



WHITE PAPER

Collection Management

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Introduction

This document contains information about the Collection Management functionality in TRIMIT 25.2 for Microsoft Dynamics 365 Business Central 2025, Wave 2 (W1).

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

Managing Collections puts a company into 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 (Variants) of a Master, as long as they are in the Matrix of the Master, meaning that only Matrix Masters can be used in TRIMIT Collection Management.

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-/Purchase Documents and have related Delivery Periods for several Shipment Dates/Expected Receipt 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 Document or bought in a Purchase Document.
- ➔ **(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 Document or bought in a Purchase Document.

TRIMIT enables many possibilities to manage your Collections.
Now it is up to you to determine what setup 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 Document or Purchase Document and even specify a specific **From Date** and **To Date** 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 and sell the Masters but cannot invoice the Masters yet. **Status Code** *READY* is set up so you can do everything.

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 for 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 of these five Colors in the Matrix – at least if the Master does have these five Colors.

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 new created 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 (for Sales Documents) or Expected Receipt Dates (for Purchase Documents) within a Collection.
Per Delivery Period, you can specify which Masters – and even which Colors/Sizes – will be delivered on a specific **Shipment Date** or received on a specific **Expected Receipt Date**.

When using the Delivery Periods related to a Collection, you need to determine if you want to connect the Masters/Items to the Collection itself or to the Collection/Delivery Periods to make it easier to manage.

You can however also connect Masters to both Collection and Collection/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 a Collection, it is best to only connect Masters/Items to the Collection/Delivery Period, and not to the Collection itself because it 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. This is also applicable for Purchase Lines and the Expected Receipt Date.

I.e.: For a **Collection** *Summer 2026* 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** (Periods) are leading.

In that case, you might not even set up Collections and Delivery Periods, but only Shipment Groups.

I.e.: In **Shipment Group** *Drop 1*, a part of your Collections Men, Women and Kids will be delivered/received, in *Drop 2* 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 can be entered in the Sales-/Purchase Order.

Private Label Collection

A Collection can also be used to specify a 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 Items 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 Document 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 Private Label Collection are, however, also available for other Customers unless you specify in the Master that it is a Private Label Master for Customer 2020 or in the Customer that the Master is a Private Label Master for that Customer. In that case, it cannot be sold to other Customers.

A Private Label Collection is only applicable for Sales Documents.

Prices per Collection, per Shipment Group or per Order Type

You are also able to set up Sales- (and/or Purchase) Prices per Collection, Shipment Group or Order Type – or any other Dimension (Financial Dimensions of Business Central).

I.e.: **Order Type** *Summer 2026* is connected to **Collection** *Summer 2026*, and the Sales Price of a Master is 10.00.

If the same Master would be sold in a Sales Order for *Winter 2025*, it could have **Order Type** *Winter 2025* that will be connected to **Collection** *Winter 2025* and the Sales Price for the same Master is 9.00.

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 sold/purchased on the Sales-/Purchase Document.

I.e.: If you create an **Order Type** *Summer 2026* with a filter for **Collection No.** *Summer 2026*, 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/purchased anymore, or the Matrix Limitations so only specific Colors/Sizes can be sold/purchased.

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

The functionality described is the functionality as of **TRIMIT 25.2 for Business Central W1 BC27.X**.

The pictures in this White Paper are based on the demo data for **TRIMIT 25.2**, which is based on Microsoft Dynamics 365 Business Central 2025 Release Wave 2, 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, Order Types 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
6036340 trm My Collections
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

The codeunits

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 company 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 company 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 (of Business Central), and if Dimension: can be used in Sales-/Purchase Prices	Can be a Dimension (of Business Central), 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 a specific Calculation Template	Can have a specific Calculation Template
Can show an overview of Calculations of related Masters	Can show an overview of Calculations of related Masters
Can have a Workflow	Can have a Workflow
Can be chosen in Order Types	Can be chosen in Order Types
Can set default Workflow Template for related Masters	
Collection can be divided into several Delivery Periods	
Can be set as a 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 set for Filtering on Measurement Chart Version and Additional Comments in Master Reports	

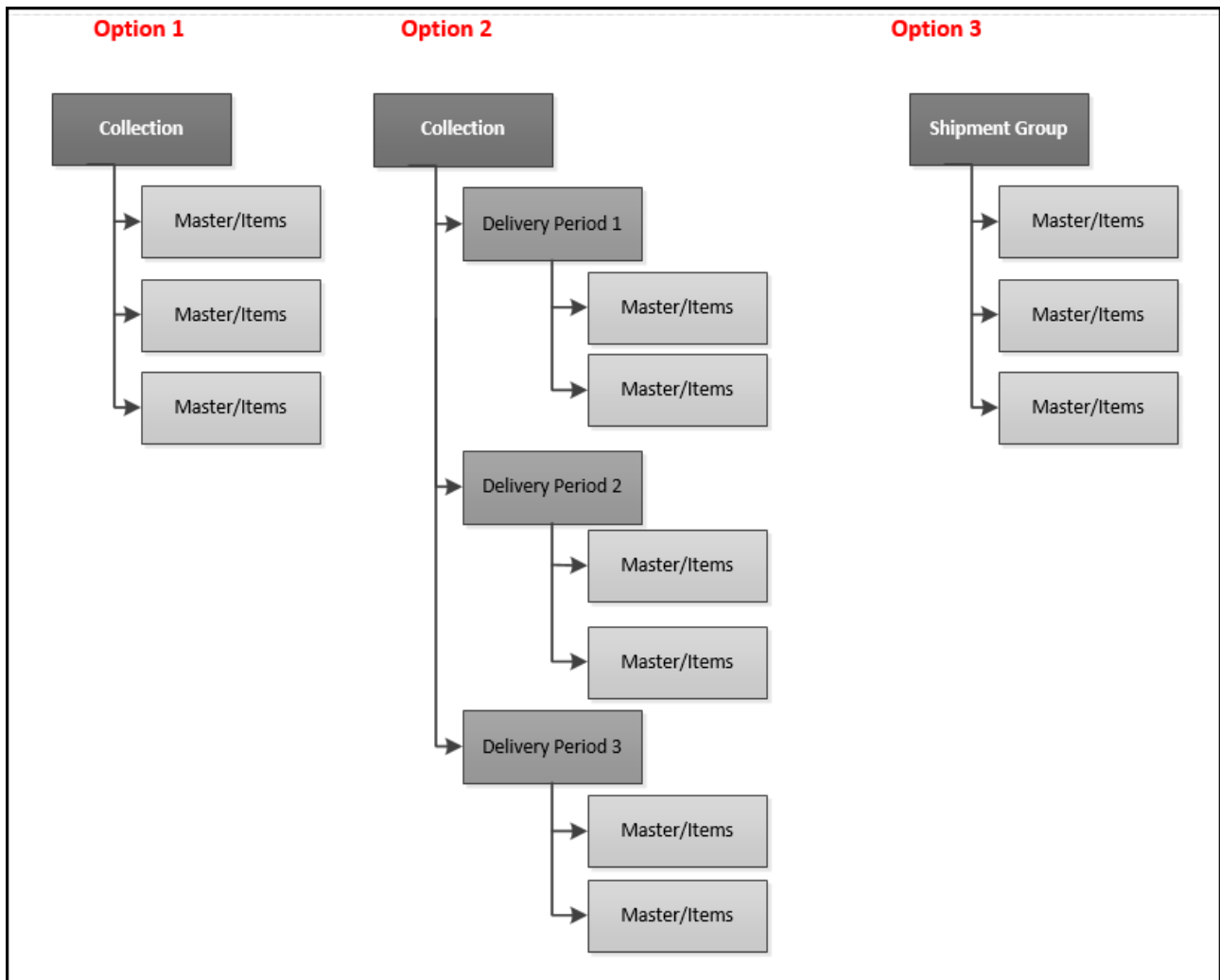
Collection versus Shipment Group

This also means that a company can choose between 3 different setups for using 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 Document, and how do you want the Order Type to handle/react?

So, our advice: explain the 3 setups to the company 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 company wants to use option 1 or 2 from the previous page, he needs to create the Collections first.

You can also use the Collection 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 General Ledger 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								
✓ Saved								
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 in based on the Value in the Sales Header
From Item No.	The Dimension Value will be filled in based on the Value of the Item No. in the Sales Line.

Note

If the Dimension is also **Global Dimension 1** or **Global Dimension 2**, the corresponding Parameters in the **Sales & Receivables Setup** FastTab **General** 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 is also **Global Dimension 1** or **Global Dimension 2**, the corresponding Parameters in the **Purchase & Payables Setup** FastTab **General** 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 is also **Global Dimension 1** or **Global Dimension 2**, the corresponding Parameters in the **Production Setup** FastTab **General** 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**.

Dimensions

+ New

Edit List

Delete

Dimension

More options

Dimension Values

Account Type Default Dim.

Allowed Dimension Values per Account

Translations

Dimension Translations

COLLECTION - Collection

✓ Saved

Dimension Translations

Search

+ New

Edit List

Delete

Language ID ↑	Language Name	Name	Code Caption	Filter Caption
→ 1033	English (United States)	Collection	Collection Code	Collection Filter

Dimension Translations

Note

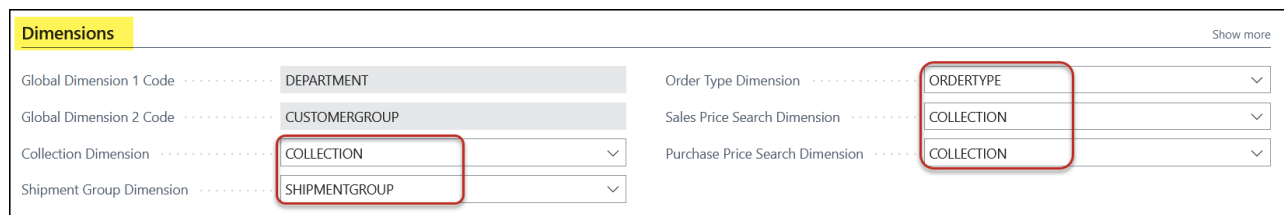
Do not enter the **Dimension Values** yet! When a TRIMIT Collection is created, the **Dimension Value** is created automatically if this Dimension is also filled as the [Collection Dimension](#) in the **General Ledger Setup**.

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	ORDERTYPE
Global Dimension 2 Code	CUSTOMERGROUP	Sales Price Search Dimension	COLLECTION
Collection Dimension	COLLECTION	Purchase Price Search Dimension	COLLECTION
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 (Masters that can only be sold to specific Customer and/or Countries).

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 Value** 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 - 1

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

Note - 2

If you – in general - use Sales-/Purchase Prices per Collection, it is useful to enter the Parameters in the General Ledger Setup, otherwise the Collection related Prices will be neglected.

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	Ready for
Show Only Lines with Outstanding Quantity ☐	Automatically Set Ready for Shipping ☐
Document Default Line Type Matrix	Automatically Set Ready for Invoicing ☐
Order Type Mandatory No	Approve Ready for Shipping When Qty. to Ship is Changed (Default Yes)
Totals in Sales Subpages No	Sales Lines
Sales Header	Posting Description for G/L Entry Posting Description for Sales Header
Retain Quote by Order No	Posting Description for Customer Ledger E... Posting Description for Sales Header
Approve Change of Posting Date Ask if existing Posting Date differs from Work Date (Default Y)	

VarDim	
Skip Creation of VarDim Order No	Matrix/Assortment List
VarDim Search String Separator None	Default Collapse Matrix ☒
Fixed Format Master Search String 0	Use Existing Matrix ☐
Order Variant Description No	Show Matrix only on Demand ☐
Sales Line Description 2 Separator None	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 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. for a specific Sales Line. All Masters related to the Collection No. (in the Header of the Sales Document) or to the Delivery Periods of the Collection No. will be shown in the lookup on the No. field of a Sales Line, and in the Matrix the VarDim Variant Options related to the Collection No. or to the Delivery Periods of the Collection No. will be shown. If a Master is only related directly to the Collection No., it will also be shown in the lookup on the No. field of the Sales Line. However, as soon as the Master has been related to the Delivery Periods of the Collection No. 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 as 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 only related to a Delivery Period earlier than the Shipment Date of the Sales Header, the Period Code of the Sales Line will be set to this Delivery Period, but the Shipment Date on the Sales Line will be set to the Shipment Date of the Sales Header. 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, that 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, and therefore which Shipment Date. All Masters related to the Collection No. (or to the Collection/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 FALSE, 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 FALSE, VarDim Variant Options connected to earlier Delivery Periods will also be shown in the lookup. When the Limit Matrix to Specified Period field is TRUE, 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, that 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 a company does not want to work with TRIMIT Collection Management, the last option of this Parameter is most applicable.

If a company chooses option 1 (only Collections), *Search Delivery Period* is most applicable.

If a company chooses 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 a company chooses 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 a Master Card will be copied into the Sales Lines. A checkmark in this field means that no Collection No. and/or Period Code 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 *TRUE*.

Note

Keep in mind that the Collection, Delivery Period and Shipment Group of an Order Type will overwrite the Collection and Delivery Period settings 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 Quantity ☐

Reuse Vendor Shipment No. ☐

Document Default Line Type Matrix

E-Document Matching Difference % 0.0

E-Document Learn Copilot Matchings ☐

Order Type Mandatory No

Totals in Purchase Subpages No

Purchase Header

Filter Purchase Order Search Order Overlying Level

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

Purchase Lines

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

VarDim

Variant Management

Order Variant Description No

Matrix/Assortment List

Default Collapse Matrix ☒

Use Existing Matrix ☐

Show Matrix only on Demand ☐

Default Matrix Distribution Method Multiple

Delivery Period Handling

Search Delivery Period

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. for a specific Purchase Line. All Masters related to the Collection No. (in the Header of the Purchase Document) or to the Delivery Periods of the Collection No. will be shown in the lookup on the No. field of a Purchase Line, and in the Matrix the VarDim Variant Options related to the Collection No. or to the Delivery Periods of the Collection No. will be shown. If a Master is only related directly to the Collection No., it will also be shown in the lookup on the No. field of the Purchase Line. However, as soon as the Master has been related to the Delivery Periods of the Collection No. 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 as the first possible with an End Purchase Delivery Period equal to or later than the Expected Receipt Date of the Purchase Header. If the Master / Item is only related to a Delivery Period earlier than the Expected Receipt Date of the Purchase Header, the Period Code of the Purchase Line will be set to this Delivery Period, but the Expected Receipt Date on the Purchase Line will be set to the Expected Receipt Date of the Purchase Header. 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
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	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/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>FALSE</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>FALSE</i>, VarDim Variant Options connected to earlier Delivery Periods will also be shown in the lookup. When the Limit Matrix to Specified Period field is <i>TRUE</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 (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 a Master Card will be copied into the Purchase Lines. A checkmark in this field means that no Collection No. and/or Period Code 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 *TRUE*.

Note

Keep in mind that the Collection, Delivery Period and Shipment Group of an Order Type will overwrite the Collection No. and Period Code 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**.

VarDim

Use Master

Use Existing Matrix

Default Collapse Matrix

VarDim Value

Number of Decimals VarDim Value

0

Field Width VarDim Value

0

Interrupt Formula Calculation

Only Current Formula when Stop Condition is met

PDM

Default MasterWizard Setup

Create All Matrix Related Items

Create Collection Relation Automatically

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

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 on 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 **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 manually.

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 Variants like 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 for option 1 of page 9 (Only Collections) can be done in several ways.

- 1) Collection Based manual
 - a. Create Collection No.
 - b. Create the Masters
 - c. Go to the Collection No. again and connect the Masters to the Collection No.
- 2) Collection Based copy
 - a. Create Collection No.
 - b. Copy Collection/Master Relations from other Collection Nos.
- 3) 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.
- 4) 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 can be used especially for NOOS (Never out of Stock) Masters, which would be part of several Collections.

The third 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 fourth 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.

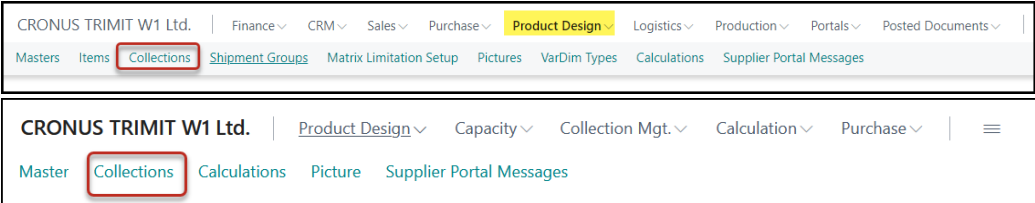
You can use all the separate ways alternately. You do not have to choose between one of the four.

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 Delivery Periods/Shipment Groups.

Collections

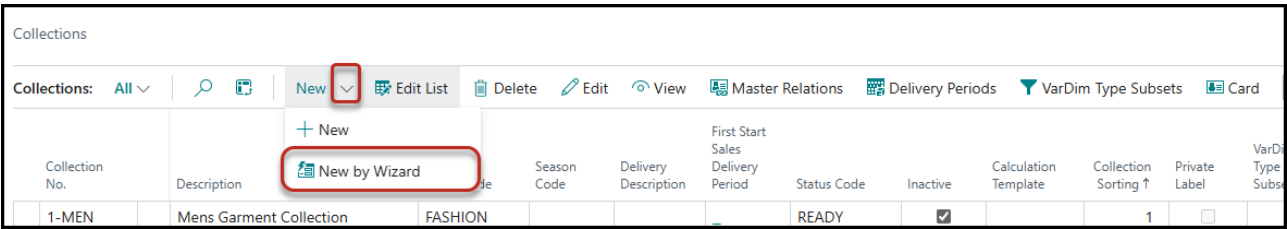
You can create the Collections via **Search Collections**, or when using the **TRIMIT Small Business** Role Center by clicking **Product Design, Collections** or when using the **TRIMIT PDM/Design** Role Center by clicking **Collections**.



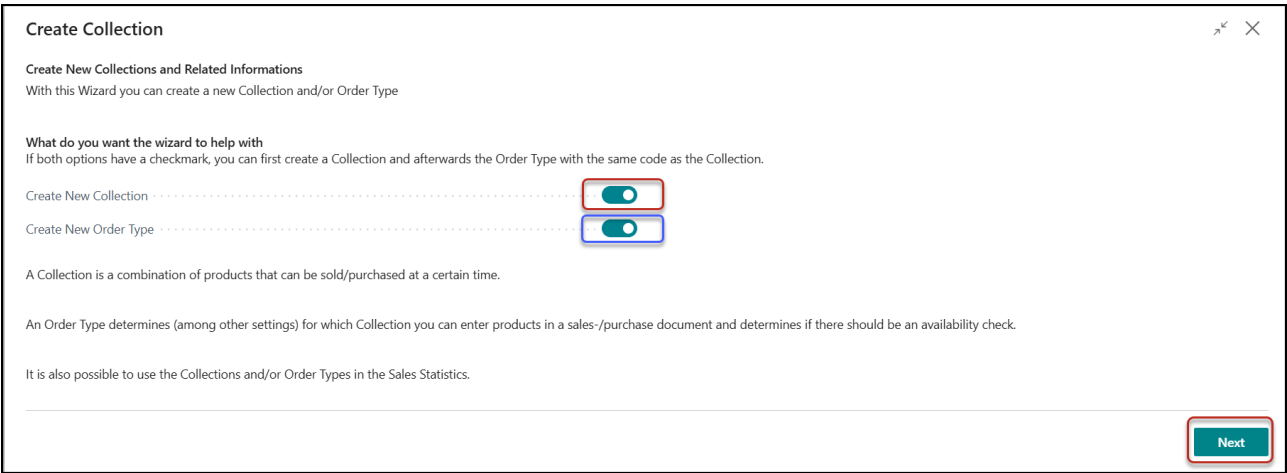
There are two ways of creating a new Collection; by clicking **+ New** or by **New by Wizard**.

Creating Collection via New by Wizard

Click **New, New by Wizard** in the Collections List.



Step 1: Determine if you only want to create a new Collection or also an Order Type



Select **Create New Collection**.

You can also select **Create New Order Type** if you want to create an Order Type with the same code as your new Collection.

Click **Next**.

Step 2: Enter the data for the New Collection.

Create Collection

Create a New Collection

A Collection is a combination of products that can be sold/purchased at a certain time.

No. 2026-02

Description Fall/Winter 2026

Create Delivery Periods ☒

Delivery Description

Add to My Collections ☒

Back Next

Now you can enter **No.** and a **Description**.

With **Create Delivery Periods** set to **TRUE**, you can also – during this Wizard – create the Delivery Periods that should be connected to the New Collection.

The [Delivery Description](#) can only be entered if no Delivery Periods should be created.

Setting the **Add to My Collections** to **TRUE**, will add the New Collection to the ListPart Page **My Collections** in the Role Center

Click **Next**.

Step 3: If Create Delivery Period is TRUE, create the Delivery Periods

If **Create Delivery Periods** is **TRUE**, you can create Delivery Periods for your new Collection.

Create Collection

Create Delivery Periods for the chosen Collection

Per Delivery Period you can determine the Start Sales Delivery Period to determine Shipment Dates for Sales Lines or End Purchase Delivery Period to determine Expected Receipt Date of Purchase Lines.

Collection No. 2026-02

Delivery Periods

Delivery Period	Delivery Period Description	Delivery Period Description 2	Start Sales Delivery Period	End Sales Delivery Period	Start Purchase Delivery Period	End Purchase Delivery Period
08-AUG	August 2026		8/31/2026	9/19/2026	7/14/2026	8/14/2026
09-SEP	September 2026		10/2/2026	10/19/2026	8/14/2026	7/14/2026

Back Next

For more information regarding the Delivery Periods see [Delivery Periods \(or Shift+F11\)](#).

Click **Next**.

Step 4: If Create New Order Type is TRUE, create the Order Type

If **Create New Order Type** is **TRUE**, the system suggests the **Code** and **Description** for the new Order Type, but you can change them.

Create Collection

Create a New Order Type

An Order Type determines (among other settings) for which Collection you can enter products in a sales-/purchase document and determines if there should be an availability check. Give the Order Type a Code and a Description. It could have the same Code (No.) and Description as the Collection.

Code 2026-02

Description Fall/Winter 2026

Availability Check No

Shipment Date

Back Next

For more information regarding the Order Type see [Order Type](#).

Click **Next**.

Step 5: Connecting Masters to the new Collection

You can choose Step 5a, 5b or 5c or decide to do it later via the new Collection itself, by not filling in any of the Fields in this page but simply click **Next**.

Step 5a: Determine if you want to connect Masters from another Collection.

If you select **Add From Collection**, you can select **Collection No.** and **Period Code** (if applicable).

Create Collection

Copy Masters from

Where do you want to copy from

Add From Collection

Collection No. SS-CY

Period Code 01-JAN

Copy Variants ☒

Back Next Finish

With **Copy Variants** you can determine if you also want to copy the **Options Var 1–9** selections from the original **Add From Collection** into your new Collection.

After clicking **Next**, you can select the Masters (and Variants) you want to connect into your new Collection. The system will show you the connected Masters to the **Add From** and you are still able to select the Masters you want to connect to the new Collection.

Collection Master Relations - SS-CY 01-JAN Matrix General

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
☒	2000	Olivia Trousers	☐	☒	COLOR_1	2	SIZE_EU	0		0
☐	2100	Lily Blouse	☐	☐	COLOR_1	3	SIZE_C	0		0
☒	2120	Sophia Shirt	☐	☒	COLOR_1	1	SIZE_C	0		0
☐	2300	Daisy Dress	☐	☒	COLOR_1	2	SIZE_EU	0		0

OK Cancel

Collection Master Relations - SS-CY 01-JAN Matrix General

No. ↑ Master Description Status Code Private Label, Master Workflow Exist VarDim Type Variant 1

2000 : Olivia Trousers ☐ ☒ COLOR_1

+ New

Edit List

By clicking **Edit List**, you are also able to change the **Options Var 1–9**, but this will only be effective if **Copy Variant** was set to **TRUE**.

When clicking **OK**, the selected Masters/Variants will be connected to the new Collection.

Step 5b: Determine if you want to connect Masters from the Masters List

If you select **Add From Master**, you can select Masters from the Master List after clicking **Next**.

Create Collection

Copy Masters from

Where do you want to copy from

Add From Master

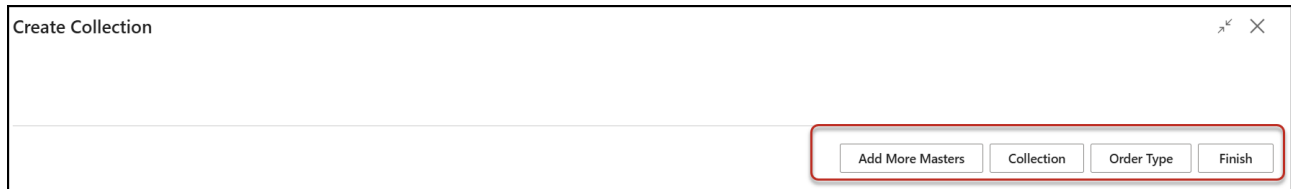
Collection No.

Period Code

Copy Variants ☐

Back Next Finish

Step 6: Close the Wizard



After you have selected the Masters in Step 5 you can click **Finish** to finish the Wizard.

But when clicking **Add More Masters** you can select Masters / Variants from other sources into the new Collection.

Clicking **Collection** will open the Collection Card

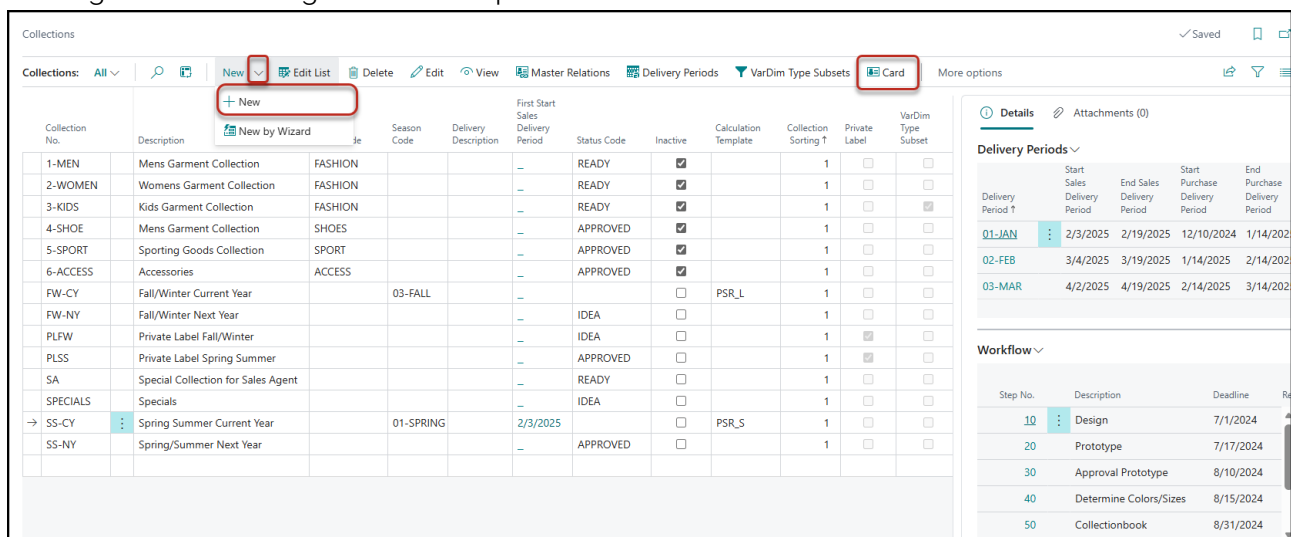
Clicking **Order Type** (only visible if you did set the **Create New Order Type** to **TRUE** in Step 1.) will open the Order Type Card.

In the Collection, there are more Fields that are interesting, which have not been filled via the Wizard – see the next paragraph for those Fields.

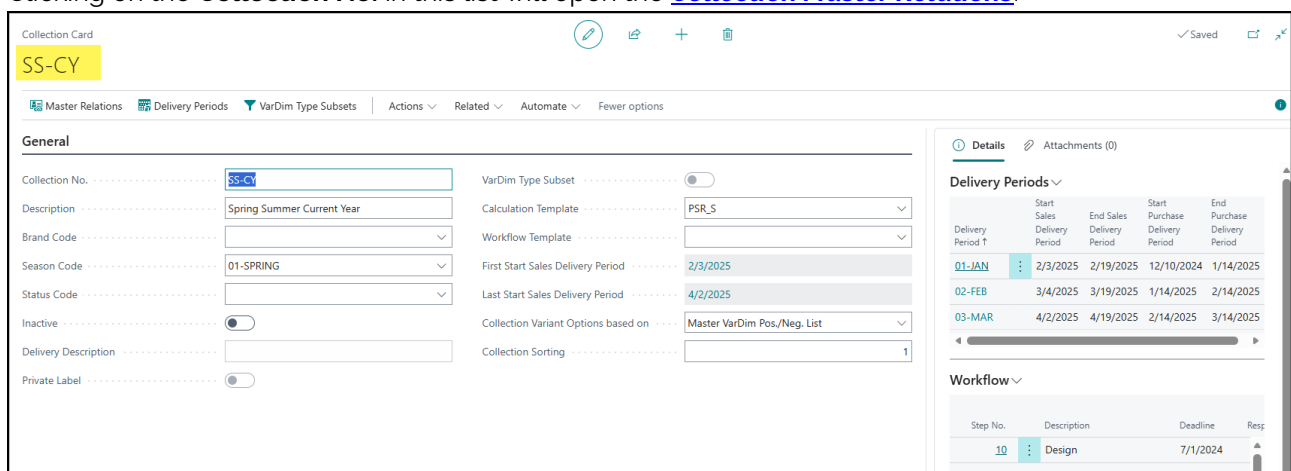
In the Order Type, there are more Fields that are interesting, which have not been filled via the Wizard – see [Order Type](#) for those Fields.

Creating Collection via + New

Clicking **+ New** or clicking on **Card** will open the **Collection Card**:



Clicking on the **Collection No.** in this list will open the [Collection Master Relations](#).



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.

Description

You can enter a **Description** for this Collection.

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** (and/or **2**) **Code** of the **Collection No.** will by default be transferred to the **Global Dimension 1** (and/or **2**) **Code** field of the Master.
Afterwards you can manually change the **Global Dimension 1** (and/or **2**) **Code** of the Master, unless the **Global Dimension 1** (and/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** (and/or **2**) **Code** of the Collection No. will by default be transferred to the **Global Dimension 1** (and/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** (and/or **2**) **Code** of the Master, unless the **Global Dimension 1** (and/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** (and/or **2**) **Code** of the Collection No. will by default be transferred to new Sales Lines of the Type **Item**, unless the Parameter **Global Dimension 1** (and/or **2**) in the Sales & Receivables Setup has been set to **From Item No.**
Afterwards you can manually change the **Global Dimension 1** (and/or **2**) **Code** of the Sales Line, unless the **Global Dimension 1** (and/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** (and/or **2**) **Code** of the Collection will by default be transferred to new Purchase Lines of the Type **Item**, unless the Parameter **Global Dimension 1** (and/or **2**) in the Purchases & Payables Setup has been set to **From Item No.**
Afterwards you can manually change the **Global Dimension 1** (and/or **2**) **Code** of the Purchase Line, unless the **Global Dimension 1** (and/or **2**) **Code** is used as **Collection Dimension**.

Status Code

You can enter a **Status Code** for the Collection No. to determine if the Collection No. can be chosen in specific Documents based on the checkmarks in the **Status Code**.

However, it is also possible to connect a TRIMIT 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 Collection No. makes sure that you, i.e., cannot choose old Collections anymore in Sales-/Purchase Documents or cannot choose upcoming Collections yet because they are still under construction.

Inactive

You can set the field **Inactive** to *TRUE*, so the Collection cannot be chosen anymore on any Document (Sales or Purchase) or in an Order Type.

This overrules the settings in the **Status Code** of the Collection.

Delivery Description

You can only enter a **Delivery Description** if the **Collection** does not have Delivery Periods to indicate when the delivery – based on this Collection – will take place. I.e., *Aug 5-10*.

If you have set the **Shipment Date Content** in the applicable **Report Layout Settings** to *Shipment Group Description*, it will print this **Delivery Description** on the Document.

I.e., If the Report **6036701** is used for the Sales Order Confirmation, and you did set **Shipment Date Content** to *Shipment Group Description* in the appropriate **Report Layout Setting**:

Report Layout Setting

Sales Report · 6036701 · General

Copy Setup... More options

Header>

General>

Sales

Show Unit List Price

Show Total Matrix Quantity

Show Signature Line if Blank

Show Shipment Date

Shipment Date Content

Show Zero VAT

Show Extended Text on Sales

Print Order Confirmation if Total Amo...

E-Mail Template Code Replacement

On Lines

Shipment Group Description

And the **Delivery Description** is *Aug 5-10*; it would look like:

The Fashion Store UK
Charley Nelson
Station Road, 21
Cambridge, CB1 2FB
Great Britain

Ship-to Address
The Fashion Store UK - LONDON
Charley Nelson
20 Savile Row
Mayfair
London, WC1 3DG
Great Britain



Order Confirmation

Order No. 0100004

Page 1

16/04/2025

Customer No.	2000	Payment Terms	Direct Payment	Order Date	04/06/25
Cust. VAT No.	GB	Salesperson	John Roberts		
Your Reference		Order Type		Shipment	
External No.				Currency Code	GBP

No.	Description	Delivery Period	Quantity	RRP	Unit Price	Amount
4710	Scarlett Shoe	Aug 5-10	43	169.00	74.00	3,182.00



	35	36	37	38	39	40	41	42
002 Black		2	4	6	6	4		
012 Red	1	2	3	3	2			
013 Pink	1	2	3	3	1			

Total3,182.00

25 % VAT795.50

Total Incl. VAT3,977.50

TRIMIT

WHITE PAPER: COLLECTION MANAGEMENT

Date: November 26, 2025

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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 Document if the Customer or Sell-To Customer Country is connected to the Collection No.

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

See [Private Label](#) for more information.

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 *TRUE* or *FALSE*) indicating if one or more VarDim Type Subsets are related to the Collection No.

See [VarDim Type Subsets](#) for more information.

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 on 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 **Collection No.** for this new Master and 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** in the Wizard but do have a **Workflow Template** on the **Collection No.** for the new Master, the Steps of that Workflow Template will be used to create a new Workflow for the new Master.

In that case, the Code of **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 Master: 2001

+ 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)	12/18/2024	User Group	DESIGN	☐		User		IDEA	SS-CY
20	Design	1/1/2025	User Group	DESIGN	☐		User			SS-CY
30	Proto Sample	1/29/2025	Vendor		☐		User			SS-CY
40	Quality Check Proto Sample	2/5/2025	User Group	DESIGN	☐		User		APPROVED	SS-CY
50	Fit Sample	3/12/2025	Vendor		☐		User			SS-CY
60	Quality Check Fit Sample	3/19/2025	User Group	DESIGN	☐		User			SS-CY
70	Ordering Salesmen Samples	3/26/2025	User Group	PURCHASE	☐		User			SS-CY
80	Salesmen Samples Received	5/28/2025	User Group	LOGISTICS	☐		User			SS-CY
90	Start Pre-Sales	6/4/2025	User Group	SALES	☐		User		READY	SS-CY
		Work Date								

Workflow based on Workflow Template "MASTER" of Collection SS-CY

Note - 1

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 - 2

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 created new Master Workflow, because you are not able to enter manually a Date for the **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 Variants like 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:

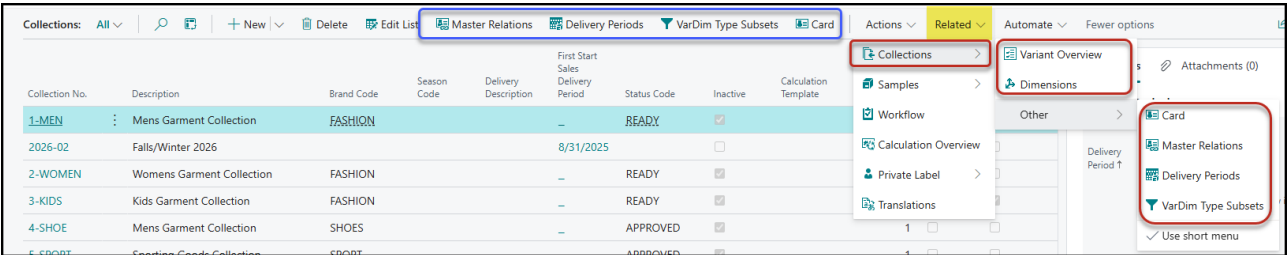
Master VarDim Pos./Neg. List	The Options Var 1-9 you can choose for a specific Collection Master Relations depends on the possible Variants that are related to the Master.
Collection VarDim Type Subset	The Options Var 1-9 you can choose for a specific Collection Master Relations depends on the possible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



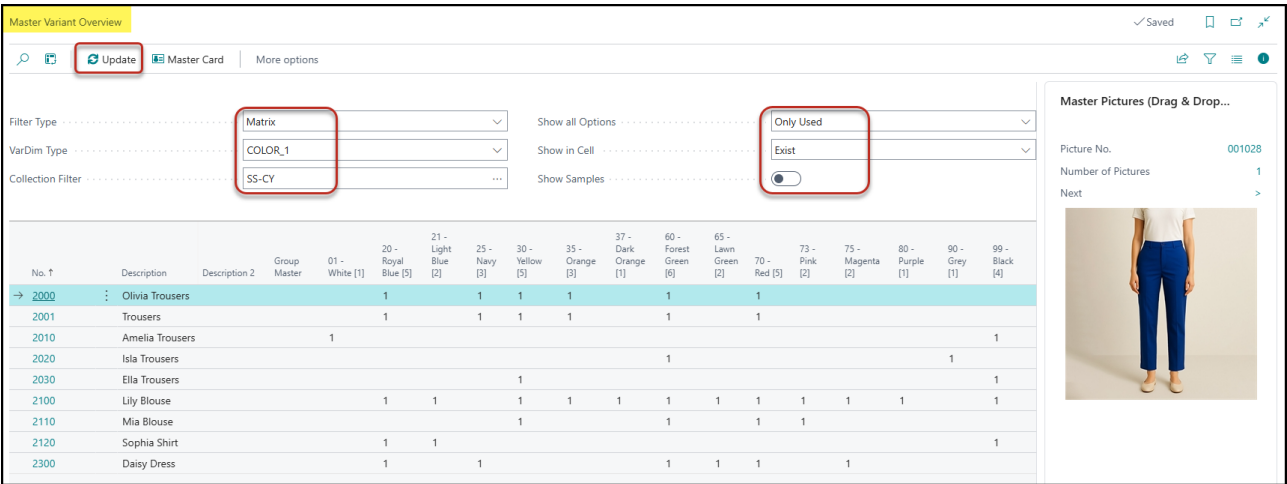
Related, Collections – **Variant Overview** is only on the Collections List, not on the Collection Card.

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.



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 with a Matrix.

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 show all the Variants of the Masters that are part of the Collection Filter 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 one (1) in the Matrix Overview if the Variant is applicable based on the filters.
Variant Name	This will show the name of the Variant for the Master (i.e., <i>White</i>) in the Matrix Overview if the Variant is applicable based on the filters.

Show Samples

If you have added Masters/Variants as Samples for a Collection, you can also see them in the Variant Overview by setting this option to **TRUE**.

In that case, in the column names, you will see between brackets first the number of Variants in the Collection and then the number of Variants in the Samples of the Collection. I.e. *[2/1]*

In the Matrix you will see the Samples of the Collection between brackets. I.e. *[1]*

Master Variant Overview

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

Show Samples

No. ↑	Description	Description 2	Group Master	01 - White [1 / 0]	20 - Royal Blue [5 / 0]	21 - Light Blue [2 / 0]	25 - Navy [3 / 0]	30 - Yellow [5 / 0]	35 - Orange [3 / 0]	37 - Dark Orange [1 / 0]	60 - Forest Green [6 / 0]	65 - Lawn Green [2 / 0]	70 - Red [5 / 0]	73 - Pink [2 / 0]	75 - Magenta [2 / 1]	80 - Purple [1 / 1]	90 - Grey [1 / 0]	99 - Black [4 / 1]
2000	Olivia Trousers				1		1	1	1		1		1					
2001	Trousers				1		1	1	1		1		1					
2010	Amelia Trousers		1															1
2020	Isla Trousers										1						1	
2030	Ella Trousers							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			

More regarding Samples can be seen in chapter [Related Samples](#).

Master Relations

Via clicking **Master Relations**, or clicking on the **Collection No.** itself, you can connect Masters (with selected Variants) directly to a Collection No.

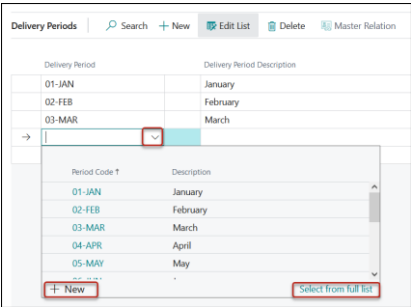
How to connect Masters to a Collection No. will be described in [Connecting Masters](#).

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 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**.



Lookup Delivery Period

Although the page is called **Shipment Groups** the filter is set to **Type = Collection**: the so-called **Delivery Periods**, and only the Shipment Groups without a checkmark in **Inactive** will be shown. 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.

Select - Shipment Groups							
Period Code	Description	Status Code	Start Shipment Date	End Shipment Date	Start Receipt Date	End Receipt Date	Calculation Template
→ 01-JAN	January		2/3/2025	2/19/2025	12/10/2024	1/14/2025	
02-FEB	February		3/4/2025	3/19/2025	1/14/2025	2/14/2025	
03-MAR	March		4/2/2025	4/19/2025	2/14/2025	3/14/2025	
04-APR	April		5/1/2025	5/19/2025	3/14/2025	4/14/2025	
05-MAY	May		5/30/2025	6/19/2025	4/14/2025	5/14/2025	
06-JUN	June		6/29/2025	7/19/2025	5/14/2025	6/14/2025	
07-JUL	July		7/30/2025	8/19/2025	6/14/2025	7/14/2025	
08-AUG	August		8/31/2025	9/19/2025	7/14/2025	8/14/2025	
09-SEP	September		10/2/2025	10/19/2025	8/14/2025	7/14/2025	
10-OCT	October		11/2/2025	11/19/2025	9/14/2025	10/14/2025	
11-NOV	November		12/4/2025	12/19/2025	10/14/2025	11/14/2025	
12-DEC	December		1/2/2026	1/15/2025	11/14/2025	12/14/2025	

trm Shipment Groups (6037177, List)

[Explore page in Visual Studio Code](#)

Table

trm Shipment Group (6037027)

[View table](#)

Table Fields | Extensions | Page Filters

Type (10, Option)
Collection
Inactive (101, Boolean)
No

UserFilters
UserFilters

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

Via **Related, Translations** you can enter Translations by Language Code. These can be shown on TRIMIT e-commerce.

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

SS-CY

Delivery Periods

+ New Edit List Delete Master Relations More options

Views

All

Filter list by:

- Collection No. SS-CY
- Relation Matrix
- Type General

+ Filter...

Delivery Period	Delivery Period Description	Delivery Period Description 2	Start Sales Delivery Period ↑	End Sales Delivery Period	Start Purchase Delivery Period	End Purchase Delivery Period
→ 01-JAN	January		2/3/2025	2/19/2025	12/10/2024	1/14/2025
02-FEB	February		3/4/2025	3/19/2025	1/14/2025	2/14/2025
03-MAR	March		4/2/2025	4/19/2025	2/14/2025	3/14/2025

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 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 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 a 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 using the Wizard. If you select a Collection No. in the Wizard for the new Master for which VarDim Type Subsets have been created, you are only able to choose Values (i.e., Colors and Sizes) that are in the VarDim Type Subsets. If you create a Master manually and enter a Collection No. in the Card, the VarDim Type Subsets will be disregarded; you are able to choose any Value of the VarDim Types.

This could mean i.e., that for a Summer Collection you only want to use the bright Colors of a Color table and for a Winter Collection you only can use the darker Colors of the same Color table. Alternatively, for a Kids Collection 3-KIDS you only can use the Sizes XS, S and M from Size Table *SIZE_C* as shown in the example below.

The screenshot illustrates the process of configuring a VarDim Type Subset. It shows the main application window with the 'VarDim Type Subsets' menu open. A list of collections is displayed, with '3-KIDS' selected. A dialog box for 'VarDim Type Subset' is shown, where 'SIZE_A' is selected as the VarDim Type, and 'Options Var 1' is set to 3. Another dialog box, 'Temporary VarDim Variables', shows a list of size variants (XS, S, M, L, XL, XXL, 3XL) with the first three checked, indicating they are the selected values for the subset.

VarDim Type Subset of Collections KIDS and VarDim Type SIZE_A

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 Document 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 Var 1

Press **Alt+Arrow Down** (or click on the three dots ...) 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 Var 1** the number of chosen Values (in the picture above 3) will be shown.

If **Options Var 1** has the value 0, it means that simply none of the Values are valid.

Dimensions (Ctrl+Shift+D)

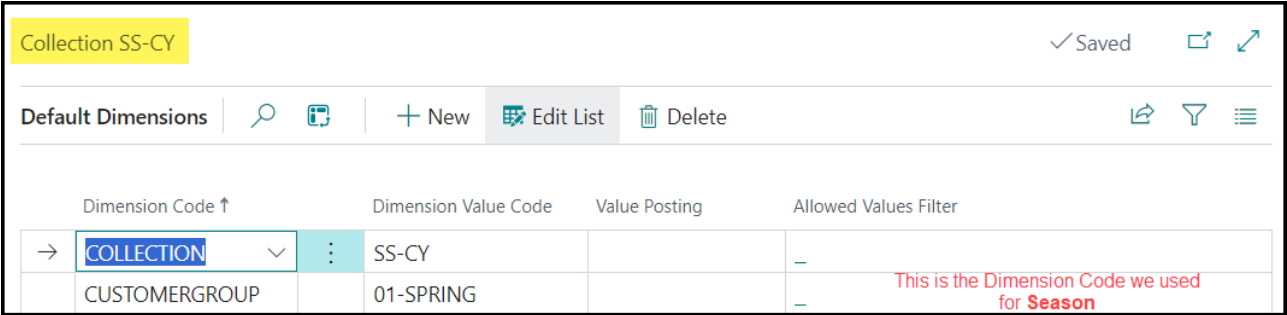
Via clicking **Dimensions**, you can see the Global Dimensions (Brand and Season in the TRIMIT Demo Data) that you have already filled in the Collection No. Card.

You can also see the **Collection No.** itself as a Dimension if you filled the **Collection Dimension** in the **General Ledger Setup**.

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

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

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

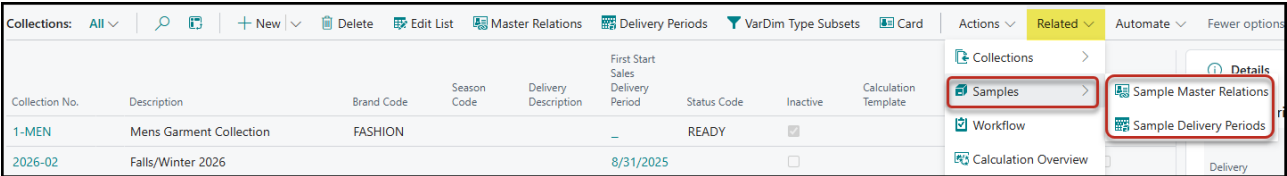


The screenshot shows the 'Collection SS-CY' interface. At the top, there's a yellow header 'Collection SS-CY' and a 'Saved' status. Below is a toolbar with 'Default Dimensions', '+ New', 'Edit List', and 'Delete'. The main table has columns: 'Dimension Code', 'Dimension Value Code', 'Value Posting', and 'Allowed Values Filter'. The first row shows 'COLLECTION' as the dimension code and 'SS-CY' as the value code. A red annotation points to 'COLLECTION' with the text 'This is the Dimension Code we used for Season'. The second row shows 'CUSTOMERGROUP' as the dimension code and '01-SPRING' as the value code.

Dimension Code ↑	Dimension Value Code	Value Posting	Allowed Values Filter
→ COLLECTION	SS-CY		
CUSTOMERGROUP	01-SPRING		

Dimensions of Collection SS-CY

Related, Samples



The screenshot shows the 'Collections' table with columns: 'Collection No.', 'Description', 'Brand Code', 'Season Code', 'Delivery Description', 'First Start Sales Delivery Period', 'Status Code', 'Inactive', and 'Calculation Template'. The 'Related' dropdown menu is open, showing options: 'Samples', 'Sample Master Relations', and 'Sample Delivery Periods'. 'Samples' is highlighted with a red box.

Collection No.	Description	Brand Code	Season Code	Delivery Description	First Start Sales Delivery Period	Status Code	Inactive	Calculation Template
1-MEN	Mens Garment Collection	FASHION				READY		
2026-02	Falls/Winter 2026				8/31/2025			

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

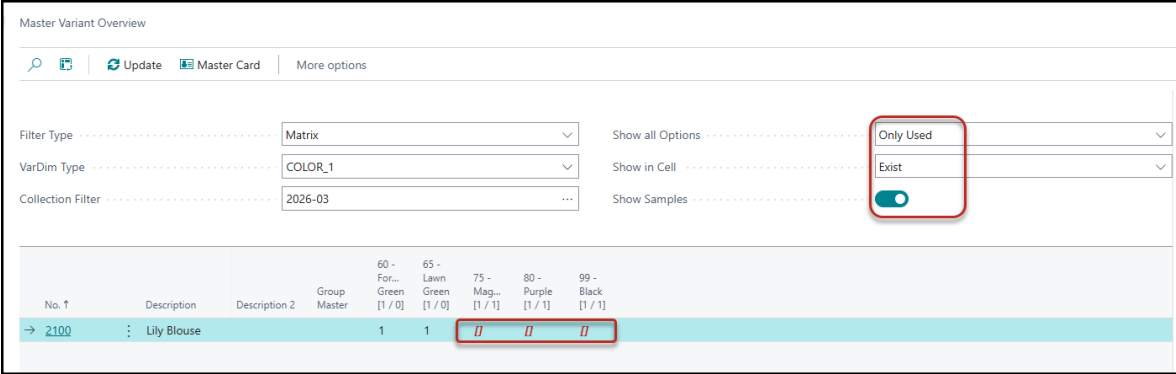
This means that if you enter a Collection No. in a Sales-/Purchase Document, and you have a checkmark in the field **Samples** of the Order Type, that only Masters (or variants of Masters) that are connected to a Collection using **Sample Master Relations** or **Sample Delivery Periods** will be shown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

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**. However, a 0 (zero) in the **Options Var 1-9** in the Sample Master Relations or Sample Delivery Periods does not imply all Variants, but no Variants at all.

In the [Variant Overview](#), you can see in different ways if Master/Variants are also connected as a Sample. I.e.

If Colors 60 and 65 are connected to the Collection, and the Colors 75, 80 and 99 are connected as a Sample:



The screenshot shows the 'Master Variant Overview' interface. It has a toolbar with 'Update' and 'Master Card'. Below are filters: 'Filter Type' (Matrix), 'VarDim Type' (COLOR_1), and 'Collection Filter' (2026-03). There are also checkboxes for 'Show all Options', 'Show in Cell', and 'Show Samples'. A red box highlights the 'Only Used' and 'Exist' options. The main table shows variant data with columns: 'No.', 'Description', 'Description 2', 'Group Master', and 'Options Var 1-9'. The first row shows '2100' as the variant number, 'Lily Blouse' as the description, and '1' as the group master. The 'Options Var 1-9' column shows '0' for colors 60, 65, 75, 80, and 99.

No. ↑	Description	Description 2	Group Master	Options Var 1-9
→ 2100	Lily Blouse		1	0 0 0 0 0

Master Variant Overview

Filter Type: Matrix
 VarDim Type: COLOR_1
 Collection Filter: 2026-03

Show all Options: All on Masters
 Show in Cell: Exist
 Show Samples: ☒

No. ↑	Description	Description 2	Group Master	20 - Royal Blue [0 / 0]	21 - Light Blue [0 / 0]	30 - Yellow [0 / 0]	35 - Orange [0 / 0]	37 - Dark Ora... [0 / 0]	60 - Forest Green [1 / 0]	65 - Lawn Green [1 / 0]	70 - Red [0 / 0]	73 - Pink [0 / 0]	75 - Magenta [1 / 1]	80 - Purple [1 / 1]	99 - Black [1 / 1]
→ 2100	Lily Blouse			*	*	*	*	*	1	1	*	*	[*]	[*]	[*]

If the Colors 60, 65, 75, 80 and 99 are connected to the Collection, and the Colors 75, 80 and 99 are connected as a Sample:

Master Variant Overview

Filter Type: Matrix
 VarDim Type: COLOR_1
 Collection Filter: 2026-03

Show all Options: Only Used
 Show in Cell: Exist
 Show Samples: ☒

No. ↑	Description	Description 2	Group Master	60 - For... Green [1 / 0]	65 - Lawn Green [1 / 0]	75 - Magenta [1 / 1]	80 - Purple [1 / 1]	99 - Black [1 / 1]
→ 2100	Lily Blouse		1	1	[1]	[1]	[1]	

Master Variant Overview

Filter Type: Matrix
 VarDim Type: COLOR_1
 Collection Filter: 2026-03

Show all Options: All on Masters
 Show in Cell: Exist
 Show Samples: ☒

No. ↑	Description	Description 2	Group Master	20 - Royal Blue [0 / 0]	21 - Light Blue [0 / 0]	30 - Yellow [0 / 0]	35 - Orange [0 / 0]	37 - Dark Ora... [0 / 0]	60 - Forest Green [1 / 0]	65 - Lawn Green [1 / 0]	70 - Red [0 / 0]	73 - Pink [0 / 0]	75 - Magenta [1 / 1]	80 - Purple [1 / 1]	99 - Black [1 / 1]
→ 2100	Lily Blouse			*	*	*	*	*	1	1	*	*	[1]	[1]	[1]

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 Collection: SS-CY

Step No.	Depending on Steps	Awaiting Previous	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Closing Date	Closed by Type	Approved	Rejected	Closed By	Assign Status Code	Collection No.
10	0	☐	Design	4/20/2025	User Group	DESIGN	☒	4/15/2025	User	☒	☐	ADMIN	IDEA	SS-CY
20	0	☐	Prototypes	5/3/2025	User Group	DESIGN	☒	5/1/2025	User	☒	☐	ADMIN		SS-CY
30	20	☐	Approval Prototypes	5/10/2025	User Group	DESIGN	☒	5/15/2025	User	☒	☐	ADMIN		SS-CY
40	0	☐	Determine Colors/Sizes	5/30/2025	User Group	DESIGN	☐		User	☐	☐		APPROVED	SS-CY
50	40/30	☒	Collectionbook	6/1/2025	User Group	MARKETING	☐		User	☐	☐		READY	SS-CY
60	40	☒	Marketing	6/25/2025	User Group	MARKETING	☐		User	☐	☐			SS-CY
70	40	☒	Sales	8/1/2025	User Group	SALES	☐		User	☐	☐			SS-CY
80	50	☒	Website	8/1/2025	User Group	IT	☐		User	☐	☐			SS-CY

The Steps with a **Deadline** before the Work Date will be shown in **red**, in this picture based on Work Date June 4, 2025.

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/process.

Depending on Steps

This field is not by default in the page; you need to add it via **Personalize**.

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

Awaiting Previous

This field is not by default in the page; you need to add it via **Personalize**.

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 Steps** is (are) 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 Workflow 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** to be visible on the **TRIMIT Web Supplier**, but this is not applicable for the Workflow of the Collections, only for the Workflow of individual Masters.

The **Type** *Customer* is not implemented in TRIMIT B2B or SA. 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.

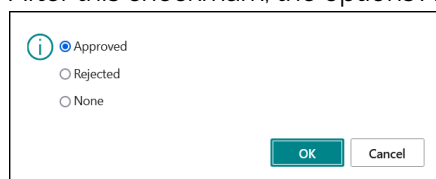
Responsible ID

Here you choose the User, Workflow 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.

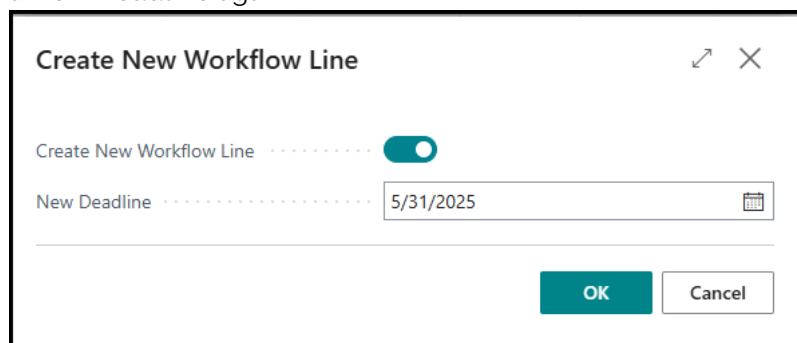


The screenshot shows a small dialog box with a title bar. Inside, there is a radio button labeled 'Approved' which is selected (indicated by a blue dot). Below it are two unselected radio buttons labeled 'Rejected' and 'None'. At the bottom of the dialog box, there are two buttons: 'OK' and 'Cancel'.

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 "Create New Workflow Line" has a close button (X) and a share icon. It contains a toggle switch for "Create New Workflow Line" which is currently turned on. Below it is a text field for "New Deadline" with the value "5/31/2025" and a calendar icon. At the bottom 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	Approved	Rejected	Closed By	Assign Status Code	Collection No.
10	0	☐	Design	4/20/2025	User Group	DESIGN	☒	4/15/2025	User	☒	☐	ADMIN	IDEA	SS-CY
20	0	☐	Prototypes	5/3/2025	User Group	DESIGN	☒	5/1/2025	User	☒	☐	ADMIN		SS-CY
30	20	☐	Approval Prototypes	5/10/2025	User Group	DESIGN	☒	5/15/2025	User	☒	☐	ADMIN		SS-CY
40	0	☐	Determine Colors/Sizes	5/30/2025	User Group	DESIGN	☒	6/4/2025	User	☐	☒	ADMIN	APPROVED	SS-CY
40	0	☐	Determine Colors/Sizes	5/31/2025	User Group	DESIGN	☐		User	☐	☐		APPROVED	SS-CY
50	40/30	☐	Collectionbook	6/1/2025	User Group	MARKETING	☐		User	☐	☐		READY	SS-CY
60	40	☐	Marketing	6/25/2025	User Group	MARKETING	☐		User	☐	☐			SS-CY
70	40	☐	Sales	8/1/2025	User Group	SALES	☐		User	☐	☐			SS-CY
80	50	☐	Website	8/1/2025	User Group	IT	☐		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**, but no checkmark will be set in **Approved** or **Rejected**.

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 Web Supplier 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 on 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: you need to add it via **Personalize**.

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: you need to add it via **Personalize**.

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: you need to add it via **Personalize**.

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.

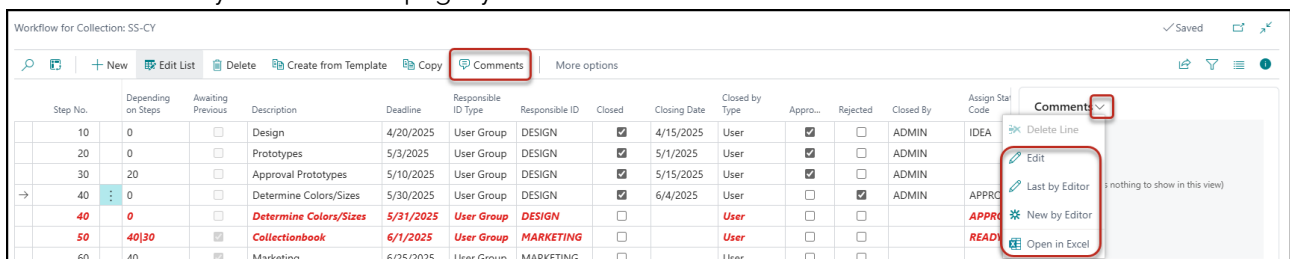
This field is not by default in the page: you need to add it via **Personalize**.

Comment

This field will indicate if there are comments added to this specific Step.

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.

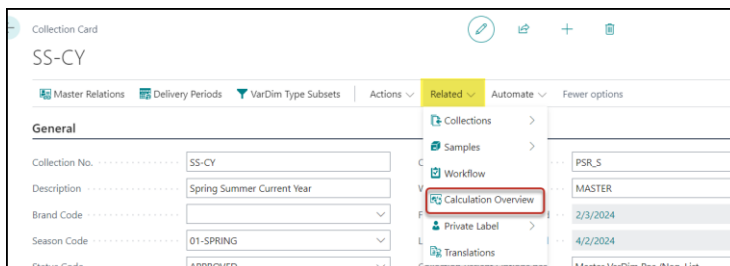
This field is not by default in the page: you need to add it via **Personalize**.



Step No.	Depending on Steps	Awaiting Previous	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Closing Date	Closed by Type	Appro...	Rejected	Closed By	Assign Stat Code	Comment
10	0	☐	Design	4/20/2025	User Group	DESIGN	☒	4/15/2025	User	☒	☐	ADMIN	IDEA	
20	0	☐	Prototypes	5/3/2025	User Group	DESIGN	☒	5/1/2025	User	☒	☐	ADMIN		
30	20	☐	Approval Prototypes	5/10/2025	User Group	DESIGN	☒	5/15/2025	User	☒	☐	ADMIN		
40	0	☐	Determine Colors/Sizes	5/30/2025	User Group	DESIGN	☒	6/4/2025	User	☐	☒	ADMIN	APPRO	
40	0	☐	Determine Colors/Sizes	5/31/2025	User Group	DESIGN	☐		User	☐	☐		APPRO	
50	40 30	☒	Collectionbook	6/1/2025	User Group	MARKETING	☐		User	☐	☐		READ	
60	40	☒	Marketing	6/25/2025	User Group	MARKETING	☐		User	☐	☐			

For more details regarding the **Workflow**, see the **White Paper – TRIMIT Workflow**.

Related, Calculation Overview



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.

Calculation Overview

Calculation ▶ Next Overview Setup Actions Related Fewer options

General

Called from Collection More Templates Used Overview Setup ALL

Specified for SS-CY Calculation Template Filter PSR_S

Exist	No. ↑	Version No. ↑	Description	Design	Item Group	Gender	Item Statistics Group 4	Item Statistics Group 5	Locked	Purchase Price	Purchase Costs %	Unit Cost	Sales Costs %	Sales Margin %	Calculated Sales Price	Actual Sales Price	Retail Price Costs %	Retail Margin %	Calculated Retail Price	Actual Retail Price
☐	2000	SS-CY-1	Olivia Trousers	1	210	110	0	10	☐	13.88	10%	15.27	5%	80%	28.86	29.00	7.5%	250%	54.60	55.00
☐	2100	SS-CY-1	Lily Blouse	1	110	110	0	20	☐	12.40	10%	13.64	5%	80%	25.78	26.00	7.5%	250%	48.77	49.00
☐	2110	SS-CY-1	Mia Blouse	5	110	110	0	20	☐	22.50	10%	24.75	5%	80%	46.78	47.00	7.5%	250%	88.48	89.00
☐	2120	SS-CY-1	Sophia Shirt	5	110	110	0	20	☐	13.31	10%	14.65	5%	80%	27.68	28.00	7.5%	250%	52.36	52.00
→ ☐	2300	SS-CY-1	Daisy Dress	2	155	110	0	30	☐	26.65	10%	29.32	5%	80%	55.42	56.00	7.5%	250%	104.82	105.00

Creation Values

Creation Calculation Template PSR_S

Creation Version No. SS-CY-1

If you go to the **Calculation Overview** of a Collection, the **Calculation Template** with **Default = TRUE**, will be filled automatically as the **Creation Calculation Template**.

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

Related, Private Label

You can set a Collection as a **Private Label** Collection by connecting Customer(s) and/or Country/Region(s) to it. This means exclusively choosing the Collection by specific Customer(s) and/or Country/Region(s).

Collection Card

PLSS

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

General

Collection No. PLSS

Description Private Label Spring Summer 2020

Brand Code

Season Code

Status Code APPROVED

Private Label

VarDim Type Subset

Related

Collections

Samples

Workflow

Calculation Overview

Private Label

Customer

Country/Region

Collection variant Options bas. master varDim pos/neg. List

Collection Sorting 1

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 of the Sales Document).

I.e., Collection **PLSS** is only applicable for Customer **2020 Sportswear A/S, Munchen**.

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

Private Labels

+ 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

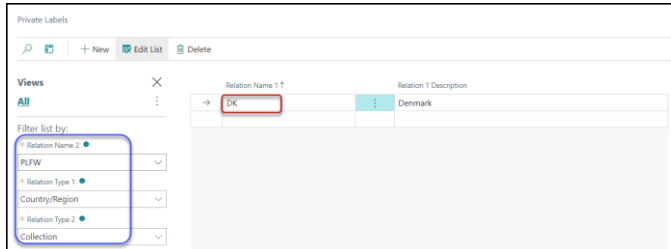
Relation 1 Description Sportswear A/S, Munchen

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, Company Group or Chain is connected to that Collection.

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*



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.

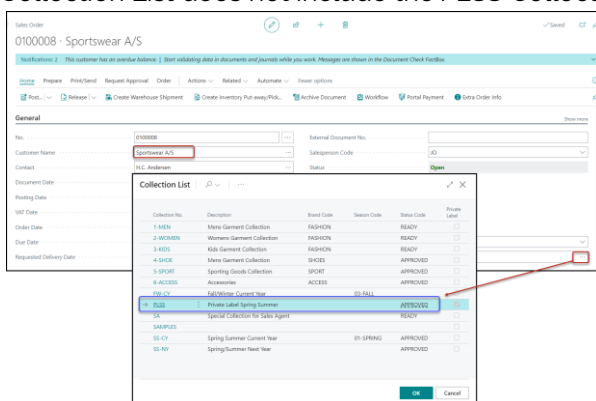
The **Private Label** functionality is only applicable for Sales Documents; not for Purchase Documents.

An Example:

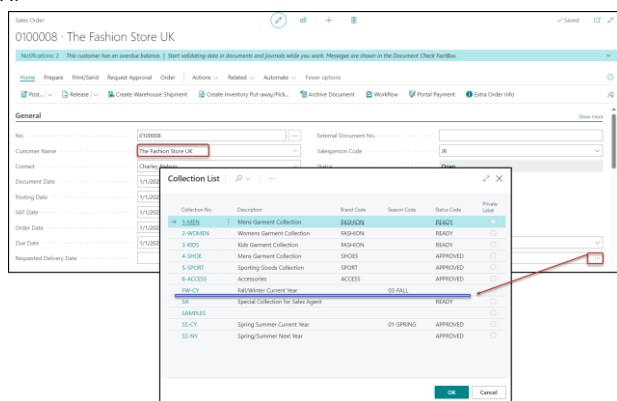
Customer *2020* is connected to **Collection No.** *PLSS*.

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



Collections for Customer 2020



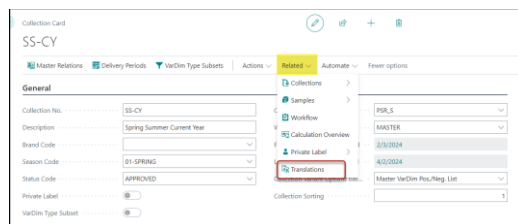
Collections for Customer 2000

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 the Masters/Variants (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 Masters or Items itself (see [Private Label](#)).

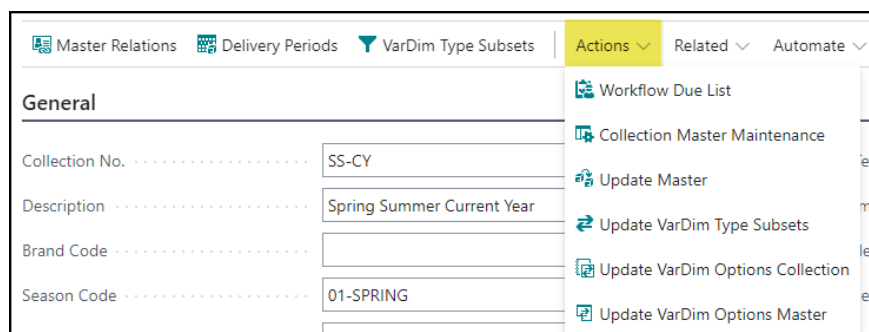
Another way of setting this up would be to have all the Masters sold based on Collections and not connecting these specific Private Label Masters to other Collections.

Related, Translations



You can create Translations per **Language Code** for the **Description** of the Collection.
This translation will be used on TRIMIT e-commerce if you use the Collections as a Tag for finding specific products.

Actions on the Collection List/Card

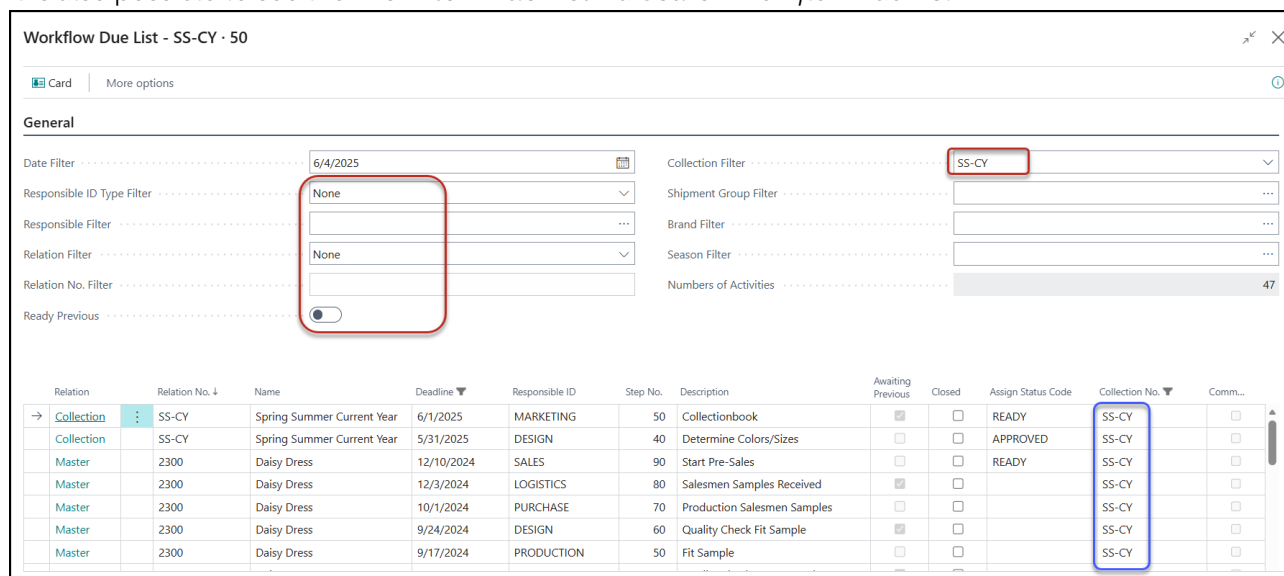


Actions, Workflow Due List

By clicking **Actions, Workflow Due List**, you can open the page of the **Workflow Due List**, which will show you all the Steps with the current 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**



Relation	Relation No. 4	Name	Deadline	Responsible ID	Step No.	Description	Awaiting Previous	Closed	Assign Status Code	Collection No.	Comm...
→ Collection	SS-CY	Spring Summer Current Year	6/1/2025	MARKETING	50	Collectionbook	☒	☐	READY	SS-CY	☐
Collection	SS-CY	Spring Summer Current Year	5/31/2025	DESIGN	40	Determine Colors/Sizes	☐	☐	APPROVED	SS-CY	☐
Master	2300	Daisy Dress	12/10/2024	SALES	90	Start Pre-Sales	☐	☐	READY	SS-CY	☐
Master	2300	Daisy Dress	12/3/2024	LOGISTICS	80	Salesmen Samples Received	☒	☐		SS-CY	☐
Master	2300	Daisy Dress	10/1/2024	PURCHASE	70	Production Salesmen Samples	☐	☐		SS-CY	☐
Master	2300	Daisy Dress	9/24/2024	DESIGN	60	Quality Check Fit Sample	☒	☐		SS-CY	☐
Master	2300	Daisy Dress	9/17/2024	PRODUCTION	50	Fit Sample	☐	☐		SS-CY	☐

Description of the Filter Fields:

Date Filter

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

Responsible ID Type Filter

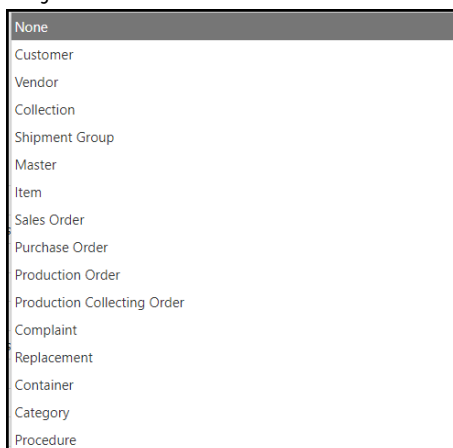
When coming in this page via the **Collection** the default is *None*. However, you can also filter on *User*, *User Group*, *Vendor*, and *Customer*

Responsible Filter

If you selected a **Responsible ID Type Filter**, you could also enter a Filter for the **Responsible ID Type Name** depending on the **Type**.

Relation Filter

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



None
Customer
Vendor
Collection
Shipment Group
Master
Item
Sales Order
Purchase Order
Production Order
Production Collecting Order
Complaint
Replacement
Container
Category
Procedure

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 Filter** 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

It shows the calculated number of open Steps of Workflows based on the Filters.

Note

If you are in a line, by 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 them directly or to the Delivery Periods or Samples (see [Connecting Masters](#)) you can get this overview.

Collection Maintenance						
+ New Edit List Delete Actions Fewer options						
Show Exist						
No. ↑	Description	GENERAL	01-JAN	02-FEB	03-MAR	
2000	Olivia Trousers	*	*	*	*	
2001	test	*				
2020	Isla Trousers	*				
2100	Lily Blouse		*	*	*	
2110	Mia Blouse			*		
2120	Sophia Shirt	*	*	*	*	
2300	Daisy Dress	*	*	*	*	
2410	Katie Scarf				*	
→ 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** of the Collection.

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**.

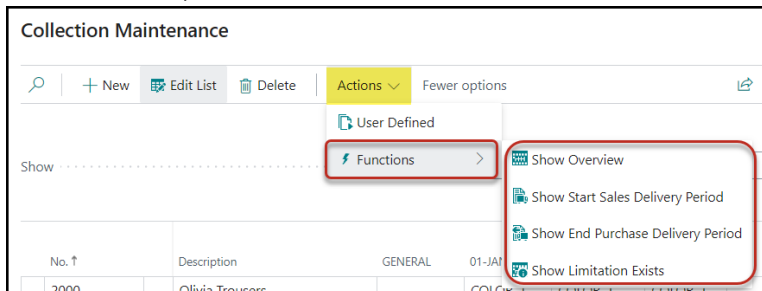
In every cell, you can press **Alt+Arrow Down** to see the details of the **Master Relation** to the Collection and Delivery Period.

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 the 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.

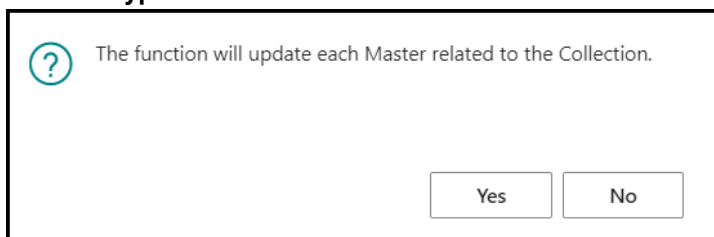
The first screenshot shows the 'Collection Maintenance' window with the 'Show' filter set to 'ShipmentDate'. The table lists items with columns for No. ↑, Description, GENERAL, 01-JAN, 02-FEB, and 03-MAR. The second screenshot shows the same window with the 'Show' filter set to 'ReceiptDate'. The third screenshot shows the same window with the 'Show' filter set to 'Limitation'.

These **Show** options are also available via **Actions, Functions**:



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**.



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*. It will however not delete Variants that are not in the **VarDim Type Subset**.

Note

This action can lead to errors in the system if your Masters have **Bill of Materials**, with **Search Tables** or **Formulas** related to your Components. Therefore, 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 or Formulas of the Bill of Materials.

You also need to check the Sales-/Purchase Prices to see if they are depending on the Variants by using the **Search Tables** or **Formulas**.

Use this Action only if you want extra Variants added to your Masters, and if you do not have Search Tables in your BOM or Sales-/Purchase Prices.

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 2 Colors from **VarDim Type** *COLOR_1* and 7 Sizes from *SIZE_EU* and is the only Master connected to a Collection. If you would run the 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 **Options 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 Var 1** and **Options Var 2** filled. If you run the Action **Update VarDim Options Collections** the system will create the **Options Var 1**, and **Options Var 2** in the **Collection Master Relations** based on the Variants of the Master:

Before:

VDTs Matrix General

Collection Master Relations

Search

New

Edit List

Delete

Home

Reports

Actions

Related

Reports

Aut

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	Private Label, Master	Workflow 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:

VDTs Matrix General

Collection Master Relations

Search

New

Edit List

Delete

Home

Reports

Actions

Related

Reports

Automate

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	Private Label, Master	Workflow 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	

Note

This is also happening for the Masters that are connected to the Collection/Delivery Periods.

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.

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 are 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 directly to the Collection and/or to the Delivery Period Codes of a Collection.

When entering Sales-/Purchase Documents, the Master Relations of the **Collection** will determine which Masters/VarDim Variants are possible to enter on the Lines.

If you also use the **Collection/Delivery Periods**, their Master Relations will also determine which 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 into 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.

However, a lookup in the **No.** field of the Sales-/Purchase Line will always show all the Masters connected to the **Collection** or to the **Collection/Delivery Periods**.

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 1-9** fields for the Collection Master Relation.

In case you connect the Masters to a Sample Collection, blank **Options Var 1-9** do NOT mean all Variants. For Sample Collections, you need to select all the Variants if they are applicable.

Note

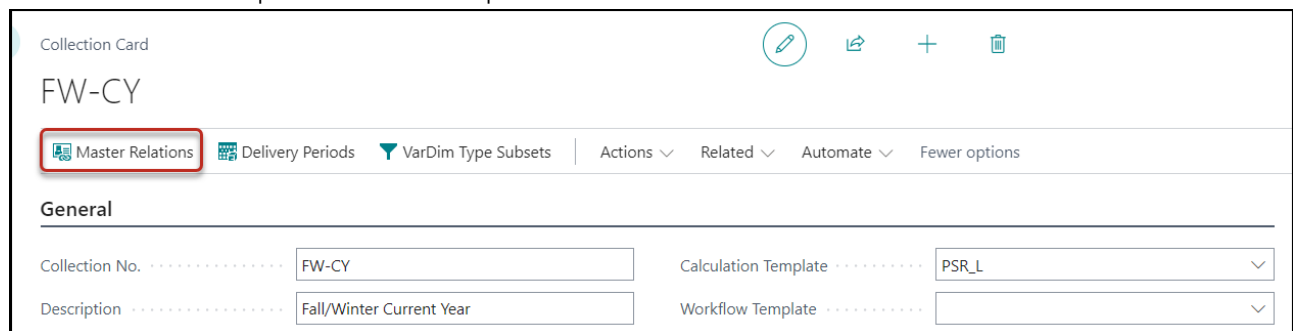
Keep in mind that if a Master is connected directly to the **Collection** and to the **Collection/Delivery Periods** only for the chosen Variants in the Collection/Delivery Periods quantities can be entered in a Sales-/Purchase Document, if you have Collection No. filled in the Header of the Document 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 1-9** 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 you can click on the **Collection No.**, in the Collection Card, you need to click **Master Relations** or press **Ctrl+F11** to open the **Collection Master Relations**.



Collection Card

FW-CY

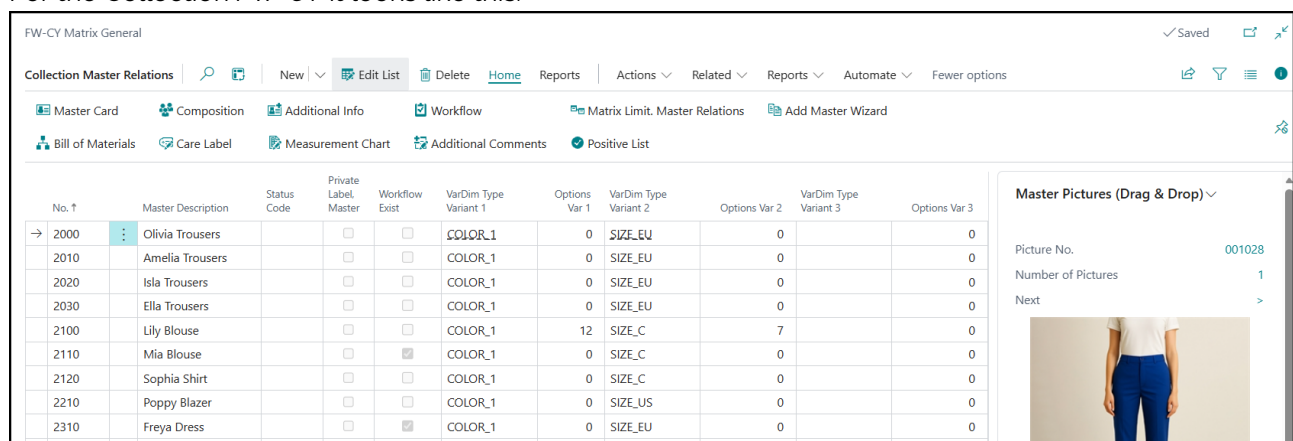
Master Relations Delivery Periods VarDim Type Subsets Actions Related Automate Fewer options

General

Collection No. FW-CY Calculation Template PSR_L

Description Fall/Winter Current Year Workflow Template

For the Collection FW-CY it looks like this:



FW-CY Matrix General

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

Master Card Composition Additional Info Workflow Matrix Limit, Master Relations Add Master Wizard

Bill of Materials Care Label Measurement Chart Additional Comments Positive List

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
→ 2000	Olivia Trousers		☐	☐	COLOR_1	0	SIZE_EU	0		0
2010	Amelia Trousers		☐	☐	COLOR_1	0	SIZE_EU	0		0
2020	Isla Trousers		☐	☐	COLOR_1	0	SIZE_EU	0		0
2030	Ella Trousers		☐	☐	COLOR_1	0	SIZE_EU	0		0
2100	Lily Blouse		☐	☐	COLOR_1	12	SIZE_C	7		0
2110	Mia Blouse		☐	☒	COLOR_1	0	SIZE_C	0		0
2120	Sophia Shirt		☐	☐	COLOR_1	0	SIZE_C	0		0
2210	Poppy Blazer		☐	☐	COLOR_1	0	SIZE_US	0		0
2310	Freya Dress		☐	☒	COLOR_1	0	SIZE_EU	0		0

Master Pictures (Drag & Drop)

Picture No. 001028

Number of Pictures 1

Next >

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 in the VarDim Master for which the **VarDim Type Placement in Item No.** is filled with *Variant 1-9*.

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 Relations. 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 show if the Master is connected to a specific Private Label (regardless if this is on specific Customers or Country/Regions).

Workflow Exist

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

VarDim Type Variant 1-9

The VarDim Type(s) that is (are) connected to the Master in the VarDim Master for which the **VarDim Type Placement in Item No.** is filled with *Variant 1-9* will be shown automatically.

Only **VarDim Type Variant 1- 3** are shown by default. The **4-9** can be added via **Personalize**.

Options VarDim 1–9

Pressing **Alt+Arrow Down** will show the Variants related to the **VarDim Variant 1–9** of the Master **No.** Only **Options VarDim 1–3** are shown by default. The **4–9** can be added via **Personalize**.

With a **checkmark** in front of a **Value**, you determine that this Value 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.

FW-CY Matrix General

Collection Master Relations

Master Card Composition

Bill of Materials Care Label

No. ↑ Master Description Stat Cod

2000 Olivia Trousers

2010 Amelia Trousers

2020 Isla Trousers

2030 Ella Trousers

2100 Lily Blouse

→ 2110 Mia Blouse

2120 Sophia Shirt

Temporary VarDim Variants Options Var 1 for No. 2110

+ New Edit List Actions Related Fewer options

Mark	Value ↑	Assortment	Blocked	Name
☒	30	☐	☐	Yellow
☒	60	☐	☐	Forest Green
☐	70	☐	☐	Red
☐	73	☐	☐	Pink

You can also make use of the **Actions** in the page to quickly mark/unmark **Values**.

Temporary VarDim Variants

+ New Edit List Actions Related Fewer options

Undo

Mark Standard Values

Mark All

Remove Marks

Show Marked/All

Mark	Value ↑	Assortment	Blocked	Name
☒	30	☐	☐	Yellow
☒	60	☐	☐	Forest Green
☐	70	☐	☐	Red
☐	73	☐	☐	Pink

Undo

This will **undo** the last entry.

Mark Standard Values

Only the **Values** that have a checkmark in **Standard Value** will get a checkmark.

Standard Value is a checkmark that you can set manually in the list of the Values of a VarDim Type.

This field is now shown by default, but you can add it via **Personalize**.

20

VarDim Variant Option No. SIZE_C

+ New Edit List Delete Actions Related Automate Fewer options

Value ↑	Ass...	Description	Short Description	Standard Value	Color Reference	RGB Code	No. Ima...	Picture	Attribute \
01	☐	XS	XS	☐			☐	+	XS
→ 02	☐	S	S	☒			☐	+	S
03	☐	M	M	☒			☐	+	M
04	☐	L	L	☒			☐	+	L
05	☐	XL	XL	☒			☐	+	XL
06	☐	XXL	XXL	☐			☐	+	XXL
07	☐	3XL	3XL	☐			☐	+	3XL
08	☐	4XL	4XL	☐			☐	+	4XL
09	☐	5XL	5XL	☐			☐	+	5XL

Details

Related Picture

Picture No.

Mark All

This will put a **Mark** in all the **Values**.

Remove Marks

This will remove the **Mark** in all the **Values**.

Show Marked/All

This will influence the **Values** that you will see in this page:

All the **Values** or only the Marked **Values**.

There are also several FactBoxes that can give insight regarding the chosen **Values** or **No.**, but they are not shown by default; you need to add them via **Personalize**.

In FactBoxes **Variant 1**, **Variant 2**, and **Variant 3** you can see which Values you have chosen for **Options Var 1-3**.

In FactBox **Collections**, you can see to which **Collections** (and **Delivery Periods**) this Master **No.** is related.

In FactBox **Delivery Periods**, you can see to which **Delivery Periods** this Master **No.** is related in this specific Collection **FW-CY**.

The screenshot shows the 'FW-CY Matrix General' interface. It features a table with columns for Master No., Master Description, Status Code, Private Label, Workflow Exist, and three variant columns (Var 1, Var 2, Var 3) each with a VarDim Type and Options. The row for 'Mia Blouse' (Master No. 2110) is highlighted with a red box. To the right of the table are three FactBoxes: 'Variant 1' showing color options (Yellow, Forest Green), 'Collections' showing 'FW-CY' and 'SS-CY', and 'Delivery Periods' showing 'FW-CY'.

Home in the Collection Master Relations

The screenshot shows the 'FW-CY Matrix General' interface with the 'Home' button highlighted in the top navigation bar. The navigation bar includes buttons for 'Master Card', 'Bill of Materials', 'Composition', 'Care Label', 'Additional Info', 'Measurement Chart', 'Workflow', 'Additional Comments', 'Matrix Limit. Master Relations', 'Positive List', and 'Add Master Wizard'.

Master Card

This will show the Master Card of Master **No.** you are standing on.

Bill of Materials

This will show the Bill of Materials of Master **No.** you are standing on.

Composition, Care Label, Additional Info

This will show respectively the Composition, the Care Labels, or the Additional Info of the Master **No.** 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 **No.** you are standing on, regardless the **Collection No.** in the Workflow Steps.

Additional Comments

This will show the Additional Comments of the Master **No.** you are standing on.

Matrix Limit. Master relations

This will show the **Limitation Codes** that you might have connected to the Master **No.** you are standing on. See [Matrix Limitation](#)

Positive List

This will show the selected Values for **Options Var 1-9** for this Collection.

But only if at least one of the **Options Var 1-9** has been filled. In that case, also the possible **Options** of the **Options Var 1-9** that have not been restricted will be shown.

If the last **Options Var 1-9** has not been restricted, these **Values** will not all be shown.

I.e., Master 2110 has 2 Variants. **Options Var 1** has some selected Colors, but **Options Var 2** has not been restricted. Then the **Positive List** will look as follows:

VarDim Type ↑	Value ↑	Description	Alternative Description	Alternative Short Description	Assortment
→ COLOR_1	30	Yellow	Yellow	Yellow	☐
COLOR_1	60	Forest Green	Forest Green	Forest	☐

I.e., Master 4700 has 5 Variants. **Options Var 1** has some selected Colors, but **Options Var 2-5** have not been restricted. Then the **Positive List** will look as follows – the possible Sizes (Options Var 5) are not in:

VarDim Type ↑	Value ↑	Description	Alternative Description	Alternative Short Description	Assortment
1 SHOE_COLOR	002	Black	Black	Black	☐
2 SHOE_SOLE	1	Leather		Leather	☐
3 SHOE_SOLE	2	Rubber		Rubber	☐
4 SHOE_SURF	01	Smooth		Smooth	☐
SHOE_SURF	02	Printed		Printed	☐
SHOE_WIDTH	G	Normal Width		Normal	☐
SHOE_WIDTH	H	Extra Width		Extra	☐

Add Master Wizard

You can add **Masters** and **Options Var 1-9** as described in [Step 5: Connecting Masters to the new Collection](#).

Related in the Collection Master Relations

No.	Master Description	Status Code	Private Label, Master	Workflow Exist	VarDim Type Variant	Options
2000	Olivia Trousers				COLOR_1	
2010	Amelia Trousers				COLOR_1	
2020	Isla Trousers				COLOR_1	
2030	Ella Trousers				COLOR_1	0 SIZE_EU

Calculation Overview

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

Exist	No.	Version No.	Description	Status Code	Brand Code	Season Code	Design	Item Group	Gender	Item Statistics Group 4	Item Statistics Group 5	Locked	Purchase Price Foreign Currency	Exchange Rate	Purchase Price Local Currency	Trans. Costs Plane %	Transport Costs Ship %	Transport Costs Road %	Duty Costs %	Other Costs %	Unit Cost	Sales Transport Costs Amount
	2000		Olivia Trousers	READY	FASHION		1	210	110	0	10											

VarDim Validation, Show Matrix

No.	Master Description	Status Code	Private Label, Master	Workflow Exist	VarDim Type Variant	Options
2000	Olivia Trousers				COLOR_1	
2010	Amelia Trousers				COLOR_1	
2020	Isla Trousers				COLOR_1	
2030	Ella Trousers				COLOR_1	0 SIZE_EU
2100	Lily Blouse				COLOR_1	12 SIZE_C
2110	Mia Blouse				COLOR_1	2 SIZE_C

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

Variant 1	Variant Description	Line Quantity	XS	S	M	L	XL	XXL	3XL
30	Yellow								
60	Forest Green								

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., for the Brogue 4700 it will show the first 4 VarDim Types – if one of the **Options Var 1-4** have been filled – you might need to add the VarDim Type Variant 3-9 via **Personalize**:

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			002	Black,Smooth,Leather,Normal Width	SHOE_SURF	01	Smooth	SHOE_SOLE	1	Leather	SHOE_WIDTH	G	Normal Width
SHOE_COLOR			002	Black,Smooth,Leather,Extra Width	SHOE_SURF	01	Smooth	SHOE_SOLE	1	Leather	SHOE_WIDTH	H	Extra Width
SHOE_COLOR			002	Black,Smooth,Rubber,Normal Width	SHOE_SURF	01	Smooth	SHOE_SOLE	2	Rubber	SHOE_WIDTH	G	Normal Width
SHOE_COLOR			002	Black,Smooth,Rubber,Extra Width	SHOE_SURF	01	Smooth	SHOE_SOLE	2	Rubber	SHOE_WIDTH	H	Extra Width
SHOE_COLOR			002	Black,Printed,Leather,Normal Width	SHOE_SURF	02	Printed	SHOE_SOLE	1	Leather	SHOE_WIDTH	G	Normal Width
SHOE_COLOR			002	Black,Printed,Leather,Extra Width	SHOE_SURF	02	Printed	SHOE_SOLE	1	Leather	SHOE_WIDTH	H	Extra Width
SHOE_COLOR			002	Black,Printed,Rubber,Normal Width	SHOE_SURF	02	Printed	SHOE_SOLE	2	Rubber	SHOE_WIDTH	G	Normal Width
SHOE_COLOR			002	Black,Printed,Rubber,Extra Width	SHOE_SURF	02	Printed	SHOE_SOLE	2	Rubber	SHOE_WIDTH	H	Extra Width

Sales Receivables, Sales Prices

The screenshot shows the 'FW-CY Matrix General' interface. The 'Related' dropdown menu is open, showing options: 'Sales Receivables' and 'Sales Prices'. The 'Sales Prices' option is highlighted with a red box. The table below shows the following data:

No. ↑	Master Description	Status Code	Private Label, Master	Workflow Exist	VarDim Type Variant 1	Option
→ 2020	Isla Trousers		☐	☐	COLOR_1	
2110	Mia Blouse		☐	☒	COLOR_1	
2200	Grace Bomber		☐	☒	COLOR_1	

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 Discounts** of the Master.

This will only be the **Line Discounts** in the regular Business Central Table **Sales Line Discount (7004)**, not the specific **Line Discounts** in the TRIMIT Table **trm Sales Line Disc Comb Rate (6036663)**, which can be filled via the Sales Line Discount Types.

Purchases, Vendors

The screenshot shows the 'FW-CY Matrix General' interface. The 'Related' dropdown menu is open, showing options: 'Purchases' and 'Vendors'. The 'Vendors' option is highlighted with a red box. The table below shows the following data:

No. ↑	Master Description	Status Code	Private Label, Master	Workflow Exist	VarDim Type Variant 1	Option
→ 2020	Isla Trousers		☐	☐	COLOR_1	
2110	Mia Blouse		☐	☒	COLOR_1	
2200	Grace Bomber		☐	☒	COLOR_1	

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

The screenshot shows the 'FW-CY Matrix General' interface. The 'Actions' dropdown menu is open, showing options: 'Variant Overview', 'Create Workflow', and 'Update VarDim Options Collection'. The 'Update VarDim Options Collection' option is highlighted with a red box. The table below shows the following data:

No. ↑	Master Description	Status Code	Private Label, Master	Workflow Exist	VarDim Type Variant 1	Option
2020	Isla Trousers		☐	☐	COLOR_1	
→ 2110	Mia Blouse		☐	☒	COLOR_1	
2200	Grace Bomber		☐	☒	COLOR_1	

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 **No.** 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

This option is not shown by default; you can add it via **Personalize**.

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

Maintenance, Create Items

This action will create all the Items of the Master **No**. 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

Reports, Master in the Collection Master Relations

FW-CY Matrix General

Collection Master Relations

New

Edit List

Delete

Home

Reports

Actions

Related

Reports

Automate

Fewer options

Master Reports

Sales Book

Master Overview

Status Overview

Checklist

Master Analysis Matrix

Master

Overviews

Master

Bill of Materials

Composition & Care Label

Additional Info

Sustainability

Measurement Chart

Additional Comments

Other

Master Reports

No. ↑	Master Description	Status Code	Private Label, Master	Workflow Exist	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	Options Var 3	Options Var 4
2000	Olivia Trousers		☐	☐	COLOR_1	0	SIZE_EU		0	
2010	Amelia Trousers		☐	☐	COLOR_1	0	SIZE_EU		0	
2020	Isla Trousers		☐	☐	COLOR_1	0	SIZE_EU		0	
2030	Ella Trousers		☐	☐	COLOR_1	0	SIZE_EU		0	
2100	Lily Blouse		☐	☐	COLOR_1	12	SIZE_C		0	
2110	Mia Blouse		☐	☒	COLOR_1	2	SIZE_C		0	
2120	Sophia Shirt		☐	☐	COLOR_1	0	SIZE_C		0	
2210	Poppy Blazer		☐	☐	COLOR_1	0	SIZE_US		0	

Use short menu

You are able to print the Reports related to the Master **No**.

For more details regarding these reports, see the **White Paper – TRIMIT PDM Report Set**.

Reports, Overviews in the Collection Master Relations

The screenshot shows the 'FW-CY Matrix General' interface. The top navigation bar includes 'Collection Master Relations', 'New', 'Edit List', 'Delete', 'Home', 'Reports', 'Actions', 'Related', 'Reports', 'Automate', and 'Fewer options'. The 'Reports' dropdown menu is open, showing 'Master Reports', 'Sales Book', 'Master Overview', 'Status Overview', 'Checklist', and 'Master Analysis Matrix'. The 'Overviews' dropdown menu is also open, showing 'Master Reports', 'Master', and 'Other'. The main table displays a list of items with 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, and Options Var 3. The table contains data for items 2000 through 2210.

You are able to print the Overview Reports related to Masters.

For more details regarding these reports, see the **White Paper – TRIMIT PDM Report Set** and **White Paper – TRIMIT Reports**.

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 shows two interfaces. The top interface is the 'Collection Card' for 'SS-CY'. It has tabs for 'Master Relations', 'Delivery Periods', and 'VarDim'. The 'Delivery Periods' tab is active, showing 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 data for 01-JAN, 02-FEB, and 03-MAR. The 'Master Relations' tab is also visible, showing a table with 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, and VarDim Type Variant 3. The table contains data for items 2000 through 2300. The bottom interface is the 'SS-CY 01-JAN Matrix General' interface. It has a 'Views' section on the left with a 'Filter list by:' section. The 'Filter list by:' section includes 'Collection No.' (SS-CY), 'Delivery Period' (01-JAN), 'Relation' (Matrix), and 'Type' (General). The main table displays a list of items with 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, and VarDim Type Variant 3. The table contains data for items 2000 through 2300.

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-/Purchase Document 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.

When creating Masters by using the Wizard (Blank or as a copy), you are only able to enter a Collection No., you are not able to give the new Master a specific Delivery Period.

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 *TRUE*.

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 **Collection No.** and the **Delivery Period** in the Master Card.

Additional, make sure you click **Show more fields** – in the FastTab **General** of the Master Card – otherwise you will not see the **Period Code**.

Before you can enter these fields (**Collection No.** and the **Delivery Period**), 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, the Master is not recognized as a Matrix Master, and no Collection/Master relation will be created. Therefore, the content of the field **Collection No.** and/or **Delivery Period** will only be handled as filter fields for your Master.

Master Card

2222 · Test for connecting Collection and Delivery Period

Home Reports Actions Related Reports Automate Fewer options

Bill of Materials Measurement Chart Care Label Additional Info Additional Comments Copy Values Attributes Item List Statistics Image Management

Workflow Composition Sustainability Additional Tags New by Wizard VarDim Master Collections Inventory Profile Product Information (PIR)

General

No. 2222 Group Master Collection No. SS-CY Period Code 03-MAR Collection Relation Yes

No. System MMMMAABB

Description Test for connecting Collection and Delivery Peri

Description 2

Base Unit of Measure PCS

Automatic Ext. Tests

Status Code

Search Description TEST FOR CONNECTING COLLECTION AND DEL

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)

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 **Home, Collections**.

Master Card

2222 · Test for connecting Collection and Delivery Period

Home Reports Actions Related Reports Automate Fewer options

Bill of Materials Measurement Chart Care Label Additional Info Additional Comments Copy Values Attributes Item List Statistics

Workflow Composition Sustainability Additional Tags New by Wizard VarDim Master Collections Inventory Profile Product Information (PIR)

SS-CY 03-MAR Matrix General

Collection Master Relations | 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. Ma

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

Here you can press **Alt+Arrow Down** on **Options Var 1-9** 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 by clicking **Home, Collections** in the Master List/Card.

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 **Home, 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

SS-CY 01-JAN Matrix General

Collection Master Relations | 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. Ma

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

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 **TRIMIT PDM/Design** Role Center.

CRONUS TRIMIT W1 Ltd. | Finance | CRM | Sales | Purchase | Product Design | Logistics | Production | Portals | Posted Documents | All Reports |

Customers | Vendors | Sales Orders | Complaints | Purchase Orders | Masters | Pick Documents

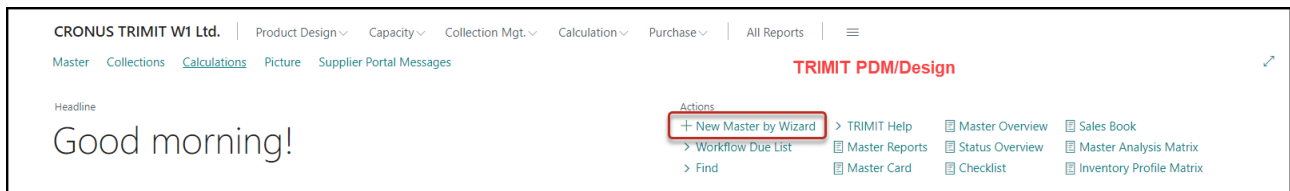
TRIMIT Small Business

Headline

Good morning!

Actions

- + New Sales Order
- + New Sales Credit Memo
- + New Complaint
- + New Purchase Order
- + New Purchase Credit Memo
- + New Pick Document
- + New Master by Wizard
- > Sales Statistics
- > Task
- > Find
- > Setup
- > TRIMIT Help
- Reports



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 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.

Workflow for Master: 2105 ✓ Saved

🔍 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.

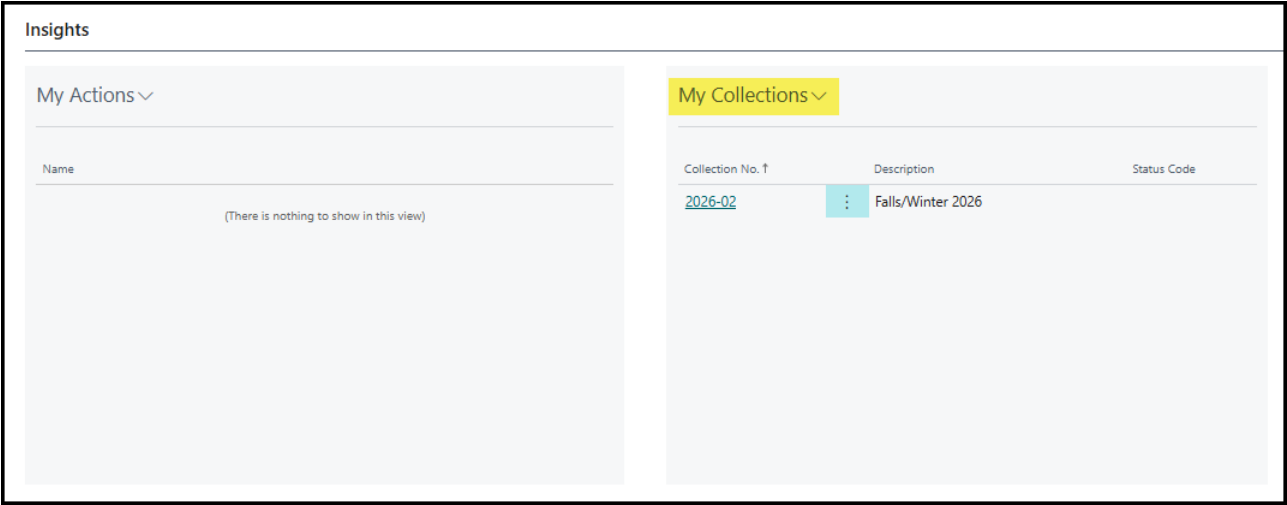
If you have connected a **VarDim Type Subset** to the selected Collection No. for the VarDim Types of the new Master, it also means that you can only select the Values that are in the Subset for the new Master.

Note

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

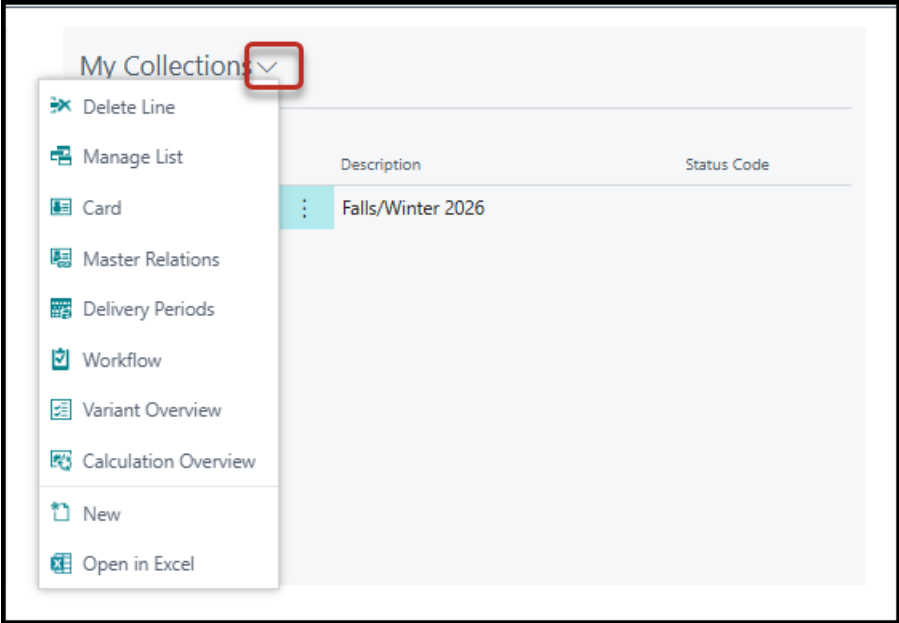
My Collections

In the TRIMIT Role Centers (Profiles) for *TRIMIT Small Business* and *TRIMIT PDM/Design*, you are able to show a specific ListPart Page **My Collections**.



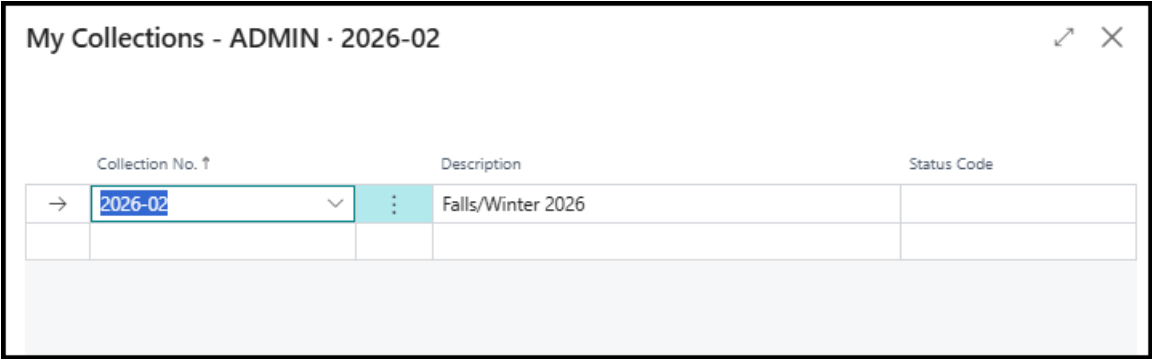
It is not shown by default, but you can add it via **Personalize**.

In this list, you can add the Collections that are important for you/that you are working on.



Manage List

This is the page on which you can enter the **Collection Nos.** that you want to keep track of.



Card

Will open the **Collection Card** of the Collection in your **My Collections** List.

Master Relations

Will open the **Collection Master Relations** page of the Collection in your **My Collections** List, so you are able to add more Masters/Variants to the Collection.

Period Codes

Will open the **Delivery Periods** page of the Collection in your **My Collection List**, so you are able to add the Delivery Periods to the Collection.

Workflow

Will open the **Workflow** page of the Collection in your **My Collection List**, so you can add/close steps of the Workflow of the Collection.

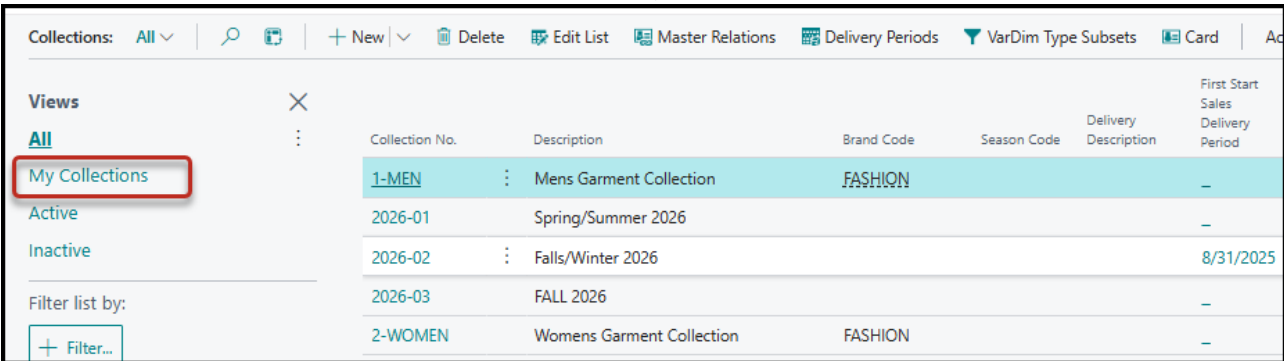
Variant Overview

Will open the **Master Variant Overview** page of the Collection in your **My Collection List**, so you can see which Variants are connected to your Collection.

Calculation Overview

Will open the **Calculation Overview** page of the Collection in your **My Collection List**, so you can see/add Calculations to the Masters in your Collection.

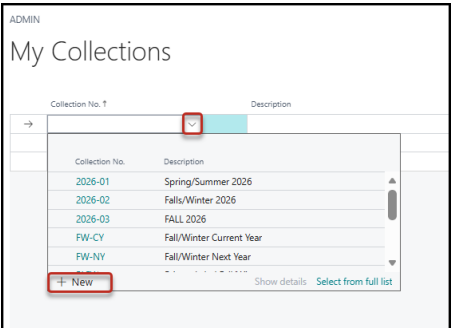
In the regular **Collection List**, you can also see a predefined Filter for **My Collections**, which will show you the Collections you added to the ListPart Page **My Collections**.



Collection No.	Description	Brand Code	Season Code	Delivery Description	First Start Sales Delivery Period
1-MEN	Mens Garment Collection	FASHION			-
2026-01	Spring/Summer 2026				-
2026-02	Falls/Winter 2026				8/31/2025
2026-03	FALL 2026				-
2-WOMEN	Womens Garment Collection	FASHION			-

New

You are able to add an existing Collection No. to the **My Collections** List, but you can of course also create a new Collection:



Collection No. 1

Description

Collection No.

Description

2026-01 Spring/Summer 2026

2026-02 Falls/Winter 2026

2026-03 FALL 2026

FW-CY Fall/Winter Current Year

FW-NY Fall/Winter Next Year

+ New

Show details Select from full list

Therefore, the **My Collections** ListPart Page in the Role Center enables you to do everything what has been described in previous chapters to create/maintain Collections.

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 Document if the Customer/Country of the Sales Document 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, Private Label functionality means exclusivity of Items or Masters for specific Customers or Countries/Regions.

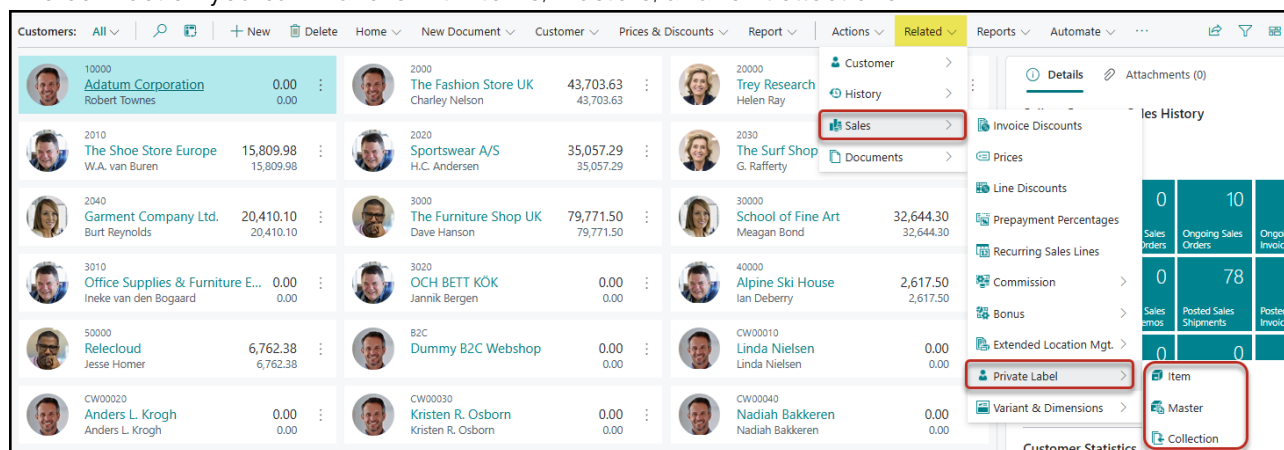
The Private Label connection can be created from:

- Customers
- Countries/Regions
- Masters
- Items
- Collections as described 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 Card, Master Card, or Collection Card.

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

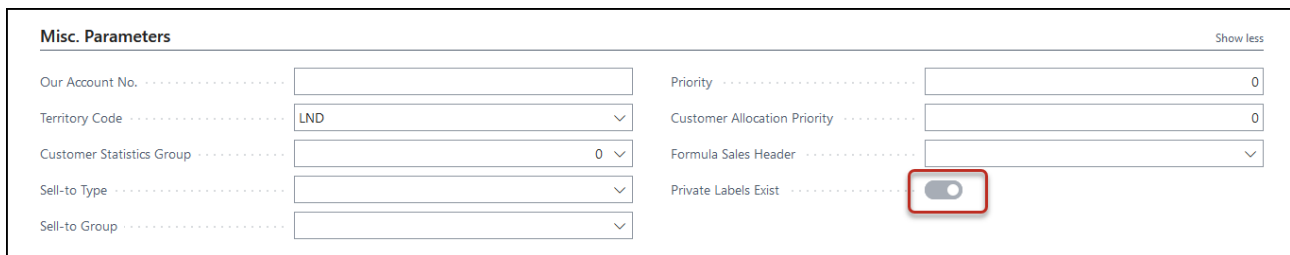


This can be setup via the Customer Card and via the Customers List.

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.

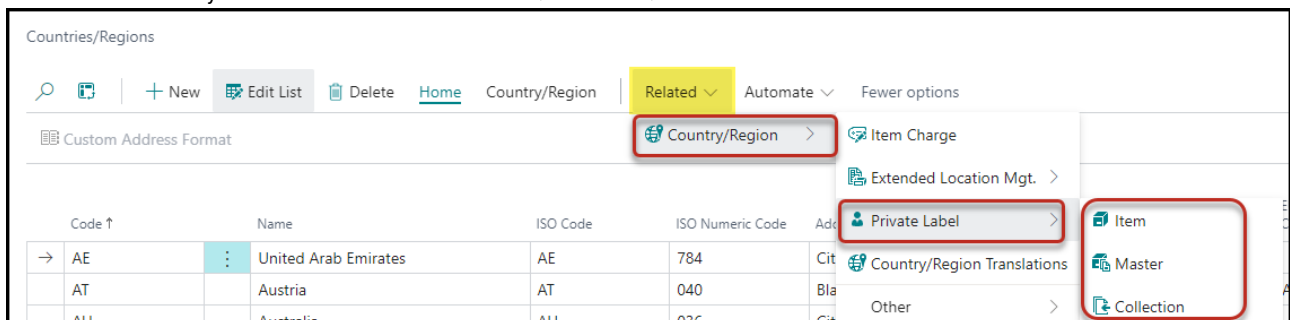
If you have connected Private Label Items, Masters and/or Collections to a Customer the Field **Private Labels Exist** on the FastTab **Misc. Parameters** of the Customer will have a **checkmark**.



How to set up Private Label for a Country/Region

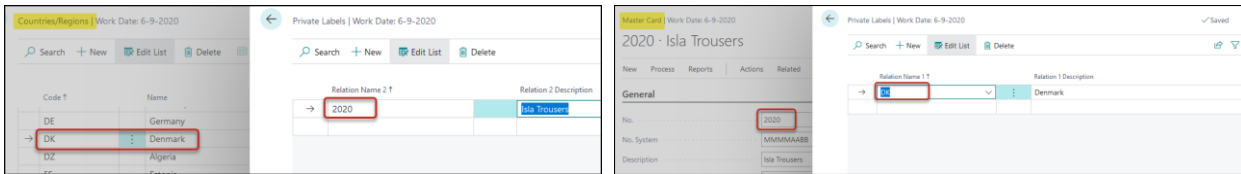
A Private Label can be set up for a Country/Region.

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



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.



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** in the Countries/Regions will have a *checkmark*.

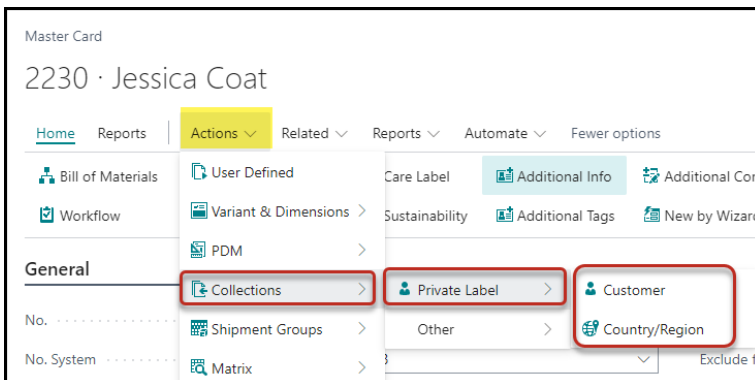
Code T	Name	ISO Code	ISO Numeric Code	Address Format	Contact Address Format	County Name	EU Country/Region Code	Intrastat Code	VAT Scheme	Private Labels Exist	Translations
CY	Cyprus			Post Code+City	After Company Name		CY	CY	CY-VAT	☐	0
CZ	Czech Republic			Post Code+City	After Company Name		CZ	CZ	CZ-VAT	☐	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.

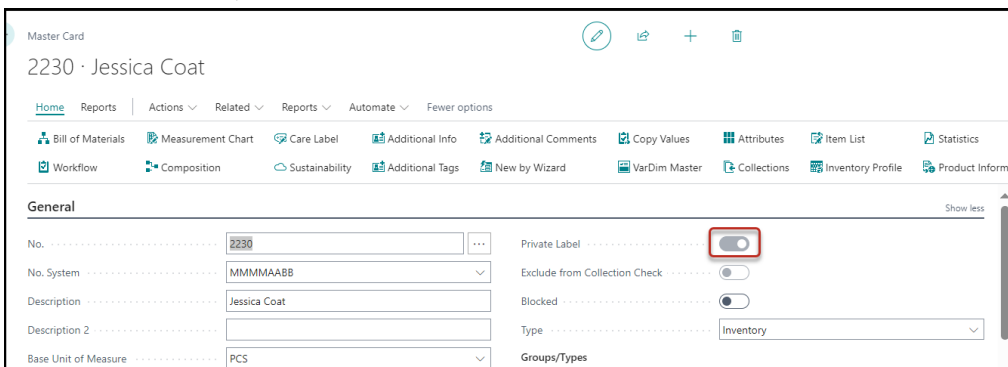
This can be done in the **Master Card** and in the **Masters List**.



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 be set to *TRUE*.

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 on the FastTab **Sale**:

The field **Master Private Label** of this Item is now *TRUE*, 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.

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 be set to *TRUE*.

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

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.

The screenshot illustrates the process of opening a Matrix for a specific Master. The top window, 'Master Card', shows the '4000 · Benjamin Skinny Jeans' with the 'Actions' menu open. The 'Matrix' option is highlighted, and the 'Show Matrix' sub-option is selected. The bottom window, 'Matrix Master - No. 4000 - Benjamin Skinny Jeans', displays a table with the following structure:

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"					

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**.

Note

If you add the field **Matrix Limitation** to the Line via **Personalize**, 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 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 is shown: an example for creating a Matrix and using a Matrix Limitation is shown. Master *2100 Lily Blouse* contains 12 Colors and 7 Sizes. The complete Matrix would look like this:

- Sales Order 0100009 - No. 2100 - Lily Blouse -										
Edit List Matrix Inventory Profile 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	Lawn Green									
70	Red									
73	Pink									
75	Magenta									
80	Purple									
99	Black									

If you want to create a new Matrix Line for Master 2100 in a Sales Order 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*

The Matrix will now look like this:

- Sales Order 0100009 - No. 2100 - Lily Blouse -

Variant 1	Variant Description	Line Quantity	S	M	L	XL
→ 30	Yellow		[2]	[1]	[0]	[0]
35	Orange		[53]	[102]	[103]	[49]
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:

The Matrix will now look like this:

- Sales Order 0100009 - No. 2100 - Lily Blouse -

Variant 1	Variant Description	Line Quantity	S	M	L	XL
→ 20	Royal Blue		[53]	[105]	[105]	[51]
21	Light Blue		[2]	[2]	[2]	[0]
30	Yellow		[2]	[1]	[0]	[0]
35	Orange		[53]	[102]	[103]	[49]
37	Dark Orange		[0]	[0]	[0]	[0]
60	Forest Green		[2]	[3]	[4]	[4]
65	Lawn Green		[0]	[2]	[3]	[3]
70	Red		[53]	[103]	[103]	[52]
73	Pink		[3]	[3]	[3]	[0]
75	Magenta		[2]	[2]	[3]	[3]
80	Purple		[2]	[3]	[3]	[2]
99	Black		[100]	[102]	[103]	[103]

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

I.e.: If you only want to change quantities in an existing Matrix Line for the Colors 20 and 99, and for the Sizes S-XL, you can use the following Matrix Limitation: 20|99,02..05, because you already have **No. 2100** filled.

20|99 *For the Colors*

02..05 *For the Sizes*

Lines						
Manage Line Order						
New Line Delete Line Select items... Suggest sales lines						
Exp... Mat...	Type	Matrix Limitation	No.	Description	Desc	
→	Matrix	20 99,02..05	2100	Lily Blouse		

The Matrix will now look like this:

- Sales Order 0100009 - No. 2100 - Lily Blouse -									
Edit List Matrix Inventory Profile Actions Related Fewer options									
Variant 1		Variant Description		Line Quantity		S M L XL			
→	20	Royal Blue				[53]	[105]	[105]	[51]
	99	Black				[100]	[102]	[103]	[103]

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

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 distinctive 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 via **Related, Matrix Limitation, Master Relations Matrix**.

VarDim Type Subset

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

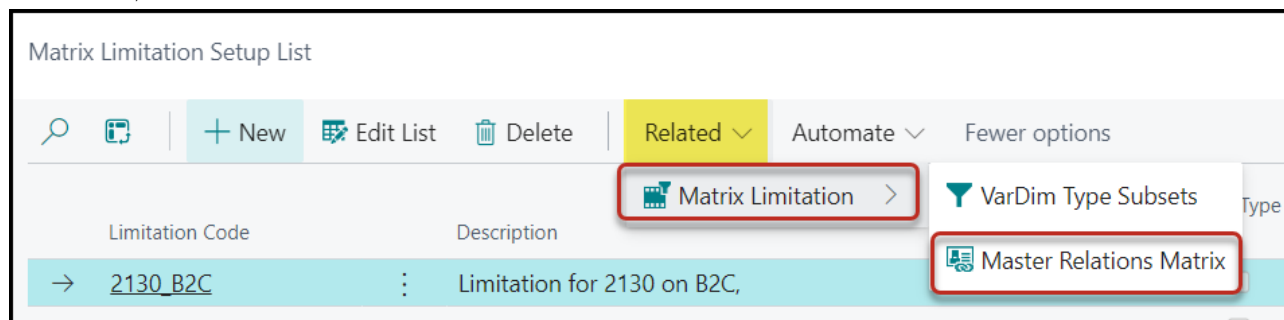
Limitation Sorting

This field is not by default on the page but can be added via **Personalize**.

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

How to Create and Maintain Master Relations

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

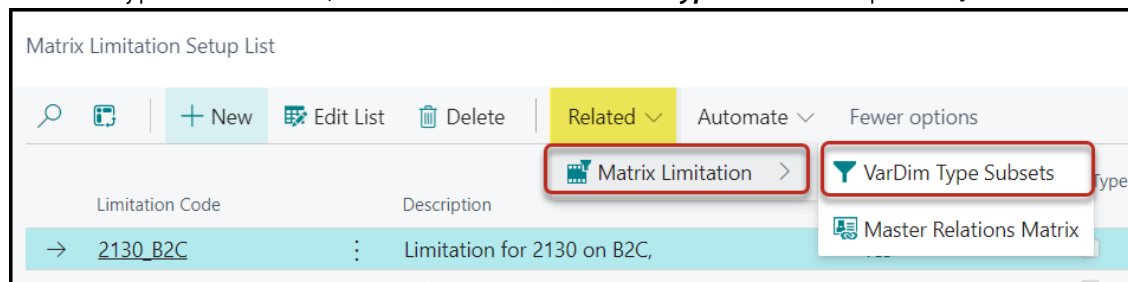


You only need to create Master Relations if you want to filter specific variants of Masters.

The way to create/maintain the Master Relations 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**.



The way to create/maintain the VarDim Type Subsets is the same as when you connect 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).

The screenshot shows the 'Lines' management interface with tabs for 'Lines', 'Manage', 'Line', and 'Order'. Below the tabs are buttons: 'New Line', 'Delete Line', 'Select items...', and 'Suggest sales lines'. A table below has columns: 'Exp... Mat...', 'Type', 'Matrix Limitation', 'No.', and 'Description'. A new row is being added with 'Matrix' in the 'Type' column, '2100,MLS_S' in the 'Matrix Limitation' column, and red asterisks in the 'No.' and 'Description' columns.

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

The screenshot shows a sales order variant list for 'Lily Blouse' (Sales Order 0100010 - No. 2100). The table has columns: Variant 1, Variant Description, Line Quantity, XS, S, M, L, XL, XXL, and 3XL. The variants listed are: 21 (Light Blue), 30 (Yellow), 35 (Orange), 60 (Forest Green), 70 (Red), 73 (Pink), and 75 (Magenta). The 'Variant 1' column is highlighted with a blue box.

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*.

The screenshot shows the 'Order Type Card' for '03FW_CY_PRE'. The card has sections for 'General' and 'Collection Mgt.'. In the 'General' section, the 'Matrix Limitation Setup' field is set to 'MLS_W'. In the 'Collection Mgt.' section, the 'Collection No.' field is empty.

In that case, by choosing this **Order Type** in a Sales-/Purchase Document 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**:

Temporary VarDim Variants

2100

+ New

Edit List

Actions

Related

Fewer options

Mark	Value	Assortment	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
	73			Pink
	75			Magenta
	80			Purple
	90			Grey
	92			Charcoal
	99			Black

Temporary VarDim Variants

MLS_W

+ New

Edit List

Actions

Related

Fewer options

Mark	Value	Assortment	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
	73			Pink
	75			Magenta
	80			Purple
	90			Grey
	92			Charcoal
	99			Black

Sales Order

0100001 · The Fashion Store UK

Notifications: 2

This customer has an overdue balance. | Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox.

Home

Prepare

Print/Send

Request Approval

Order

More actions

Post...

Release

Create Warehouse Shipment

Create Inventory Put-away/Pick...

Archive Document

Workflow

Portal Payment

Extra Order Info

General

Customer Name

The Fashion Store UK

Order Date

6/4/2025

Use Value Date

Blocked

Due Date

8/31/2025

Ignore Blocking

Document Date

8/31/2025

Requested Delivery Date

9/30/2025

Skip Availability Check

Posting Date

6/4/2025

External Document No.

Status

Open

Order Type

03FW_CY_PRE

VAT Date

6/4/2025

Collection No.

Lines

Manage

Line

Order

New Line

Delete Line

Select items...

Exp. Mat.	Type	Matrix Limitation	No.	Description	Description 2	Location Code	Shipment Date	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Unit Cost (LCY)	Line Discount %	Line Amount Excl. VAT	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Related No.
→		Matrix	2100								0.00							
				2100	Lily Blouse													
				M2100	Thread 100% Cotton													

- Sales Order 0100001 - No. 2100 - Lily Blouse -

Edit List

Matrix Inventory Profile

More options

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.

The screenshot shows the 'FW-CY Matrix General' interface. A table lists items with 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. Item 2100 (Lily Blouse) is highlighted with a red box, and its 'Options Var 1' value is 5. A red box also highlights the 'Matrix Limitation Setup' dropdown in the top navigation bar. To the right, a color selection pop-up is visible, showing a list of colors with their corresponding values: 20 (Royal Blue), 65 (Lawn Green), 70 (Red), 80 (Purple), and 99 (Black). The value 70 (Red) is highlighted in the pop-up.

The **Matrix Limitation Setup** *MLS_W* is set to limit the number of Colors in **VarDim Type** *COLOR_1* by a **VarDim Type Subset** as shown below.

The screenshot shows two interfaces. On the left, the 'Matrix Limitation Setup List' interface displays a table of limitation codes and descriptions. The 'MLS_W' (Winter Colors) entry is highlighted with a red box. A red arrow points from this entry to the 'Temporary VarDim Variants' interface on the right. The 'Temporary VarDim Variants' interface shows a table of temporary variants for 'MLS_W'. The table has columns: Mark, Value, Assortment, Blocked, and Name. The 'Value' column is highlighted with a red box, and the 'Name' column is also highlighted. The values 20, 65, 70, 80, and 99 are highlighted in the 'Value' column, corresponding to the colors Royal Blue, Lawn Green, Red, Purple, and Black respectively.

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

The screenshot shows the 'Order Type Card' for '03FW_CY-PRE'. The 'General' section contains fields for Order Type, Description, Brand Code, Season Code, Location Code, Status Sales, Status Purchase, Matrix Limitation Setup, and Show Invalid Combinations. The 'Matrix Limitation Setup' field is set to 'MLS_W' and is highlighted with a red box. The 'Collection Mgt.' section contains fields for Collection No., Delivery Period, Delivery Period Handling, Limit Matrix to Specified Period, and Sample. The 'Collection No.' field is set to 'FW-CY' and is highlighted with a red box. The 'Delivery Period Handling' field is set to 'Search Delivery Period' and is highlighted with a red box.

The result is that **Master** *2100* will only be available in four Colors as shown below, because *70 Red* might be part of the **Collection** *FW_CY*, but not of the **Matrix Limitation Setup** *MLS_W*.

Sales Order

0100012 · The Fashion Store UK

Notifications: 2 This customer has an overdue balance. | Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox.

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. 0100012 External Document No. Salesperson Code JR Status Open

Customer Name The Fashion Store UK Contact Charley Nelson

Document Date 9/30/2020 Posting Date 1/1/2024 VAT Date 1/1/2024 Order Date 1/1/2024 Due Date 9/30/2020 Requested Delivery Date 8/31/2020

Use Value Date Blocked Ignore Blocking Skip Availability Check Order Type 03FW_CY_PRE FW-CY Collection No.

Lines Manage Line Order

New Line Delete Line Select items... Suggest

No.	Description
2100	Lily Blouse

Exp... Mat... Type Matrix Limitation No. + New Show details Select from full list

No.	Period Code	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %
Matrix						

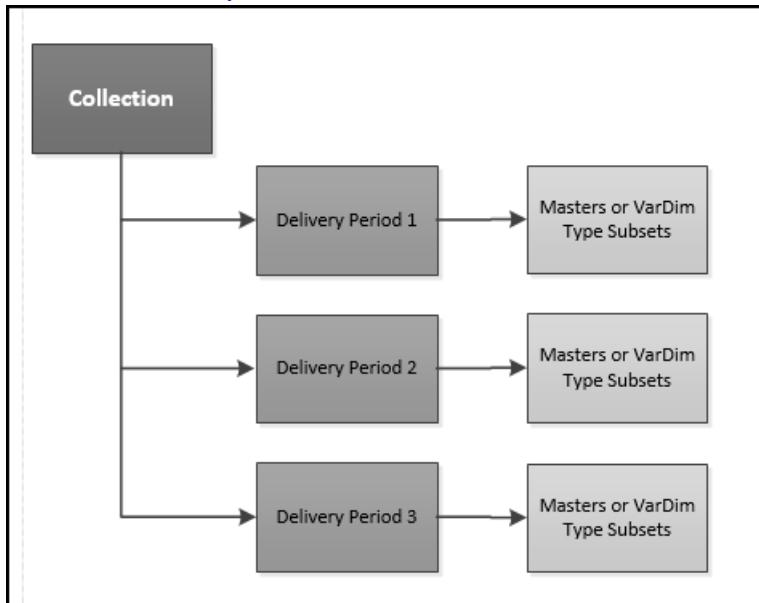
- Sales Order 0100012 - No. 2100 - Lily Blouse -

Edit List Matrix Inventory Profile Actions Related Fewer options

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

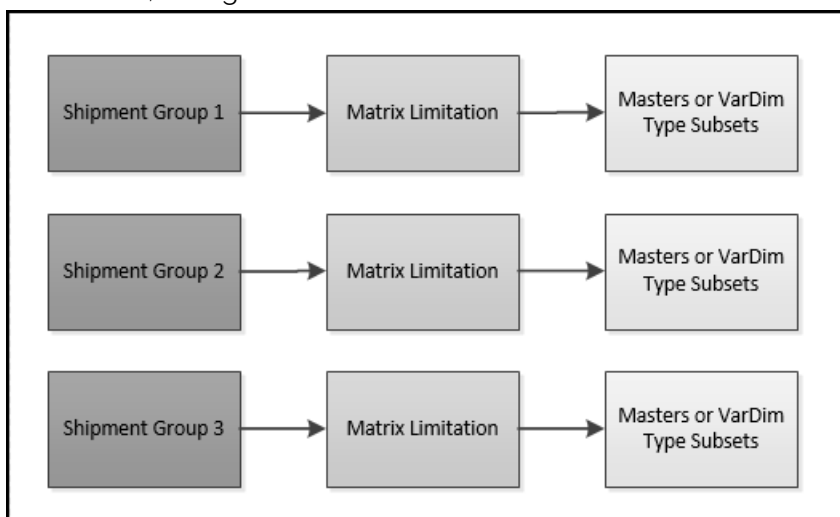
Shipment Group

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 a Men's collection or from a 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.

Period Code ↑	Description	Inactive ▼	Matrix Limitation	Status Code	Start Shipment Date	End Shipment Date	Start Receipt Date	End Receipt Date	Calculation Template
DROP1	Delivery Period 1	☐	DROP1		1/5/2025	4/4/2025	12/1/2024	12/29/2024	
DROP2	Delivery Period 2	☐	DROP2		4/5/2025	7/4/2025	3/5/2025	4/2/2025	
DROP3	Delivery Period 3	☐	DROP3		7/5/2025	10/4/2025	6/5/2025	7/3/2025	
DROP4	Delivery Period 4	☐	DROP4		10/5/2025	1/4/2026	9/5/2025	10/3/2025	

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 in 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 Shipment Date** of an applicable **Period Code** (Shipment Group) in a Sales Line will determine the **Shipment Date** and is therefore also the Date for Availability.

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

The other two dates (**End Shipment Date** and **Start Receipt Date**) 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.

Inactive

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

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.

You can see in the Filter of the page that only the **Shipment Groups** with the field **Inactive** is **FALSE** are shown.

Matrix Limitation

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

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 set up the **Matrix Limitation Setup** can be read in [Matrix Limitation](#)

Start Shipment Date

You can enter a **Start Shipment Date**. This **Start Shipment Date** will be copied into the Sales Document/Lines as the **Shipment Date** 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

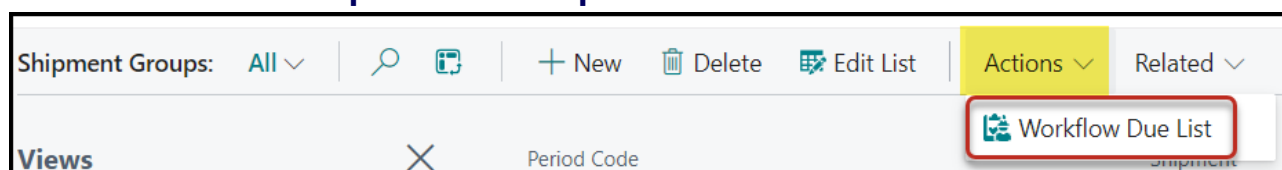
This **End Receipt Date** will be copied as the **Expected Receipt Date** into the Purchase Document/Lines if the Shipment Group is selected in an Order Type and this Order Type is selected in the Purchase Document or if you enter the **Shipment Group** directly into a Purchase Line (in the field **Period 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**

Actions of the Shipment Group



Workflow Due List

Workflow Due List

Card | More options

General

Date Filter: 1/1/2024

Responsible ID Type Filter: None

Responsible Filter: ...

Relation Filter: None

Relation No. Filter: ...

Ready Previous: ☐

Collection Filter: ...

Shipment Group Filter: DROP1

Brand Filter: ...

Season Filter: ...

Numbers of Activities: 0

Relation	Rela... No.	Name	Deadline	Responsible ID	Step No.	Description	Awaiting Previous	Clos...	Assign Status Code	Com...	Collection No.	Shipment Group
(There is nothing to show in this view)												

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

CRONUS TRIMIT W1 Ltd. | < Finance Sales Purchase Product Design Logistics Production

Shipment Groups: All | + New | Delete | Edit List | Actions | Related | Automate | Fewer options

Views

All

Filter list by:

X Inactive

Period Code

↑

DROP1 : Delivery Period 1

DROP2 : Delivery Period 2

DROP3 : Delivery Period 3

4/5/2024

7/5/2024

10/4/2024

6/5/2024

Period Code

Calculation Overview

Calculation

Translations

Dimensions

Master Relations

Show Inactive

Workflow

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

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

Calculation, Calculation Overview, has already been described in detail in [Calculation Overview \(Ctrl+Shift+C\)](#). Their function is comparable for the **Shipment Group**.

Translations give the possibility to enter Translations by Language Code. These can be shown on TRIMIT e-commerce.

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 connect Masters to a Collection (see [Master Relations via Collection](#)).

Matrix Limitation Master Relations

✓ Saved

+ New | Edit List | Delete | Actions | Related | Automate | ...

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		
2210	Poppy Blazer		COLOR_1	2	SIZE_US	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
Finished Goods	2000	Olivia Trousers	READY
Finished Goods	2001	test	READY
Finished Goods	2010	Amelia Trousers	READY
Finished Goods	2020	Isla Trousers	READY

Actions

- User Defined
- Variant & Dimensions >
- PDM >
- Collections >
- Shipment Groups >**
 - Shipment Group Relation**
- Attributes >

I.e., for Master 2000 Olivia Trousers:

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
→ ☐	01	☐	☐	White
☐	03	☐	☐	Snow
☒	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** = *FALSE* and **Inactive** = *TRUE*.

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 filled in 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** of the Collection is valid for Sales-/Purchase Documents.

If a Status Code is filled in 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 of the Master is valid for Sales-/Purchase Documents.

If a Status Code is related to an **Item** (via the Master/Matrix Cells), 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.

If **Status Sales** is set to *Closed* in an **Order Type**, the Order Type will not be shown in a lookup List and cannot be entered in a Sales Document.

If a **Status Purchase** is set to *Closed* in an **Order Type**, the Order Type will not be shown in a lookup List and cannot be entered in a 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**).

The screenshot shows the 'Master Card' for '2000 · Olivia Trousers'. The 'General' fasttab is active, displaying various fields for the item. The 'Blocked' toggle switch is highlighted with a red box, indicating it is currently turned on. Other fields include 'No.' (2000), 'No. System' (MMMMMAABB), 'Description' (Olivia Trousers), 'Base Unit of Measure' (PCS), 'Automatic Ext. Texts' (off), 'Status Code' (READY), 'Search Description' (OLIVIA TROUSERS), 'Group Master', 'Collection No.' (SS-CY), 'Period Code' (01-JAN), 'Collection Relation' (Yes), 'Private Label' (off), 'Exclude from Collection Check' (off), '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)), and 'Item Statistics Group 5' (Flat Pack (10)).

Item Card

20000136 · Olivia Trousers

Home

Item

Prices & Discounts

Actions

Related

Reports

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. 20000136

Design One Color (1)

Description Olivia Trousers

Item Group Trousers (210)

Description 2 White,36

Gender Women (110)

Blocked ☒

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

Type Inventory

Item Statistics Group 5 Flat Pack (10)

Base Unit of Measure PCS

Exclude from Collection Check ☐

Item Category Code

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 (Items). 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

Home

Reports

Actions

Related

Reports

Automate

Fewer options

Bill of Materials

Workflow

General

No. 4000

No. System

Description

Description 2

Base Unit of Measure PCS

User Defined

Variant & Dimensions

PDM

Collections

Shipment Groups

Matrix

Care Label

Sustainability

Additional Info

Additional Tags

New by Wizard

Matrix

Assortments

Valid Combinations

Matrix Y-Axis

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

- Matrix Master - No. 4000 - Benjamin Skinny Jeans -							
Edit List Matrix Inventory Profile Related Fewer 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"		-	+	+	+	

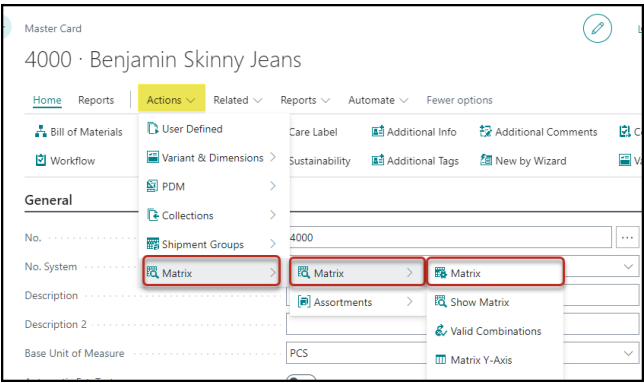
If the cursor is placed in a cell and 0 (zero) is entered to set the combination to invalid a Minus Sign "-" is shown. If 1 (one) is entered to set the combination to valid, a Plus Sign "+" is shown.

Note

You should only set the **Valid Combinations** when you start with a new Master, not when you have already 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**)



And then click **Related, Matrix Cells**

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

Relation 2 Name ↑

→ 4000

Ben

Matrix Cells

Matrix Item Nos. - 4000 Benjamin Skinny Jeans

VarDim Y-Axis ↑	Variant Table ↑	Variant No. ↑	New Line No.	Created Item No.	Variant Description	Status Code	Related Assortment	Invalid Combination	Skip Availability Check	Skip Calculation of Unit Price	Skip Test Unit Cost
→ 40002028	25	30	705	4000202820	Royal Blue, Length 30", Waist 28"			☐	☐	☐	☐
40002028	25	32	788	4000202832	Royal Blue, Length 32", Waist 28"			☐	☐	☐	☐
40002028	25	34	871	4000202834	Royal Blue, Length 34", Waist 28"			☐	☐	☐	☐
40002028	25	36	954	4000202836	Royal Blue, Length 36", Waist 28"			☒	☐	☐	☐
40002029	25	30	1327	4000202930	Royal Blue, Length 30", Waist 29"			☐	☐	☐	☐
40002029	25	32	1410	4000202932	Royal Blue, Length 32", Waist 29"			☐	☐	☐	☐
40002029	25	34	1493	4000202934	Royal Blue, Length 34", Waist 29"			☐	☐	☐	☐
40002029	25	36	1576	4000202936	Royal Blue, Length 36", Waist 29"			☒	☐	☐	☐
40002030	25	30	1949	4000203030	Royal Blue, Length 30", Waist 30"			☐	☐	☐	☐
40002030	25	32	2032	4000203032	Royal Blue, Length 32", Waist 30"			☐	☐	☐	☐
40002030	25	34	2115	4000203034	Royal Blue, Length 34", Waist 30"			☐	☐	☐	☐
40002030	25	36	2198	4000203036	Royal Blue, Length 36", Waist 30"			☐	☐	☐	☐
40002031	25	30	2571	4000203130	Royal Blue, Length 30", Waist 31"			☐	☐	☐	☐

What you entered in [For some Combinations of a Master - 1](#) will also be shown on 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, Matrix** (or press **Ctrl+Shift+M**),

Master Card

4000 · Benjamin Skinny Jeans

Home Reports **Actions** Related Reports Automate Fewer options

Bill of Materials User Defined Care Label Additional Info Additional Comments

Workflow Variant & Dimensions Sustainability Additional Tags New by Wizard

General

No. 4000

No. System

Description

Description 2

Base Unit of Measure PCS

Matrix

Matrix

Matrix

Assortments

Show Matrix

Valid Combinations

Matrix Y-Axis

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

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

Relation 2 Name ↑

→ 4000

Ben

Matrix Y-Axis

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

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
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	Description	chase quisition, 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 Quantity
IDEA	Idea/Design	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐
DESIGN	Design	☒	☒	☒	☒	☐	☒	☒	☒	☐	☐	☐
APPROVED	Approved	☒	☒	☒	☒	☐	☒	☒	☒	☐	☐	☐
READY	Ready	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐
PRODUCTION	InProduction	☒	☒	☒	☐	☐	☒	☒	☒	☐	☐	☐
INTRANS	In Transit	☐	☐	☐	☒	☒	☒	☒	☒	☐	☐	☐
INHOUSE	In House	☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐
NO-SALES	Sales Only Available Until Jan. 31	☒	☒	☒	☒	☒	☐	☒	☐	☒	☒	☐
NO-PURCHASE	Purchase Only Available Until Jan. 31	☐	☒	☐	☒	☒	☒	☒	☒	☒	☒	☐
AVAILABLE	Sales Only If Available Quantities	☐	☐	☐	☐	☐	☐	☒	☒	☒	☐	☒
BLOCKED	Blocked	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

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 specific 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 specific 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 a Sales-/Purchase Document.

Relating a Status Code

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

- ➔ 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 if a specific Item/Master can be sold/purchased, the search will be done in the following order:

- ➔ A Status Code related to a Matrix Cell (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 whether you have a **Period Code** filled in the Sales-/Purchase Line.

To a Collection

A **Status Code** can be related to a Collection by filling in a **Status Code** in the field **Status Code** as shown:

Collection No.	Description	Brand Code	Season Code	First Start Sales Delivery Period	Status Code	Calculation Template	Collection Sorting ↑	Private Label	VarDim Type Subset
1-MEN	Mens Garment Collection	FASHION	—	—	READY		1	☐	☐
2-WOMEN	Womens Garment Collection	FASHION	—	—	READY		1	☐	☐
3-KIDS	Kids Garment Collection	FASHION	—	—	READY		1	☐	☒
4-SHOE	Mens Garment Collection	SHOES	—	—	APPROVED		1	☐	☐
5-SPORT	Sporting Goods Collection	SPORT	—	—	APPROVED		1	☐	☐
6-ACCESS	Accessories	ACCESS	—	—	APPROVED		1	☐	☐
FW-CY	Fall/Winter Current Year		03-FALL	—		PSR_L	1	☐	☐
FW-NY	Fall/Winter Next Year		—	—	IDEA		1	☐	☐
PLFW	Private Label Fall/Winter		—	—	IDEA		1	☒	☐
PLSS	Private Label Spring Summer		—	—	APPROVED		1	☒	☐
SA	Special Collection for Sales Agent		—	—	READY		1	☐	☐

I.e., the **Status Code** *IDEA* for Collection *FW-NY* means that you cannot select **Collection No.** *FW-NY* yet for Sales- or Purchase Documents based on the checkmarks in the **Status Code**.

To a Collection 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 Matrix General									
Collection Master Relations									
Master Card Composition Additional Info Workflow Matrix Limit. Master Relations Copy Value									
Bill of Materials Care Label Measurement Chart Additional Comments Positive List									
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 2
2020	Isla Trousers		☐	☐	COLOR_1	0	SIZE_EU	0	
2100	Lily Blouse		☐	☐	COLOR_1	5	SIZE_C	0	
2110	Mia Blouse		☐	☒	COLOR_1	2	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	2	SI

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 Collection 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 **Options Var 1** for the Master Relation that are part of the **Matrix Y-Axis**.

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 **Master 2100**, you 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 Matrix General' interface. The 'Matrix Y-Axis' tab is selected. The 'Status Code' field is highlighted with a red box and contains 'IDEA'. The 'Variant 1' field is highlighted with a blue box and contains '65'. The 'Variant 1 Name' is 'Lawn Green'. The 'Options Var 1' field is also highlighted with a blue box and contains '65'. The 'Matrix Y-Axis' tab is highlighted with a red box.

Note

This is, however, only possible if you have already selected 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.

Even if i.e., **Options Var 1, 2, 3, 4** would be part of the **Y-Axis**, this possibility is only applicable if you did select specific **Options Var 1**. In that case, it will show all the **Y-Axis Lines**. I.e.,

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	IDEA	☐	002	Black,Smooth,Leather,Normal Width	SHOE_SOLE	01	Smooth	SHOE_SOLE	1	Leather	SHOE_WIDTH	G	Normal Width
SHOE_COLOR		☐	002	Black,Smooth,Leather,Extra Width	SHOE_SOLE	01	Smooth	SHOE_SOLE	1	Leather	SHOE_WIDTH	H	Extra Width
SHOE_COLOR		☐	002	Black,Smooth,Rubber,Normal Width	SHOE_SOLE	01	Smooth	SHOE_SOLE	2	Rubber	SHOE_WIDTH	G	Normal Width
SHOE_COLOR		☐	002	Black,Smooth,Rubber,Extra Width	SHOE_SOLE	01	Smooth	SHOE_SOLE	2	Rubber	SHOE_WIDTH	H	Extra Width
SHOE_COLOR		☐	002	Black,Printed,Leather,Normal Width	SHOE_SOLE	02	Printed	SHOE_SOLE	1	Leather	SHOE_WIDTH	G	Normal Width
SHOE_COLOR		☐	002	Black,Printed,Leather,Extra Width	SHOE_SOLE	02	Printed	SHOE_SOLE	1	Leather	SHOE_WIDTH	H	Extra Width
SHOE_COLOR		☐	002	Black,Printed,Rubber,Normal Width	SHOE_SOLE	02	Printed	SHOE_SOLE	2	Rubber	SHOE_WIDTH	G	Normal Width
SHOE_COLOR		☐	002	Black,Printed,Rubber,Extra Width	SHOE_SOLE	02	Printed	SHOE_SOLE	2	Rubber	SHOE_WIDTH	H	Extra Width

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

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.

Master Card

4700 · Roger Brogue

Home Reports **Actions** Related Reports Automate Fewer options

- Bill of Materials
- Workflow
- Measurement Chain
- User Defined
- Variant & Dimensions
- PDM
- Collections
- Shipment Groups
- Additional Info
- Additional Tags
- Additional Comments
- New by Wizard
- Copy Values
- VarDim Master
- Attributes
- Collections
- Item List
- Inventory Profiles
- Statistics
- Product Information

General

No.	System	Description	Description 2	Base Unit of Measure	Automatic Est. Type	Private Label	Exclude from Collection	Blocked	Type	Groups/Types	Item Type
	MMMR	Roger Brogue		PAIR							

Matrix (highlighted in red box)

Matrix (highlighted in red box)

Matrix

Show Matrix

Valid Combinations

Matrix Y-Axis (highlighted in red box)

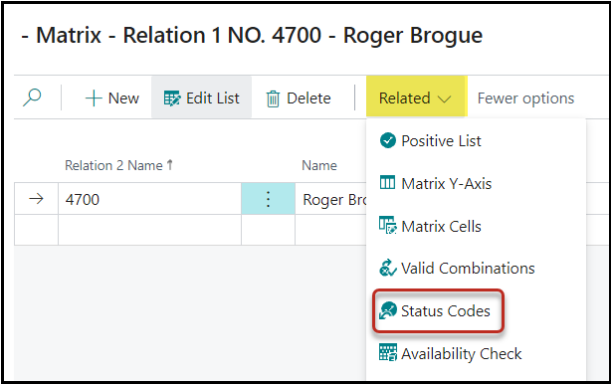
Setup 1

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		☐	002	Black,Smooth,Leather,Normal Width	SHOE_SUE	01	Smooth	SHOE_SOLE	1	Leather	SHOE_WIDTH	G	Normal Width
SHOE_COLOR		☐	002	Black,Smooth,Leather,Extra Width	SHOE_SURF	01	Smooth	SHOE_SOLE	1	Leather	SHOE_WIDTH	H	Extra Width
SHOE_COLOR		☐	002	Black,Smooth,Rubber,Normal Width	SHOE_SURF	01	Smooth	SHOE_SOLE	2	Rubber	SHOE_WIDTH	G	Normal Width
SHOE_COLOR		☐	002	Black,Smooth,Rubber,Extra Width	SHOE_SURF	01	Smooth	SHOE_SOLE	2	Rubber	SHOE_WIDTH	H	Extra Width
SHOE_COLOR		☐	002	Black,Printed,Leather,Normal Width	SHOE_SURF	02	Printed	SHOE_SOLE	1	Leather	SHOE_WIDTH	G	Normal Width
SHOE_COLOR		☐	002	Black,Printed,Leather,Extra Width	SHOE_SURF	02	Printed	SHOE_SOLE	1	Leather	SHOE_WIDTH	H	Extra Width
SHOE_COLOR		☐	002	Black,Printed,Rubber,Normal Width	SHOE_SURF	02	Printed	SHOE_SOLE	2	Rubber	SHOE_WIDTH	G	Normal Width
SHOE_COLOR		☐	002	Black,Printed,Rubber,Extra Width	SHOE_SURF	02	Printed	SHOE_SOLE	2	Rubber	SHOE_WIDTH	H	Extra Width
SHOE_COLOR		☐	003	Brown,Smooth,Leather,Normal Width	SHOE_SURF	01	Smooth	SHOE_SOLE	1	Leather	SHOE_WIDTH	G	Normal Width
SHOE_COLOR		☐	003	Brown,Smooth,Leather,Extra Width	SHOE_SURF	01	Smooth	SHOE_SOLE	1	Leather	SHOE_WIDTH	H	Extra Width
SHOE_COLOR		☐	003	Brown,Smooth,Rubber,Normal Width	SHOE_SURF	01	Smooth	SHOE_SOLE	2	Rubber	SHOE_WIDTH	G	Normal Width
SHOE_COLOR		☐	003	Brown,Smooth,Rubber,Extra Width	SHOE_SURF	01	Smooth	SHOE_SOLE	2	Rubber	SHOE_WIDTH	H	Extra Width
SHOE_COLOR		☐	003	Brown,Printed,Leather,Normal Width	SHOE_SURF	02	Printed	SHOE_SOLE	1	Leather	SHOE_WIDTH	G	Normal Width
SHOE_COLOR		☐	003	Brown,Printed,Leather,Extra Width	SHOE_SURF	02	Printed	SHOE_SOLE	1	Leather	SHOE_WIDTH	H	Extra Width
SHOE_COLOR		☐	003	Brown,Printed,Rubber,Normal Width	SHOE_SURF	02	Printed	SHOE_SOLE	2	Rubber	SHOE_WIDTH	G	Normal Width

To a Master Matrix Cell via the Matrix

A **Status Code** can be related to a **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, Matrix** (or press **Ctrl+Shift+M**), and then click **Related, Status Codes**.



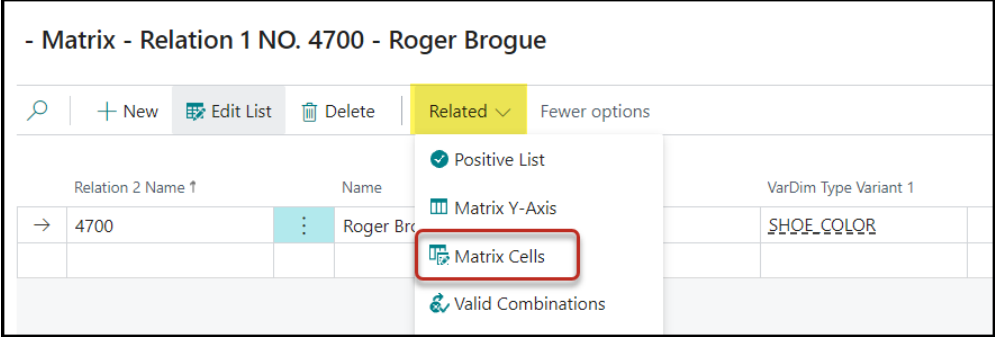
I.e., In every cell of the Matrix, you can enter a different **Status Code**, but you need to know the exact **Status Code** – you cannot use a lookup.

Variant 1	Variant Description	Line Quantity	5	5 1/2	6	6 1/2	7	7 1/2	8	8 1/2	9	9 1/2	10	10 1/2	11
002	Black,Smooth,Leather,Normal Width			BLOCKED											
002	Black,Smooth,Leather,Extra Width			BLOCKED											
002	Black,Smooth,Rubber,Normal Width			BLOCKED											
002	Black,Smooth,Rubber,Extra Width			BLOCKED											
002	Black,Printed,Leather,Normal Width			BLOCKED											
002	Black,Printed,Leather,Extra Width			BLOCKED											
002	Black,Printed,Rubber,Normal Width			BLOCKED											
002	Black,Printed,Rubber,Extra Width			BLOCKED											
003	Brown,Smooth,Leather,Normal Width			IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA
003	Brown,Smooth,Leather,Extra Width			IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA
003	Brown,Smooth,Rubber,Normal Width			IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA
003	Brown,Smooth,Rubber,Extra Width			IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA	IDEA
003	Brown,Printed,Leather,Normal Width														
003	Brown,Printed,Leather,Extra Width														
003	Brown,Printed,Rubber,Normal Width														

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, Matrix** (or press **Ctrl+Shift+M**), and then click **Related, Matrix Cells**



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

Matrix Item Nos. - 4700 Roger Brogue

VarDim Y-Axis 1	Variant Table 1	Variant No. 1	New Line No.	Created Item No.	Variant Description	Status Code	Related Assort...	Invalid Combination	Skip Availabil... Check	Skip Calculat... of Unit Price	Skip Test Unit Cost
4700002011G		27 050	411	4700002011G050	Black, Leather, Smooth, 5, Normal Width		☐	☐	☐	☐	☐
4700002011G		27 055	423	4700002011G055	Black, Leather, Smooth, 5½, Normal Width	BLOCKED	☐	☐	☐	☐	☐
4700002011G		27 060	435	4700002011G060	Black, Leather, Smooth, 6, Normal Width		☐	☐	☐	☐	☐
→ 4700002011G		27 065	447	4700002011G065	Black, Leather, Smooth, 6½, Normal Width		☐	☐	☐	☐	☐
4700002011G		27 070	459	4700002011G070	Black, Leather, Smooth, 7, Normal Width		☐	☐	☐	☐	☐
4700002011G		27 075	471	4700002011G075	Black, Leather, Smooth, 7½, Normal Width		☐	☐	☐	☐	☐
4700002011G		27 080	483	4700002011G080	Black, Leather, Smooth, 8, Normal Width		☐	☐	☐	☐	☐
4700002011G		27 085	495	4700002011G085	Black, Leather, Smooth, 8½, Normal Width		☐	☐	☐	☐	☐
4700002011G		27 090	507	4700002011G090	Black, Leather, Smooth, 9, Normal Width		☐	☐	☐	☐	☐
4700002011G		27 095	519	4700002011G095	Black, Leather, Smooth, 9½, Normal Width		☐	☐	☐	☐	☐
4700002011G		27 100	531	4700002011G100	Black, Leather, Smooth, 10, Normal Width		☐	☐	☐	☐	☐
4700002011G		27 105	543	4700002011G105	Black, Leather, Smooth, 10½, Normal Width		☐	☐	☐	☐	☐
4700002011G		27 110	555	4700002011G110	Black, Leather, Smooth, 11, Normal Width		☐	☐	☐	☐	☐
4700002011G		27 115	567	4700002011G115	Black, Leather, Smooth, 11½, Normal Width		☐	☐	☐	☐	☐

Status Code

IDEA Idea/Design

DESIGN Design

APPROVED Approved

READY Ready

PRODUCTION InProduction

+ New Show details Select from full list

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 approve a Step No. with an **Assign Status Code**, the Status Code of the Master or Master/Collection or Master/Collection/Delivery Period will also change.

Workflow for Master: 2105

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			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			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.

Note

If you only filled in the **Shipment Group** in a **Step No.** of the Workflow, approve the Step, the **Assign Status Code** will be copied to the **Status Code** of the Master, NOT of the **Shipment Group Master Relations**.

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 **TRUE** as shown below.

Order Type Card

10AFTERSALES

Related Automate

General

Order Type: 10AFTERSALES

Description: Aftersales

Brand Code: [dropdown]

Season Code: [dropdown]

Location Code: [dropdown]

Status Sales: Open

Status Purchase: Open

Matrix Limitation Setup: [dropdown]

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 **TRUE** for a whole Y-Axis Line, the Field **Show Invalid Combinations** in the Order Type of the Order must be set to **TRUE**, otherwise you do not know that you might have entered quantities on a Y-Axis that are 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 search for a Sales-/Purchase Price.

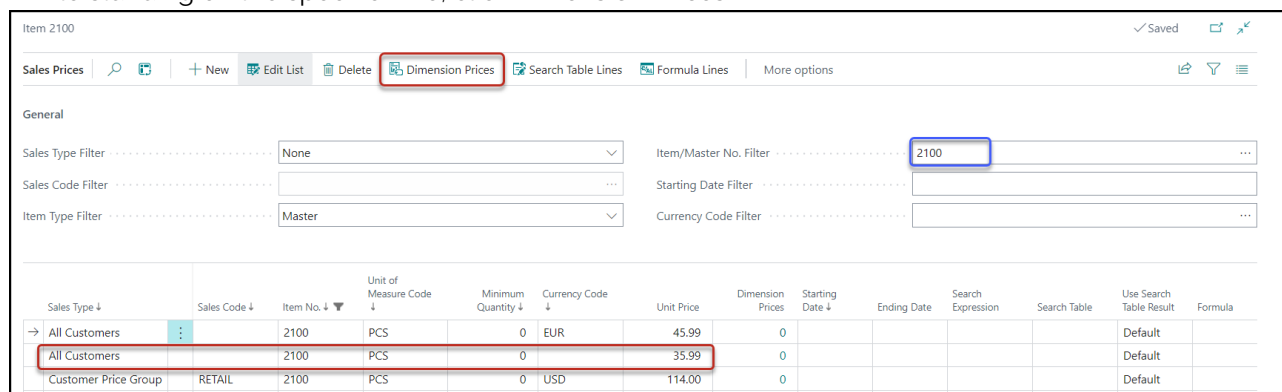
This opens up the opportunity to set up different Prices for (i.e.) Collections.

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 **34.00** and for **FW-CY** it would cost **37.50**.

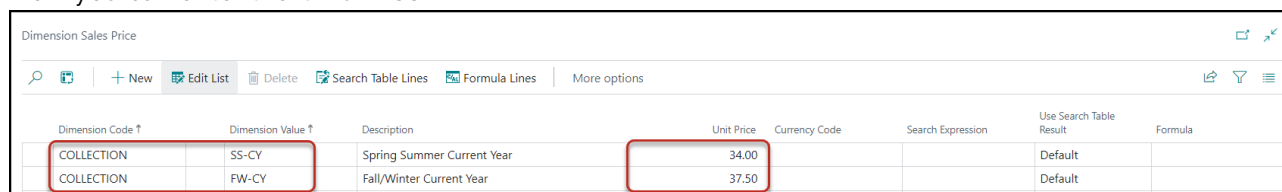
In the Master Card, go to **Related, Sales Receivables, Sales Prices**.

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



Sales Type ↓	Sales Code ↓	Item No. ↓	Unit of Measure Code ↓	Minimum Quantity ↓	Currency Code ↓	Unit Price	Dimension Prices	Starting Date ↓	Ending Date	Search Expression	Search Table	Use Search Table Result	Formula
→ All Customers		2100	PCS	0	EUR	45.99	0					Default	
All Customers		2100	PCS	0		35.99	0					Default	
Customer Price Group	RETAIL	2100	PCS	0	USD	114.00	0					Default	

Now you can enter the **Unit Price**



Dimension Code ↑	Dimension Value ↑	Description	Unit Price	Currency Code	Search Expression	Use Search Table Result	Formula
COLLECTION	SS-CY	Spring Summer Current Year	34.00			Default	
COLLECTION	FW-CY	Fall/Winter Current Year	37.50			Default	

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 have a Sales Order with **Collection No.** is SS-CY, the **Unit Price** would be 34.00.

Sales Order

0100013 · The Fashion Store UK

Notifications: 2 This customer has an overdue balance. | Default Dimension Priorities are not defined for Source Code: SALES.

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 Show more

Customer Name The Fashion Store UK Salesperson Code JR ▾

Contact Charley Nelson Status Open

Document Date 1/1/2024 Use Value Date ☐

Posting Date 1/1/2024 Blocked ☐

VAT Date 1/1/2024 Ignore Blocking ☐

Order Date 1/1/2024 Skip Availability Check ☐

Due Date 1/1/2024 Order Type ▾

Requested Delivery Date Collection No. SS-CY

External Document No.

Lines Manage Line Order

New Line Delete Line Select items... Suggest sales lines

Exp... Mat...	Type	Matrix Limitation	No.	Description	Description 2	Collection No.	Period Code	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
→ ☐	Matrix		2100	Lily Blouse ▾		SS-CY	03-MAR	BLUE	6	PCS	34.00		204.00	6

If you have a Sales Order with **Collection No.** is FW-CY, the **Unit Price** would be 37.50.

Sales Order

0100013 · The Fashion Store UK

× This customer has an overdue balance. Show details

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 Show more

Customer Name The Fashion Store UK Salesperson Code JR ▾

Contact Charley Nelson Status Open

Document Date 1/1/2024 Use Value Date ☐

Posting Date 1/1/2024 Blocked ☐

VAT Date 1/1/2024 Ignore Blocking ☐

Order Date 1/1/2024 Skip Availability Check ☐

Due Date 1/1/2024 Order Type ▾

Requested Delivery Date Collection No. FW-CY

External Document No.

Lines Manage Line Order

New Line Delete Line Select items... Suggest sales lines

Exp... Mat...	Type	Matrix Limitation	No.	Description	Description 2	Collection No.	Period Code	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
→ ☐	Matrix		2100	Lily Blouse ▾		FW-CY		BLUE	6	PCS	37.50		225.00	6

If the **Unit Price Excl. VAT** would still be 35.99, check the **Sales Price Search Dimension** in the General Ledger Setup:

General Ledger Setup

Home Posting General VAT Bank Journal Templates Automate ▾ Fewer options

Change Payment Tolerance Change Global Dimensions...

General >

Dimensions Show more

Global Dimension 1 Code DEPARTMENT Order Type Dimension ORDERTYPE ▾

Global Dimension 2 Code CUSTOMERGROUP Sales Price Search Dimension COLLECTION

Collection Dimension COLLECTION ▾ Purchase Price Search Dimension ▾

Shipment Group Dimension SHIPMENTGROUP ▾

Order Type

One of the most important fields in the Sales-/Purchase Document 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																	
Order Types: All																	
Order Type 1	Description	Collection 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	Season Filter	Availability Check
→ 01FW_LY_PRE	Fall/Winter Last Year Presales				☐	Closed	Open	☐	8/31/2024	0	9/30/2024						No
02SS_CY_PRE	Spring/Summer Current Year Presales	SS-CY			☐	Open	Open	☐		0							No
03FW_CY_PRE	Fall/Winter Current Year Presales	FW-CY		MLS_W	☐	Open	Open	☐	8/31/2025	0	9/30/2025						No
04SS_NY_PRE	Spring/Summer Next Year Presales				☐	Closed	Open	☐	3/31/2025	0	2/25/2026						No
05FW_NY_PRE	Fall/Winter Next Year Presales				☐	Closed	Open	☐	9/30/2026	0	9/30/2025						No
10AFTERSALES	Aftersales				☐	Open	Open	☐		0							Yes
2026-02	Fall/Winter 2026	2026-02			☐	Open	Open	☐		0							No
B2B	B2B Webshop Order Orders				☐	Open	Open	☐		0							
B2B_FASH	B2B Fashion Webshop Orders				☐	Open	Open	☐		0							
B2B_FURN	B2B Furniture Webshop Orders				☐	Open	Open	☐		0							
B2C	B2C Webshop Orders				☐	Open	Open	☐		0		BLUE					Yes
B2C_FASH	B2C Fashion Webshop Orders				☐	Open	Open	☐		0		BLUE					Yes
B2C_FURN	B2C Furniture Webshop Orders				☐	Open	Open	☐		0		BLUE					Yes
SA	Sales Agent Portal Orders				☐	Open	Open	☐		0							No
SA_FASH	Sales Agent Portal Fashion Orders				☐	Open	Open	☐		0							No
SA_FURN	Sales Agent Portal Furniture Orders				☐	Open	Open	☐		0							No
SAMPLES	Samples				☒	Open	Open	☐		0							No

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 Type02SS_CY_PRE

DescriptionSpring/Summer Current Year Presales

Brand Code

Season Code

Location Code

Status SalesOpen

Status PurchaseOpen

Matrix Limitation Setup

Show Invalid Combinations

Description of the Fields:

Status Sales

Here you can choose *Open* or *Closed* to determine if this **Order Type** can be chosen in new Sales Documents.

Status Purchase

Here you can choose *Open* or *Closed* to determine if this **Order Type** can be chosen in new 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 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
Limit Matrix to Specified Period	☐
Sample	☐

Description of the Fields:

Collection No.

Here you can enter **Collection No.** for this Order Type. This **Collection No.** will influence the Master/Items that can be selected in a new Order Line 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 a new Order Line 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 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 Documents) or the Purchase & Payables Setup (for Purchase Documents)
Search Delivery Period	Search Delivery Period means that the program will automatically find the first possible Delivery Period. With this option, you should enter 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 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 as 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 Collection No. and Delivery Period or just enter Collection No. and leave Delivery Period field empty in this Order Type. All Masters related to the Collection No. (or to the Collection/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 the Order Type.

	If a Master is only related directly to the Collection No. and the Limit Matrix to Specified Period field is <i>FALSE</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>FALSE</i>, VarDim Variant Options connected to earlier Delivery Periods will also be shown in the lookup. When the Limit Matrix to Specified Period field is <i>TRUE</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 field is only effective if the **Delivery Period Handling** is set to *Specify Delivery Period*. If this field is *TRUE*, 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 *FALSE*, 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. via **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

Shipment Group

Here you can enter a **Shipment Group** if you did not fill the **Collection No.** (and **Delivery Period**) already op FastTab **Collection Mgt.**

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

3/15/2025

Shipment Date

3/31/2025

Item Group

*** ITEM GROUP *** (0)

Default Quantity to Ship

Set Ready for Shipping

Set Ready for Invoicing

Sales Price Search Dimension

ORDERTYPE

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

Create Sales Workflow

PL

Availability Check

Location Filter

Availability Check

Skip

Inventory Profile Setup

Horizon Availability Check

Error when No Available Quantity

Exclude Availability Check

Formula Sales Header

Requested Delivery Date/Shipment Date

If you do not use **Collection No.** or **Shipment Group**, you can set a default **Requested Delivery Date** and/or **Shipment Date** for the Sales-/Purchase Document.

Sales Price Search Dimension

This field in the Order Type will overrule the content in the corresponding Parameter of the **General Ledger Setup** to determine that specific Dimension related Sales Prices should be taken.

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)

Create Sales Workflow

In this field you can choose a **TRIMIT Workflow Template**. When adding the **Order Type** to a Sales Document, it will automatically create a TRIMIT Workflow for this Sales Document based on the **Create Sales Workflow** Template, where the **Deadlines** will be calculated based on the current Work Date.

Because the calculated **Deadlines** in the TRIMIT Workflow will be based on the Work Date, make sure that in your TRIMIT Workflow Templates, the "current day" (*oD*) is based on the Work Date, and other **Deadline Date Formulas** will be based on this.

Formula Sales Header

This field is not shown by default; you need to add it to the page via **Personalize**.

You can enter a Formula of **Type Sales Header**, which can influence the data in the Sales Header when you choose this Order Type.

FastTab Purchase

Purchase

Purchase Price Search Dimension

Skip Unit Cost Check Purchase

Default Qty. to Receive

Create Purchase Workflow

Purchase Price Search Dimension

The content of a **Purchase Price Search Dimension** will overrule the content in the corresponding Parameter of the **General Ledger Setup** to determine that specific Dimension related Purchase Prices should be taken.

Create Purchase Workflow

In this field you can choose a **TRIMIT Workflow Template**. When adding the **Order Type** to a Purchase Document, it will automatically create a TRIMIT Workflow for this Purchase Document based on the **Create Purchase Workflow** Template, where the **Deadlines** will be calculated based on the current Work Date.

Because the calculated **Deadlines** in the TRIMIT Workflow will be based on the Work Date, make sure that in your TRIMIT Workflow Templates, the "current day" (*oD*) is based on the Work Date, and other **Deadline Date Formulas** will be based on this.

FastTab Filters

Filters

LookUp Filters

Collection Filter Type

Collection No.

Collection Filter

Shipment Group Filter

Brand Filter

Season Filter

Item Type Filter

Design Filter

Item Group Filter

Gender Filter

Item Statistics Group 4 Filter

Item Statistics Group 5 Filter

Exclude Private Label Items

Availability Check Filters

Filter Global Dimension 1 Availabili...

Filter Global Dimension 2 Availabili...

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 Collection Nos. that you will enter in the next field Collection Filter: only Masters connected to these Collection Nos. (and their Delivery Periods) in the Collection Master Relations of these Collection Nos. will be shown in the lookup or only Masters that have field Collection No. filled with the Collections you enter in the Collection Filter .
-------------------	--

Collection Filter

In this field a filter string for the **Collections** can be entered if **Collection Filter Type** is set to *Collection Filter*.

This Filter can be used in two ways:

1. There are **Collection Master Relations** in the system (regardless any Collection, so not only for the **Collection Filter** Collections!)
This will limit the Masters that will be shown (and possible to enter) in the lookup for a Sales-/Purchase Line based on the **Collection Master Relations** to these Collections (and their Period Codes) of the **Collection Filter**.
2. There are no **Collection Master Relations** in the system at all (regardless any Collection, so not only for the **Collection Filter** Collections!)
The Parameter **Create Collection Relation Automatically** in the Inventory Setup is *FALSE*.
This will limit the Masters that will be shown (and possible to enter) in the lookup for a Sales-/Purchase Line based on the field **Collection No.** in the Master Card.

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 with a checkmark in **Private Label** from the lookup on the field **No.** of a Matrix Sales-/Purchase Line if the Customer or Country of the Header does not fit.

Without a checkmark in this field, it will still show Masters that do have a checkmark in **Private Label** in the lookup on the field **No.** of a Matrix Sales-/Purchase Line, but when selecting or entering such a Private Label Master, you will get an error message.

A checkmark in this field will have no influence on the Matrix if a Master in a Sales-/Purchase Line, but when entering a Quantity on a Cell that represents an Item with a checkmark in **Private Label** that does not fit the Customer or Country of the Order, you will get an error message.

FastTab CPO

Portal	
Category	AGENT
Show on Web	☒
CPO Availability Check Method	Available
Create Web Orders as	Order
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 in this field, you allow this Order Type to be shown as selectable in the **TRIMIT Sales Agent** and/or 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.

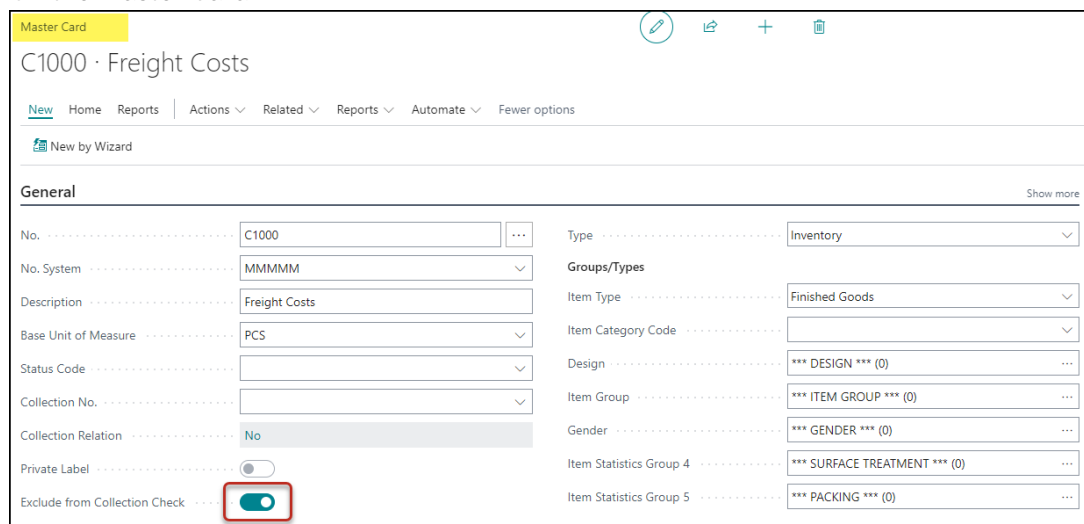
Master for “Costs”

In case you use a Master to specify 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 the field **Exclude from Collection Check** in the Master/Item:

It can only be set to *TRUE* in a Master if no Matrix or Assortment Matrix has been created 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 Design *** DESIGN *** (0)

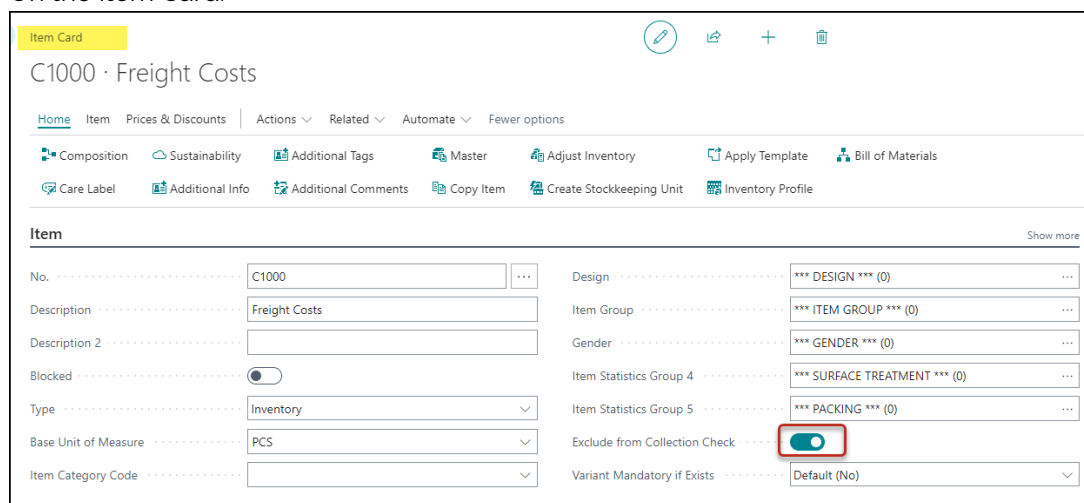
Collection No. Item Group *** ITEM GROUP *** (0)

Collection Relation No Gender *** GENDER *** (0)

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

Exclude from Collection Check ☒ 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 Gender *** GENDER *** (0)

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

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

Base Unit of Measure PCS Exclude from Collection Check ☒

Item Category Code Variant Mandatory if Exists Default (No)

Setting the field **Exclude from Collection Check** to *TRUE*, means that you can enter the Item on an Item Line (so you need to have **Type** set to *Item*) in any Sales-/Purchase Document, 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 at what will happen in a Sales Document 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** in the Sales Header.

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 in the Sales Header.

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 Collection, and it is setup as Private Label, the Master/Item will always be shown in the lookup of the **No.** of a Sales Line, but will only be allowed to enter/select, 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.

Because there are so many dependencies (like the Private Label functionality) regarding the Masters/Items you can enter on a Sales Document: If the Sell-to Customer No. or the Bill-to Customer No. is changed in the Sales Header, and Sales Lines exist, you need to delete the Sales Lines first, otherwise you get an error message:

The screenshot shows a 'General' tab in a software interface. It contains several fields: 'No.' with value '0100005', 'Customer Name' with value '2010', 'Contact', 'Document Date', and 'Posting Date' with value '1/1/2024'. A red error message box is overlaid on the 'Customer Name' field, stating: 'You must delete existing sales lines before Sell-to Customer can be changed.' The error box has a red 'x' icon and a close button.

Note

The lookup in the **No.** (for Master or Item) field of a Sales Line, will not check upfront if there might be an issue regarding **Private Label** settings. Therefore, the lookup might show Masters/Items in the list, but if you choose/enter it, you might still get an error message regarding "not available for...".

This has been done because of performance; if we check all levels for all possible/not valid Masters/Items or if it might be available to choose based on **Private Label** it would take too long to get the list of possible **No.** to choose from.

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** of the Order Type is checked to determine if you can choose this **Order Type** for the Sales Document.

The **Status Sales** needs to be *Open*, to be able to enter the **Order Type** in a Sales Document.

When entering **Collection No.** in Sales Header, the Status Code of the Collection is checked to determine if you can choose this **Collection No.** for the Sales Document.

Or when entering an **Order Type** with **Collection No.**, the Status Code of the Collection is checked to determine if you can choose this **Order Type** with this **Collection No.** for the Sales Document.

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 the Sales Document.

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.

Note

The lookup in the **No.** (for Masters or Items) field of a Sales Line will not check upfront if there might be a **Status Code** that is not applicable for the current Sales Header. Therefore, the lookup might show Masters/Items in the list, but if you choose/enter it, you might still get an error message regarding "not available for...".

This has been done because of performance; if we would check all levels for all possible/invalid Masters/Items and if it might be available to choose based on **Status Code**, it would take too long to get the list of possible **No.** to choose.

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 act 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.

The **Delivery Period Handling** is determined by the Parameter in the Sales & Receivables Setup but cannot be *Specific Delivery Period* if the **Collection No.** does not have Delivery Periods connected.

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 Delivery Period 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 possible to enter and this will overrule the **Options Var 1-9** that might be connected to the **Collection** itself.

Note

The lookup in the **No.** field for Masters of a Sales Line will simply show all Masters in the Collection Master Relations and in the Collection/Delivery Period Master Relations. In the Matrix however, it will only show the Lines (Colors) and Columns (Sizes) that are connected to the Collection/Delivery Period or to the Collection (if the Master is not connected to any Collection/Period).

The lookup in the **No.** field for Items of a Sales Line will simply show all Items, so not only the Items that are connected to the Collection or Collection/Delivery Period.

Therefore, the lookup might show Masters/Items in the list, but if you choose/enter it, you might still get an error message regarding "not available for...".

This has been done because of performance; if we would check all levels for all possible/invalid Masters/Items and if it might be available to choose based on **Collection** or **Collection/Period**, it would take too long to get the list of possible **No.** to choose.

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** (but is related to the **Collection**), 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

✓ Saved

Delivery Periods

+ New

Edit List

Delete

Master Relation

More options

Delivery Period	Delivery Period Description	Start Sales Delivery Period ↑	End Sales Delivery Period	Start Purchase Delivery Period	End Purchase Delivery Period
→ 01-JAN	January	2/3/2024	2/19/2024	12/10/2023	1/14/2024
02-FEB	February	3/3/2024	3/19/2024	1/14/2024	2/14/2024
03-MAR	March	4/2/2024	4/19/2024	2/14/2024	3/14/2024

In addition, you would have entered the **Shipment Date 02/15/24** 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 02/15/24**

Master 2100 Color 35, 60, 70 and 80 are connected to 02-FEB and would get:

Delivery Period 02-FEB and **Shipment Date 03/03/24**

Master 2100 Color 20, 37, 65, 75 and 99 are connected to 03-MAR and would get:

Delivery Period 03-MAR and **Shipment Date 04/02/24**

Lines <u>Manage</u> Line Order										
New Line Delete Line Service Commitments Select items...										
Expand Matrix	Type	No.	Description	Description 2	Collection No.	Period Code	Shipment Date	Location Code	Quantity	
→ ☒	Matrix	2100	Lily Blouse		SS-CY	01-JAN	2/15/2024	BLUE	12	
☐	Item	21002003	Lily Blouse	Royal Blue,M	SS-CY	03-MAR	4/2/2024	BLUE	1	
☐	Item	21002103	Lily Blouse	Light Blue,M	SS-CY	01-JAN	2/15/2024	BLUE	1	
☐	Item	21003003	Lily Blouse	Yellow,M	SS-CY	01-JAN	2/15/2024	BLUE	1	
☐	Item	21003503	Lily Blouse	Orange,M	SS-CY	02-FEB	3/3/2024	BLUE	1	
☐	Item	21003703	Lily Blouse	Dark Orange,M	SS-CY	03-MAR	4/2/2024	BLUE	1	
☐	Item	21006003	Lily Blouse	Forest Green,M	SS-CY	02-FEB	3/3/2024	BLUE	1	
☐	Item	21006503	Lily Blouse	Lawn Green,M	SS-CY	03-MAR	4/2/2024	BLUE	1	
☐	Item	21007003	Lily Blouse	Red,M	SS-CY	02-FEB	3/3/2024	BLUE	1	
☐	Item	21007303	Lily Blouse	Pink,M	SS-CY	01-JAN	2/15/2024	BLUE	1	
☐	Item	21007503	Lily Blouse	Magenta,M	SS-CY	03-MAR	4/2/2024	BLUE	1	
☐	Item	21008003	Lily Blouse	Purple,M	SS-CY	02-FEB	3/3/2024	BLUE	1	
☐	Item	21009903	Lily Blouse	Black,M	SS-CY	03-MAR	4/2/2024	BLUE	1	

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 of 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

0100008 · The Fashion Store UK

Home Prepare Print/Send Request Approval Order More options

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

❌ The page has an error. Refresh (F5) to undo the change, or correct the error.

No. 0100008 External Document No.

Customer Name The Fashion Store UK Status Open

Contact Charley Nelson Use Value Date ☐

Document Date 9/30/2020 Blocked ☐

Posting Date 1/1/2024 Ignore Blocking ☐

VAT Date 1/1/2024 Skip Availability Check ☐

Order Date 1/1/2024 Order Type 03FW_CY_PRE

Due Date 9/30/2020 Collection No. FW-CY

Requested Delivery Date 8/31/2020

Lines | Manage Line Order

New Line Delete Line Service Commitments Select items...

Expand Matrix	Type	No.	Description	Description 2	Collection No.	Period Code	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT
✖	Matrix	4700	*		FW-CY								

Master 4700 is not available for Collection No. FW-CY.

In this example we manipulated the data a little:

The **Status Code** of the **Master 4700** has been set to **READY**.

Select - Masters | 🔍 + New ...

No. ↑	Description	Status Code	Brand Code	Season Code
→ 2020	Isla Trousers	READY	FASHION	
2100	Lily Blouse		FASHION	02-SUMMER
2105	Blouse	DESIGN	FASHION	02-SUMMER
2110	Mia Blouse		FASHION	02-SUMMER
2200	Grace Bomber		FASHION	03-FALL
2210	Poppy Blazer		FASHION	03-FALL
2310	Freya Dress		FASHION	02-SUMMER
4700	Roger Brogue	READY	SHOES	

↑
Master Card Status

OK Cancel

But after adding 4700 to the **Collection FW_CY**, we set the **Status Code** in the **Collection Master Relation** to **IDEA**, which is not available for Sales Orders.

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 4700 was shown in the lookup because it is connected to **Collection No. FW-CY**.

But Master 4700 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 which **Delivery Period** it belongs before entering the Quantities in the Matrix.

The **Period Codes** of the Collection No. that will be 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

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 ▾

Collection Mgt.

Collection No. SS-CY Limit Matrix to Specified Period ☐

Delivery Period Specify Delivery Period Sample ☐

Delivery Period Handling Specify Delivery Period

Sales Order

0100009 · The Fashion Store UK

Notifications: 3 This customer has an overdue balance. | Default Dimension Priorities are not defined for Source Code: SALES. | Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox.

Home Prepare Print/Send Request Approval Order More options

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

General

No. 0100009 External Document No.

Customer Name The Fashion Store UK Status Open

Contact Charley Nelson Use Value Date ☐

Document Date 1/1/2024 Blocked ☐

Posting Date 1/1/2024 Ignore Blocking ☐

VAT Date 1/1/2024 Skip Availability Check ☐

Order Date 1/1/2024 Order Type 02SS_CY_PRE ▾

Due Date 1/1/2024 Collection No. SS-CY

Requested Delivery Date

Lines Manage Line Order

New Line Delete Line Service Comm

Expand Matrix Type No. Matrix 2100

Shipment Groups

Period Code	Description	Start Shipment Date †	End Shipment Date	Start Receipt Date	End Receipt Date
01-JAN	January	2/3/2024	2/19/2024	12/10/2023	1/14/2024
02-FEB	February	3/3/2024	3/19/2024	1/14/2024	2/14/2024
03-MAR	March	4/2/2024	4/19/2024	2/14/2024	3/14/2024

OK Cancel

Only the **Period Codes** (Shipment Groups) that are applicable for 2100 in the **Collection SS_CY** are shown, and when choosing 01-JAN the opened Matrix will only show the Colors/Sizes connected to 01-JAN.

- Sales Order 0100009 - No. 2100 - Lily Blouse -

Edit List Matrix Inventory Profile More options

Variant 1	Variant Description	Line Quantity	XS	S	M	L	XL	XXL	3XL
→ 21	Light Blue								
30	Yellow								
73	Pink								

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 **Period Code** of the Master Card 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	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	Search Delivery Period ▾		

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 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 No. 1 Description Order Type COLPER

External Document No. 2000 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 %

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.

But in the Matrix, you will see all Colors/Sizes of a selected Master in the Matrix that are connected to the Collection and Collection/Periods, and entered Quantities in the Matrix will react as if there was NOT a **Delivery Period** entered in the Order Type!!

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 Show Invalid Combinations ☐

Season Code ☐

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.

And in the Matrix, you will only see all Colors/Sizes of a selected Master that are connected to the Collection No. and Delivery Period.

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 Show more

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 Manage Line

No. ↑	Description
2001	Trouser Olivia
2031	Ella

Exp... Mat... Type Matrix + New Select from full list

Quantity	Unit of Measure Code	Unit Price Excl. VAT	Prepmt. Amt. Inv. Excl. VAT	Prepmt Amt to Deduct Excl. VAT	Lin Discoun
			0.00	0.00	

Shipment Groups

Search + New Edit List Delete Actions Related Automate Fewer options

Period Code ↑ Description

Period Code ↑	Description	Start Shipment Date	End Shipment Date	Start Receipt Date	End Receipt Date
DROP1	Delivery Period 1	1/5/2023	4/4/2023	12/1/2022	12/29/2022
DROP2	Delivery Period 2	4/5/2023	7/4/2023	3/5/2023	4/2/2023
DROP3	Delivery Period 3	7/5/2023	10/4/2023	6/5/2023	7/3/2023
DROP4	Delivery Period 4	10/5/2023	1/4/2024	9/5/2023	10/3/2023

→ DROP4

Related Dimensions Master Relations Show Inactive Workflow

Matrix Limitation Master Relations

Search + New Edit List Delete More options

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

An Order Type without Collection No. or Shipment Group

If you 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.

Collection Mgt.

Collection No. Delivery Period Delivery Period Handling None

Limit Matrix to Specified Period Sample

Shipment Group Mgt.

Shipment Group

Sales >

Purchase >

Filters

Lookup Filters

Collection Filter Type Collection Filter NOOSS-CY

Availability Check Filters

Filter Global Dimension 1 Availability Check 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

None

Limit Matrix to Specified Period

Sample

Shipment Group Mgt.

Shipment Group

Sales >

Purchase >

Filters

LookUp Filters

Collection Filter Type

Collection No.

Collection Filter

Shipment Group Filter

DROP4

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](#).

But instead of the **Shipment Date** of Sales Lines based on the **Start Sales Delivery Period**, the Delivery Period can determine the **Expected Receipt Date** based on the **End Purchase Delivery Period**.

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** = *Open*.

Production

Collection Management has no influence on TRIMIT Production.

Note

Status Code functionality has not been implemented for Production.

E-commerce

Collection Management also influences TRIMIT e-commerce.

Within the **Categories**, you cannot only connect Masters/Items but also **Collection No.**, **Period Code** and **Matrix Limitation Setups** to determine which Masters/Items belong to a **Category**.

In the B2B Webshop and Sales Agent, 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 Webshop and the Sales Agent 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 consequences

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 advise the companies – based on their procedures – to determine which setup/combination will work best.

In the [Appendix](#), you will see questions that can help to determine how to use Collection Management, as well as scenarios described in [Sales](#) in a more compressed list of options.

Appendix

Questions

Regarding Collections

- ➔ What is the basis of the Collection?
 - Brands, Seasons, Gender, Customer, etc. or combination.
- ➔ How many Brands?
- ➔ Private Labeling (restrictions) for specific Customers or Countries?
- ➔ How many Collections:
 - Per Year?
 - Per Season?
 - Multiple Delivery Periods (Drops) within a Seasonal Collection?
- ➔ Do Colors of a Style depend on the Collection (Season)?
- ➔ Customer/Regional Specific Colors/Sizes?
- ➔ Can customers buy from several Collections in one Sales Order?
- ➔ Status Handling at Collection level?
- ➔ Do you have Styles that are specific for 1 Collection?
 - If a Style is used in several Collections, would you create new Styles?

Regarding Samples

- ➔ Samples as Cost Item?
 - Proto Samples
 - Samples that cannot be sold
 - Post Sample Cost Directly to G/L Account "Sample Costs"
- ➔ Samples as unique Logistic Entity?
 - Samples are not considered as Direct Cost or at least with Costing Method *FIFO*.
 - Separate Logistic follow-up may be desirable.
 - Sample has a unique Item Code (mostly with reference to original Master)?
- ➔ Samples as Collection Product, but different Timeline
 - Samples that are identical to sellable products, but have separate Production or Purchase orders?
 - Salesman Samples, Marketing Samples?
 - In general: Samples that can be sold during Sample Sales?
 - No separation between Sample and normal product. Separate Purchase-/Production Orders with own Receipt/End Dates. These can be handled via TRIMIT Collection Management.

The answers can help to determine how to set up Collections.

Scenario's

Impact – Example 1

→ Option 1:

- Entering a **Collection No.** (that does not have Period Codes) in the Sales-/Purchase Header

The screenshot shows a 'Sales Order' form for '0100015 - The Fashion Store UK'. The form includes a navigation bar with options like 'Home', 'Prepare', 'Print/Send', 'Request Approval', 'Order', 'Actions', 'Related', 'Automate', and 'Fewer options'. Below the navigation bar, there are tabs for 'Post...', 'Release', 'Create Warehouse Shipment', 'Create Inventory Put-away/Pick...', 'Archive Document', 'Workflow', 'Portal Payment', and 'Extra Order Info'. The 'General' section contains fields for 'No.' (0100015), 'Customer Name' (The Fashion Store UK), 'Contact' (Charley Nelson), 'Document Date' (1/1/2024), 'Posting Date' (1/1/2024), 'VAT Date' (1/1/2024), 'Order Date' (1/1/2024), 'Due Date' (1/1/2024), 'Requested Delivery Date', 'External Document No.', 'Salesperson Code' (JR), 'Status' (Open), 'Use Value Date', 'Blocked', 'Ignore Blocking', 'Skip Availability Check', 'Order Type', and 'Collection No.' (FW-CY). The 'Collection No.' field is highlighted with a red box.

Impact – Example 1

- Lookup in **No.** on the Line will show ALL Masters in the Collection Master Relations.
- Choosing a Master that has a "blocked" **Status Code** in the Collection Master Relations or in the Master itself, will give an error! The lookup will however show this Master; because of performance we do not check all **Status Codes** on all levels for the lookup list.
- **Delivery Period Handling** in the S&R Setup or P&P Setup can not be *Specify Delivery Period!!*
- Matrix of the Master is limited by the Variants chosen in the Collection Master Relations
 - It will not show Colors (Lines in the Matrix) if the Y-Axis of the Collection Master Relations has a "blocked" **Status Code**.
 - It will not show Colors (Lines in the Matrix) of the Master that have a "blocked" **Status Code**.

Impact – Example 2

→ Option 1:

- Entering an **Order Type** in the Sales-/Purchase Header with a **Collection No.** (that does not have Period Codes).

The screenshot displays two SAP interfaces side-by-side. The left interface is the 'Sales Order' header for document 01000015, titled 'The Fashion Store UK'. It shows various dates (Document Date: 9/30/2024, Posting Date: 1/1/2024, VAT Date: 1/1/2024, Order Date: 1/1/2024, Due Date: 9/30/2024, Requested Delivery Date: 8/31/2024) and a 'Collection No.' field with the value 'FW-CY'. The right interface is the 'Order Type Card' for '03FW_CY_PRE'. It shows the 'Collection Mgt.' section with 'Collection No.' set to 'FW-CY' and 'Delivery Period Handling' set to 'Search Delivery Period'. Both interfaces have red boxes highlighting the 'Collection No.' field in the Sales Order and the 'Collection No.' and 'Delivery Period Handling' fields in the Order Type Card.

Impact – Example 2

- Lookup in **No.** on the Line will show ALL Masters in the Collection Master Relations.
- Choosing a Master that has a "blocked" **Status Code** in the Collection Master Relations or in the Master itself will give an error! The lookup will however show this Master; because of performance we do not check all **Status Codes** on all levels for the lookup list.
- **Delivery Period Handling** in the Order Type can not be *Specify Delivery Period!!*
- Matrix of the Master is limited by the Variants chosen in the Collection Master Relations
 - It will not show Colors (Lines in the Matrix) if the Y-Axis of the Collection Master Relations has a "blocked" **Status Code**.
 - It will not show Colors (Lines in the Matrix) of the Master that have a "blocked" **Status Code**.
 - It will also be limited by the **Matrix Limitation Setup** in the Order Type.

Impact – Example 3

- Option 3:
- Entering an **Order Type** in the Sales-/Purchase Header with a **Shipment Group**.

The screenshot shows the SAP Sales Order interface for 'The Fashion Store UK'. The 'General' tab is active. The 'Order Type' field is set to 'DROP1' and is highlighted with a red box. The 'Shipment Group' field is also set to 'DROP1' and is highlighted with a red box. The 'Status' field is set to 'Open'. The 'Order Date' is 1/1/2024. The 'Requested Delivery Date' is 1/1/2024. The 'External Document No.' is empty.

Impact – Example 3

- Lookup in **No.** on the Line will show ALL Masters in the Period Code Master Relations of the Shipment Group.
- Choosing a Master that has a “blocked” **Status Code** in the Period Code Master Relations of the Shipment Group or in the Master itself will give an error!
The lookup will however show this Master; because of performance we do not check all **Status Codes** on all levels for the lookup list.
- **Delivery Period Handling** has no impact; there are no periods related to a Shipment Group.
- Matrix of the Master is limited by the Variants chosen in the Period Code Master Relations of the Shipment Group
 - It will not show Colors (Lines in the Matrix) if the Y-Axis of the Period Code Master Relations of the Shipment Group has a “blocked” **Status Code**.
 - It will not show Colors (Lines in the Matrix) of the Master that have a “blocked” **Status Code**.

Impact – Example 4

➔ Option 2:

➔ Entering a **Collection No.** (that has Period Codes) in the Sales-/Purchase Header

Sales Order
0100007 · The Fashion Store UK

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable this for me | Don't show again

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 Show more

Customer Name	The Fashion Store UK	Salesperson Code	JR
Contact	Charley Nelson	Status	Open
Document Date	9/30/2020	Use Value Date	☐
Posting Date	1/1/2024	Blocked	☐
VAT Date	1/1/2024	Ignore Blocking	☐
Order Date	1/1/2024	Skip Availability Check	☒
Due Date	9/30/2020	Order Type	
Requested Delivery Date	8/31/2020	Collection No.	SS-CY
External Document No.			

Impact – Example 4

- ➔ Lookup in **No.** on the Line will show ALL Masters related to the Collection No, and Masters related to the Collection No. + Period Codes
- ➔ If **Delivery Period Handling** in the S&R Setup or P&P Setup is set to *Specify Delivery Period*, you need to choose a **Delivery Period** – unless the Master is only connected to 1 Delivery Period, then that will be set automatically.
 - ➔ If Master is connected to the Collection No. and not to the Collection No. + chosen Period Code, you can enter quantities – as if Master is applicable for all chosen Periods.
 - ➔ The Matrix will be limited by the Variants in the Collection + chosen Period Code or the Variants in the Collection – if not connected to any of the Periods.
 - ➔ It will not show Colors (Lines in the Matrix) if the Y-Axis of the Collection Master Relations has a "blocked" **Status Code**.
 - ➔ It will not show Colors (Lines in the Matrix) of the Master that have a "blocked" **Status Code**.
- ➔ If **Delivery Period Handling** in the S&R Setup or P&P Setup is set to *Search Delivery Period*, the **Shipment Date** of the Sales Header or **Expected Receipt Date** of the Purchase Header, will determine the first applicable **Period Code** of the Collection No. and will change the **Date** in the Line based on the applicable **Date** of the Period Code (Start Sales or End Purchase).
 - ➔ If Master is only connected to the Collection No. and not to a Period, it will get the first applicable **Period Code**.
 - ➔ The Matrix will be limited by the Variants in all the Collection + Period Codes. If Master is connected directly to the Collection and to the Collection + Period Codes, the Collection + Period Codes Variants will overrule the Collection Variants. If Master is only connected to the Collection, the Matrix will be limited by the Variants of the Master Relation of the Collection.
 - ➔ It will not show Colors (Lines in the Matrix) if the Y-Axis of the Collection Master Relations has a "blocked" **Status Code**.
 - ➔ It will not show Colors (Lines in the Matrix) of the Master that have a "blocked" **Status Code**.

Impact – Example 5

➔ Option 2:

➔ Entering an **Order Type** in the Sales-/Purchase Header with a **Collection No.** (that has Period Codes)

The screenshot displays the 'Sales Order' form for 'The Fashion Store UK' (01000007). The form is divided into two main sections: 'General' and 'Collection Mgt.'. The 'General' section contains fields for Customer Name, Contact, Document Date, Posting Date, VAT Date, Order Date, Due Date, Requested Delivery Date, External Document No., Salesperson Code, Status, Use Value Date, Blocked, Ignore Blocking, Skip Availability Check, Order Type (set to 02SS_CY_PRE), and Collection No. (set to SS-CY). The 'Collection Mgt.' section contains fields for Collection No. (set to SS-CY), Delivery Period, Delivery Period Handling (set to Search Delivery Period), and a 'Limit Matrix to Specified Period' toggle (set to On). The 'Order Type Card' is also visible, showing the Order Type (02SS_CY_PRE) and related fields.

Impact – Example 5

- ➔ Lookup in **No.** on the Line will show ALL Masters related to the Collection No, and Masters related to the Collection No. + Period Codes
- ➔ If **Delivery Period Handling** in the Order Type is set to *Specify Delivery Period*, you need to choose a **Delivery Period** – unless the Master is only connected to 1 Delivery Period, then that will be set automatically.
 - ➔ If Master is connected to the Collection No. and not to the Collection No. + chosen Period Code, you can enter quantities – as if Master is applicable for all chosen Periods.
 - ➔ The Matrix will be limited by the Variants in the Collection + chosen Period Code or the Variants in the Collection – if not connected to any of the Periods.
 - ➔ It will not show Colors (Lines in the Matrix) if the Y-Axis of the Collection Master Relations has a "blocked" **Status Code**.
 - ➔ It will not show Colors (Lines in the Matrix) of the Master that have a "blocked" **Status Code**.
- ➔ If **Delivery Period Handling** in the Order Type is set to *Search Delivery Period*, the **Shipment Date** of the Sales Header or **Expected Receipt Date** of the Purchase Header, will determine the first applicable **Period Code** of the Collection No. and will change the **Date** in the Line based on the applicable **Date** of the Period Code (Start Sales or End Purchase).
 - ➔ If Master is only connected to the Collection No. and not to a Period, it will get the first applicable **Period Code**.
 - ➔ The Matrix will be limited by the Variants in all the Collection + Period Codes. If Master is connected directly to the Collection and to the Collection + Period Codes, the Collection + Period Codes Variants will overrule the Collection Variants. If Master is only connected to the Collection, the Matrix will be limited by the Variants of the Master Relation of the Collection.
 - ➔ It will not show Colors (Lines in the Matrix) if the Y-Axis of the Collection Master Relations has a "blocked" **Status Code**.
 - ➔ It will not show Colors (Lines in the Matrix) of the Master that have a "blocked" **Status Code**.

Impact – Example 6

➔ Option 2:

➔ Entering an **Order Type** in the Sales-/Purchase Header with a **Collection No.** (that has Period Codes) and a **Period Code**

The screenshot shows the SAP Sales Order header for '01000007 - The Fashion Store UK'. The 'General' tab is active. The 'Order Type' is 'SS-CY' and the 'Collection No.' is 'SS-CY'. The 'Delivery Period Handling' is set to 'Specify Delivery Period'. The 'Delivery Period' is '01-JAN' and the 'Sample' is 'Specify Delivery Period'. The 'Limit Matrix to Specified Period' is set to 'On'.

Impact – Example 6

- ➔ Lookup in **No.** on the Line will show ALL Masters related to the Collection No, and Masters related to the Collection No. + Period Codes
- ➔ If **Delivery Period Handling** in the Order Type is set to *Specify Delivery Period*, the Delivery Period is automatically set to the Period Code in the Order Type.
 - ➔ If Master is connected to the Collection No. and not to the Collection No. + Period Code in the Order Type, you can not select/enter the Master on the Line. This will give you an error.
 - ➔ The Matrix will be limited by the Variants in the Collection + Period Code in the Order Type which is set as the chosen Period Code.
 - ➔ It will not show Colors (Lines in the Matrix) if the Y-Axis of the Collection Master Relations has a "blocked" **Status Code**.
 - ➔ It will not show Colors (Lines in the Matrix) of the Master that have a "blocked" **Status Code**.
- ➔ If **Delivery Period Handling** in the Order Type is set to *Search Delivery Period*, the **Shipment Date** of the Sales Header or **Expected Receipt Date** of the Purchase Header, will determine the first applicable **Period Code** of the Collection No. and will change the **Date** in the Line based on the applicable **Date** of the Period Code (Start Sales or End Purchase).
 - ➔ If Master is only connected to the Collection No. and not to a Period, it will get the first applicable **Period Code**.
 - ➔ The Matrix will be limited by the Variants in ALL the Collection + Period Codes. If Master is connected directly to the Collection and to the Collection + Period Codes, the Collection + Period Codes Variants will overrule the Collection Variants. If Master is only connected to the Collection, the Matrix will be limited by the Variants of the Master Relation of the Collection. So, the **Period Code** in the Order Type has no influence!
 - ➔ It will not show Colors (Lines in the Matrix) if the Y-Axis of the Collection Master Relations has a "blocked" **Status Code**.
 - ➔ It will not show Colors (Lines in the Matrix) of the Master that have a "blocked" **Status Code**.

Impact – Example 7

→ Option 2:

- Entering an **Order Type** in the Sales-/Purchase Header with a **Collection No.** (that has Period Codes), no **Period Code**, but a checkmark in **Limit Matrix to Specified**.

The screenshot shows the SAP Sales Order interface for '0100007 - The Fashion Store UK'. The 'General' tab is active, displaying fields for Customer Name, Contact, Document Date, Posting Date, VAT Date, Order Date, Due Date, Requested Delivery Date, and External Document No. The 'Order Type Card' is also visible, showing 'SS-CY-LIMIT' as the Order Type. The 'Collection Mgt.' section shows 'SS-CY' as the Collection No. and 'Specify Delivery Period' as the Delivery Period Handling. The 'Limit Matrix to Specified Period' checkbox is checked.

Impact – Example 7

- Lookup in **No.** on the Line will show ALL Masters related to the Collection No, and Masters related to the Collection No. + Period Codes
- If **Delivery Period Handling** in the Order Type is set to *Specify Delivery Period*, the Delivery Period is automatically set to the chosen Period Code. Or, if you did enter a **Period Code** in the Order Type, then this will be set as the chosen Period Code automatically.
 - If Master is connected to the Collection No, and not to the Collection No. + chosen Period Code, you can not select/enter the Master on the Line. This will give you an error.
 - The Matrix will be limited by the Variants in the Collection + Period Code of the chosen Period Code.
 - It will not show Colors (Lines in the Matrix) if the Y-Axis of the Collection Master Relations has a "blocked" **Status Code**.
 - It will not show Colors (Lines in the Matrix) of the Master that have a "blocked" **Status Code**.
- If **Delivery Period Handling** in the Order Type is set to *Search Delivery Period*, the **Shipment Date** of the Sales Header or **Expected Receipt Date** of the Purchase Header, will determine the first applicable **Period Code** of the Collection No, and will change the **Date** in the Line based on the applicable **Date** of the Period Code (Start Sales or End Purchase).
 - If Master is only connected to the Collection No, and not to a Period, it will get the first applicable **Period Code**.
 - The Matrix will be limited by the Variants in all the Collection + Period Codes. If Master is connected directly to the Collection and to the Collection + Period Codes, the Collection + Period Codes Variants will overrule the Collection Variants. If Master is only connected to the Collection, the Matrix will be limited by the Variants of the Master Relation of the Collection.
 - It will not show Colors (Lines in the Matrix) if the Y-Axis of the Collection Master Relations has a "blocked" **Status Code**.
 - It will not show Colors (Lines in the Matrix) of the Master that have a "blocked" **Status Code**.

Impact – Example 8

→ Option 1 or 2

→ Entering an **Order Type** in the Sales-/Purchase Header with a checkmark in **Samples**

- Lookup in **No.** on the Line will show ALL Masters related to the Collection No, in the **Sample Master Relations** and Masters related to the **Sample Delivery Periods**
- Rest depends on the other settings in the **Order Type**, but it will look at the **Sample Master Relations** and the **Sample Delivery Periods**

The screenshot shows a software interface titled "Order Type Card". At the top, the word "SAMPLES" is displayed. Below it are two dropdown menus labeled "Related" and "Automate". A section titled "General" is expanded, showing a "Collection Mgt." section. This section contains three fields: "Collection No." with a dropdown menu showing "SAMPLES", "Limit Matrix to Specified Period" with a toggle switch that is turned on, and "Sample" with a dropdown menu showing "None". The "Delivery Period" and "Delivery Period Handling" fields are also visible but not highlighted.