



WHITE PAPER

TRIMIT PERMISSIONS 23.2

This document contains information regarding the specific TRIMIT Permission Sets in TRIMIT 23.2 for Microsoft Dynamics 365 Business Central 2023, Wave 2 (W1).

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Date: 24-01-2024

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INTRODUCTION

This White Paper will show and explain how to use the **TRIMIT Permission Sets** that are created automatically when installing the **TRIMIT app** and the **TRIMIT Shop Floor app**.

Permission Sets are created via specific AL codes in Business Central. I.e.,

Permission Set	Name	Type	Extension Name
D365 INV, SETUP	Dyn. 365 Inventory Setup	System	Base Application

```

1 permissionset 8462 "D365 INV, SETUP"
2
3     Assignable = true;
4
5     Caption = 'Dyn. 365 Inventory Setup';
6     Permissions = tabledata "Inventory Posting Group" = RIMD,
7                  tabledata "Inventory Posting Setup" = RIMD,
8                  tabledata Location = RIMD,
9                  tabledata "Transfer Line" = D,
10                 tabledata "Transfer Route" = RIMD;
11 }
12

```

TRIMIT also creates their specific Permission Sets, the same way.

Many of the created TRIMIT Permission Sets are however extending standard Business Central Permission Sets and cannot be chosen for **Users** or **User Groups**. Therefore, you need to select a standard Business Central Permission Set – and this will then include the specific TRIMIT Permissions as well.

This document will give you an overview of the TRIMIT Permission Sets, and which Business Central Permission Sets will be extended. It will also give you several examples for choosing Permission Sets for **Users** or **User Groups** that use specific processes.

On the Partner Portal an excel sheet will be available with a detailed overview of all the TRIMIT Permission Sets and Permissions.

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 23.2 for Business Central W1 BC23.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 23.2**, 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 Permissions contains the following objects:

PERMISSION SETS AL CODES IN TRIMIT APP

No.	Name	Description	Extends BC Set
6036500	TRM-ACC. PAY, EXT	TRIMIT Accounts Payable Extension	D365 ACC. PAYABLE
6036501	TRM-ACC. REC, EXT	TRIMIT Accounts Receivables Extension	D365 ACC. RECEIVABLE
6036518	TRM-API	TRIMIT API Tables for Portals	
6036502	TRM-BASIC ISV,EXT	TRIMIT Basic ISV Access Extension	D365 BASIC ISV
6036503	TRM-BASIC, EXT	TRIMIT Basic Access Extension	D365 BASIC
6036504	TRM-COMPLAINTS	TRIMIT Complaints	
6036505	TRM-FULL ACC, EXT	TRIMIT Full Business Access Extension	D365 BUS FULL ACCESS
6036506	TRM-HR, EXT	TRIMIT Create Basic HR Extension	D365 HR, EDIT
6036507	TRM-IC, EXT	TRIMIT Intercompany Extension	D365 IC, SETUP
6036520	TRM-INTEGRATIONS	TRIMIT Integrations	
6036508	TRM-ITEM, EXT	TRIMIT Create Items Extension	D365 ITEM, EDIT
6036509	TRM-POR-ADMIN	TRIMIT Portal Administrator	
6036510	TRM-POR-BASIC	TRIMIT Portal Basic	
6036511	TRM-PRODUCTION	TRIMIT Production	
6036512	TRM-PURCHDOC, EXT	TRIMIT Create Purch. Doc. Extension	D365 PURCH DOC, EDIT
6036513	TRM-PURCHPST, EXT	TRIMIT Post Purchase Doc. Extension	D365 PURCH DOC, POST
6036514	TRM-REPLICATION	TRIMIT Replication	
6036515	TRM-SALESDOC, EXT	TRIMIT Create Sales Doc. Extension	D365 SALES DOC, EDIT
6036516	TRM-SALESPST, EXT	TRIMIT Post Sales Doc. Extension	D365 SALES DOC, POST
6036519	TRM-TABLE EDITOR	TRIMIT Table Information Editor	
6036517	TRM-WHSE, EXT	TRIMIT Create Warehouse Extension	D365 WHSE, EDIT

PERMISSION SETS AL CODES IN TRIMIT SHOP FLOOR APP

No.	Name	Description	Extends BC Set
6038400	TRM-SF-ADMIN	TRIMIT Shop Floor Administrator	
6038401	TRM-SF-BASIC ISV, EX	TRIMIT Shop Floor Basic ISV Access Extension	D365 BASIC ISV
6038402	TRM-SF-EMPLOYEE	TRIMIT Shop Floor Employee	
6038403	TRM-SF-FULL ACC, EXT	TRIMIT Shop Floor Full Business Access Extension	D365 BUS FULL ACCESS
6038404	TRM-SF-HR, EXT	TRIMIT Shop Floor HR Extension	D365 HR, EDIT
6038405	TRM-SF-PROD, EXT	TRIMIT Shop Floor Production Extension	TRM-PRODUCTION

PERMISSION SETS AL CODES IN TRIMIT DATA AND TEST APP

No.	Name	Description	Extends BC Set
60000	TRM-BASIC DATA APP, EXT	TRIMIT Data and Test	D365 BASIC

Because this Permission Set will extend the **D365 Basic** Permission Set when installing the **TRIMIT Data and Test** App, it means, that every user – which will get the **D365 Basic** Permission Set, will also be able to create Demo Data based on the **TRIMIT Data and Test** App.

PERMISSION SETS AL CODES IN TRIMIT SHOP FLOOR DATA AND TEST APP

No.	Name	Description	Extends BC Set
60190	TRM-BASIC SF DATA APP, EXT	TRIMIT Shop Floor Data and Test	D365 BASIC

Because this Permission Set will extend the **D365 Basic** Permission Set when installing the **TRIMIT Shop Floor Data and Test App**, it means, that every user – which will get the **D365 Basic** Permission Set, will also be able to create Shop Floor Demo Data based on the **TRIMIT Shop Floor Data and Test App**.

PERMISSION SETS AL CODE IN TRIMIT ADDON FOR CONTINIA DOCUMENT CAPTURE

No.	Name	Description	Extends BC Set
80005	TRM-BASIC DC, EXT	TRIMIT Document Capture	D365 BASIC

Because this Permission Set will extend the **D365 Basic** Permission Set when installing the **TRIMIT AddOn Document Capture App**, it means, that every user – which will get the **D365 Basic** Permission Set, will also be able to use the objects of the **TRIMIT AddOn Document Capture App**.

Of course, the User might need specific Continia Document Capture Permission Sets that will be created when installing Continia Document Capture.

PERMISSION SETS AL CODE IN TRIMIT ADDON FOR FORNAV

No.	Name	Description	Extends BC Set
90000	TRM-BASIC ForNAV, EXT	TRIMIT ForNav	D365 BASIC

Because this Permission Set will extend the **D365 Basic** Permission Set when installing the **TRIMIT AddOn ForNav App**, it means, that every user – which will get the **D365 Basic** Permission Set, will also be able to use the objects of the **TRIMIT AddOn ForNav App**.

Of course, the User might need specific ForNav Permission Sets that will be created when installing ForNav.

PERMISSION SETS AL CODE IN TRIMIT ADDON FOR TASKLET

No.	Name	Description	Extends BC Set
80000	TRM-BASIC TASKLET	TRIMIT TaskLet	D365 BASIC

Because this Permission Set will extend the **D365 Basic** Permission Set when installing the **TRIMIT AddOn Mobile WMS App**, it means, that every user – which will get the **D365 Basic** Permission Set, will also be able to use the objects of the **TRIMIT AddOn Mobile WMS App**.

Of course, the User might need specific TaskLet Factory Permission Sets that will be created when installing TaskLet Factory.

CREATED PERMISSION SETS

IN TRIMIT APP

When you install the **TRIMIT App** it will automatically create the **Permission Sets** for:

TRM-API
 TRM-COMPLAINTS
 TRM-INTEGRATION
 TRM-POR-ADMIN
 TRM-POR-BASIC
 TRM-PRODUCTION
 TRM-REPLICATION
 TRM-TABLE EDITOR

The other mentioned TRIMIT Permission Sets in [Permission Sets AL Codes in TRIMIT App](#) will not be created as separate Permission Sets. Instead, the Permissions of these TRIMIT Permission Sets will be added to the standard Business Central Permission Sets for which they are setup as an Extension.

IN TRIMIT SHOP FLOOR APP

When you install the **TRIMIT Shop Floor App** it will automatically create the **Permission Sets** for:

TRM-SF-ADMIN
 TRM-SF-EMPLOYEE

The other mentioned TRIMIT Shop Floor Permission Sets in [Permission Sets AL Codes in TRIMIT Shop Floor App](#) will not be created as separate Permission Sets. Instead, the Permissions of these TRIMIT Permission Sets will be added to the standard Business Central Permission Sets for which they are setup as an Extension.

Permission Sets

Search

New

Edit List

Delete

Permissions

Copy Permission Set...

Import Permission Sets

Export Permission Sets

Views

*All

Filter list by:

× Permission Set

TRM-*

+ Filter...

Reset filters

Permission Set ↑ ▼	Name	Type ↑	Extension Name
→ TRM-API	TRIMIT API Tables	System	TRIMIT
TRM-COMPLAINTS	TRIMIT Complaints	System	TRIMIT
TRM-INTEGRATIONS	TRIMIT Integrations	System	TRIMIT
TRM-POR-ADMIN	TRIMIT Portal Administrator	System	TRIMIT
TRM-POR-BASIC	TRIMIT Portal Basic	System	TRIMIT
TRM-PRODUCTION	TRIMIT Production	System	TRIMIT
TRM-REPLICATION	TRIMIT Replication	System	TRIMIT
TRM-SF-ADMIN	TRIMIT Shop Floor Administrator	System	TRIMIT Shop Floor
TRM-SF-EMPLOYEE	TRIMIT Shop Floor Employee	System	TRIMIT Shop Floor

You will not see the TRIMIT Permission Sets that are setup as Extensions of standard Business Central Permission Sets.

But if you look i.e., at the Business Central **Permission Set** *D365 ITEM, EDIT*, you will also see the specific TRIMIT Tables in the Permissions that were created for the **TRIMIT Permission Set** *TRM-ITEM, EXT*.

Permission Sets

Search
New
Edit List
Delete
Permissions
Copy Permission Set...
Import Permission Sets
Export Permission Sets
More options

Permission Set ↑	Name	Type ↑	Extension Name
D365 INV, SETUP	Dyn. 365 Inventory Setup	System	Base Application
→ D365 ITEM, EDIT	Dynamics 365 Create items	System	Base Application
D365 ITEM, VIEW	Dynamics 365 View items	System	Base Application

Permissions

X Permission sets of type System and Extension cannot be changed. Only permission sets of type User-Defined can be changed.
Don't show again

General

Permission Set
D365 ITEM, EDIT

Actions

Object Type ↑	Object ID ↑	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	Security Filter
Table Data	7704	Item Identifier	Yes	Yes	Yes	Yes		
Table Data	9152	My Item	Yes	Yes	Yes	Yes		
Table Data	6036304	trm Temp Transact Avail Check	Yes	Yes	Yes	Yes		
Table Data	6036309	trm Temp Inventory Profile	Yes	Yes	Yes	Yes		
Table Data	6036310	trm Temp Transact Avail Check3	Yes	Yes	Yes	Yes		
Table Data	6036314	trm Temp BOM Buffer	Yes	Yes	Yes	Yes		
Table Data	6036317	trm Temp Collect Master Relat	Yes	Yes	Yes	Yes		
Table Data	6036414	trm Call Availability Check	Yes	Yes	Yes	Yes		
Table Data	6036502	trm Caption Class Setup	Yes	Yes	Yes	Yes		
Table Data	6036516	trm Inventory Profile Setup	Yes	Yes	Yes	Yes		
Table Data	6036652	trm Dimension Purchase Price	Yes	Yes	Yes	Yes		
Table Data	6036654	trm Dimension Sales Price	Yes	Yes	Yes	Yes		
Table Data	6036655	trm VarDim Sales Price	Yes	Yes	Yes	Yes		
Table Data	6036656	trm Price Group Parameters	Yes	Yes	Yes	Yes		
Table Data	6036661	trm Campaign Discount Header	Yes	Yes	Yes	Yes		
Table Data	6036662	trm Campaign Discount Entry	Yes					
Table Data	6036672	trm Bottleneck Setup	Yes	Yes	Yes	Yes		
Table Data	6037003	trm Contribution Margin	Yes	Yes	Yes	Yes		
Table Data	6037004	trm Std Unit Cost Log	Yes	Yes	Yes	Yes		
Table Data	6037006	trm Ext Location Management	Yes	Yes	Yes	Yes		

EXAMPLES TRIMIT APP

The examples give you an idea of which **Permission Sets** would at least be needed to do the processes. Keep in mind, that other **Permission Sets** might have to be included for other functionality (like i.e., *EXPORT REPORT EXCEL* if the Users/User Groups should be able to export data to Excel) or other installed Apps.

1. CREATE/MAINTAIN MASTERS/ITEMS

Users/User Groups who create and/or maintain Masters and all related information would need at least the following Permission Sets:

Permission Set ↑	Description	Company	Extension Name	Permission Scope
→ D365 BASIC	Dynamics 365 Basic access		Base Application	System
D365 ITEM, EDIT	Dynamics 365 Create items		Base Application	System
TRM-API	TRIMIT API Tables for Portals		TRIMIT	System

2. CREATE/MAINTAIN SALES ORDERS (1)

Users/User Groups who create and/or maintain Sales Documents (without postings) for Masters/Items that will **NOT** create Related Orders would need at least the following Permission Sets:

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
→ D365 BASIC	Dynamics 365 Basic access		Base Application	System
D365 CUSTOMER, VIEW	Dynamics 365 View customers		Base Application	System
D365 ITEM, EDIT	Dynamics 365 Create items		Base Application	System
D365 SALES DOC, EDIT	Dynamics 365 Create sales doc.		Base Application	System
TRM-API	TRIMIT API Tables for Portals		TRIMIT	System

3. CREATE/MAINTAIN SALES ORDERS (2)

Users/User Groups who create and/or maintain Sales Documents (without postings) for Masters/Items that can create Related Purchase Orders would need at least the following Permission Sets:

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
D365 BASIC	Dynamics 365 Basic access		Base Application	System
D365 CUSTOMER, VIEW	Dynamics 365 View customers		Base Application	System
D365 ITEM, EDIT	Dynamics 365 Create items		Base Application	System
D365 PURCH DOC, EDIT	Dyn. 365 Create purch. doc.		Base Application	System
D365 SALES DOC, EDIT	Dynamics 365 Create sales doc.		Base Application	System
→ TRM-API	TRIMIT API Tables for Portals		TRIMIT	System

4. CREATE/MAINTAIN SALES ORDERS (3)

Users/User Groups who create and/or maintain Sales Documents (without postings) for Masters/Items that can create Related Production Orders would need at least the following Permission Sets:

Permission Set ↑	Description	Company	Extension Name	Permission Scope
→ D365 BASIC	Dynamics 365 Basic access		Base Application	System
D365 CUSTOMER, VIEW	Dynamics 365 View customers		Base Application	System
D365 ITEM, EDIT	Dynamics 365 Create items		Base Application	System
D365 SALES DOC, EDIT	Dynamics 365 Create sales doc.		Base Application	System
TRM-API	TRIMIT API Tables for Portals		TRIMIT	System
TRM-PRODUCTION	TRIMIT Production		TRIMIT	System

You might have to include *D365 PURCH DOC, EDIT* if there might be Components in the Bill of Materials that are purchased Order Based. In that case, creating the Related Production Order might also result in creating a Related Purchase Order for the Component.

NOTE

When creating Sales Documents, you always need to include *D365 ITEM, EDIT*, because it can always be necessary to create Items – if they are not created up front already – especially for Furniture/Configuration.

5. CREATE/MAINTAIN PURCHASE ORDERS

Users/User Groups who create and/or maintain Purchase Documents (without postings) for Master/Items would need at least the following Permission Sets:

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
→ D365 BASIC	Dynamics 365 Basic access		Base Application	System
D365 ITEM, EDIT	Dynamics 365 Create items		Base Application	System
D365 PURCH DOC, EDIT	Dyn. 365 Create purch. doc.		Base Application	System
D365 VENDOR, VIEW	Dynamics 365 View vendors		Base Application	System
TRM-API	TRIMIT API Tables for Portals		TRIMIT	System

NOTE

When creating Purchase Documents, you always need to include *D365 ITEM, EDIT*, because it can always be necessary to create Items – if they are not created up front already – especially for Furniture/Configuration.

6. CREATE/POST PRODUCTION ORDERS

Users/User Groups who should be able to create Production Order or Production Collecting Orders, as well as posting Consumptions or Finishing would need at least the following Permission Sets:

User Permission Sets Manage				
Permission Set ↑	Description	Company	Extension Name	Permission Scope
→ D365 BASIC	Dynamics 365 Basic access		Base Application	System
D365 INV DOC, POST	Dyn. 365 Post inventory doc		Base Application	System
D365 ITEM, EDIT	Dynamics 365 Create items		Base Application	System
D365 PURCH DOC, EDIT	Dyn. 365 Create purch. doc.		Base Application	System
D365 SALES DOC, POST	Dynamics 365 Post sales doc.		Base Application	System
TRM-API	TRIMIT API Tables for Portals		TRIMIT	System
TRM-PRODUCTION	TRIMIT Production		TRIMIT	System

If you also make use of WMS, you also need to include **D365 WHSE, EDIT**

NOTE

When creating Production Order or Production Collecting Orders, you always need to include *D365 ITEM, EDIT*, because it can always be necessary to create Items – if they are not created up front already – especially for Furniture/Configuration.

7. CREATE/MAINTAIN COMPLAINTS AND ALL RELATED DOCUMENTS

Users/User Groups who create and/or maintain Complaints, but are also able to create the Sales-/Purchase Orders and even post these Orders directly via the Complaints, would need at least the following Permission Sets:

Permission Set ↑	Description	Company	Extension Name	Permission Scope
→ D365 BASIC	Dynamics 365 Basic access		Base Application	System
D365 CUSTOMER, VIEW	Dynamics 365 View customers		Base Application	System
D365 ITEM, EDIT	Dynamics 365 Create items		Base Application	System
D365 PURCH DOC, EDIT	Dyn. 365 Create purch. doc.		Base Application	System
D365 PURCH DOC, POST	Dyn. 365 Post purchase doc.		Base Application	System
D365 SALES DOC, EDIT	Dynamics 365 Create sales doc.		Base Application	System
D365 SALES DOC, POST	Dynamics 365 Post sales doc.		Base Application	System
D365 VENDOR, EDIT	Dynamics 365 Create vendors		Base Application	System
TRM-API	TRIMIT API Tables for Portals		TRIMIT	System
TRM-COMPLAINTS	TRIMIT Complaints		TRIMIT	System

If also **Production Orders** should be created via the Complaints, you also need to include **TRM-PRODUCTION**.

If you also make use of WMS, you also need to include **D365 WHSE, EDIT**

NOTE

When creating Sales-/Purchase Documents, you always need to include **D365 ITEM, EDIT**, because it can always be necessary to create Items – if they are not created up front already – especially for Furniture/Configuration.

8. CREATE/POST TRIMIT PICK DOCUMENTS

Users/User Groups who create and/or maintain TRIMIT Pick Documents, but should also be able to post the TRIMIT Pick Documents, would need at least the following Permission Sets:

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
D365 BASIC	Dynamics 365 Basic access		Base Application	System
D365 ITEM, EDIT	Dynamics 365 Create items		Base Application	System
D365 SALES DOC, EDIT	Dynamics 365 Create sales doc.		Base Application	System
D365 SALES DOC, POST	Dynamics 365 Post sales doc.		Base Application	System
D365 WHSE, EDIT	Dynamics 365 Create warehouse		Base Application	System

If you have Sales Lines with Related Production Orders, it might also be necessary to include **TRM-PRODUCTION** because posting a Shipment could – based on Parameters – also Finish a Production Order.

EXAMPLES TRIMIT SHOP FLOOR APP

The examples give you an idea of which **Permission Sets** would at least be needed to do the processes. Keep in mind, that other **Permission Sets** might have to be included for other functionality (like i.e., *EXPORT REPORT EXCEL* if the Users/User Groups should be able to export data to Excel) or other Apps.

1. CREATE/POST DATA SHOP FLOOR (SHOP FLOOR MANAGER)

User/User Groups who needs to be able to create the basic data for Shop Floor, but also should be able to post the Production Journals, would need at least the following Permission Sets:

User Group Memberships >				
User Permission Sets Manage				
Permission Set ↑	Description	Company	Extension Name	Permission Scope
→ D365 BASIC	Dynamics 365 Basic access		Base Application	System
D365 HR, EDIT	Dynamics 365 Create Basic HR		Base Application	System
D365 INV DOC, POST	Dyn. 365 Post inventory doc		Base Application	System
D365 SALES DOC, POST	Dynamics 365 Post sales doc.		Base Application	System
TRM-PRODUCTION	TRIMIT Production		TRIMIT	System
TRM-SF-ADMIN	TRIMIT Shop Floor Administrator		TRIMIT Shop Floor	System

This would i.e., include creating Employees (regular and Shop Floor specific). But because this would probably be the Shop Floor Manager, the example also includes Permission Sets for creating the Tasks (based on Production Orders) and posting the Production Journals.

2. ARRIVE, LEAVE, START-/END TASK (SHOP FLOOR EMPLOYEE)

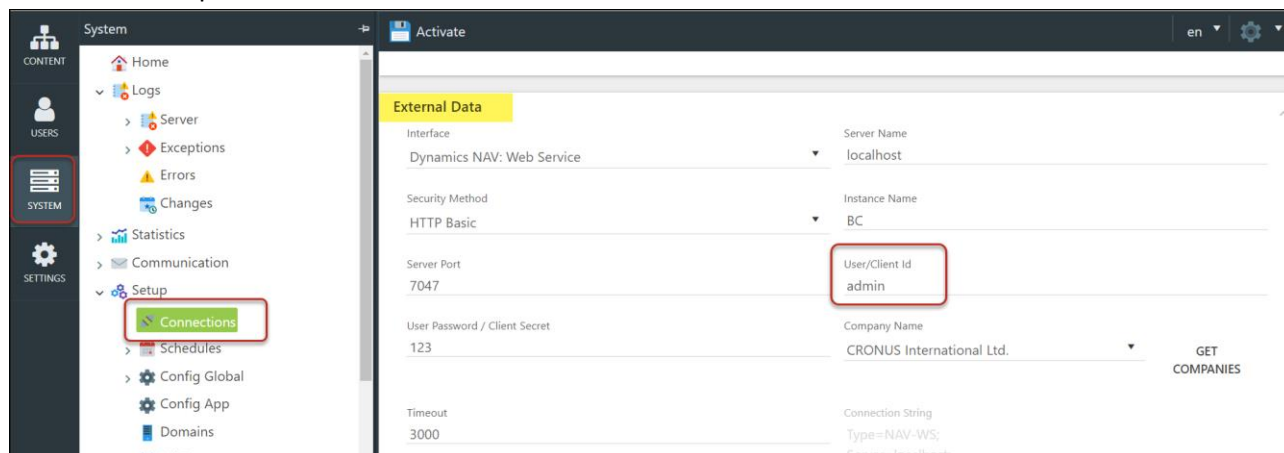
User/User Groups who needs to be able to use the Terminal Login to register their spend time on Tasks, or register their indirect time or absence time, would need at least the following Permission Sets:

User Permission Sets Manage				
Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
→ D365 BASIC	Dynamics 365 Basic access		Base Application	System
TRM-SF-EMPLOYEE	TRIMIT Shop Floor Employee		TRIMIT Shop Floor	System

If the Shop Floor Employee should also be able to Post the Production Journal Lines he created, you need to include *D365 INV DOC, POST* and *D365 SALES DOC, POST* and *TRM-PRODUCTION*.

EXAMPLES REGARDING TRIMIT PORTALS

In Modelyn, there is only one specific setting to determine the Permissions for all Users on all the different TRIMIT Webshops and Portals:



The **User/Client Id** refers to a User in the TRIMIT ERP system.

Therefore, this specific User needs to have Permission Sets to enable all functionality in the different TRIMIT Webshops and Portals – like mentioned in [Users of the TRIMIT Portals/Webshops \(Portal User\)](#).

1. USERS OF THE TRIMIT PORTALS/WEBSHOPS (PORTAL USER)

Because there is only 1 setting for all the TRIMIT Portals/Webshops, this **User/Client Id** needs at least the following Permission Sets to be able to create new Customer (for B2C Webshop and Sales Agent Portal), enter Sales Orders (for B2C Webshop, B2B Webshop, Sales Agent Portal), edit Purchase Orders (for Supplier Portal), change Master data (for Supplier Portal):

User Group Memberships >					
User Permission Sets Manage					
Permission Set ↑	Description	Company	Extension Name	Permission Scope	
→ D365 BASIC	Dynamics 365 Basic access		Base Application	System	
D365 CUSTOMER, EDIT	Dynamics 365 Create customers		Base Application	System	
D365 ITEM, EDIT	Dynamics 365 Create items		Base Application	System	
D365 PURCH DOC, EDIT	Dyn. 365 Create purch. doc.		Base Application	System	
D365 SALES DOC, EDIT	Dynamics 365 Create sales doc.		Base Application	System	
TRM-API	TRIMIT API Tables for Portals		TRIMIT	System	
TRM-POR-BASIC	TRIMIT Portal Basic		TRIMIT	System	
TRM-PRODUCTION	TRIMIT Production		TRIMIT	System	

Even if you only have the B2B Webshop, you do need *D365 PURCH DOC, EDIT* and *TRM-PRODUCTION* in case you need to create a Related Purchase and/or Production Order.

This combination of Permission Sets is also necessary for Salespersons that have access to the Sales Agent Portal and can create Customers and Sales Orders.

NOTE

When creating Sales Documents, you always need to include *D365 ITEM, EDIT*, because it can always be necessary to create Items – if they are not created up front already – especially for Furniture/Configuration.

2. SETTING UP PORTAL INFORMATION IN ERP (PORTAL ADMINISTRATOR)

Users/User Groups who should be able to create/maintain all the necessary information regarding the TRIMIT Portals (Portal Setup, Portal Profiles, Categories, etc.) you need to have at least the following Permission Sets:

User Permission Sets		Manage				
Permission Set ↑		Description	Company	Extension Name	Permission Scope	
→ D365 BASIC		Dynamics 365 Basic access		Base Application	System	
D365 CUSTOMER, EDIT		Dynamics 365 Create customers		Base Application	System	
D365 ITEM, EDIT		Dynamics 365 Create items		Base Application	System	
D365 PURCH DOC, EDIT		Dyn. 365 Create purch. doc.		Base Application	System	
D365 SALES DOC, EDIT		Dynamics 365 Create sales doc.		Base Application	System	
TRM-API		TRIMIT API Tables for Portals		TRIMIT	System	
TRM-POR-ADMIN		TRIMIT Portal Administrator		TRIMIT	System	
TRM-POR-BASIC		TRIMIT Portal Basic		TRIMIT	System	
TRM-PRODUCTION		TRIMIT Production		TRIMIT	System	

With these Permission Sets, this specific “Portal Administrator” is also able to react as a User for the Portals itself.