase Line will be set to the first possible with a Start Sales Delivery Period/End Purchase Delivery Period equal to or later than the current Work Date. If the Master / Item is also related to a Delivery Period earlier than the current Work Date, the Period Code of the Sales-/Purchase Line will be set to earliest Period Code after the Work Date, even though the Master / Item is not related to it. The principle is, that a Master related to a Delivery Period and with the specified VarDim Variant Options, will also be available in all later Delivery Periods. The Shipment Date of the Sales Line will be transferred from the Start Sales Delivery Period of the Delivery Period table unless the Shipment Date, Requested Delivery Date or Promised Delivery Date in the Sales Header is a later Date. In that case, this Date will be taken for the Shipment Date of the Sales Line. The Expected Receipt Date of the Purchase Line will be transferred from the End Purchase Delivery Period of the Delivery Period table unless the Expected Receipt Date, Requested Receipt Date or Promised Receipt Date in the Purchase Header is a later Date. In that case, this Date will be taken for the Expected Receipt Date of the Purchase Line.
Specify Delivery Period	Specify Delivery Period means that you specify which Delivery Period to be used. With this option, enter the Collection No. and the Delivery Period or just enter the Collection No. and leave the Delivery Period field empty in this Order Type.

	All Masters related to the Collection No. (or to the Collection No. + Delivery Code) will be shown in the lookup, but in the matrix, only the VarDim Variant Options related to the chosen Delivery Period will be displayed. However, be also aware of the influence of the Limit Matrix to Specified Period field in an Order Type. If a Master is only related directly to the Collection No. and the Limit Matrix to Specified Period field is <i>No</i>, the Master will also be shown by lookup. However, as soon as the Master has been related to Delivery Periods as well, it will only be available in those Delivery Periods and with the VarDim Variant Options related to those Delivery Periods. And when this field is <i>No</i>, also VarDim Variant Options connected to earlier Delivery Periods will be shown in the lookup. When the Limit Matrix to Specified Period field is <i>Yes</i>, a Master only related directly to the Collection No. will not be available. If you do not specify the Delivery Period on the Order Type, a list of the possible Delivery Periods will pop up when you create a Sales-/Purchase Line enabling you to select one of them. If only one Delivery Period is available, it will automatically be used. The Period Code of the Sales Line will be set to the specified or selected and the Shipment Date will be transferred from the Start Sales Delivery Period of the Delivery Period table unless the Shipment Date, Requested Delivery Date or Promised Delivery Date in the Sales Header is a later Date. In that case, this Date will be taken for the Shipment Date of the Sales Line. The Period Code of the Purchase Line will be set to the specified or selected and the Expected Receipt Date will be transferred from the End Purchase Delivery Period of the Delivery Period table unless the Expected Receipt Date, Requested Receipt Date or Promised Receipt Date in the Purchase Header is a later Date. In that case, this Date will be taken for the Expected Receipt Date of the Purchase Line.
--	--

LIMIT MATRIX TO SPECIFIED PERIOD

This parameter can be used when the **Delivery Period Handling** is set to *Specify Delivery Period*.

If this field is *Yes*, you will only be able to use Masters/Items related to the specified combination of **Collection No.** and **Delivery Period**. Therefore, if a Master/Item is only related directly to the Collection and not to any of its Delivery Periods, it will not be available for creation of Sales Lines / Purchase Lines.

If this field is *No*, you will be able to use Masters/Items related to the specified combination of **Collection No.** and **Delivery Period** as well as Masters/Items related to earlier **Delivery Periods**.

If a Master/Item is only related directly to the Collection and not to any of its Delivery Periods, it will be available in all the Delivery Periods related to the **Collection**.

SAMPLE

A checkmark in this field makes sure that only the connected Masters (or variants of Masters) that are connected to the Collection No. with **Sample Master Relations** or **Sample Delivery Periods** will be shown in the Matrix of a Sales-/Purchase Order.

FASTTAB SHIPMENT GROUP MGT.

Shipment Group Mgt.	
Shipment Group	

DESCRIPTION OF THE FIELD

SHIPMENT GROUP

Here you can enter a **Shipment Group** if you are not using the **Collection No.** (and **Delivery Period**). This **Shipment Group** will influence the Master/Items that can be selected in an Order with this specific Order Type.

You can only choose the **Shipment Groups** with **Type** = *Shipment Group* that are not connected to a **Collection No.**

FASTTAB SALES

Sales	
Requested Delivery Date	
Shipment Date	
Item Group	*** ITEM GROUP *** (0)
Default Quantity to Ship	
Set Ready for Shipping	
Set Ready for Invoicing	
Sales Price Search Dimension	
Unit Price Date Handling	
Unit Price Date	
Line Discount Date Handling	
Line Discount Date	
Skip Campaign Unit Prices	☐
Skip Unit Cost Check Sales	☐
Sales Channel	
Availability Check	
Location Filter	
Availability Check	Skip
Inventory Profile Setup	
Horizon Availability Check	
Error when No Available Quantity	☐
Exclude Availability Check	☐

The content of a **Sales Price Search Dimension** will overrule the content in the corresponding Parameter of the **General Ledger Setup**.

AVAILABILITY CHECK

The field **Availability Check** in the **Order Type** determines if an Availability Check should be carried out. You can now choose between the following four options:

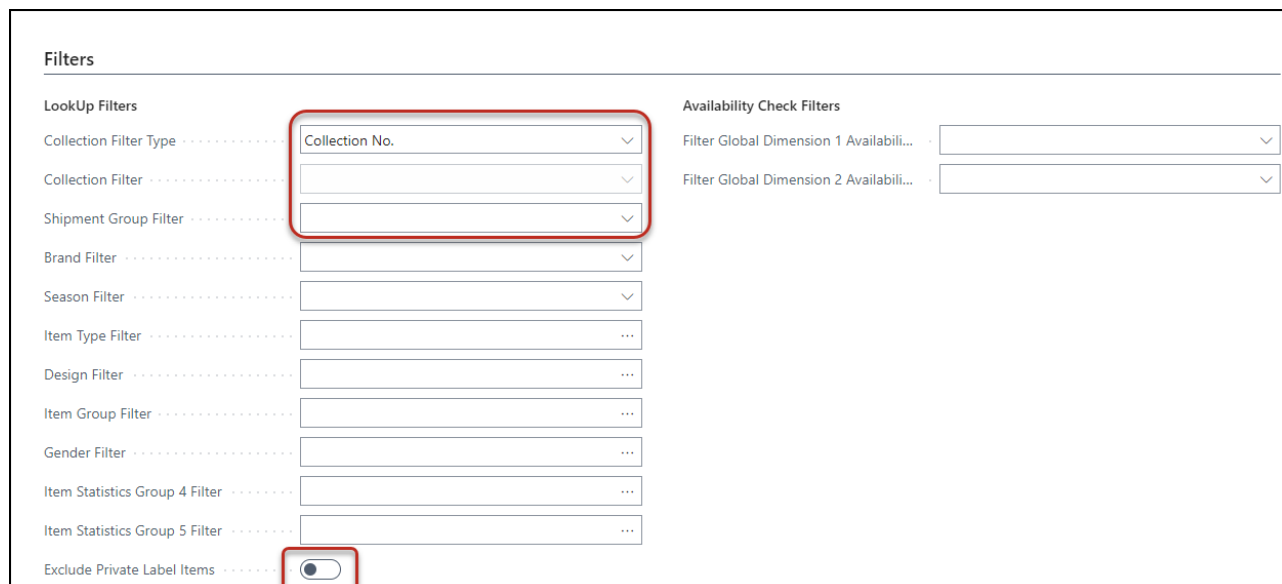
Skip	No Availability will take place in an Order when entering Quantities
Yes	An Availability Check will always take place in an Order when entering Quantities, considering the content of the parameter Min. Cells Check on Demand in the Sales & Receivables Setup
On Demand	An Availability Check can be asked for in an Order Line or Order Matrix, but will not take place automatically
Skip if No Transactions	An Availability Check will only take place if there are Transactions (Item Ledger Entries)

FASTTAB PURCHASE

Purchase	
Purchase Price Search Dimension	
Default Qty. to Receive	
Skip Unit Cost Check Purchase	☐

The content of a **Purchase Price Search Dimension** will overrule the content in the corresponding Parameter of the **General Ledger Setup**.

FASTTAB FILTERS



The Filters on this FastTab will influence the lookup on the **No.** of a Sales-/Purchase Line if you have entered the Order Type in the Header.

Besides **Collection Filter Type** *Collection No.*, they will be checked with the fields in the Master Card.

DESCRIPTION OF THE FIELDS

COLLECTION FILTER TYPE

With this field you can determine how you want to filter on **Collection No.**

You can choose the following two options:

Collection No.	You want to filter on the Collection No. that you entered on the FastTab Collection Mgt.: only Masters connected to this Collection No. (and their Delivery Periods) in the Master Relations of this Collection No. will be shown in the lookup.
Collection Filter	You want to filter on the field Collection No. in the Masters, based on the Collections that you will enter in the next field Collection Filter

COLLECTION FILTER

In this field a filter string for the **Collection** can be entered if **Collection Filter Type** is set to *Collection Filter*. This will limit the Masters that will be shown (and possible to enter) in the lookup for a Sales-/Purchase Line. This filter will simply be checked with the field **Collection No.** in the Master Card.

This field can also be used if you did not setup **Collection Master Relations** but simply created your Masters by Wizard and entered the Collection No. In that case, the Collection No. field in the Master will be filled, but (based on the Parameter **Create Collection Relation Automatically** in the **Inventory Setup**) no **Collection Master Relation** must be created.

SHIPMENT GROUP FILTER

In this field a filter string for the **Shipment Group** can be entered to limit the Masters that will be shown (and possible to enter) in the lookup for a Sales-/Purchase Line.

This filter will simply be checked with the field **Period Code** in the Master Card.

You can only enter this filter if no **Delivery Period** has been entered on the FastTab **Collection Mgt.**, no **Shipment Group** has been entered on the FastTab **Shipment Group Mgt.** and no **Shipment Date** on the FastTab **Sales**.

EXCLUDE PRIVATE LABEL ITEMS

A checkmark in this field will exclude Masters/Items with a checkmark in **Private Label**.

Without a checkmark in this field, it will still show Masters/Items that do have a checkmark in **Private Label**; so, it will overrule the Private Label functionality.

FASTTAB CPO

Portal	
Category	
Show on Web	☒
CPO Availability Check Method	
Create Web Orders as	
Instant ASI Posting	☒
Posting Lines Threshold	0
Disable Signature in Checkout	☒
Skip Credit Card Payment	☒

DESCRIPTION OF THE FIELD

SHOW ON WEB

By setting a checkmark this field, you allow this Order Type to be shown as selectable in the **TRIMIT Sales Agent Portal** and the **TRIMIT B2B Webshop**.

This can be especially important if you are using **TRIMIT Collection Management** because it will also influence the Masters/Items that can be selected on a Sales Order based on the fields of the Order Type as described earlier.

MASTER FOR COSTS

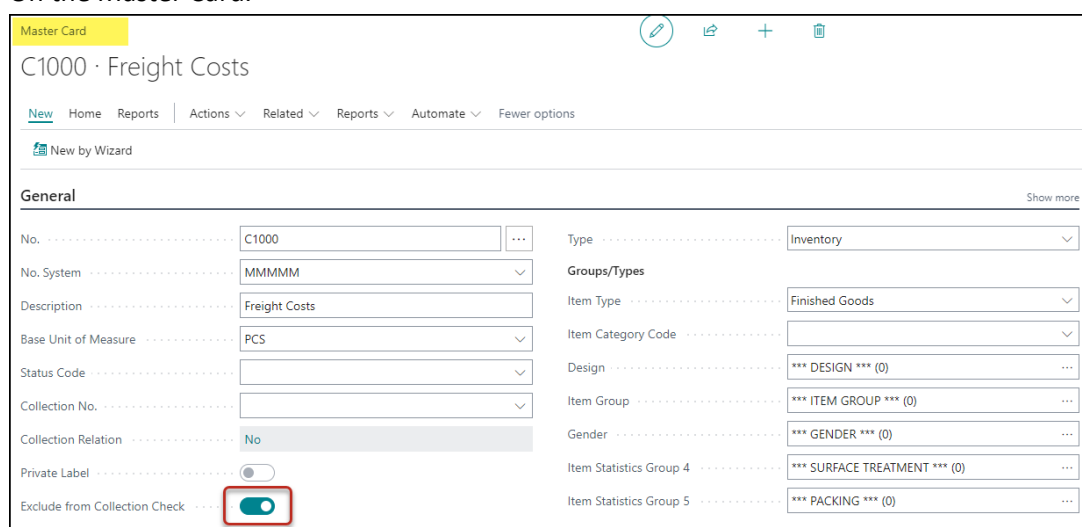
In case you use a Master to specify specific Sales-/Purchase Costs or Services that you want to enter on an Order, you do not want to add this specific Master to each Collection.

Therefore, we have introduced a new field in the Master/Item:

Exclude from Collection Check.

It can only be set to *Yes* in a Master if no Matrix or Assortment Matrix has been filled for the Master.

On the Master Card:



Master Card

C1000 · Freight Costs

New Home Reports Actions Related Reports Automate Fewer options

New by Wizard

General

No. C1000 Type Inventory

No. System M M M M M Groups/Types

Description Freight Costs Item Type Finished Goods

Base Unit of Measure PCS Item Category Code

Status Code

Collection No.

Collection Relation No

Private Label

Exclude from Collection Check ☒

Design *** DESIGN *** (0)

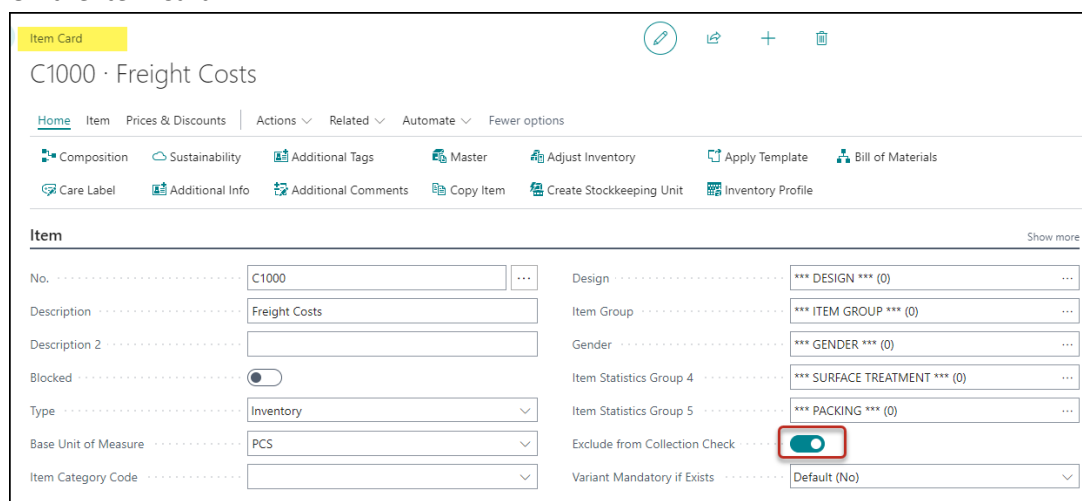
Item Group *** ITEM GROUP *** (0)

Gender *** GENDER *** (0)

Item Statistics Group 4 *** SURFACE TREATMENT *** (0)

Item Statistics Group 5 *** PACKING *** (0)

On the Item Card:



Item Card

C1000 · Freight Costs

Home Item Prices & Discounts Actions Related Automate Fewer options

Composition Sustainability Additional Tags Master Adjust Inventory Apply Template Bill of Materials

Care Label Additional Info Additional Comments Copy Item Create Stockkeeping Unit Inventory Profile

Item

No. C1000 Design *** DESIGN *** (0)

Description Freight Costs Item Group *** ITEM GROUP *** (0)

Description 2

Blocked ☒

Type Inventory Gender *** GENDER *** (0)

Base Unit of Measure PCS Item Statistics Group 4 *** SURFACE TREATMENT *** (0)

Item Category Code Item Statistics Group 5 *** PACKING *** (0)

Exclude from Collection Check ☒

Variant Mandatory if Exists Default (No)

Setting the field **Exclude from Collection Check** to *Yes*, means that you can enter the Item on an Item Line (so you need to have **Type** set to *Item*) on any Sales-/Purchase Order, regardless the **Collection No.** in the Order.

NOTE

It is only possible to change the **Exclude from Collection Check** in the Master Card if there is no Matrix or Assortment Matrix connected to the Master.

SALES

Now we look what will happen in a Sales Order when we use the Collection Management settings that were described in the previous chapters.

PRIVATE LABEL

If a **Collection** is set up as a Private Label Collection, it will only be shown in the lookup of the field **Collection No.** in the Sales Header and Sales Line, if the Customer of the Sales Document or the Country is listed in the Private Label Setup for the Collection.

The Country of the Private Label Collection will be compared to the **Sell-To Country/Region**.

The Customer of the Private Label Collection will be compared with the **Sell-To Customer, Bill-To Customer, Company Group** and **Chain** of the Sell-To Customer.

The same test will be carried out if the **Collection No.** is directly filled in the Sales Header or the Sales Line.

If a **Master/Item** is related to a non-Private Label Collection, the Master/Item will only be shown in the lookup and will only be allowed to enter on a Sales Line, if the Sell-To Customer, Bill-To Customer, Company Group of the Sell-To Customer or Chain of the Sell-To Customer is listed as the Customer in the Private Label Setup for the Master/Item, or if the Sell-To Country/Region is listed as the Country/Region in the Private Label Setup of the Master/Item.

If the Sell-to Customer No. in the Sales Header, the Bill-to Customer No., the Company Group, the Chain, or the Sell-to Country/Region Code is changed, and Sales Lines exist the Private Label Setup will be tested again.

MATRIX LIMITATION

If you fill the field **Matrix Limitation** (as a string or as a **Matrix Limitation Setup**) in the Sales Line, this will overrule the possible colors/sizes of the **Collections, Delivery Periods** or **Shipment Groups**.

This means, that if the **Matrix Limitation** in the Sales Lines tells you that only the colors *Red* and *White* should be shown in the Matrix, then these will be the only color lines possible in the Matrix.

However, if based on a **Collection No., Delivery Period** or **Shipment Group** the colors *Black, White* and *Blue* can be selected; in the Matrix, you will still only see the color *White* based on the **Matrix Limitation**.

STATUS CODE

When entering an **Order Type** in a Sales Header, the Status Sales is checked to determine if you can choose this **Order Type** for this Sales Document at this moment.

When entering a **Collection No.** in a Sales Header, the Status Code is checked to determine if you can choose this **Collection No.** for this Sales Document at this moment.

When entering a **Master** or **Item** in the Sales Line, the Status Code is checked to determine if you can choose this **Master/Item** for this Sales Document at this moment.

When you enter a **Master/Item** related to a Collection, the Status Code of the **Collection Master Relation** is checked as well as the Status Code of the individual **Master/Item**.

In other words: whatever relations you might have created by using the **Collections** (and **Delivery Periods**) and/or **Shipment Group** and/or **Matrix Limitation**; the **Status Code** will overrule this.

NO COLLECTION NO. AND NO ORDER TYPE

If no **Collection No.** and no **Order Type** has been entered in a Sales Header, but you did enter **Collection No.** in your Master, this field will be copied into the **Collection No.** of the Sales Line, unless you have a checkmark in the Parameter **Skip Transfer of Collection and Delivery Period from Master** in the **Sales & Receivables Setup**.

A **Delivery Period** from the Master Card will be copied into the Sales Line and can determine the **Shipment Date** for this specific Sales Line unless you have a checkmark in the Parameter **Skip transfer of Collection and Delivery Period from Master** in the **Sales & Receivables Setup**.

ONLY A COLLECTION NO. AND NO ORDER TYPE

If you only enter the field **Collection No.** and no **Order Type** in the Sales Header, it will also react as a filter for entering Masters/Items in a Sales Line.

The field **Collection No.** in the Header will also be copied into the Sales Line and can therefore be used in the TRIMIT Sales Statistics.

If the Parameter **Collection Dimension** in the **General Ledger Setup** is filled, the Collection will also be copied to a Dimension of the Sales Line.

A **Delivery Period** from the Master Card will be copied into the Sales Line and can determine the **Shipment Date** for this specific Sales Line.

If the Parameter **Shipment Group Dimension** in the **General Ledger Setup** is filled, the Shipment Group will also be copied to a Dimension of the Sales Line.

If **Delivery Periods** have been created for the **Collection**, and the Parameter **Delivery Period Handling** in the **Sales & Receivables Setup** has been set to *Search Delivery Period* and the Master might be connected

directly to the **Collection** but also to the **Delivery Periods**, only the chosen **Options Var 1-9** related to the **Delivery Period** will be shown and this will overrule the **Options Var 1-9** that might be connected to the **Collection** itself.

AN ORDER TYPE WITH A COLLECTION NO.

If you enter an **Order Type** in the Sales Header with only a **Collection No.** filled, this **Collection No.** will be copied into the **Collection No.** of the Sales Header and the Sales Lines and will react as described in [Only a Collection No. and no Order Type](#).

If the field **Shipment Date** was filled in the **Order Type** this will be copied to the **Document Date** and the **Shipment Date** of the Sales Header and to the **Shipment Date** (and other related Dates) of the Sales Lines – unless there are Collection Delivery Periods related to the Collection No.

SEARCH DELIVERY PERIOD

In case there are **Delivery Periods** related to the Collection No. and the **Delivery Period Handling** is set to *Search Delivery Period*:

- If the Master is related to a **Delivery Period** with a Start Sales Delivery Period later than the Shipment Date of the Header: the **Period Code** in the Sales Line will be filled with the **Delivery Period**, and the **Start Sales Delivery Period** of the **Delivery Period** will be copied to the **Shipment Date** Sales Line.
- If the Master is related to a **Delivery Period** with a Start Sales Delivery Period before the Shipment Date of the Header: the **Period Code** in the Sales Line will be filled with the **Delivery Period**, but the **Shipment Date** of the Line will be copied from the Shipment Date of the Header.
- If the Master is not related to any **Delivery Period**, the first **Delivery Period** will be copied to the **Period Code** of the Sales Line, and the **Shipment Date** of the Line will be copied from the Shipment Date of the Header.

I.e.: If you have **Order Type 02SS_CY_PRE** with **Collection No. SS-CY** with the **Delivery Periods**:

SS-CY | Work Date: 9/6/2020

✓ Saved

Delivery Periods

Search

New

Edit List

Delete

Master Relation

...

Delivery Period	Delivery Period Description	Start Sales Delivery Period ↑	End Sales Delivery Period	Start Purchase Delivery Period	End Purchase Delivery Period
→ 01-JAN	January	1/28/2020	2/15/2020	12/10/2019	1/10/2020
02-FEB	February	2/28/2020	3/15/2020	1/10/2020	2/10/2020
03-MAR	March	3/28/2020	4/15/2020	2/10/2020	3/10/2020

In addition, you would have entered the **Shipment Date 15-02-20** in the Sales Header.

Master 2100 colors 21, 30 and 73 are connected to 01-JAN and would get:

Delivery Period 01-JAN and Shipment Date 15-02-20

Master 2100 color 35, 60, 70 and 80 are connected to 02-FEB and would get:

Delivery Period 02-FEB and Shipment Date 28-02-20

Master 2100 color 20, 37, 65, 75 and 99 are connected to 03-MAR and would get:

Delivery Period 03-MAR and Shipment Date 29-03-20

Lines	Manage	Line	Order	Fewer options						
Exp... Mat...	Type	No.	Description	Description 2	Collection No.	Period Code	Shipment Date	Location Code	Quantity	
→ ☒ 	Matrix	2100	Lily Blouse		SS-CY	01-JAN	15-2-2020	BLUE	78	
☐	Item	21002003	Lily Blouse	Royal Blue,M	SS-CY	03-MAR	28-3-2020	BLUE	1	
☐	Item	21002103	Lily Blouse	Light Blue,M	SS-CY	01-JAN	15-2-2020	BLUE	2	
☐	Item	21003003	Lily Blouse	Yellow,M	SS-CY	01-JAN	15-2-2020	BLUE	3	
☐	Item	21003503	Lily Blouse	Orange,M	SS-CY	02-FEB	28-2-2020	BLUE	4	
☐	Item	21003703	Lily Blouse	Dark Orange,M	SS-CY	03-MAR	28-3-2020	BLUE	5	
☐	Item	21006003	Lily Blouse	Forest Green,M	SS-CY	02-FEB	28-2-2020	BLUE	6	
☐	Item	21006503	Lily Blouse	Dark Green,M	SS-CY	03-MAR	28-3-2020	BLUE	7	
☐	Item	21007003	Lily Blouse	Red,M	SS-CY	02-FEB	28-2-2020	BLUE	8	
☐	Item	21007303	Lily Blouse	Pink,M	SS-CY	01-JAN	15-2-2020	BLUE	9	
☐	Item	21007503	Lily Blouse	Magenta,M	SS-CY	03-MAR	28-3-2020	BLUE	10	
☐	Item	21008003	Lily Blouse	Purple,M	SS-CY	02-FEB	28-2-2020	BLUE	11	
☐	Item	21009903	Lily Blouse	Black,M	SS-CY	03-MAR	28-3-2020	BLUE	12	

If the field **Matrix Limitation Setup** was filled into the **Order Type** this will influence the Matrices that will be shown of the Masters based on the **VarDim Type Subset** of the **Matrix Limitation Setup**.

I.e.: Influence of **Status Code**: If you have **Order Type 03FW_CY_PRE** with **Collection No. FW-CY**

Order Type Card






03FW_CY_PRE

Related ▾
Automate ▾

General

Order Type: 03FW_CY_PRE

Status Sales: Open ▾

Description: Fall/Winter Current Year Presales

Status Purchase: Open ▾

Brand Code: ▾

Matrix Limitation Setup: ▾

Season Code: ▾

Show Invalid Combinations: ☒

Location Code: ▾

Collection Mgt.

Collection No.: FW-CY ▾

Limit Matrix to Specified Period: ☐

Delivery Period: ▾

Sample: ☐

Delivery Period Handling: Search Delivery Period ▾

Shipment Group Mgt.

Shipment Group: ▾

The lookup will show all Masters related to this Collection **FW-CY** regardless the **Status Code**.

But if you select a Master/Item with a **Status Code** that does not allow Sales Order, you will get an error if you choose it.

Sales Order | Work Date: 5-1-2020

0100016 · The Fashion Store UK

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

The page has an error. [Refresh \(F5\)](#) to undo the change, or correct the error.

General Show more

No. 0100016 Status Open

Customer Name The Fashion Store UK Use Value Date

Contact Charley Nelson Blocked

Posting Date 5-1-2020 Ignore Blocking

Order Date 5-1-2020 Skip Availability Check

Due Date 30-9-2020 Order Type 03FW_CY_PRE

Requested Delivery Date 31-8-2020 Collection No. FW-CY

External Document No.

Lines Manage Line Order Fewer options

Exp. Mat.	Type	No.	Description	Description 2	Collection No.	Period Code	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Tax Area Code	Tax Group Code	Line Discount %
☒	Matrix	4700	Isla Trousers		FW-CY									
Validation Results Master 4700 is not available for Collection No. FW-CY.														

Select - Masters

No. ↑	Description	Status Code	Brand Code	Season Code
→ 2020	Isla Trousers	READY	FASHION	
2100	Lily Blouse	FASHION	FASHION	02-SUMMER
2105	Blouse	DESIGN	FASHION	02-SUMMER
2110	Mia Blouse	FASHION	FASHION	02-SUMMER
2200	Grace Bomber	FASHION	FASHION	03-FALL
2210	Poppy Blazer	FASHION	FASHION	03-FALL
2310	Freya Dress	FASHION	FASHION	02-SUMMER
4700	Roger Brogue	READY	SHOES	

Master Card Status

OK Cancel

FW-CY | Work Date: 5-1-2020

Collection Master Relations Search New Edit List Delete Process Reports Actions Related Reports Fewer options

New Master by Wizard + New

No. ↑	Master Description	Status Code	Private Label Master	Workflow Exist	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2
→ 2020	Isla Trousers		☒	☐	COLOR_1	0	SIZE_EU	0
2100	Lily Blouse		☐	☐	COLOR_1	5	SIZE_C	0
2105	Blouse		☐	☒	COLOR_1	0	SIZE_C	0
2110	Mia Blouse		☐	☐	COLOR_1	0	SIZE_C	0
2200	Grace Bomber		☐	☐	COLOR_1	0	SIZE_US	0
2210	Poppy Blazer		☐	☐	COLOR_1	0	SIZE_US	0
2310	Freya Dress		☐	☐	COLOR_1	0	SIZE_EU	0
4700	Roger Brogue	IDEA	☐	☐	SHOE_COLOR	1	SHOE_SURF	1

That Master 2700 was shown in the lookup because of the **Status Code** *READY* in the Master. But Master 2700 is not allowed for Collection FW-CY, because **Status Code** *IDEA* in the Collection Master Relations does not allow Sales Orders.

SPECIFY DELIVERY PERIOD

In case there are **Delivery Periods** related to the Collection No. and the **Delivery Period Handling** is set to *Specify Delivery Period* it means, that after entering the Master on the Sales Line, you are asked to which **Delivery Period** it belongs before entering the quantities in the Matrix.

The **Period Codes** shown depend on the Master you entered.

The Matrix depends also on the Limit Matrix to specified Period in the Order Type.

Order Type Card | Work Date: 5-1-2020

02SS_CY_PRE

Related

General

Order Type

02SS_CY_PRE

Description

Spring/Summer Current Year Presales

Brand Code

Season Code

02-SUMMER

Location Code

Status

Open

Matrix Limitation Setup

Show Invalid Combinations

☐

Collection Mgt.

Collection No.

SS-CY

Delivery Period

Delivery Period Handling

Specify Delivery Period

Limit Matrix to Specified Period

☒

Sample

☐

Sales Order | Work Date: 5-1-2020

0100018 · The Fashion Store UK

×

This customer has an overdue balance.

Show details

Process

Release

Posting

Prepare

Order

Request Approval

Print/Send

Navigate

Actions

Related

Fewer options

General

Show more

No.

0100018

Status

Open

Customer Name

Contact

Posting Date

Order Date

Due Date

Requested Delivery Date

External Document No.

Shipment Groups

Period Code	Description	Start Shipment Date T	End Shipment Date	Start Receipt Date	End Receipt Date
→ 01-JAN	January	28-1-2020	15-2-2020	10-12-2019	10-1-2020
02-FEB	February	28-2-2020	15-3-2020	10-1-2020	10-2-2020
03-MAR	March	28-3-2020	15-4-2020	10-2-2020	10-3-2020

Unit of Measure Code

PCS

Unit Price Excl. VAT

Tax Area Code

Tax Group Code

Line Discount %

Lines

Manage

Line

Order

Fewer options

Exp. Mat.

Type

No.

Matrix

2100

OK

Cancel

Only the **Period Codes** that are applicable for 2100 are shown.

Edit - Sales Order 0100018 - No. 2100 - Lily Blouse -											
Search New Edit List Process Actions Related Fewer options											
Variant 1	Variant Description			Line Quantity	XS	S	M	L	XL	XXL	3XL
→ 21	Light Blue										
30	Yellow										
73	Pink										

Only the colors related to 01-JAN are shown in the Matrix.

AN ORDER TYPE WITH A COLLECTION NO. AND A DELIVERY PERIOD

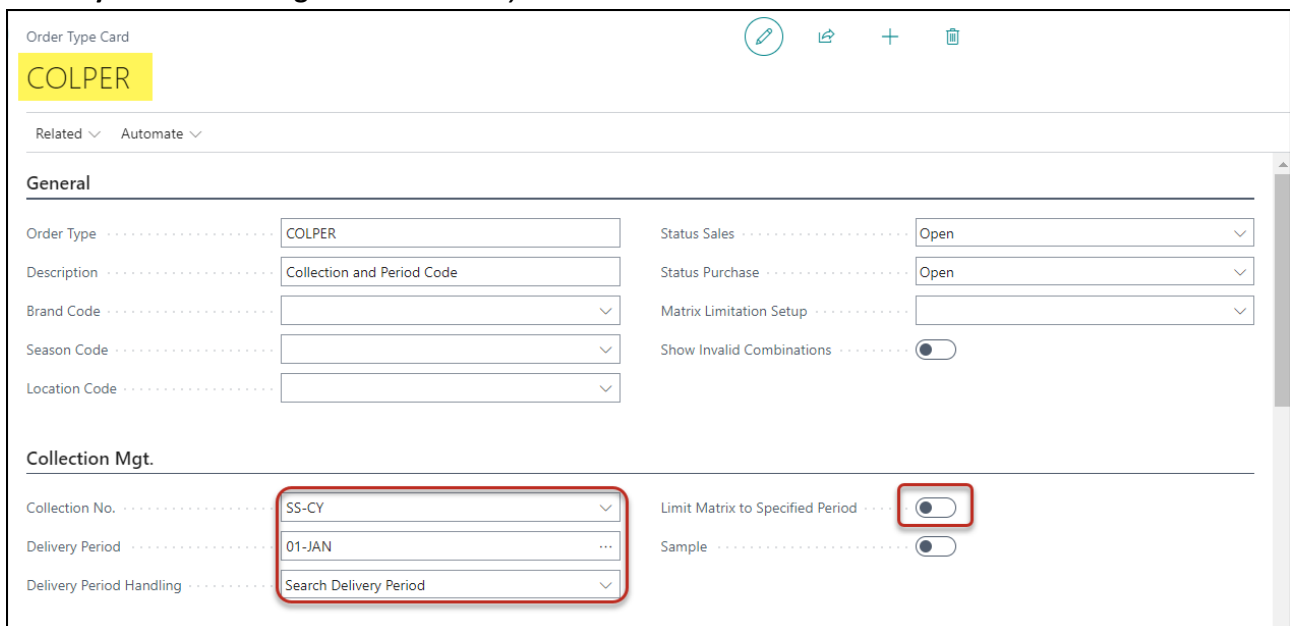
If you enter an **Order Type** in the Sales Header with a **Collection No.** and a **Delivery Period** filled, this **Collection No.** will be copied into the **Collection No.** of the Sales Header and the Sales Lines, and will react as described in [Only a Collection No. and no Order Type](#), but the combination of **Collection No.** and the **Delivery Period** in the Order Type will now react as a filter for entering Items/Masters on the Sales Lines and the **Delivery Period** of the Master will be disregarded if the **Delivery Period Handling** of the Order Type is set to *Specify Delivery Period*.

However, if the **Delivery Period Handling** in the Order Type is set to *Search Delivery Period*, you can enter all the Items/Masters that are directly related to the Collection and the Items/Masters that are related to the specific Collection and Delivery Period.

The **Shipment Date** (and other related Dates) of the Sales Lines will – in both situations - be filled with the **Start Sales Delivery Period** of the **Delivery Period**, and the **Delivery Period** of the **Order Type** will also be copied into the Sales Lines field **Period Code**.

If the field **Matrix Limitation Setup** was filled into the **Order Type** this will influence the Matrices that will be shown of the Masters based on the **VarDim Type Subset** of the **Matrix Limitation Setup**.

I.e.: If you have an Order Type with **Collection No.** is SS-CY and **Delivery Period** 01-JAN and the field **Delivery Period Handling** is *Search Delivery Period*:



Order Type Card

COLPER

Related Automate

General

Order Type COLPER

Description Collection and Period Code

Brand Code

Season Code

Location Code

Status Sales Open

Status Purchase Open

Matrix Limitation Setup

Show Invalid Combinations

Collection Mgt.

Collection No. SS-CY

Delivery Period 01-JAN

Delivery Period Handling Search Delivery Period

Limit Matrix to Specified Period

Sample

Sales Order | Work Date: 1-1-2020

0100019 · The Fashion Store UK

✕ This customer has an overdue balance. Show details

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

General

Customer Name: The Fashion Store UK Status: Open

Contact: Charley Nelson Use Value Date: ☐

Posting Date: 6-9-2020 Blocked: ☐

Order Date: 6-9-2020 Ignore Blocking: ☐

Due Date: 6-9-2020 Skip Availability Check: ☐

Requested Delivery Date: Order Type: COLPER

External Document No.: 2000 Description: Olivia Trousers Collection No.: SS-CY

2100 Lily Blouse

2110 Mia Blouse

2120 Sophia Shirt

2222 Test for connecting Collection and Delivery Period

Lines Manage Line

Exp. Mat. Type Matrix

Period Code	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Tax Area Code	Tax Group Code	Line Discount %
SS-CY								

Only Masters connected to Collection SS-CY directly and Masters connected to Collection SS-CY and Delivery Period 01-JAN are shown in the lookup.

I.e.: If you have an Order Type with **Collection No.** is SS-CY and **Delivery Period** 01-JAN and the field **Delivery Period Handling** is *Specify Delivery Period*:

Order Type Card

COLPER

Related Automate

General

Order Type: COLPER Status Sales: Open

Description: Collection and Period Code Status Purchase: Open

Brand Code: Matrix Limitation Setup: ☐

Season Code: Show Invalid Combinations: ☐

Location Code:

Collection Mgt.

Collection No.: SS-CY Limit Matrix to Specified Period: ☐

Delivery Period: 01-JAN Sample: ☐

Delivery Period Handling: Specify Delivery Period

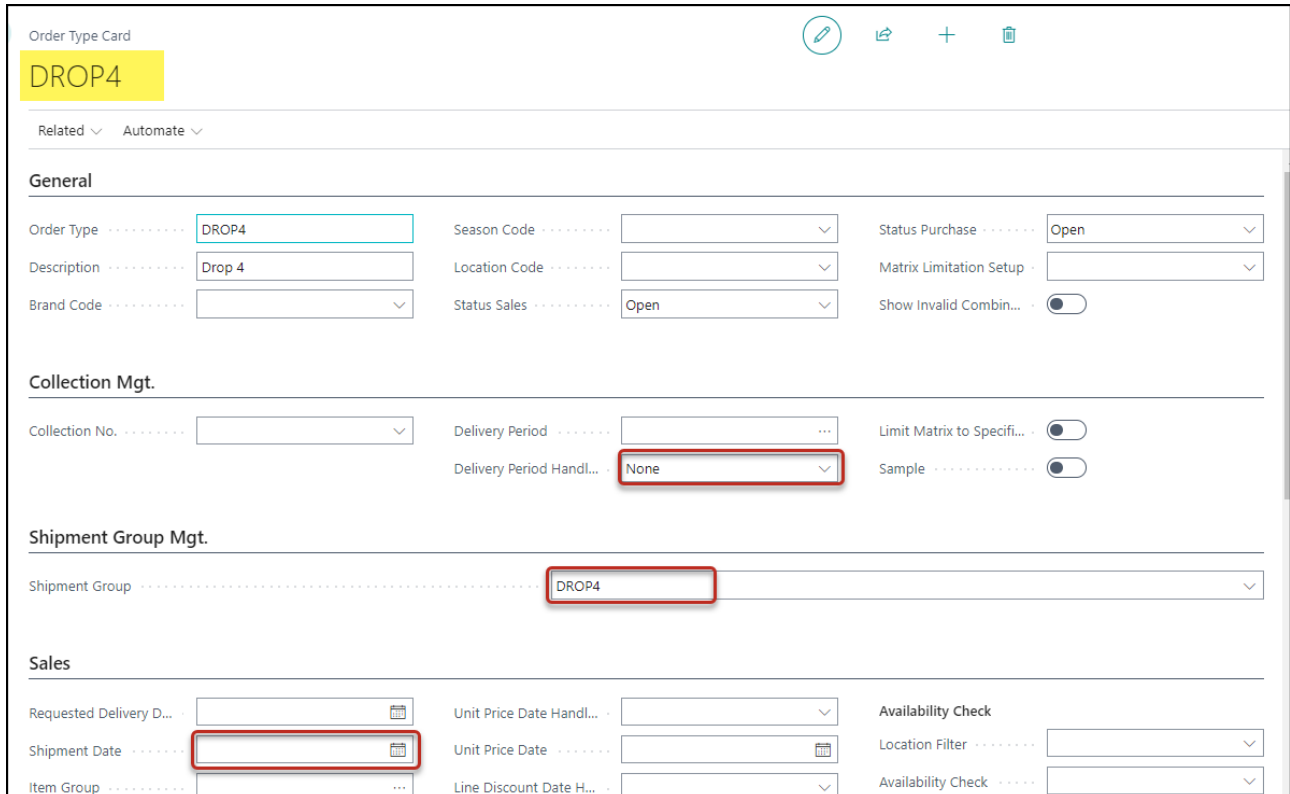
Now, only Masters connected to Collection SS-CY and Delivery Period 01-JAN are shown in the lookup.

AN ORDER TYPE WITH A SHIPMENT GROUP AND NO COLLECTION NO.

If you enter an **Order Type** in the Sales Header with only a **Shipment Group** filled and no **Collection No.**, this **Shipment Group** will be copied into the **Period Code** of the Sales Lines and the **Matrix Limitation Setup** of the **Shipment Group** will now function as a filter for entering Items/Masters on the Sales Lines. From the **Matrix Limitation Setup** of the **Shipment Group** only the **Master Relation Matrix** will be regarded; not the **VarDim Type Subset**!

Only the **Shipment Date** (and other related Dates) of the Sales Lines will be filled with the **Start Shipment Date** of the **Shipment Group**. Nothing will be changed on the Sales Header in the Dates based on the **Shipment Group** of the **Order Type**.

I.e.: If you have an Order Type with only **Shipment Group DROP4** (the field **Delivery Period Handling** will be set to *None* automatically) and not a **Shipment Date**:



Order Type Card

DROP4

Related Automate

General

Order Type: DROP4 Season Code: Status Purchase: Open

Description: Drop 4 Location Code: Matrix Limitation Setup:

Brand Code: Status Sales: Open Show Invalid Combin...: ☐

Collection Mgt.

Collection No.: Delivery Period: Limit Matrix to Specifi...: ☐

Delivery Period Handl...: None Sample: ☐

Shipment Group Mgt.

Shipment Group: DROP4

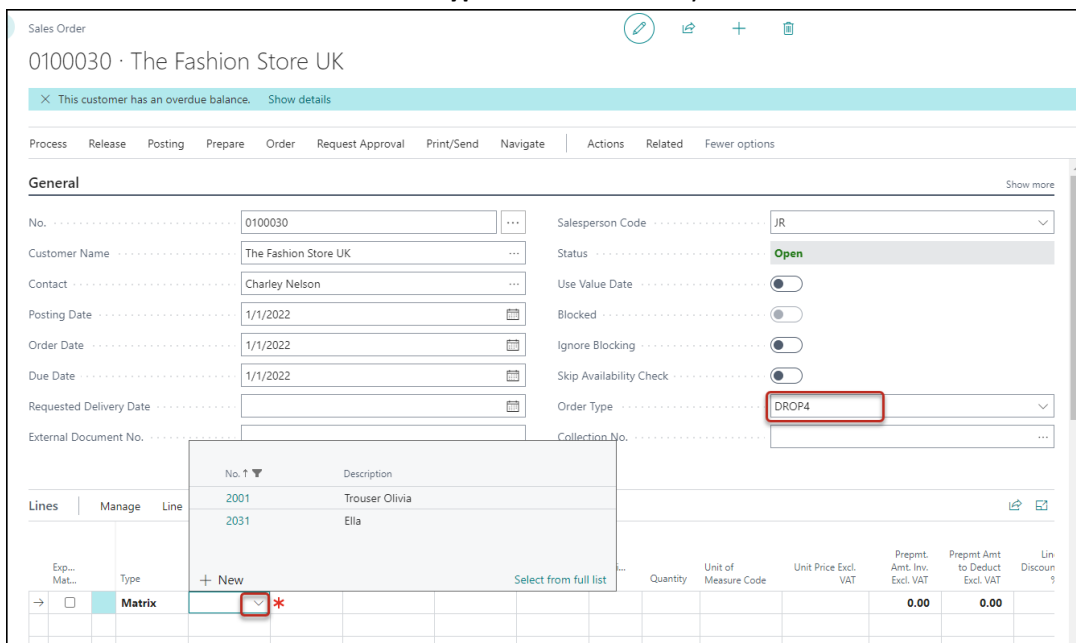
Sales

Requested Delivery D...: Unit Price Date Handl...: Availability Check:

Shipment Date: Unit Price Date: Location Filter:

Item Group: Line Discount Date H...: Availability Check:

And enter a Sales Order with **Order Type DROP4** I will only see the Masters related to **DROP4**.



Sales Order

0100030 · The Fashion Store UK

This customer has an overdue balance. Show details

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

General

No.: 0100030 Salesperson Code: JR

Customer Name: The Fashion Store UK Status: Open

Contact: Charley Nelson Use Value Date: ☐

Posting Date: 1/1/2022 Blocked: ☐

Order Date: 1/1/2022 Ignore Blocking: ☐

Due Date: 1/1/2022 Skip Availability Check: ☐

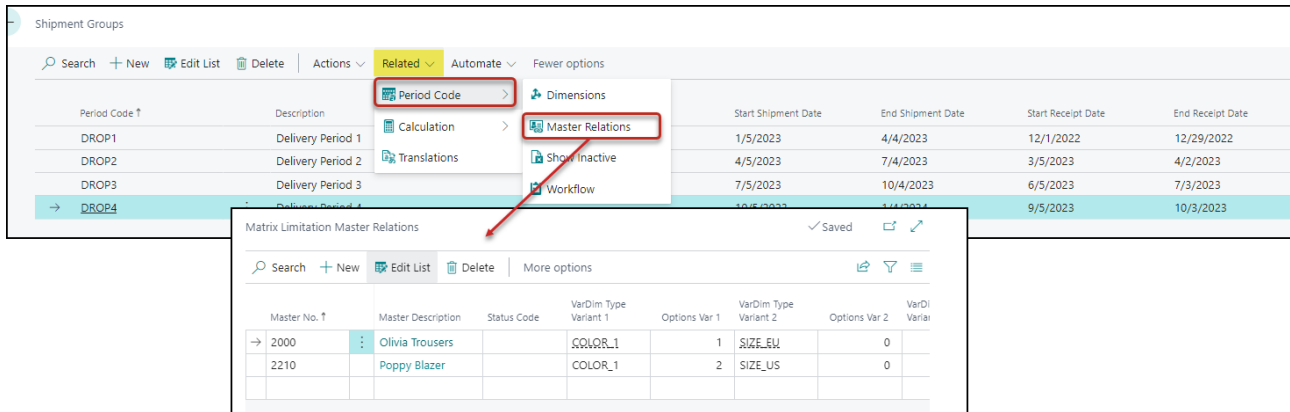
Requested Delivery Date: Order Type: DROP4

External Document No.: Collection No.:

Lines

No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Prepmnt. Amt. Inv. Excl. VAT	Prepmnt. Amt. to Deduct Excl. VAT	Lin Discoun 9
2001	Trouser Olivia				0.00	0.00	
2031	Ella						

Matrix ☐ *



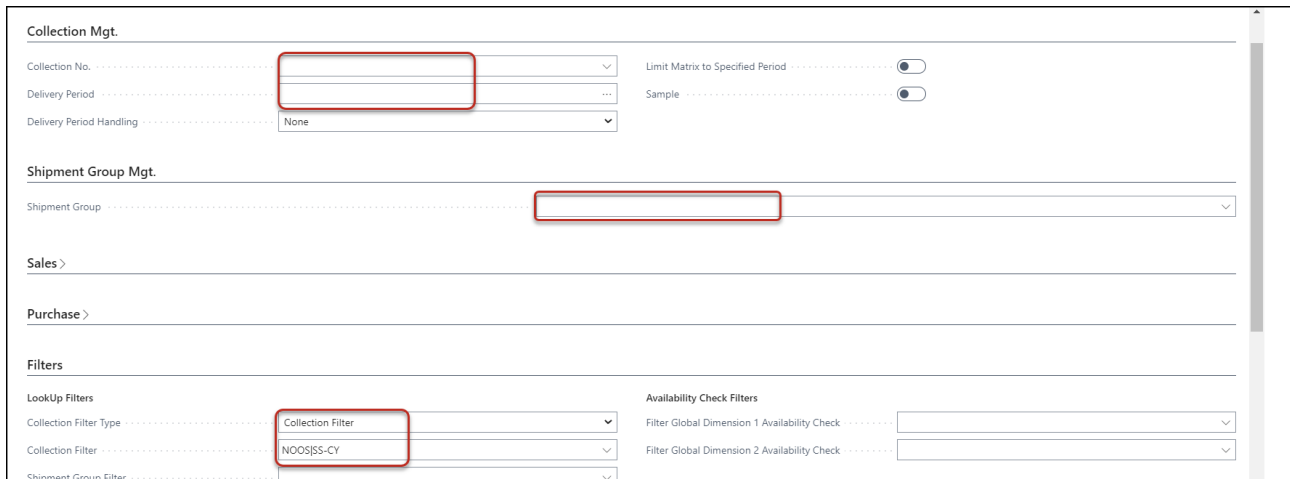
The screenshot shows the 'Shipment Groups' table with columns: Period Code, Description, Start Shipment Date, End Shipment Date, Start Receipt Date, and End Receipt Date. The 'Related' menu is open, showing options like 'Period Code', 'Dimensions', 'Master Relations', 'Calculation', 'Translations', 'Show Inactive', and 'Workflow'. The 'Matrix Limitation Master Relations' dialog is also shown, displaying a table with columns: Master No., Master Description, Status Code, VarDim Type Variant 1, Options Var 1, VarDim Type Variant 2, Options Var 2, and VarDi Variat.

AN ORDER TYPE WITHOUT COLLECTION NO. OR SHIPMENT GROUP

If you would have no **Collection No.** and no **Shipment Group** filled in the Order Type:

COLLECTION FILTER TYPE = COLLECTION FILTER AND COLLECTION FILTER IS FILLED

The content of the **Collection Filter** in FastTab **Filters** will filter the Masters/Items that have this **Collection Filter** filled in the field **Collection No.** of the Master/Item Card. I.e.



The screenshot shows the 'Collection Mgt.' section with fields for 'Collection No.', 'Delivery Period', and 'Delivery Period Handling'. The 'Shipment Group Mgt.' section has a 'Shipment Group' field. The 'Filters' section shows 'LookUp Filters' with 'Collection Filter Type' set to 'Collection Filter' and 'Collection Filter' set to 'NOOS\$S-CY'. The 'Availability Check Filters' section has two fields for 'Filter Global Dimension 1 Availability Check' and 'Filter Global Dimension 2 Availability Check'.

This will show all Masters that have **Collection No.** **NOOS** or **SS-CY** in the Master Card.

SHIPMENT GROUP FILTER FILLED

The Masters/Items that have this **Shipment Group Filter** filled in the field **Period Code** of the Master/Item Card will be shown in the lookup of **No.** of the Sales Line. I.e.

Collection Mgt.

Collection No.

Delivery Period

Delivery Period Handling

Limit Matrix to Specified Period

Sample

Shipment Group Mgt.

Shipment Group

Sales >

Purchase >

Filters

LookUp Filters

Collection Filter Type

Collection Filter

Shipment Group Filter

Availability Check Filters

Filter Global Dimension 1 Availability Check

Filter Global Dimension 2 Availability Check

This will show all Masters that have **Period Code** *DROP4* in the Master Card.

NOTE

Keep in mind that the **Status Code** will still overrule any settings of Collections and/or Shipment Groups.

PURCHASE

Purchase and Collection Management can be compared to Sales and Collection Management described in the previous Chapter [SALES](#).

DIFFERENCES WITH SALES

- No Private Label Management
- If applicable, the **Expected Receipt Date** will be filled with **End Purchase Delivery Period/Last Receipt Date** of a Delivery Period or Shipment Group.
- An **Order Type** can only be chosen in a Purchase Document if the **Status Purchase** allows it.

PRODUCTION

Collection Management has no influence on TRIMIT Production.

NOTE

Status Code has not been implemented for Production yet.

PORTALS

Collection Management also influences the TRIMIT Portals.

Within the **Categories**, you cannot only connect Masters/Items but also **Collection No.**, **Period Code** and **Matrix Limitation Setups** to determine what Masters/Items belong to a **Category**.

In the B2B Portal and Sales Agent Portal, you are also able to enter an **Order Type** if this **Order Type** is connected to the Portal Profile.

This **Order Type** will however not influence the Masters/Items that can be chosen. This will be overruled by the setup of the **Categories**.

For more information regarding the setup of **Categories**: please see at the **White Paper – TRIMIT Category Management** and regarding the usage of **Order Type** in the B2B Portal and the Sales Agent Portal the **White Paper - TRIMIT Portals Setups in Business Central**.

SUMMARY

Collection Management of TRIMIT:

- Collections
- Collection Delivery Periods
- Shipment Groups (Drops, Delivery Slots)
- Private Label
- Matrix Limitation
- Status Code
- Order Type influence

You can make almost any combination of the above areas to determine which Masters/Items can be entered at a certain moment in a Sales- or Purchase Document.

The possibilities are endless.

It is up to the TRIMIT Partners to advice the customers – based on their procedures – to determine which setup/combination will work best.