



WHITE PAPER

TRIMIT Drag and Drop 23.1

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

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INTRODUCTION

TRIMIT Drag and Drop enables users to connect **Pictures** quick and easy to Masters, Items, VarDim Types, VarDim Type Options, etc.

It also enables users to connect **Attachments** quick and easy to all kind of documents.

Pictures that you want to import to TRIMIT/BC by using **TRIMIT Drag and Drop** functionality can be of extension: .bmp, .jpg, .ai, .jpeg, .png, .pdf, .emf, .ico, .tiff, .gif or .wmf

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 23.1 for Business Central W1 BC22.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 23.1**, which is based on Microsoft Dynamics 365 Business Central 2023 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT Drag & Drop contains the following objects:

The pages **6036850** *trm Drag and Drop Factbox*

The codeunits **6027181** *trm Drag And Drop Handling*

And there is a special ControlAddIns *trm_File_Drag_and_Drop.zip*

The **TRIMIT Drag and Drop** FactBox is available in many objects to connect **Pictures** and/or **Attachments**. It will not be shown by default: you need to add the FactBox to the page via **Personalization**.

MASTER RELATED

Additional Comment Card List/Card

Item Card/List

Master Card/List

Measurement Chart Header

Picture List

Sustainability Lines

VarDim Type List/Card

VarDim Type Variant Options

PURCHASE RELATED

Blanket Purchase Order List/Card

Vendor List/Card

Purchase Order List/Card

Purchase Return Order List/Card

SALES RELATED

Blanket Sales Order List/Card

Complaint Order List/Card

Customer List/Card

Posted Credit Memo List/Card

Posted Sales Invoices List/Card

Sales Order List/Card

Sales Quote List/Card

Sales Return Order List/Card

If you might need it in other pages/lists as well; just let us know.

CONNECT PICTURES

TO VARDIM TYPE AND VARDIM TYPE VARIANT OPTIONS

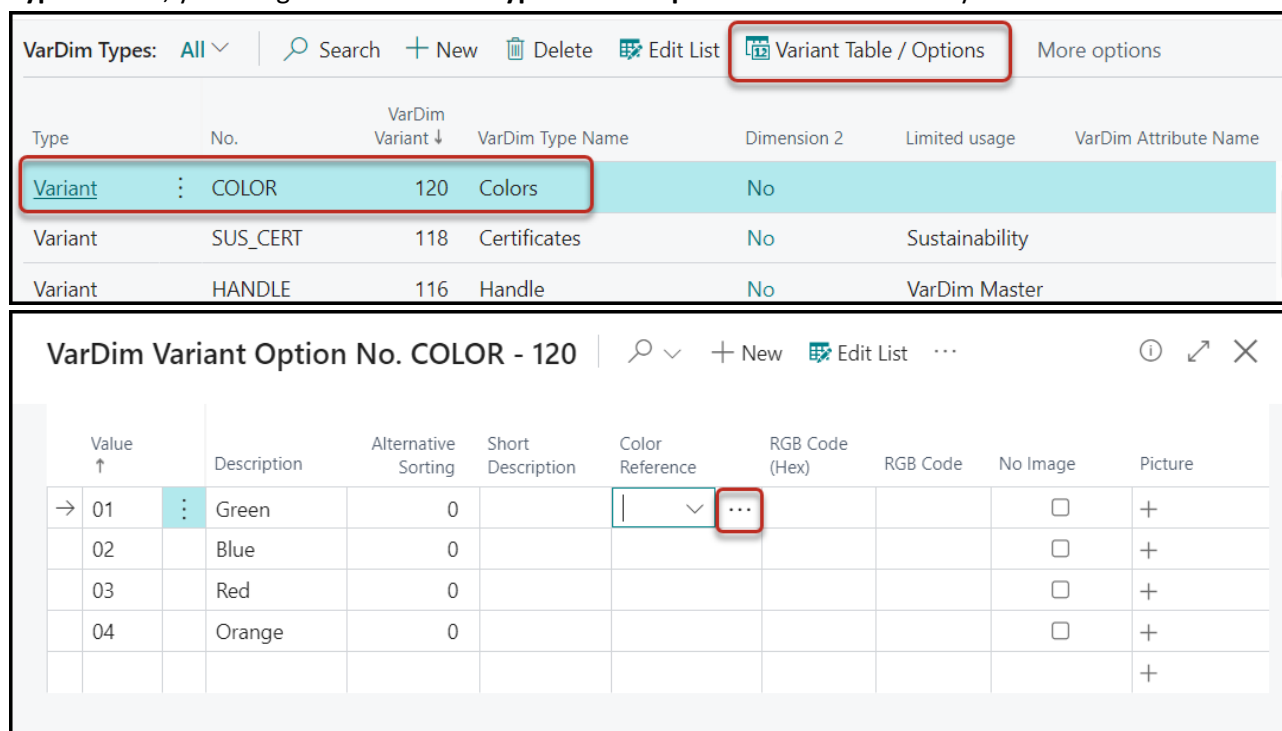
Especially in a VarDim Type that represents a Color Table, you can use the **Drag and Drop** FactBox to connect the right pictures to the right Values, although there are also other ways to connect color-related pictures.

USING COLOR REFERENCE

You can use the **Color References**, for which we already created lists for three Types:

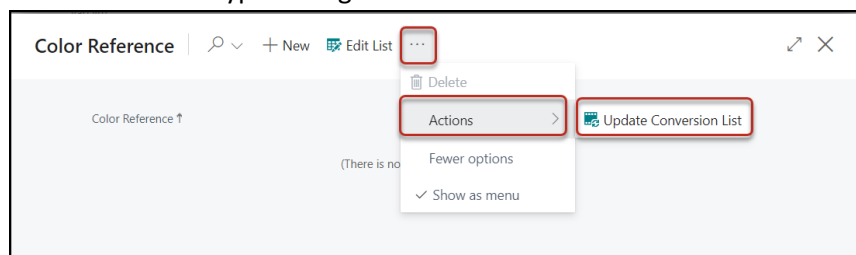
- RGB Color
- Pantone Numbers
- RAL Color

In the **VarDim Type** (via **Design, VarDim Types** in several TRIMIT Profiles or via **Search VarDim Types**) of **Type Variant**, you can go to the **VarDim Type Variant Options** for the Values of your Colors.



The screenshot shows the 'VarDim Types' interface. At the top, there's a search bar and buttons for 'New', 'Delete', 'Edit List', and 'Variant Table / Options' (highlighted with a red box). Below this is a table with columns: Type, No., VarDim Variant, VarDim Type Name, Dimension 2, Limited usage, and VarDim Attribute Name. The first row is highlighted with a red box and contains: Variant, COLOR, 120, Colors, No, and Sustainability. Below this table is a section titled 'VarDim Variant Option No. COLOR - 120'. It contains a table with columns: Value, Description, Alternative Sorting, Short Description, Color Reference, RGB Code (Hex), RGB Code, No Image, and Picture. The first row of this table is highlighted with a red box and contains: 01, Green, 0, , , , , , and +. The 'Color Reference' column in the first row has a dropdown menu with a red box around the '...' button.

If you drill-down to the **Color References**, you can use an Action **Update Conversion List**, to create one of the three Types of Color References – but you can use this Action 3 times in a row, if you want all the three **Color Reference** Types being created:



The screenshot shows the 'Color Reference' interface. At the top, there's a search bar and buttons for 'New', 'Edit List', and '...' (highlighted with a red box). Below this is a section titled 'Color Reference'. It contains a table with columns: Color Reference, Alternative Sorting, Short Description, Color Reference, RGB Code (Hex), RGB Code, No Image, and Picture. The first row of this table is highlighted with a red box and contains: , , , , , , , and +. The 'Color Reference' column in the first row has a dropdown menu with a red box around the '...' button. The dropdown menu is open, showing options: 'Delete', 'Actions', 'Fewer options', and 'Show as menu'. The 'Actions' option is highlighted with a red box, and the 'Update Conversion List' action is visible in the background.

i

☒ RGB Selection

☐ PANTONE Selection

☐ RAL Selection

OK

Cancel

I.e., for **RGB Selection**, a list of **Color References** and **RGB Codes** will be created with their Image:

Color Reference				
Color Reference ↑		RGB Code	Image	
RGB alice blue		240,248,255		
RGB antique white		250,235,215		
RGB aqua		0,255,255		
→ RGB aqua marine	:	127,255,212		
RGB azure		240,255,255		
RGB beige		245,245,220		
RGB bisque		255,228,196		
RGB Black		0,0,0		
RGB blanched almond		255,235,205		
RGB Blue		0,0,255		
RGB blue violet		138,43,226		
RGB brown		165,42,42		

OK

Cancel

Clicking **OK** while standing on the correct **Color Reference**, will fill the **Color Reference**, **RGB Code (Hex)** (not in page by default, you can add it via **Personalize**), **RGB Code** and **Picture** (with the **Image** of Color Reference) in the VarDim Type Variant Option.

VarDim Variant Option No. COLOR - 120									
Value ↑		Description	Alternative Sorting	Short Description	Color Reference	RGB Code (Hex)	RGB Code	No Image	Picture
→ 01	:	Green	0		RGB aqua marine	#7FFFD4	127,255,212	☐	
02		Blue	0					☐	+
03		Red	0					☐	+
04		Orange	0					☐	+

NOTE

There are many lists to find on the Internet for the **Pantone** numbers.

For the **Pantone Selection** in TRIMIT, we created a list based on a list from one of our Customers.

Using the **Color Reference** can be the best way to connect Pictures to your Colors, if you also refer this way to your Vendors or Manufacturers when mentioning a specific Color.

USING RGB CODE OR RGB CODE(HEX)

Instead of using the **Color Reference**, you can also use the **RGB Code** or the **RGB Code (Hex)** to automatically get the right color picture connected to a **Value** of a VarDim Type.

I.e., if **RGB Code** is 0,0,0 it will also automatically determine the **RGB Code (Hex)** and show the right **Black Picture**.

VarDim Variant Option No. COLOR - 120							
Value ↑	Description	Short Description	Color Reference	RGB Code (Hex)	RGB Code	No Image	Picture
01	Green		RGB aqua marine	#7FFFD4	127,255,212	☐	
02	Blue					☐	+
03	Red					☐	+
04	Orange					☐	+
→ 05	Black			#000000	0,0,0	☐	

Or entering **RGB Code (Hex)** #632289 will also automatically determine the **RGB Code** and show the right purple **Picture**.

VarDim Variant Option No. COLOR - 120							
Value ↑	Description	Short Description	Color Reference	RGB Code (Hex)	RGB Code	No Image	Picture
01	Green		RGB aqua marine	#7FFFD4	127,255,212	☐	
02	Blue					☐	+
03	Red					☐	+
04	Orange					☐	+
05	Black			#000000	0,0,0	☐	
→ 06	Purple			#632289	99,34,137	☐	

Using the **RGB Code** or the **RGB Code (Hex)** can be the best way to connect Pictures to your Colors, if you also refer this way to your Vendors or Manufacturers when mentioning a specific Color.

USING DRAG AND DROP VIA THE VARDIM TYPE CARD

If you already have Pictures for you Colors and want to connect them to the right VarDim Variant Option, you can use the **Drag and Drop** functionality.

Therefore, you need to add the FactBox **Drag & Drop** to the page of the VarDim Type Card by using **Personalization**.

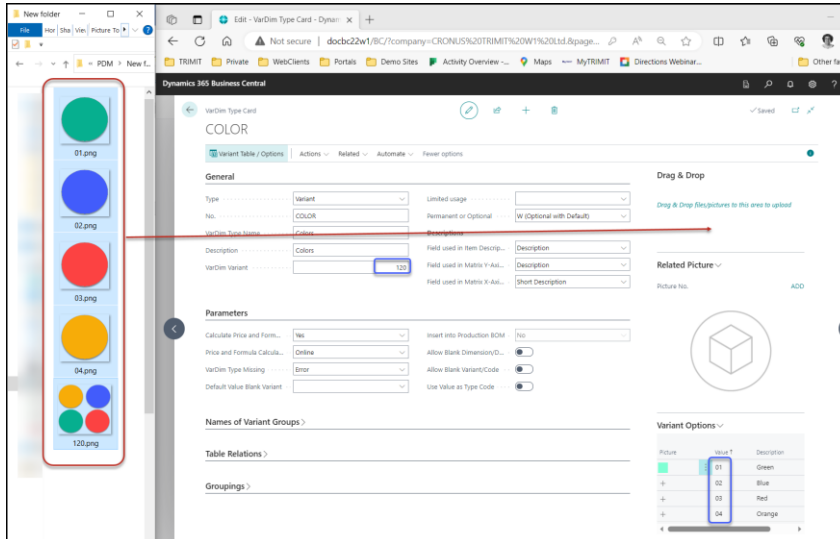
In this scenario, it is important that the names of the Pictures are the same as the **Values** or the **VarDim Variant** of the VarDim Type.

So, if you have the colors **01, 02, 03, 04**, the Picture names should also be **01.xxx, 02.xxx, 03.xxx, 04.xxx**: the name must be the same as the **Value** in the VarDim Variant Option.

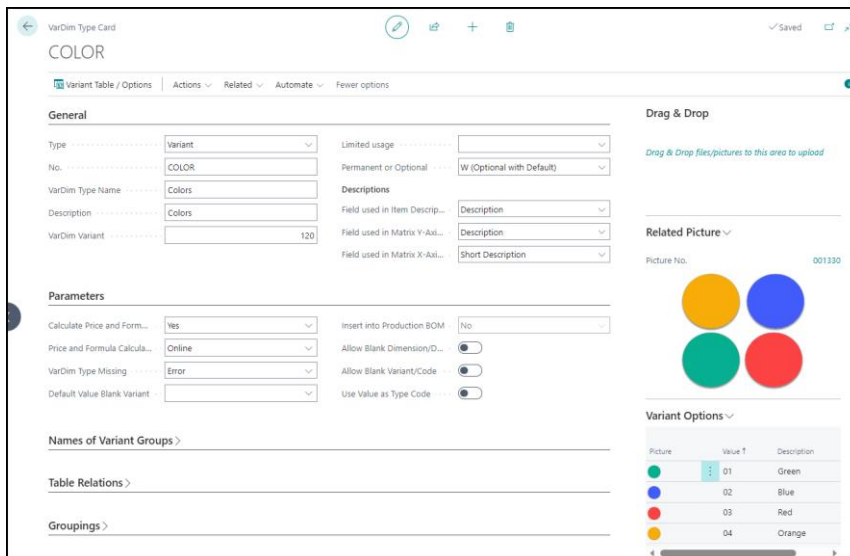
The Picture with the same name as the **VarDim Variant** of the VarDim Type, will be connected to the VarDim Type itself.

So, if you have the VarDim Type with **VarDim Variant 120**, also the overall VarDim Type picture should be named 120.xxx

Then you can select the Pictures from your directory on your server/pc and drop them in the **Drag & Drop** FactBox. This will automatically connect the Pictures to the appropriate **Values**:



This will result in:



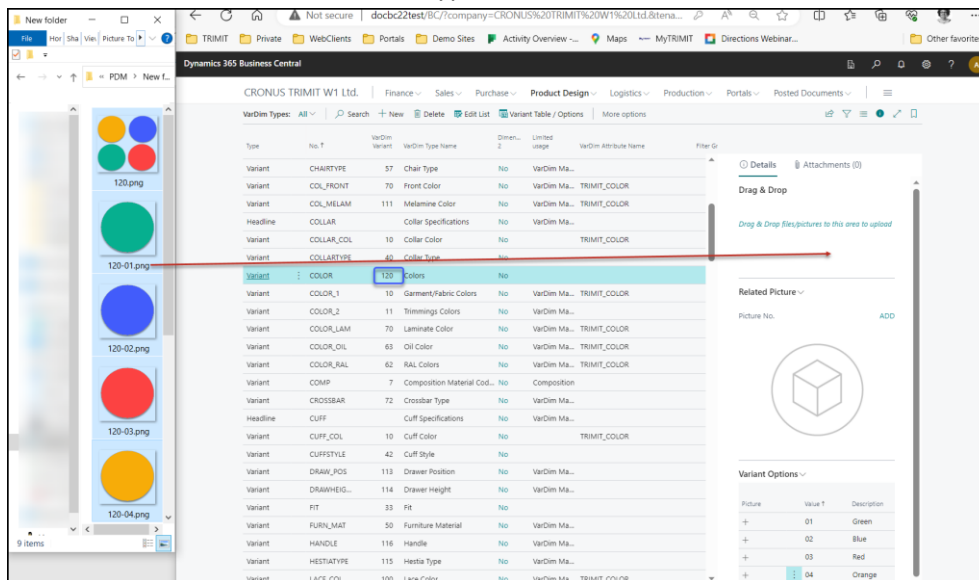
As you can see, it will overrule existing Pictures from i.e., the **Color Reference**.

USING DRAG AND DROP VIA THE VARDIM TYPE LIST

If you already have Pictures for you Colors and want to connect them to the right VarDim Variant Option of a VarDim Type, you can use the **Drag and Drop** functionality.

Therefore, you need to add the FactBox **Drag & Drop** to the page of the VarDim Type List by using **Personalization**.

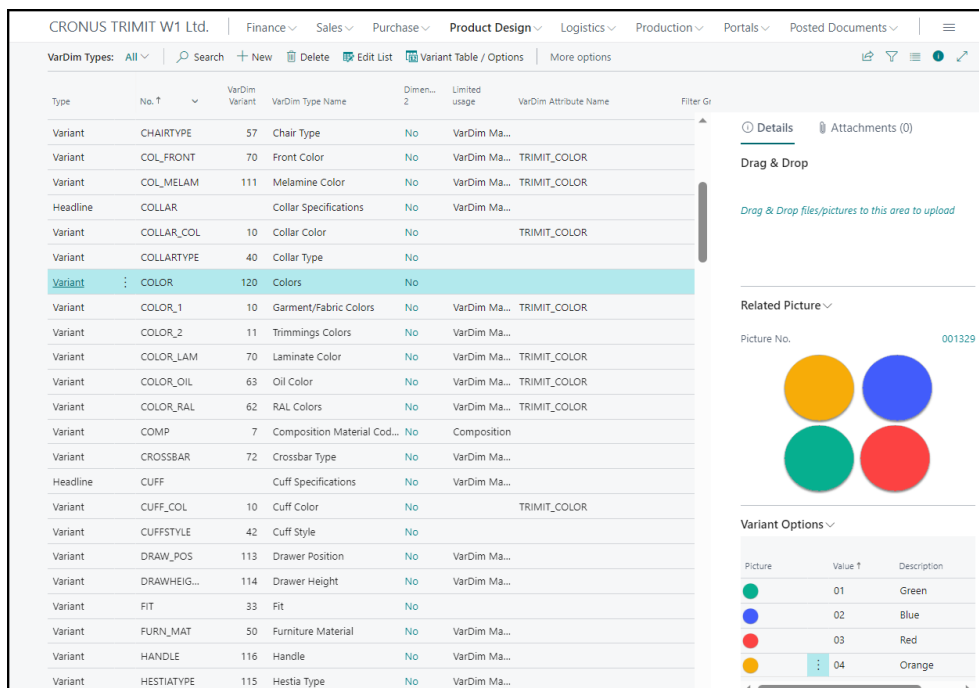
In this scenario, it is important that the names of the Pictures are the same as the **VarDim Variant+Value** or the **VarDim Variant** of the VarDim Type.



The screenshot shows the TRIMIT application interface. On the left, there is a file explorer showing a folder named 'PDM' with several image files: '120-01.png', '120-02.png', '120-03.png', and '120-04.png'. In the center, the 'VarDim Type List' is displayed. The table has columns: Type, No. 1, VarDim Variant, VarDim Type Name, Dimen., Limited usage, and VarDim Attribute Name. The 'COLOR' variant is selected, showing a list of color options. On the right, the 'Drag & Drop' section is visible, with a prompt to 'Drag & Drop files/pictures to this area to upload'. Below this, there is a 'Related Picture' section and a 'Variant Options' table.

Type	No. 1	VarDim Variant	VarDim Type Name	Dimen.	Limited usage	VarDim Attribute Name
Variant	CHAIRTYPE	57	Chair Type	No	VarDim Ma...	
Variant	COL_FRONT	70	Front Color	No	VarDim Ma... TRIMIT_COLOR	
Variant	COL_MELAM	111	Melamine Color	No	VarDim Ma... TRIMIT_COLOR	
Headline	COLLAR		Collar Specifications	No	VarDim Ma...	
Variant	COLLAR_COL	10	Collar Color	No	TRIMIT_COLOR	
Variant	COLLARTYPE	40	Collar Type	No		
Variant	COLOR	120	Colors	No		
Variant	COLOR_1	10	Garment/Fabric Colors	No	VarDim Ma... TRIMIT_COLOR	
Variant	COLOR_2	11	Trimings Colors	No	VarDim Ma...	
Variant	COLOR_LAM	70	Laminate Color	No	VarDim Ma... TRIMIT_COLOR	
Variant	COLOR_OIL	63	Oil Color	No	VarDim Ma... TRIMIT_COLOR	
Variant	COLOR_RAL	62	RAL Colors	No	VarDim Ma... TRIMIT_COLOR	
Variant	COMP	7	Composition Material Cod...	No	Composition	
Variant	CROSSBAR	72	Crossbar Type	No	VarDim Ma...	
Headline	CUFF		Cuff Specifications	No	VarDim Ma...	
Variant	CUFF_COL	10	Cuff Color	No	TRIMIT_COLOR	
Variant	CUFFSTYLE	42	Cuff Style	No		
Variant	DRAW_POS	113	Drawer Position	No	VarDim Ma...	
Variant	DRAWHEIG...	114	Drawer Height	No	VarDim Ma...	
Variant	FIT	33	Fit	No		
Variant	FURN_MAT	50	Furniture Material	No	VarDim Ma...	
Variant	HANDLE	116	Handle	No	VarDim Ma...	
Variant	HESTIATYPE	115	Hestia Type	No	VarDim Ma...	
Variant	LEGE_COL	100	Lege Color	No	VarDim Ma... TRIMIT_COLOR	

This will result in:



The screenshot shows the TRIMIT application interface after the Drag & Drop operation. The 'COLOR' variant is selected in the 'VarDim Type List'. The 'Drag & Drop' section on the right now shows four color options: Green, Blue, Red, and Orange. The 'Variant Options' table is updated with the following data:

Picture	Value 1	Description
01	Green	
02	Blue	
03	Red	
04	Orange	

You can Drag and Drop many Variant related Pictures at the same time. If the name of the Picture is based on the **VarDim Variant** of the VarDim Type (in the above example 120) and the **Value** (in the above example 01, 02, 03, 04) of the Variant, it will be connected to the right VarDim Type/Variant Option. So, in the example above 120-01, 120-02, 120-03 and 120-04 will be connected to the Colors 01, 02, 03, 04 of VarDim Type with **VarDim Variant 120**.

TO MASTERS AND MASTER/COLORS

Connecting Pictures by using **Drag and Drop** to the Masters and the Variant 1 Values of the Masters works the same way as connecting Pictures to the VarDim Type and VarDim Type Variant Options.

USING DRAG AND DROP VIA THE MASTER CARD

If you already have Pictures for you Masters and Master/Colors, and want to connect them to the right Master, you can use the **Drag and Drop** functionality.

Therefore, you can add the FactBox **Drag & Drop** to the Master Card by using **Personalization**.

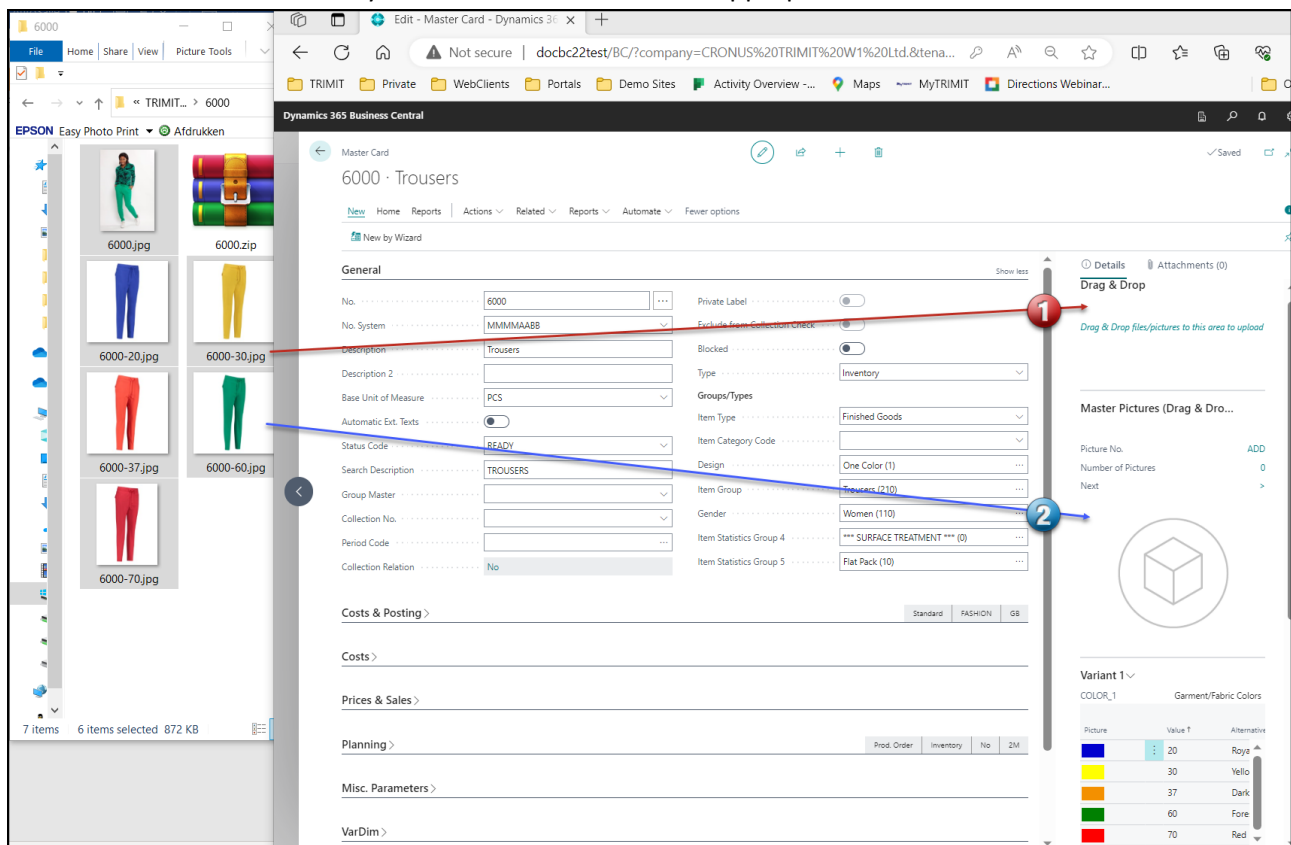
In this scenario, it is important that the names of the Pictures are the same as the **Master** and/or the **Variant 1 Values** (Colors) of the Master and that you drop it in FactBox **Drag & Drop (1)**.

So, if you have the Master **6000** and the Colors **20, 30, 37, 60, 70**, the Picture names should also be **20.xxx** (or **6000-20.xxx**), **30.xxx** (or **6000-30.xxx**), **37.xxx** (or **6000-37.xxx**), **60.xxx** (or **6000-60.xxx**), **70.xxx** (or **6000-70.xxx**): the name must be the same as the **Value** in the VarDim Variant Option or the **Master-Value**.

The Picture with the same name as the **Master**, will be connected to the Master itself.

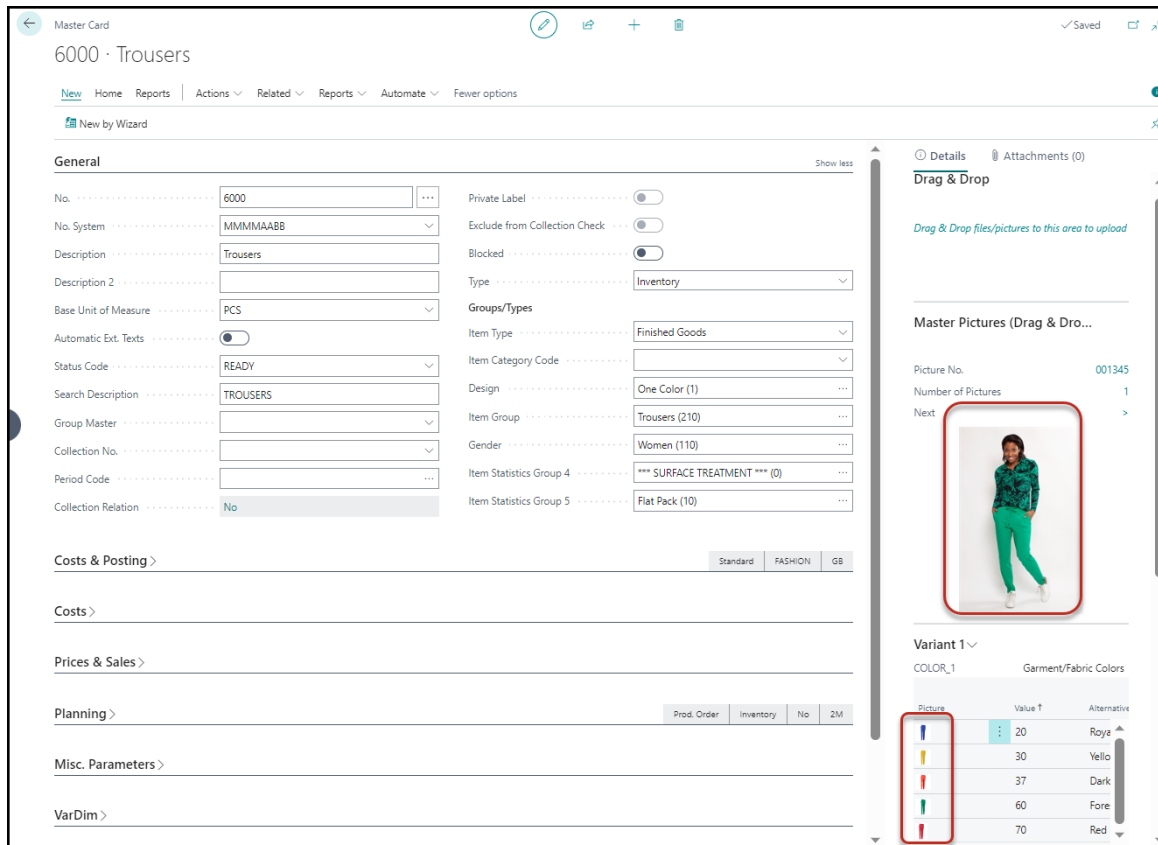
The Pictures with the same name as the **Master-Value** will be connected to the Variant 1 Values of the Master.

Then you can select the Pictures from your directory on your server/pc and drop them in the **Drag & Drop** FactBox. This will automatically connect the Pictures to the appropriate **Values**:

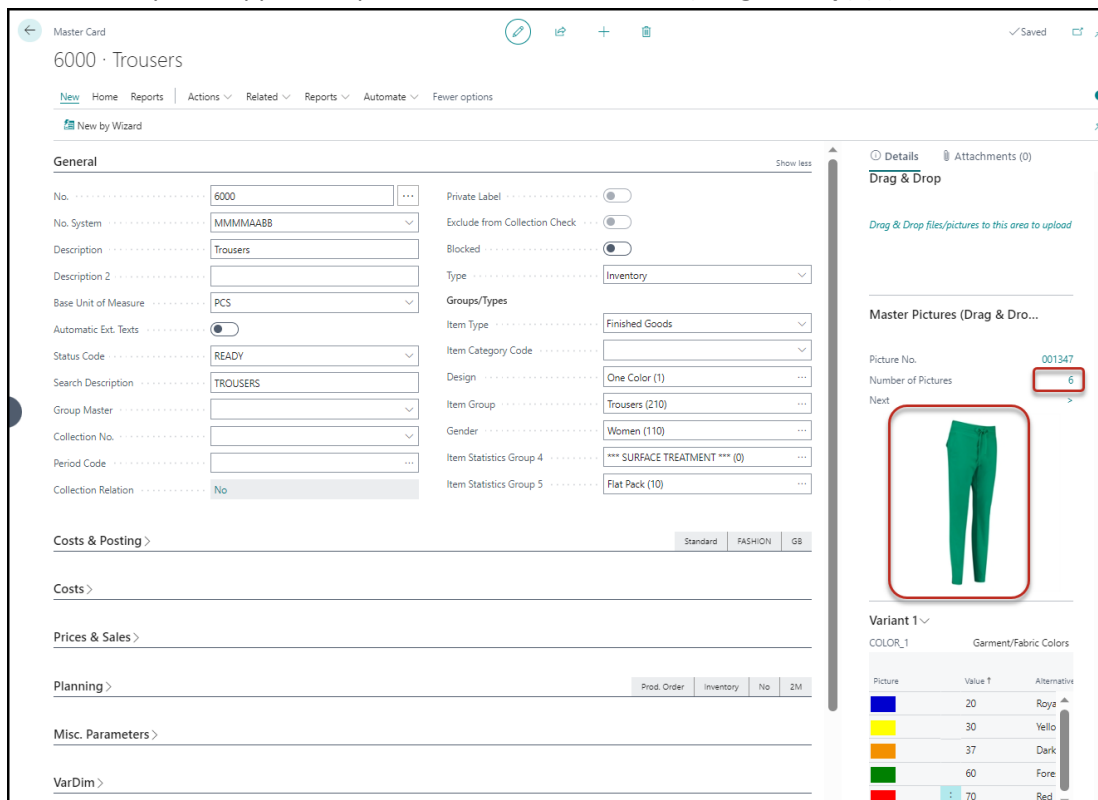


The screenshot displays the Dynamics 365 Business Central interface for a Master Card titled '6000 - Trousers'. On the left, a file explorer shows a directory structure with images named '6000.jpg', '6000-20.jpg', '6000-30.jpg', '6000-37.jpg', '6000-60.jpg', and '6000-70.jpg'. The main area shows the Master Card details with fields for No., No. System, Description, Base Unit of Measure, Status Code, Search Description, Group Master, Collection No., Period Code, and Collection Relation. The right sidebar shows the 'Drag & Drop' factbox with a 'Master Pictures (Drag & Drop...)' section. A red arrow labeled '1' points to the 'Drag & Drop' factbox, and a blue arrow labeled '2' points to the 'Master Pictures (Drag & Drop...)' section.

Drag & Drop (1) will result in:

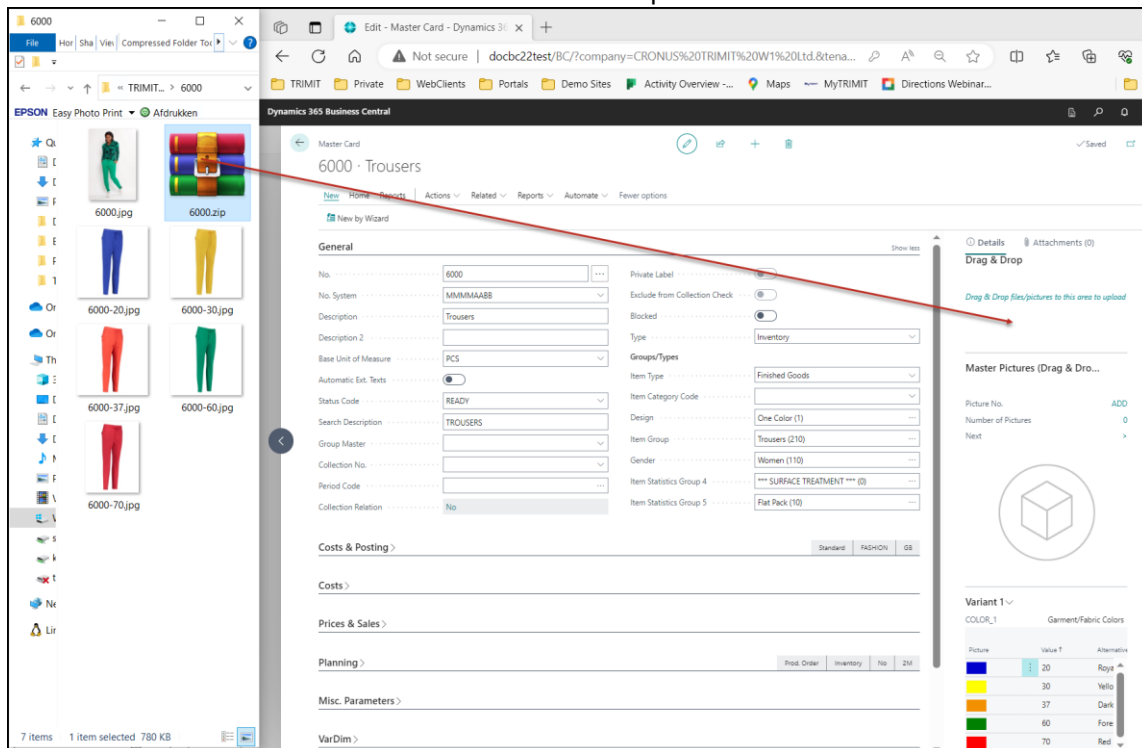


However, if you dropped the pictures in **Master Pictures (Drag & Drop) (2)** it will result in:

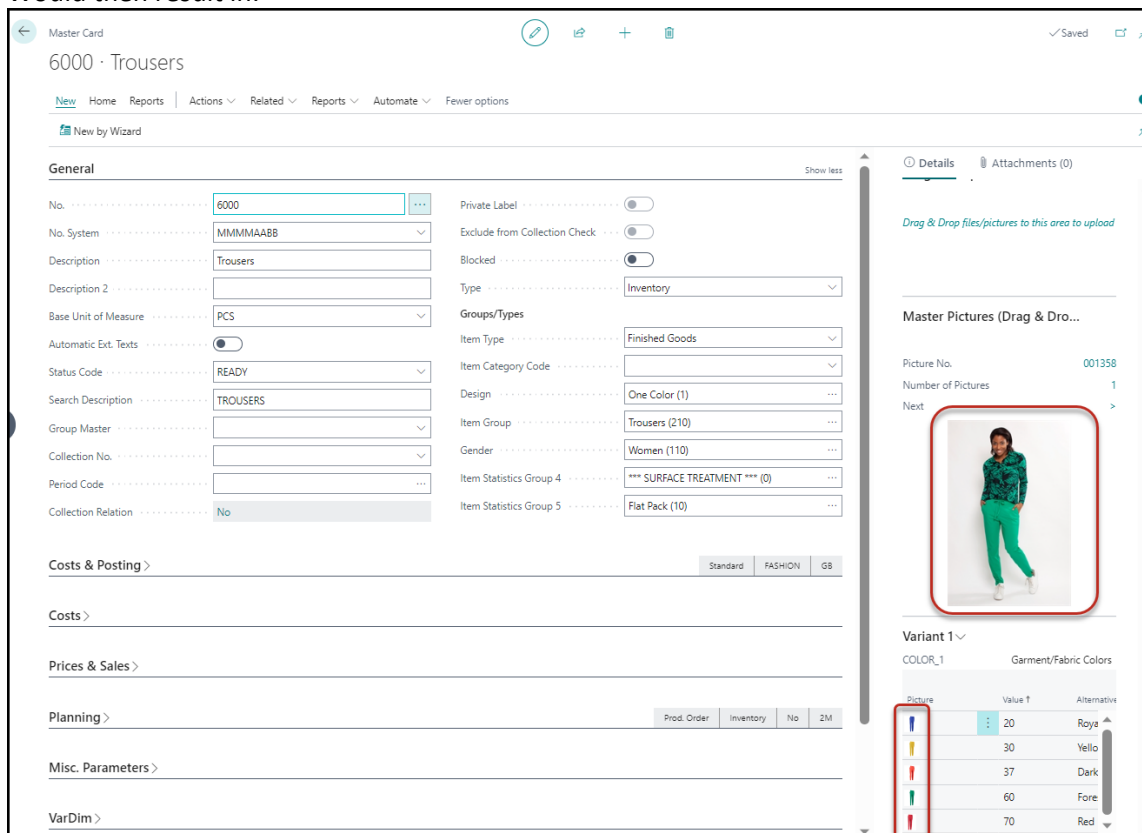


All six pictures have been connected to the Master itself – not to the Variants, even though the name would implicate it.

Even if you would create a .zip file with the six Pictures and would drop it in the **Drag & Drop** FactBox, the system is able to recognize the individual Pictures and connect them to the Master or the Variant 1 Values based on the names of the individual Pictures in the zip-file.



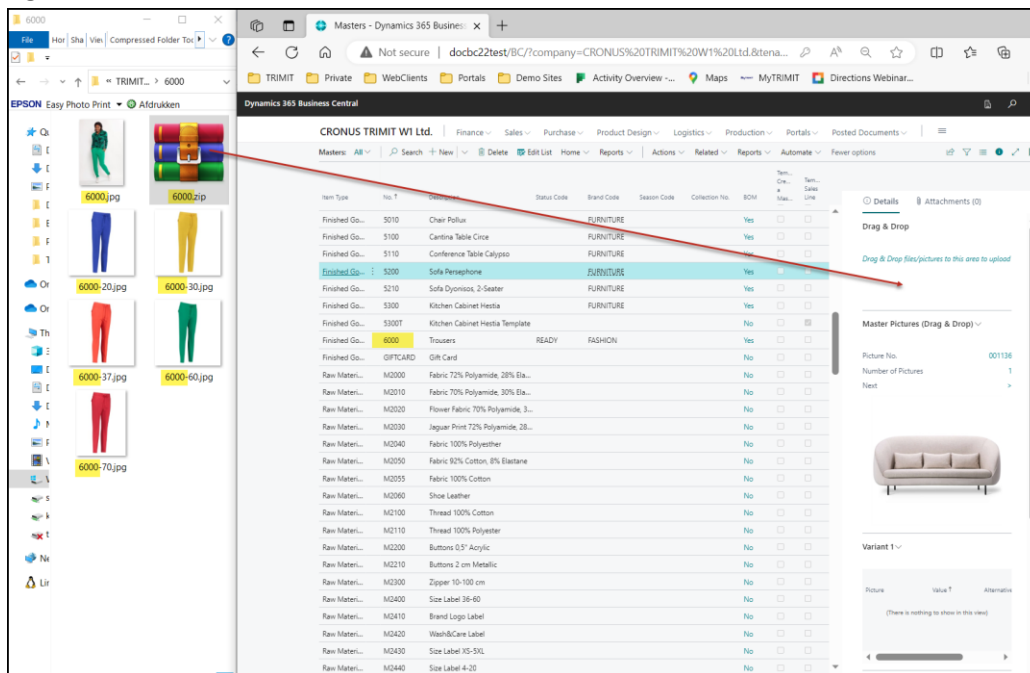
Would then result in:



USING DRAG AND DROP VIA THE MASTER LIST

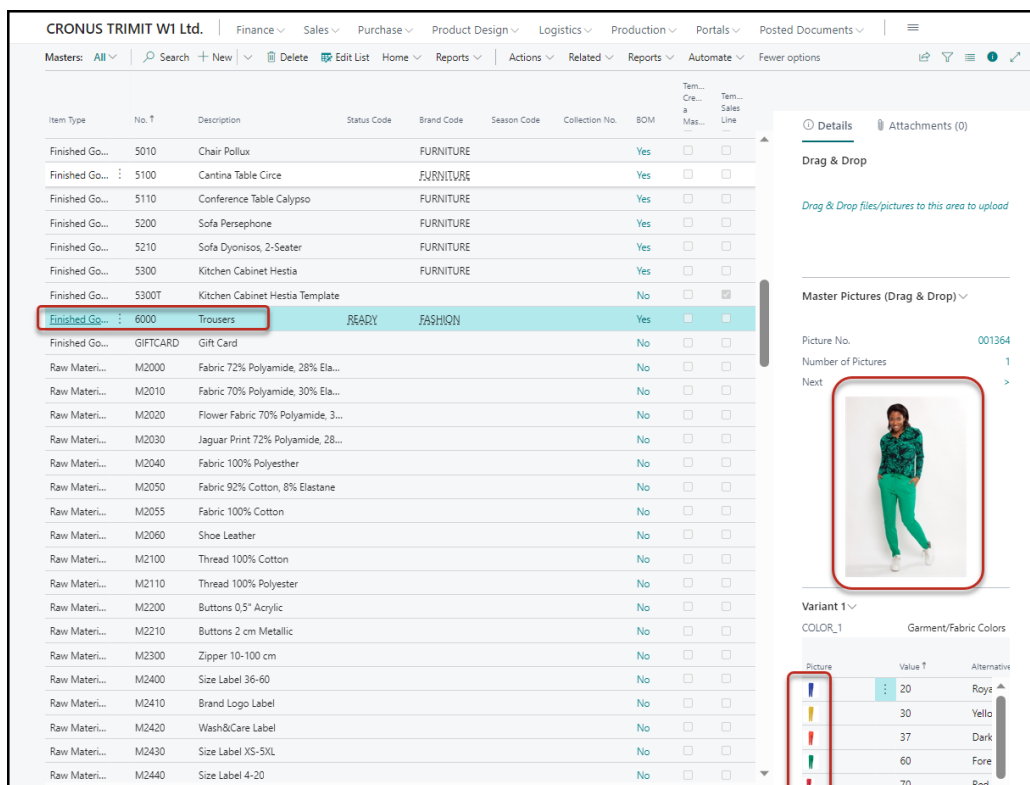
If you create the names of your Pictures based on the rules **MMMM** or **MMMM-VV** where **MMMM** stands for the Master Number and **VV** stands for the Variant 1 Values of the Master, the Pictures can be connected to the appropriate Master or Master/Variant 1 Value.

Even when standing on any Master in the List, the **MMMM** or **MMMM-VV** Pictures will be related to the right Master Variant 1 Value of the Master. I.e.,



Item Type	No. 1	Description	Status Code	Brand Code	Season Code	Collection No.	BOM	Term. Cre. a	Term. Sales Line
Finished Go...	5010	Chair Pollux		FURNITURE			Yes		
Finished Go...	5100	Cantina Table Circe		FURNITURE			Yes		
Finished Go...	5110	Conference Table Calypso		FURNITURE			Yes		
Finished Go...	5200	Sofa Persephone		FURNITURE			Yes		
Finished Go...	5210	Sofa Dyonisos, 2-Seater		FURNITURE			Yes		
Finished Go...	5300	Kitchen Cabinet Hestia		FURNITURE			Yes		
Finished Go...	5300T	Kitchen Cabinet Hestia Template					No		
Finished Go...	6000	Trainers	READY	FASHION			Yes		
Finished Go...	GIFTCARD	Gift Card					No		
Raw Materi...	M2000	Fabric 72% Polyamide, 28% Ela...					No		
Raw Materi...	M2010	Fabric 70% Polyamide, 30% Ela...					No		
Raw Materi...	M2020	Flower Fabric 70% Polyamide, 3...					No		
Raw Materi...	M2030	Jaguar Print 72% Polyamide, 28...					No		
Raw Materi...	M2040	Fabric 100% Polyester					No		
Raw Materi...	M2050	Fabric 92% Cotton, 8% Elastane					No		
Raw Materi...	M2055	Fabric 100% Cotton					No		
Raw Materi...	M2060	Shoe Leather					No		
Raw Materi...	M2100	Thread 100% Cotton					No		
Raw Materi...	M2110	Thread 100% Polyester					No		
Raw Materi...	M2200	Buttons 0.5" Acrylic					No		
Raw Materi...	M2210	Buttons 2 cm Metallic					No		
Raw Materi...	M2300	Zipper 10-100 cm					No		
Raw Materi...	M2400	Size Label 36-60					No		
Raw Materi...	M2410	Brand Logo Label					No		
Raw Materi...	M2420	Wash&Care Label					No		
Raw Materi...	M2430	Size Label XS-SXL					No		
Raw Materi...	M2440	Size Label 4-20					No		

Would result in:



Picture	Value 1	Alternative
20	Yellow	
30	Dark	
37	Fore	
60	Red	
70		

SEVERAL PICTURES TO A MASTER

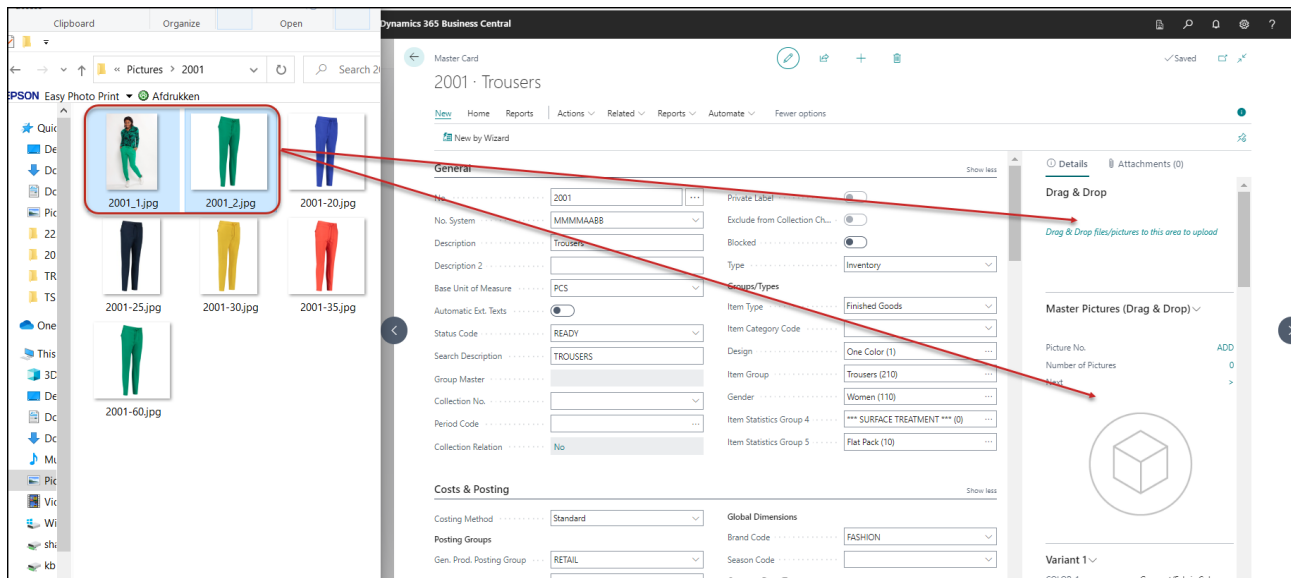
We have seen the Picture format **MMMM** for the Master, and **MMMM-VV** for the Variant 1 Value (usually Color Code) of the Master.

It is also possible to connect several Pictures to the Master.

In that case, the Picture format needs to be **MMMM_9** where MMMM stands for the Master and the _9 stands for _1 to _9 for up to 9 different Pictures related to the Master.

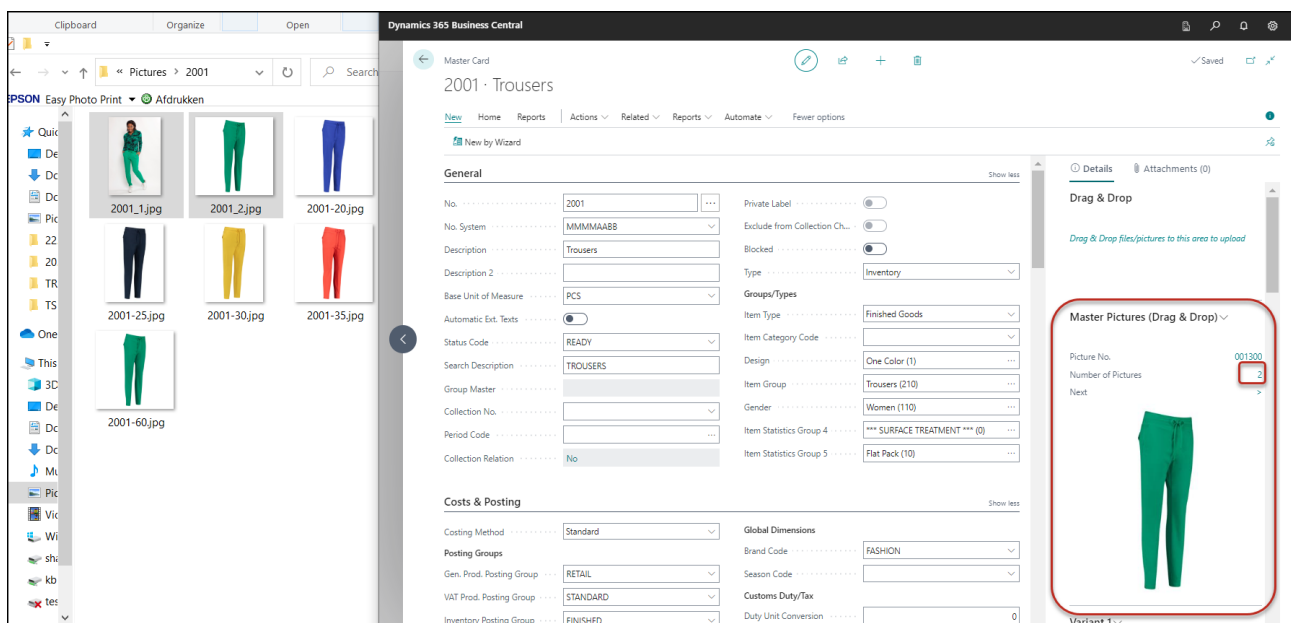
This is also the way imported Pictures in **TRIMIT PIR** (Product Information Repository) will be named when importing them.

Now I can select the Pictures and drag them to the FactBox **Drag & Drop**



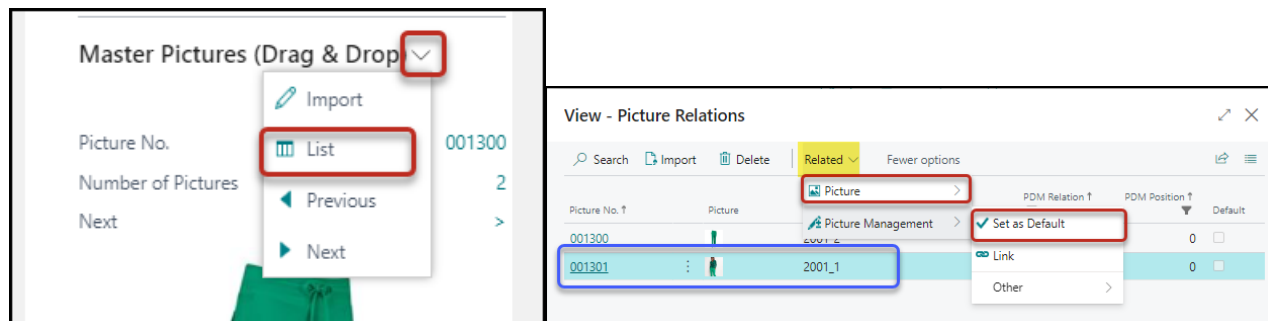
If it is for the **Master Pictures**, you can drop it in the **Drag & Drop** FactBox or in the **Master Pictures (Drag & Drop)** FactBox. The result will be the same:

The result:

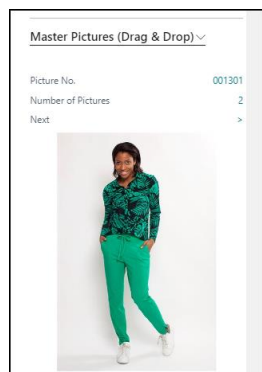


If you added more than 1 Picture to the Master, you need to determine which Picture the **Default** is, and will be printed on several reports if you have dropped them in the **Drag & Drop** FactBox.

If you have dropped them in the **Master Pictures (Drag & Drop)** FactBox, and the Picture name is according to the format **MMMM** – where MMMM stands for the Master Number – this picture will automatically be **Set as Default**.



The Picture set as **Default** will now also be shown in the Master List/Card.



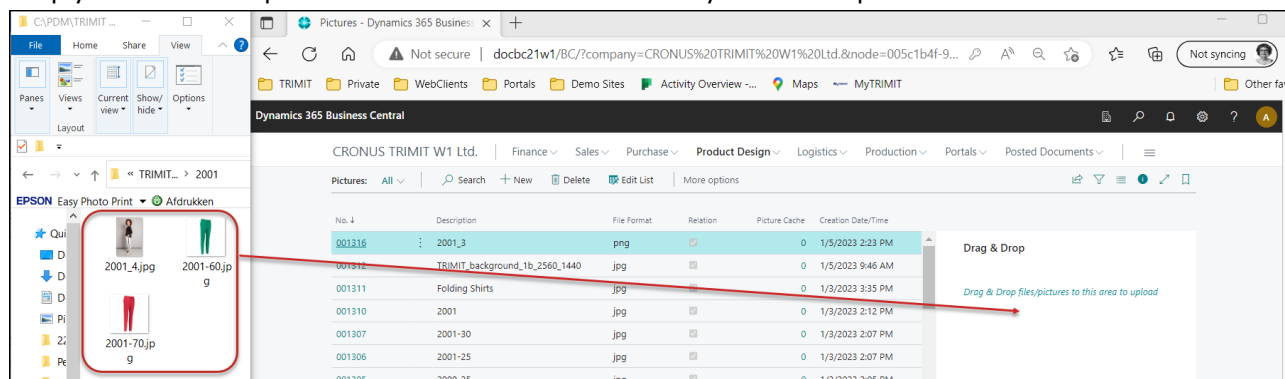
TO PICTURES IN THE PICTURES LIST

Also in the Pictures List, you can add the FactBox **Drag & Drop** and drop pictures.

If the name of the dropped Picture is according to the Master format **MMMM** or **MMMM_9** it will also be connected to the Master.

If the name of the dropped Picture is according to the Master/Variant format **MMMM-VV** or **MMMM-VV_9** it will also be connected to the Master/Variant.

If the name of the dropped Picture is not according the Master format or the Master/Variant format, it will simply be added as a picture in the Pictures list without any Relationship.

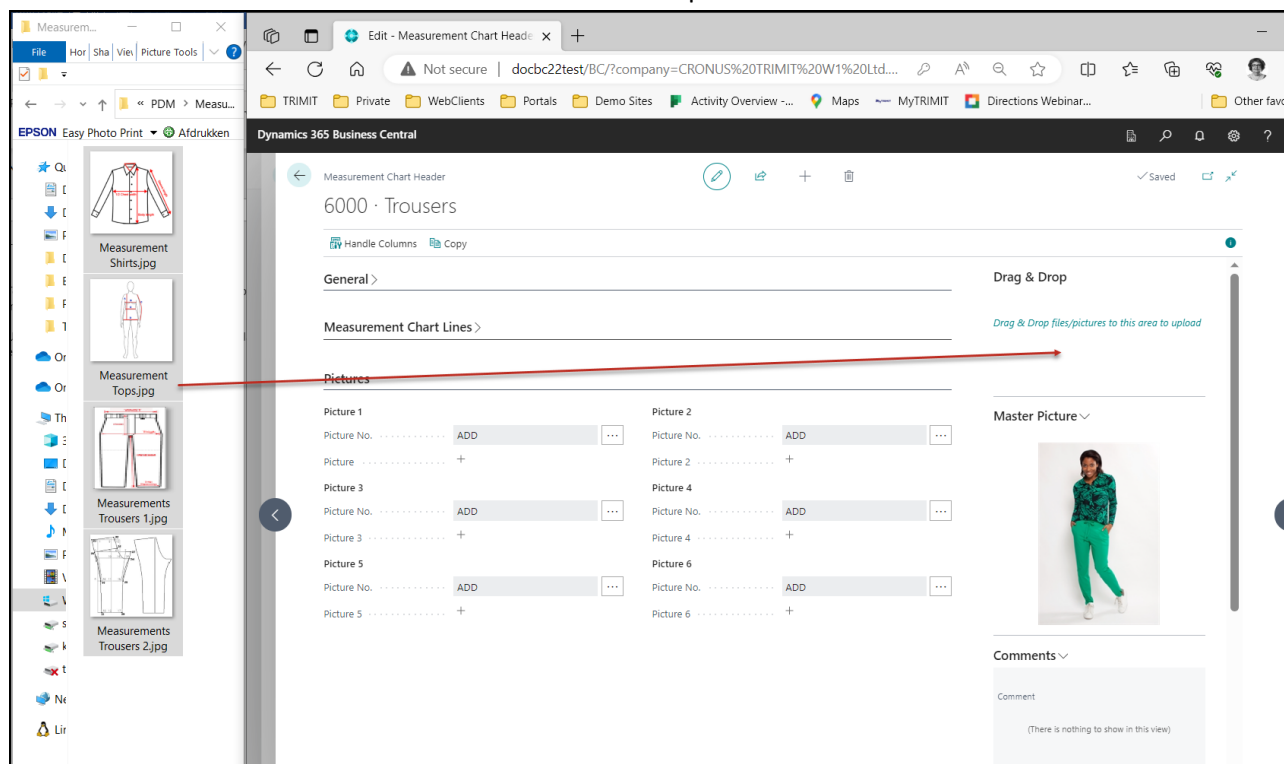


Pictures: All ▾ Search + New Delete Edit List More options					
No. ↓	Description	File Format	Relation	Picture Cache	Creation Date/Time
001319	2001_4	jpg	☒	0	1/10/2023 9:41 AM
001318	2001-60	jpg	☒	0	1/10/2023 9:41 AM
001317	2001-70	jpg	☒	0	1/10/2023 9:41 AM
001316	2001_3	png	☒	0	1/5/2023 2:23 PM
001312	TRIMIT_background_1b_2560_1440	jpg	☒	0	1/5/2023 9:46 AM
001311	Folding Shirts	jpg	☒	0	1/3/2023 3:35 PM
001310	2001	jpg	☒	0	1/3/2023 3:13 PM

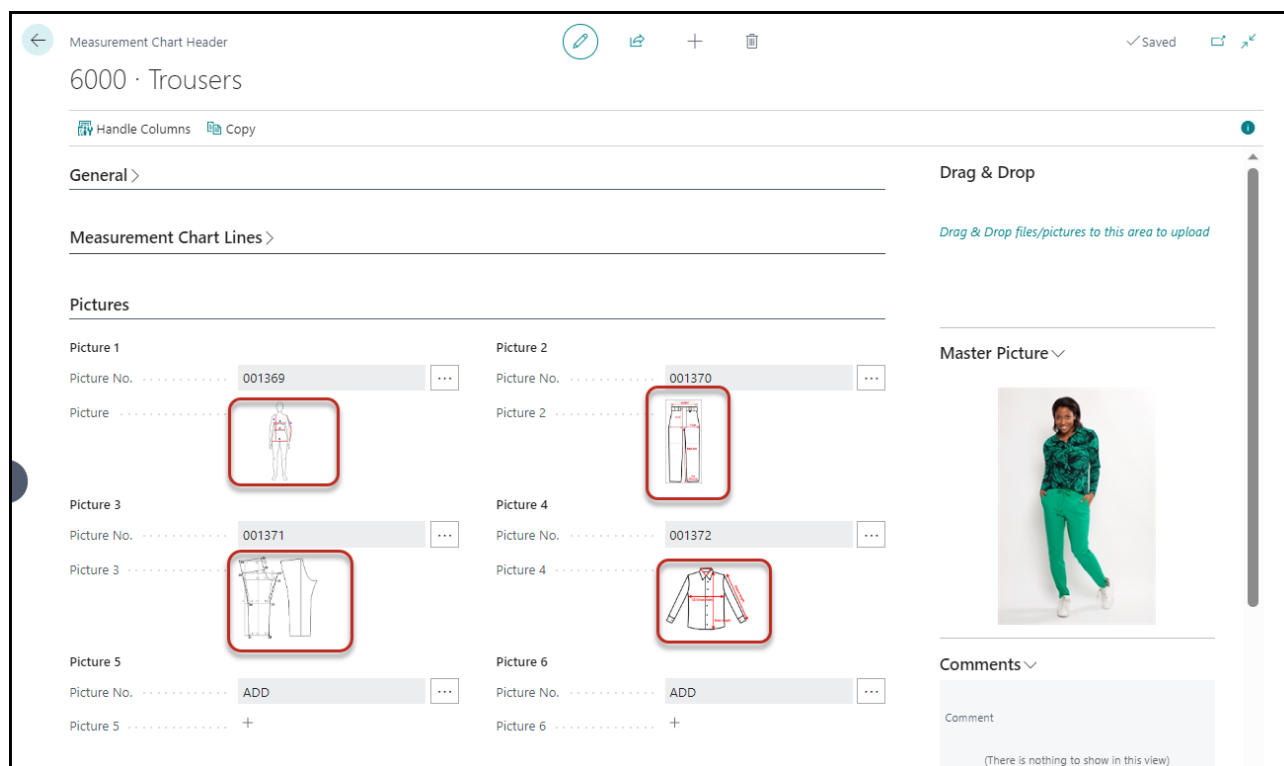
TO MEASUREMENT CHART OF A MASTER OR ITEM

It is also possible to connect more technical Pictures of the Master to a **Measurement Chart**.

There are no rules for the Picture name format for these pictures. I.e.



Will result in:



If **Picture 1** was already filled, new dropped Picture will become the next empty Picture, so it would become **Picture 2**, etc.

TO ADDITIONAL COMMENTS OF A MASTER OR ITEM

Based on some naming conventions, you are also able to add Pictures 1 – 4 to the **Additional Comments** by using the **Drag & Drop** function.

You need to stand in the page of the **Additional Comments**, where you Drag & Drop a Picture.

- Picture Name = **MMMM** (Master Number)
 - o The Picture will be connected to the Additional Comment **Code** you are standing on for the **Master MMMM** as the first empty Picture.
- Picture Name = **MMMM-9** (Master Number-Picture 1 to 4)
 - o The Picture will be connected to the Additional Comment **Code** you are standing on for the **Master MMMM** as the Picture No. 1,2,3 or 4.
- Picture Name = **MMMM-AAAAA** (Master Number-Code of Additional Comment)
 - o The Picture will be connected to the **Master MMMM**, **Code AAAAA** as the first empty Picture.
- Picture Name = **MMMM-AAAAA-9** (Master Number-Code of Additional Comment-Picture 1 to 4)
 - o The Picture will be connected to the **Master MMMM**, **Code AAAAA**, as the Picture No. 1,2,3 or 4.

These naming conventions will only work if there are no “-” (minus sign) or “_” (underscore) in the Master Numbers or in the Codes of the Additional Comments.

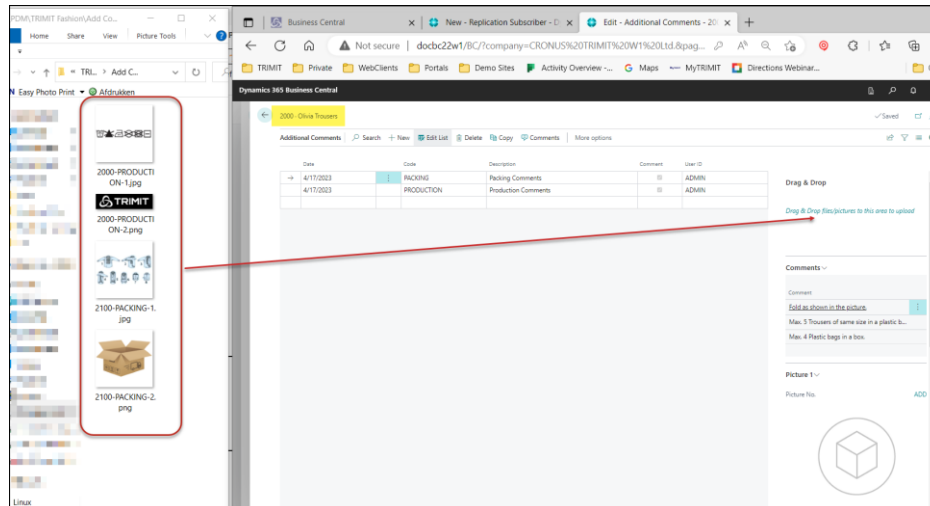
If none of the above-described naming conventions are applicable a dropped Picture will be connected to the current Master and current Additional Comment Code, you are standing on as the first empty picture.

Example:

Suppose I have for **Master 2100** the Additional Comments **Code PACKING** – without Pictures:

2100 - Lily Blouse					
Additional Comments Search + New Edit List Delete Copy Comments More options					
Date	Code	Description	Comment	User ID	
4/17/2023	PRODUCTION	Production Comments	☒	ADMIN	
→ 1/1/2023	PACKING	Packing Comments	☐	ADMIN	

And I am in **Master 2000 Code PACKING**



If I now drop 4 pictures:

1. 2000-PRODUCTION-1
2. 2000-PRODUCTION-2
3. 2100-PACKING-1
4. 2100-PACKING-2

The result will be:

In **Master 2000, Code PRODUCTION**, the first 2 Pictures will be connected:

2000 - Olivia Trousers					
Additional Comments Search + New Edit List Delete Copy Comments More options					
Date	Code	Description	Comment	User ID	
4/17/2023	PACKING	Packing Comments	☒	ADMIN	
→ 4/17/2023	PRODUCTION	Production Comments	☒	ADMIN	

W&C Label: in left seam - 3 cm down fro...

Picture 1

Picture No. 001324



Picture 2

Picture No. 001325



And in **Master 2100**, **Code PACKING**, the last 2 Pictures will be connected – but this will only happen if **Master 2100** already had a **Code PACKING**.

If there is no **Code PACKING** for **Master 2100**, the pictures will be connected to the Master/Code that you were standing on when you dropped the pictures.

2100 - Lily Blouse

Additional Comments

Search

+ New

Edit List

Delete

Copy

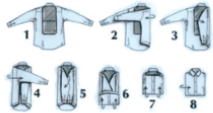
Comments

More options

Date	Code	Description	Comment	User ID
4/17/2023	PRODUCTION	Production Comments	☒	ADMIN
→ 1/1/2023	PACKING	Packing Comments	☐	ADMIN

Picture 1

Picture No. 001326



Picture 2

Picture No. 001327



CONNECT ATTACHMENTS

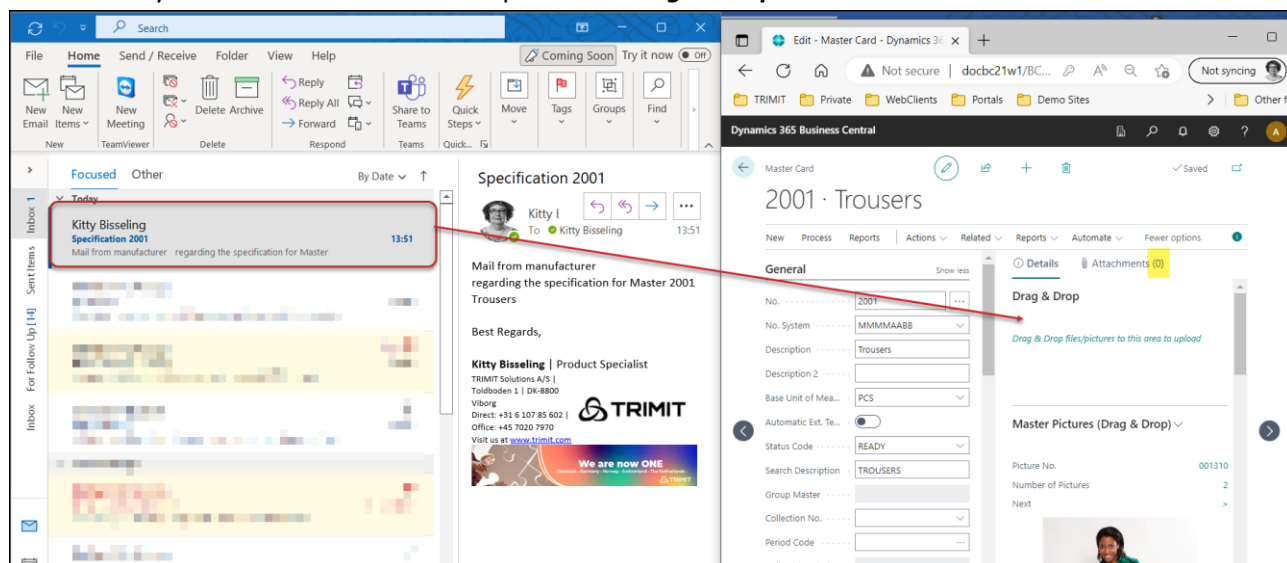
E-MAILS AS ATTACHMENTS

The **Drag & Drop** functionality can also be used to create Attachments to subjects or documents based on an E-Mail.

An Example:

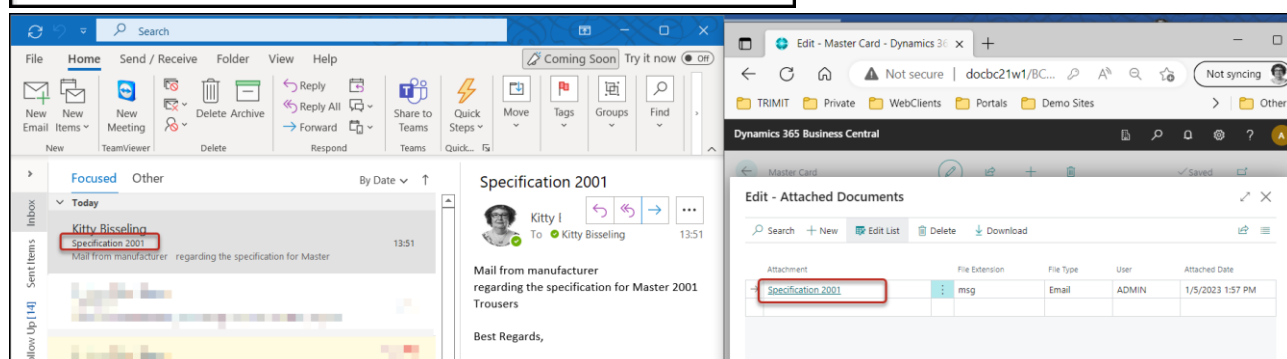
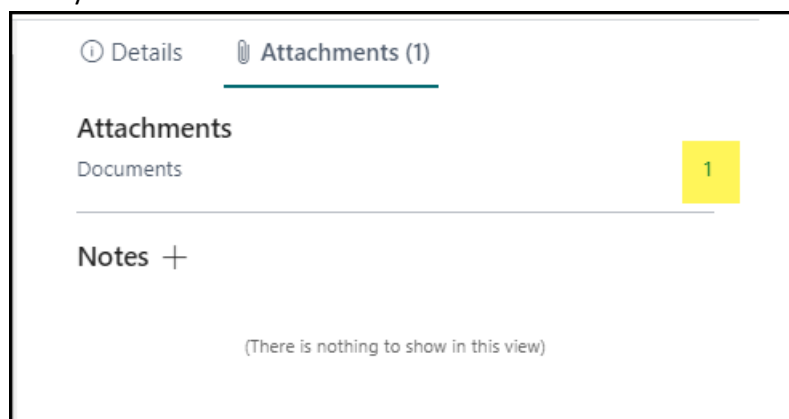
You receive an E-Mail from a Manufacturer regarding a Master.

In that case you select the E-Mail and drop it in the **Drag & Drop** FactBox of the Master.

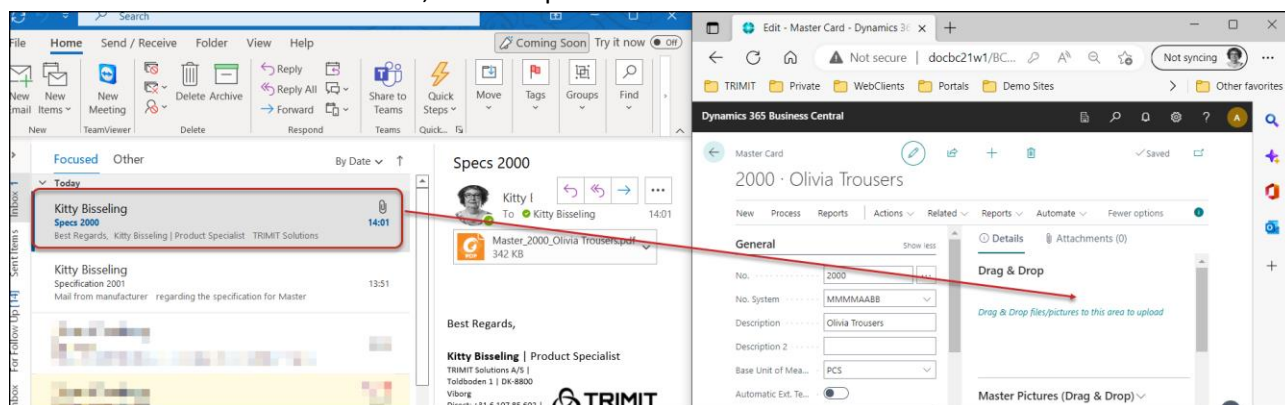


In that case, it will be recognized as an Attachment and not as a Picture as we saw before.

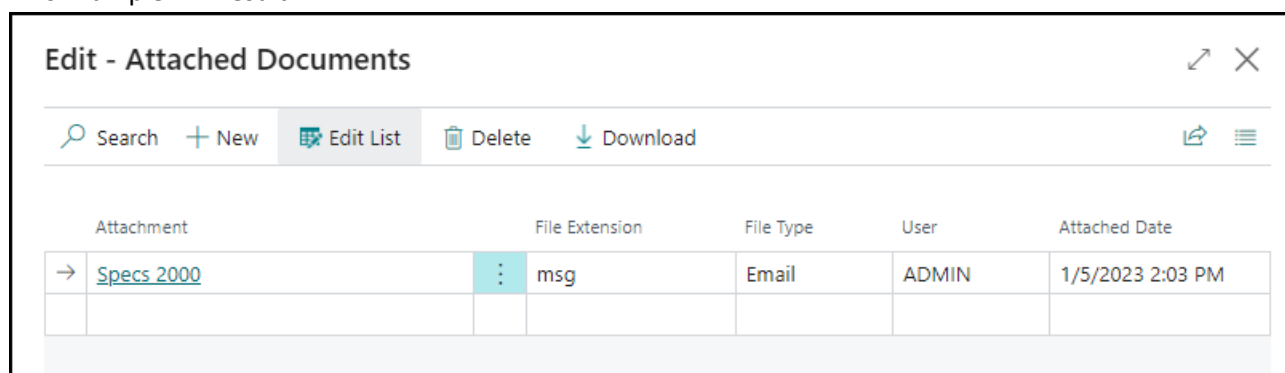
The system will create the Attachment.



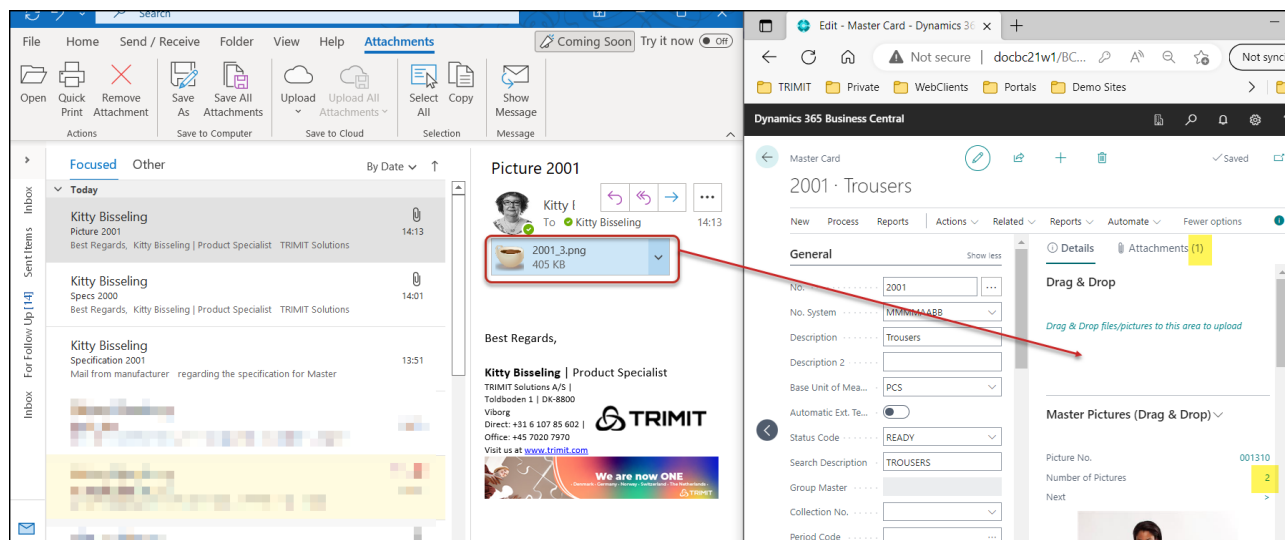
Even if the E-Mail has attachments, it will be part of the Attached Document.

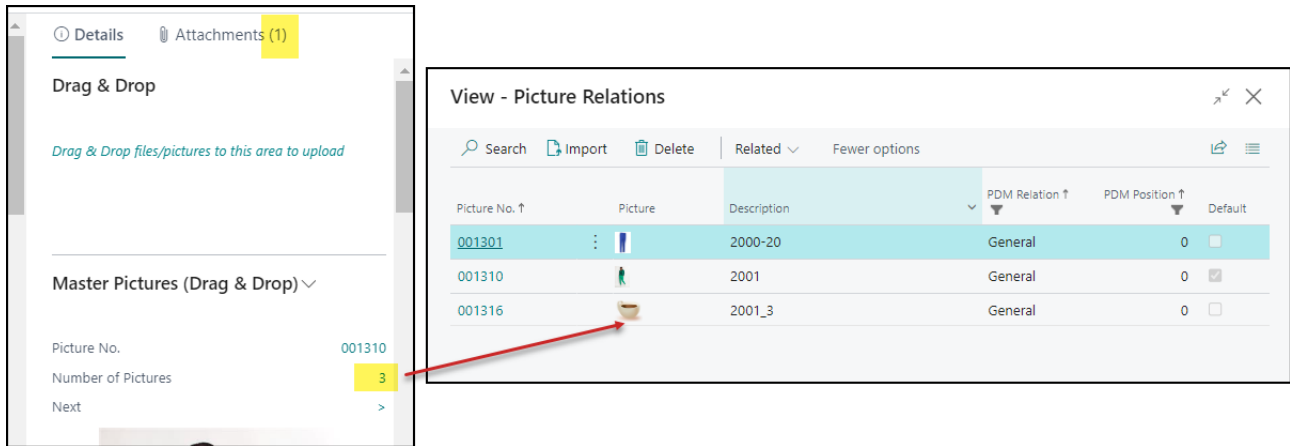


This Example will result in:



If you would take an attachment of an E-Mail and would drop it in the **Drag & Drop** FactBox of the Master (assuming the name is according the **MMMM**, **MMMM_9** or **MMMM-VV** format, it will be connected as a Picture to the Master or the Variant 1 Value (Color). Otherwise, it will be connected as part of the E-Mail as an **Attachment**.





DOCUMENTS AS ATTACHMENTS

You can also use the **Drag & Drop** FactBox in many Documents and other subjects:

Sales Quotes, Orders, Return Orders, Blanket Orders, Posted Invoice, Posted Credit Memo Lists and Cards.

Purchase Orders, Return Orders, Blanket Orders Lists and Cards.

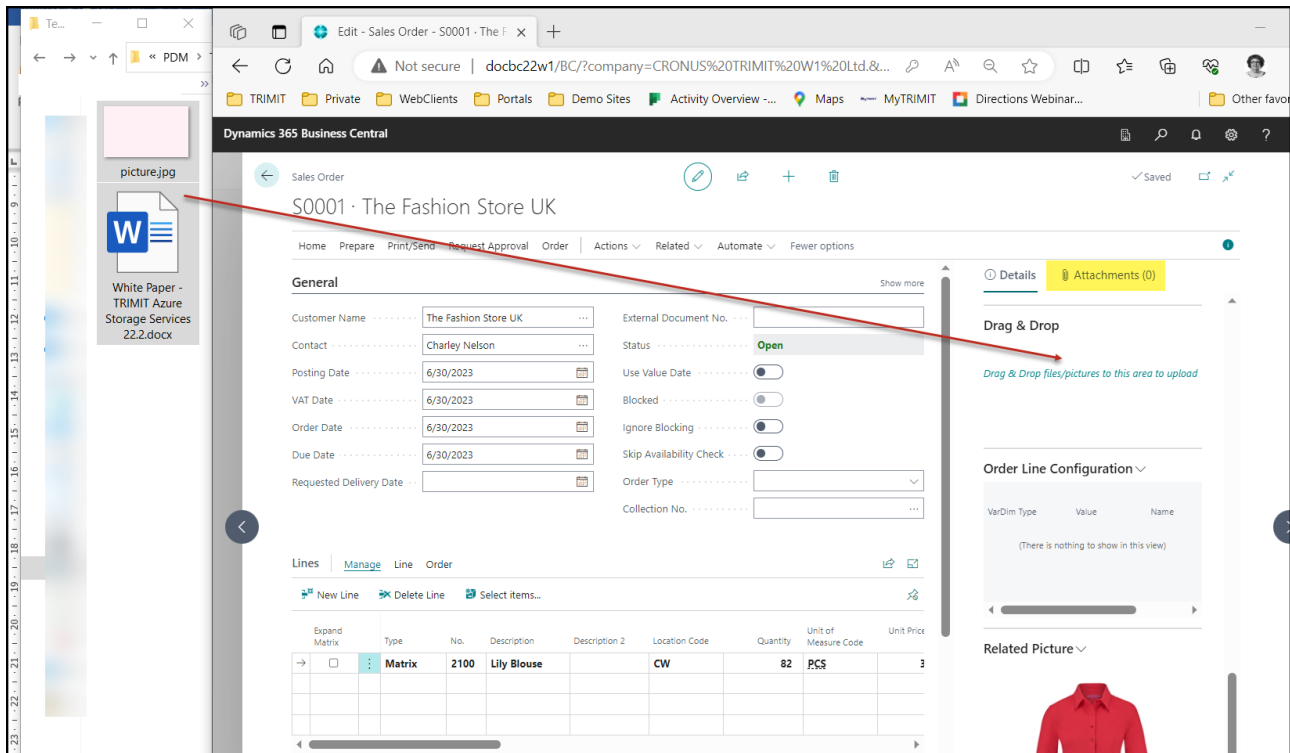
Customers List and Card

Vendors List and Card

In the above-mentioned pages, you can add the **Drag & Drop** FactBox by using **Personalize**.

In that case, you can drop any file type to the Document, and it will automatically be imported as an **Attachment** to the document.

An example:



Sales Order

S0001 · The Fashion Store UK

Home

Prepare

Print/Send

Request Approval

Order

Actions

Related

Automate

Fewer options

General

Show more

Customer Name

The Fashion Store UK

External Document No.

Contact

Charley Nelson

Status

Open

Posting Date

6/30/2023

Use Value Date

VAT Date

6/30/2023

Blocked

Order Date

6/30/2023

Ignore Blocking

Due Date

6/30/2023

Ship Availability Check

Details

Attachments (2)

Attachments

Documents

2

Notes

(There is nothing to show in this view)

Edit - Attached Documents

Search

New

Edit List

Delete

Download

Attachment

File Extension

File Type

User

Attached Date

Flow to Sales Trx

→

White Paper - TRIMIT Azure Storage Services 22.2

:

docx

Word

ADMIN

8/2/2023 11:03 AM

picture

jpg

Image

ADMIN

8/2/2023 11:03 AM

CONNECT PICTURES AND ATTACHMENTS

We have seen how to connect Pictures to subjects and how to connect Attachments to Documents. There is however one Document that could have both: the **Complaint**.

COMPLAINT

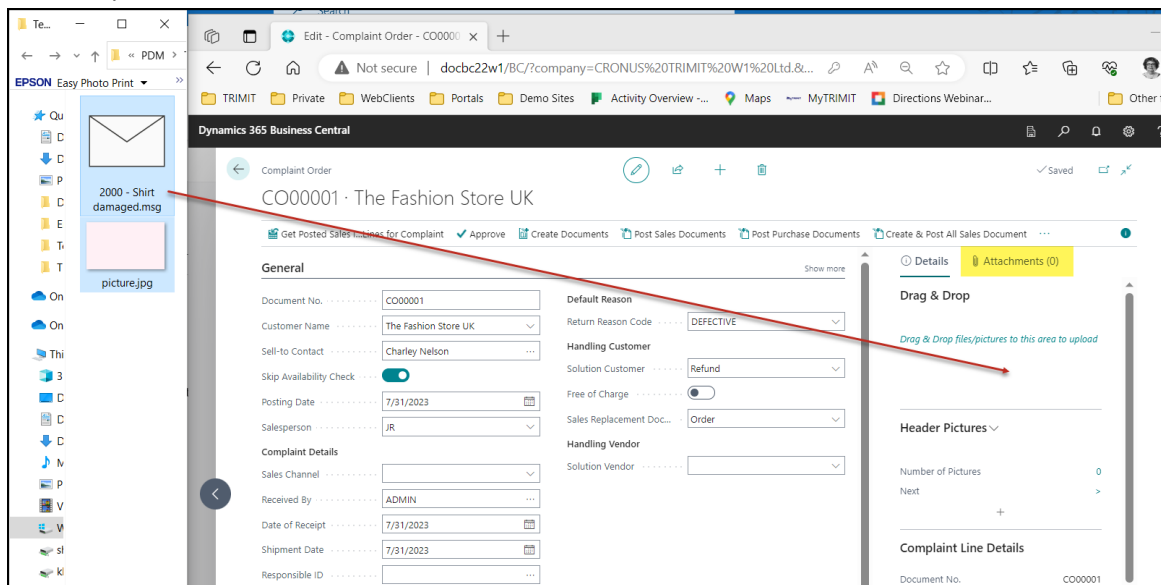
In the Complaint, you can import Pictures (i.e., from damaged goods) and Attachments (i.e., E-Mail from the customer).

You can use the **Drag & Drop** FactBox to connect both to the Complaint.

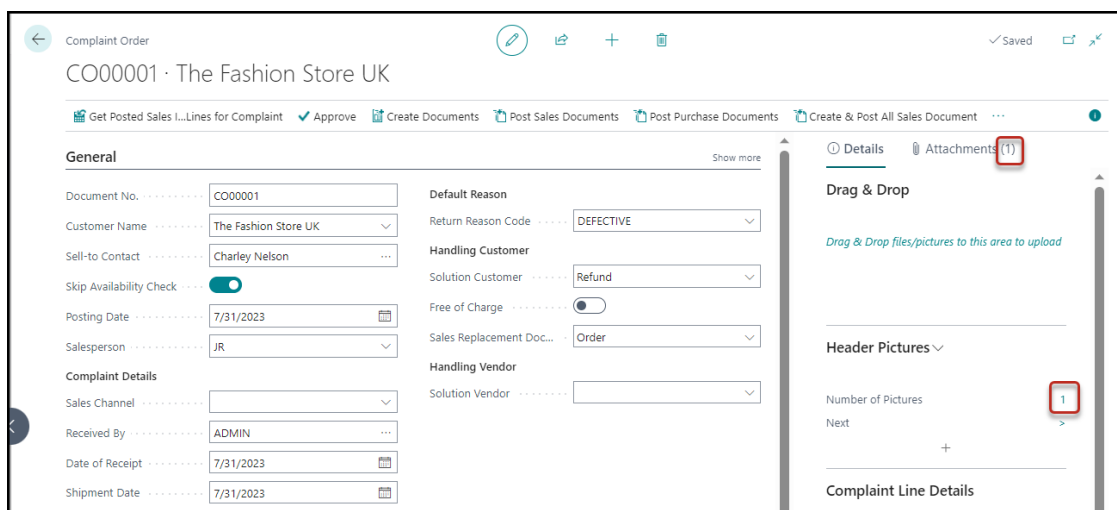
The system will interpret files with extension .bmp, .jpg, .ai, .jpeg, .png, .pdf, .emf, .ico, .tiff, .gif or .wmf as a Picture.

All other file types will be interpreted as an Attachment.

An example:



Will result in:



You need to close the Complaint Card and open it again to see the **Header Picture**:

Complaint Order

CO00001 · The Fashion Store UK

Get Posted Sales Lines for Complaint ✓ Approve Create Documents Post Sales Documents Post Purchase Documents Create & Post All Sales Document

General Show more

Document No. CO00001

Customer Name The Fashion Store UK

Sell-to Contact Charley Nelson

Skip Availability Check ☒

Posting Date 7/31/2023

Salesperson JR

Complaint Details

Sales Channel

Received By ADMIN

Date of Receipt 7/31/2023

Shipment Date 7/31/2023

Responsible ID

Status Approved

Solution Suggested by

Default Reason

Return Reason Code DEFECTIVE

Handling Customer

Solution Customer Refund

Free of Charge ☐

Sales Replacement Doc... Order

Handling Vendor

Solution Vendor

Details Attachments (1)

Drag & Drop

Drag & Drop files/pictures to this area to upload

Header Pictures

Number of Pictures 1

Next

Complaint Line Details

Document No. CO00001

Line No. 20000

Lines Manage Line VarDim Related Order No. Functions

And you can see the **Attachment** by clicking the 1:

Complaint Order

CO00001 · The Fashion Store UK

Get Posted Sales Lines for Complaint ✓ Approve Create Documents Post Sales Documents Post Purchase Documents Create & Post All Sales Document

General Show more

Document No. CO00001

Customer Name The Fashion Store UK

Sell-to Contact Charley Nelson

Skip Availability Check ☒

Posting Date 7/31/2023

Default Reason

Return Reason Code DEFECTIVE

Handling Customer

Solution Customer Refund

Free of Charge ☐

Attachments (1)

Attachments

Documents 1

Notes +

(There is nothing to show in this view)

Edit - Attached Documents

Search + New Edit List Delete Download

Attachment	File Extension	File Type	User	Attached Date
→ 2000 - Shirt damaged	msg	Email	ADMIN	8/2/2023 11:35 AM

