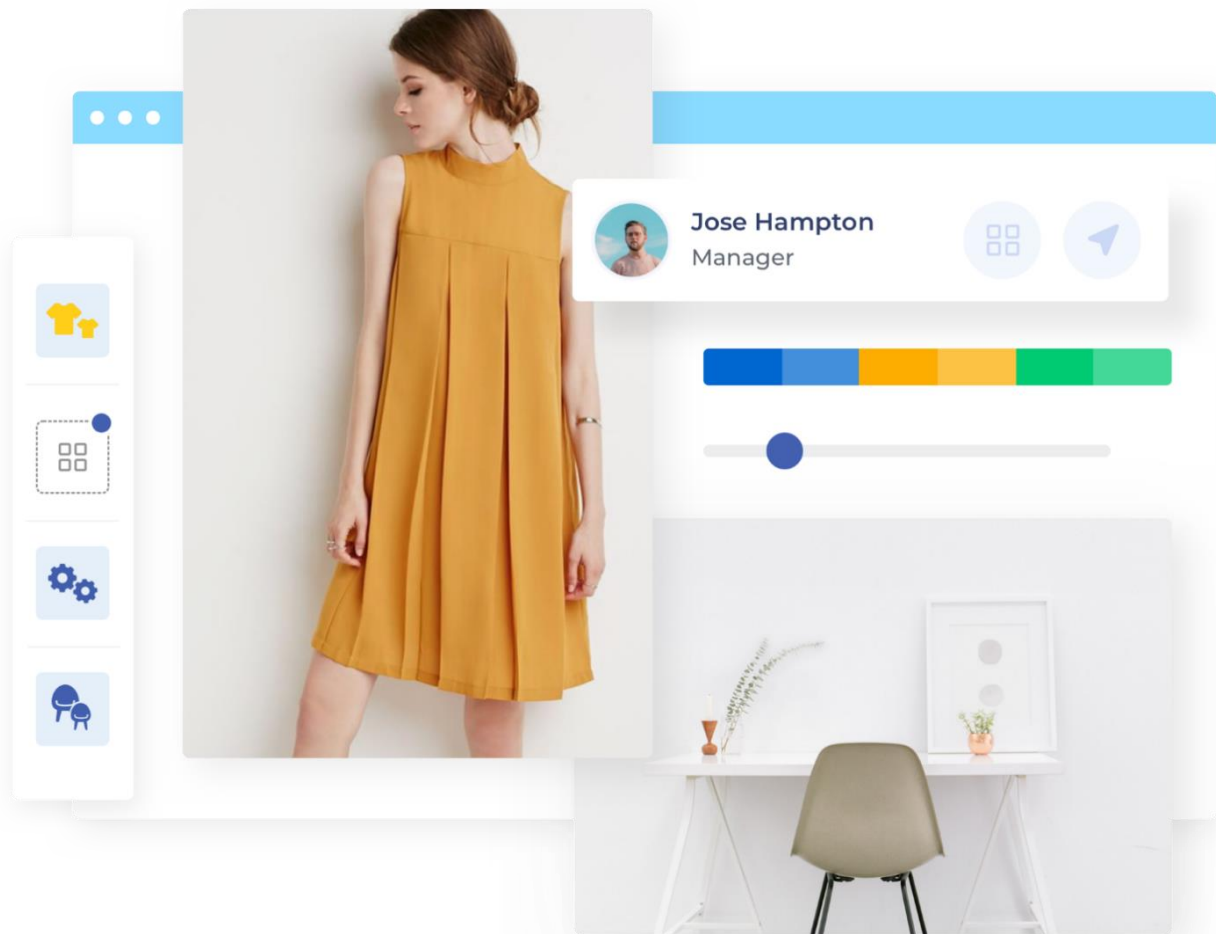




WHITE PAPER

TRIMIT Portals Setup in Business Central 21.2

This document contains information regarding the Setups for the Portals in Business Central for in TRIMIT 21.2 for Business Central 2021 Release Wave 2 W1 (BC19) in combination with the Portals Package JAN22-003 for the TRIMIT Portals.

Version: 21.2
Date: 26-04-2022

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INTRODUCTION

This document contains information about the Setups in TRIMIT ERP (TRIMIT) regarding the TRIMIT Portals. The Setups in TRIMIT for the B2C Webshop are described in a separate document:

White Paper - TRIMIT B2C Webshop Setups in Business Central

This document is based on the released version of TRIMIT 21.2 and will only discuss the functionality and fields in standard TRIMIT.

For information about standard Business Central fields, please see the [documentation](#) from Microsoft.

In this document, you will be guided through the Setups, which are needed in TRIMIT to start using the out-of-the-box Portal solutions of TRIMIT.

Our starting point for most of the actions will be the Role Center **TRIMIT Portal Administrator**.

The audience for this document is the Consultant or very skilled User.

Be aware of not changing settings and parameters in a live database without consulting the implementing partner.

The functionality described is the functionality in **TRIMIT 21.2 for Business Central W1 BC19.X** in combination with the **Portals Package JAN22-003**.

The pictures in this White Paper are based on the demo database for **TRIMIT 21.2**, which is based on Microsoft Dynamics 365 Business Central 2021 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

NOTE

Layout in pictures of portal pages might differ based on Theming selections and version of the installed portals.

COMPONENTS

TRIMIT Portals Setups in Business Central contains the following objects:

The tables	6036327	<i>trm Temp Category Management</i>
	6036856	<i>trm Statistics Overview Header</i>
	6037028	<i>trm Sales Import Journal Line</i>
	6037029	<i>trm Sales Import Jnl Header</i>
	6038101	<i>trm User Relationship Mgt</i>
	6038103	<i>trm User Relationship</i>
	6038108	<i>trm Web Transaction Log</i>
	6038109	<i>trm File Repository</i>
	6038110	<i>trm Portal Control Setup</i>
	6038117	<i>trm Portal Activity log</i>
	6038118	<i>trm Portal Message</i>
	6038120	<i>trm Category</i>
	6038121	<i>trm Category Line</i>
	6038122	<i>trm Category Buffer</i>
	6038123	<i>trm Portal Action Setup</i>
	6038125	<i>trm Portal Profile</i>
	6038126	<i>trm Portal Newsletter</i>
	6038127	<i>trm Portal News Recipient</i>
	6038128	<i>trm Profile Order Type Relat</i>
	6038129	<i>trm Portal Customer Template</i>
	6038169	<i>trm B2B Relation Authorization</i>
	6036190	<i>trm Portals Setup</i>

The pages	6036865	<i>trm Statistics Overview</i>
	6036867	<i>trm Statistics Overview List</i>
	6037018	<i>trm Portal Sales Document</i>
	6037019	<i>trm Portal Sales Doc Subpage</i>
	6038101	<i>trm User Relationship Man.</i>
	6038103	<i>trm User Relationship List</i>
	6038116	<i>trm Web Transaction Log</i>
	6038118	<i>trm Portal File Repository</i>
	6038119	<i>trm Category Line Card</i>
	6038120	<i>trm Category Card</i>
	6038121	<i>trm Category List</i>
	6038122	<i>trm Category Lines</i>
	6038125	<i>trm Category Man Subform</i>
	6038124	<i>trm Category Management</i>
	6038126	<i>trm Portal Newsletter</i>
	6038127	<i>trm Portal Newsletter Recip</i>
	6038128	<i>trm Profile Order Type Relat</i>
	6038129	<i>trm Portal Customer Templates</i>

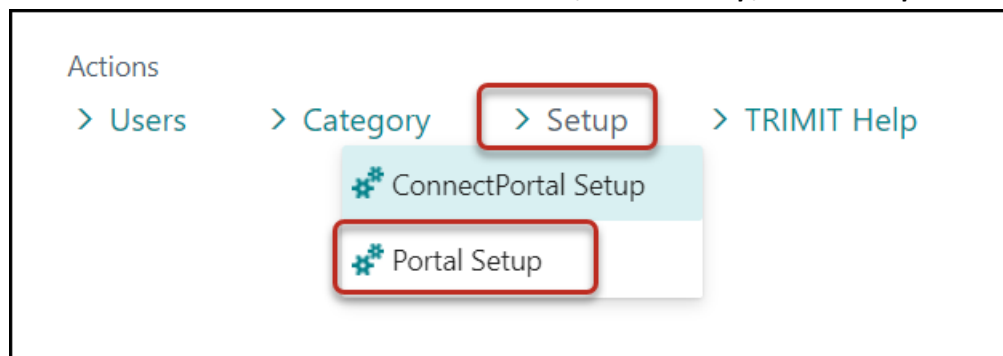
6038130	<i>trm Portal Profiles List</i>
6038131	<i>trm B2B Portal Profile</i>
6038133	<i>trm SalesAgent Portal Profile</i>
6038134	<i>trm Supplier Portal Profile</i>
6038135	<i>trm Attach to Category</i>
6038136	<i>trm Category TreeView</i>
6038137	<i>trm Instore Portal Profile</i>
6038138	<i>trm Portal Action Setup</i>
6038139	<i>trm PIR Portal Profile</i>
6038140	<i>trm Portal Control Setup</i>
6038146	<i>trm Insite Portal Profile</i>
6038154	<i>trm Category Copy Wizard</i>
6038162	<i>trm Portal Activity Log</i>
6038163	<i>trm Portal Message List</i>
6038164	<i>trm Portal Message Card</i>
6038167	<i>trm Portal Document Overdue</i>
6038168	<i>trm Portal Document Templates</i>
6038169	<i>trm B2B Relation Authorization</i>
6038190	<i>trm Portal Setup</i>

The reports	6038101	<i>trm Create B2B Author. Code</i>
	6038129	<i>trm Batch Delete ASI Document</i>

PORTAL SETUP

Portal Setup page allows setting up such Parameters as: Points applied on B2C Webshop as well as Payment and Gift Card Currency Tolerance and others, which are described below.

In the Role Center **TRIMIT Portal Administrator**, Actions **Setup, Portal Setup** or via **Tell me Portal Setup**.



FASTTAB GENERAL

General			
Points Item No.	B2C_POINT01	Gift Card Currency Tolerance	0,10
Registration Level	Level 0	Payment Gen. Journal Template	WEBRCPT
Points from Level	Level 0	Payment Gen. Journal Batch	DEFAULT
Portal Payment Tolerance (LCY)	0,10	B2C Responsibility Center	
Payment Tolerance G/L Account	9280	Capture Payment by Invoicing	☐
Fee G/L Account	6840	Payment Integration	Instant
Payment Difference in Exchange	9285	Payment Notification User ID	

DESCRIPTION OF THE FIELDS

POINTS ITEM NO.

This is the **Item No.** that will be used when creating the deduction Sale Line on a Sales Order where Customer Club Points are used to reduce the Order Amount

REGISTRATION LEVEL

When a user registers (signs in) on the B2C Webshop the Customer will get this **Customer Club Level** assigned.

Options are *Level 0, Level 1, Level 2, Level 3, Level 4, Level 5*

POINTS FROM LEVEL

This field specifies from which **Customer Club Level** users begin to earn Customer Club Points and can use Customer Club Points.

Options are *Level 0, Level 1, Level 2, Level 3, Level 4, Level 5*

PORTAL PAYMENT TOLERANCE (LCY)

Specify the Sales Order Amount which will be dismissed in case the Portal Payment Provider Fee is larger than the Sales Order Amount or similar.

PAYMENT TOLERANCE G/L ACCOUNT

This field is used in cooperation with the **Portal Payment Tolerance (LCY)**. Here you specify the **G/L Account** to be used for posting of Discount given to reduce Order Total to zero when the Order Total is smaller than the **Portal Payment Tolerance (LCY)**.

FEE G/L ACCOUNT

This field specifies the **G/L Account** to use for posting of the Portal Payment **Fee** Amount.

PAYMENT DIFFERENCE IN EXCHANGE

This field specifies the **G/L Account** to use for posting the Difference in Exchange caused by trade in Currencies differing from the Settlement Currency. The Settlement Currency is a Currency the sale has been created in or the Currency in which money coming on the Bank Account.

GIFT CARD CURRENCY TOLERANCE

When a Gift Card in one Currency is used to reduce a Sales Order in another Currency, a small Rounding Difference may remain on the Gift Card.

This field specifies the maximum Rounding Difference allowed to be considered as Currency Exchange Deviation in Local Currency.

PAYMENT GEN. JOURNAL TEMPLATE

This field specifies the **Name** of the **General Journal Template** to be used for the **Portal Payment Receipt** posting.

PAYMENT GEN. JOURNAL BATCH

This field specifies the **Name** of the **General Journal Batch** of the **Payment Gen. Journal Template** to be used for the **Portal Payment Receipt** posting.

B2C RESPONSIBILITY CENTER

Orders created will be “tagged” with the stated Responsibility Center. This enables an easy filtering of orders from the B2C Webshop appose to other orders.

CAPTURE PAYMENT BY INVOICING

This option indicates whether to capture the Payment from the Payment Provider when invoicing a Sales Order.

PAYMENT INTEGRATION

This field indicates how the payment capture is executed.

You can choose the following two options:

<empty>	No automatic Payment Integration. Payments needs to be handled manually based a bank mutation.
Instant	Capture of the funds from the Payment Provider is done instantly. This is handled in Codeunit 80 Sales-Post . This method is the only preferable as it allows detecting potential issues in capturing process and rolling the sales order posting process to initial state.

PAYMENT NOTIFICATION USER ID

You can choose a **User ID** for the user that will get a notification (on all Role Center Home page) if a Payment has been done.

FASTTAB PAYMENT PROCESSING

Payment Processing	
Order Cleanup Active	☒
Exclude Availability Threshold	2 minutes
Archive Order Threshold	4 minutes

DESCRIPTION OF THE FIELDS

ORDER CLEANUP ACTIVE

When a B2C Customer goes to Payment but never finishes it, the Sales Order created in the BC backend remains and takes Product Availability. Setting this option to **TRUE** cleans those “dead” Sales Orders (gone to Payment but never finished) after certain time and releases the Item Availability.

EXCLUDE AVAILABILITY THRESHOLD

If the Base Threshold (calculated: Work Date minus Payment creation DateTime) is greater than **Exclude Availability Threshold**, then this Sales Order will be set to **Exclude Availability Check** = **TRUE** (field in the Sales Header and in the Sales Lines). And **Processing Status** = **Exclude Availability** for the Payment Entry. In this case Availability Check will be excluded.

The entry of the **Exclude Availability Threshold** is a Duration: a Quantity and then “minutes”, “hours”, etc. depending on the Language in **My Settings**.

ARCHIVE ORDER THRESHOLD

If the Base Threshold (calculated: Work Date minus Payment creation DateTime) is greater than **Archive Order Threshold**, then Sales Order will be deleted. At the same time the corresponding Sales Order will be archived and in Payment list **Payment Service Provider** = **ORDER CANCELLED**. If the payment is created (Pending), but there is no Sales Order, then **Payment Service Provider** = **CANCELLED** for the corresponding Payment.

The entry of the **Archive Order Threshold** is a Duration: a Quantity and then “minutes”, “hours”, etc. depending on the Language in **My Settings**.

If the Sales Order is archived, then the Availability Schedule should run to release the Item Availability on B2C Webshop. Therefore, Availability Schedule should run relatively often (up to several times per day).

FASTTAB ADVANCED SALES INTEGRATION

Advanced Sales Integration	
Delete Adv. Sales Int. Doc.	Sales Posting

DELETE ADV. SALES INT. DOC.

Delete Advanced Sales Integration Document determines when the records will be deleted.

You can choose between the following two options:

Sales Posting	When an Sales Order is Posted or removed, the Advanced Sales Integration Document is also deleted if it is posted and not in error state.
Batch	You need to setup a Job Queue for Report 6038102 trm Batch Delete ASI Document , which could be run daily or weekly.

FASTTAB DATA FEED SETUP

Data Feed Setup			
Brand Mapping	Global Dimension 1	Age Group Attribute Id	25
Gender Attribute Id	24	Age Group Attribute Name	Data-Feed-Age-Group
Gender Attribute Name	Data-Feed-Gender-Group		

The fields in this FastTab can be used for Google Analytics.

The **Attribute Id's**, **Attribute Names** and their options can be created via the [Actions, Create Data Feed Attributes](#)

DESCRIPTION OF THE FIELDS

BRAND MAPPING

You can choose the subject that represents the **Brand**.

You can choose the following options:

Global Dimension 1
Global Dimension 2
Statistics Group
Item Statistics Group 2
Item Statistics Group 3
Item Statistics Group 4
Item Statistics Group 5

GENDER ATTRIBUTE ID

You can choose the **Item Attribute** that represents the **Gender**.

GENDER ATTRIBUTE NAME

After choosing a **Gender Attribute ID**, the Name will be displayed automatically.

AGE GROUP ATTRIBUTE ID

You can choose the **Item Attribute** that represents the **Age Group**.

AGE GROUP ATTRIBUTE NAME

After choosing an **Age Group Attribute ID**, the Name will be displayed automatically.

ACTIONS, CREATE DATA FEED ATTRIBUTES

Actions	Related
 Create Data Feed Attributes	

This action will create for you the option **Item Attribute Data-Feed-Age-Group** with the options: *newborn, infant, toddler, kids, adult*.

This action will also create for you the option **Item Attribute Data-Feed-Gender-Group** with the options: *male, female, unisex*.

RELATED, MULTIPLE BANK ACCOUNTS SETUP

Actions

Related

 Multiple Bank Accounts Setup

Multiple Bank Accounts Setup | Work Date: 9/6/2020

✓ Saved

Search

New

Edit List

Delete

	Currency Code ↑	Country/Region Code ↑	Portal Payment Service Provider ↑	Account Type	Account No.
→		⋮		G/L Account ▾	
				G/L Account	
				Bank Account	

Per **Currency Code**, **Country/Region Code** and **Portal Payment Service Provider** you can enter a **G/L Account** or a **Bank Account** for the Payments.

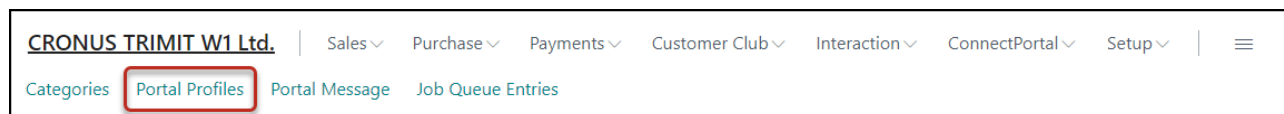
PORTAL PROFILES

When Modelyn is used with the TRIMIT Sales Agent Portal (SA), TRIMIT B2B Webshop (B2B) or Supplier Portal (SUP), a specific setup of fields needs to be filled.

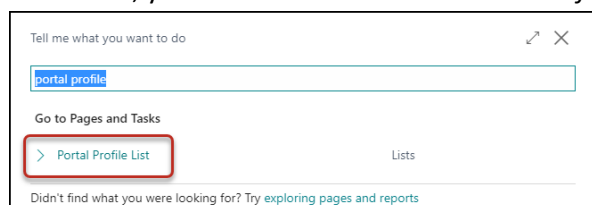
The **B2C Webshop Portal Profile** is described in document **White Paper - TRIMIT B2C Webshop Setups in Business Central**.

The fields in the Portal Profiles are different for SA, B2B and SUP.

If you have opened the **Role TRIMIT Portal Administrator** (via **My Settings**), you can find the **Portal Profiles** via:



Otherwise, you can find it via **Tell me Portal Profile**:



Portal Profiles: All ▾			Search	+ New	Delete	Edit List	Related ▾	Fewer options
Code ↑	Type	Description						
AGENT	SalesAgent	Sales Agent Basic Setup						
AGENT_FASH	SalesAgent	Sales Agent Fashion Setup						
AGENT_FURN	SalesAgent	Sales Agent Furniture Setup						
B2B	BusinessToBusiness	B2B Basic Setup						
B2B_FASH	BusinessToBusiness	B2B Fashion Setup						
B2B_FURN	BusinessToBusiness	B2B Furniture Setup						
B2C	BusinessToConsumer	Webshop Basic Setup						
INSITE	InSite	InSite Setup						
SUPPLIER	BusinessToSupplier	Supplier Basic Setup						

Click **+ New** to create a new Portal Profile, or click on the **Code** of an existing Portal Profile to open Portal Profile Card.

SA PROFILE

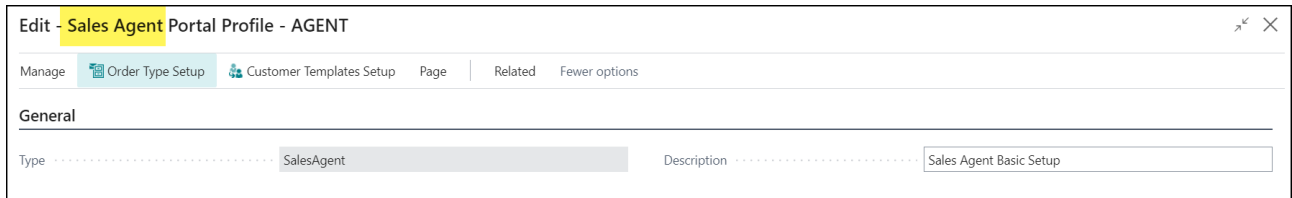
To open the Sales Agent Portal Profile (called *AGENT* in our Demo Company) page click on **Code AGENT**.

Or click **+ New** to create a new Portal Profile with **Type SalesAgent**.

The **Type** and **Description** were already filled in the **Portal Profiles**.

Based on the **Type SalesAgent** the page **Sales Agent Portal Profile** will open.

FASTTAB GENERAL



TYPE

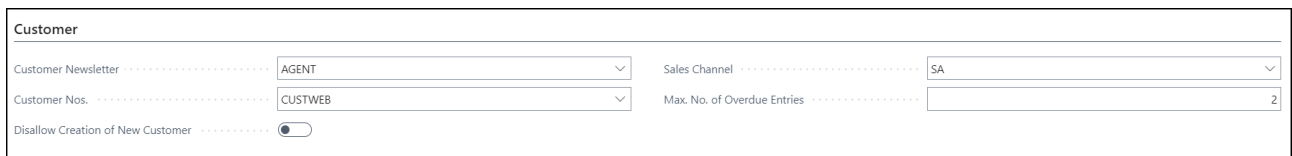
Select Portal Profile Type.

Available options are *BusinessToBusiness*, *BusinessToConsumer*, *SalesAgent*, *BusinessToSupplier*, *InstoreB2C*, *PIR*, *InSite*.

DESCRIPTION

Enter a Portal Profile Description.

FASTTAB CUSTOMER



CUSTOMER NEWSLETTER

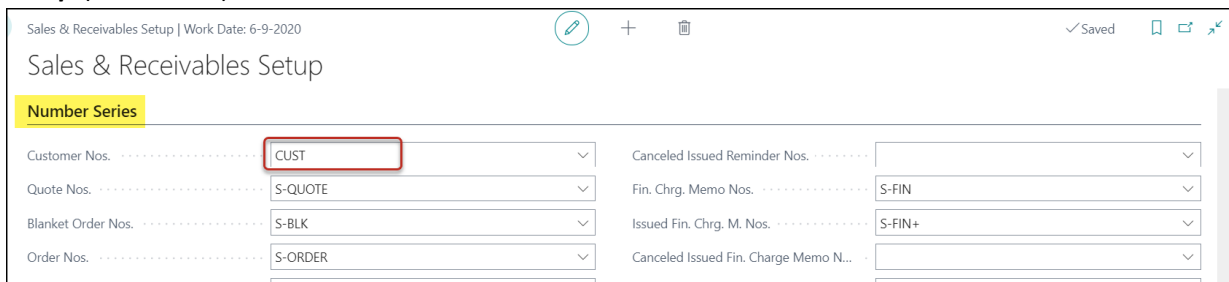
Select Customer Newsletter group.

For more information about **Customer Newsletter** – see chapter [Portals Newsletter](#).

CUSTOMER NOS.

Specify **No. Series** to be used when creating new Customers on Sales Agent Portal.

If this field is left blank, then the **No. Series** is taken from the field **Customer Nos.** in **Sales & Receivables Setup** (via **Tell me**)



DISALLOW CREATION OF NEW CUSTOMER

If this field is set to **TRUE**, it will not be possible to create a new Customer on Sales Agent Portal

SALES CHANNEL

Here it is possible to put a Sales Channel Code (i.e., SA-DE for Sales Agent Orders in Germany) which will be transferred to the Sales Header.

Different Portal Profiles can have different Sales Channel Codes and, in this way, can be differentiated.

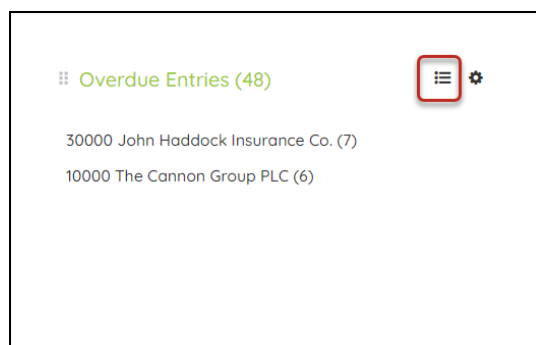
This could also influence Campaign Prices; for more details see **White Paper – TRIMIT Price Group Parameters and Campaigns**.

MAX. NO OF OVERDUE ENTRIES

In this field you can determine the maximum Quantity of Customers for which you want to see that they have **Overdue Entries** in the dock on the Dashboard of the Sales Agent Portal.

The default will be 7.

It will then show this number of Customers with the highest Overdue Amount.



If you then click on **See all overdue entries** a new page will open with all the Customers with Overdue Entries. The sorting of the Customers is based on the total Overdue Amount.

CUSTOMER	NAME	ENTRIES
30000	John Haddock Insurance Co.	7
10000	The Cannon Group PLC	6
20000	Selangorian Ltd.	6
3000	The Furniture Shop UK	1
2000	The Fashion Store UK	13
49858585	Hotel Pferdesee	4
49525252	Beef House	6
49633663	Autohaus Mielberg KG	3
40000	Deerfield Graphics Company	1
50000	Guildford Water Department	1

FASTTAB ORDER

Order	
Enable Template Selection	☒
Default Order Type	SA
Order Type Mandatory	☒
Allow Quote to Order	☒
Quote Nos.	S-QUO-WSA
Order Nos.	S-ORD-WSA
Allow Change of Price	☒
Allow Change of Line Discount	☒
Allow Change of Shipment Date on Sales Line	☒
Allow Line Comments	☒
Comments Code	SA

ENABLE TEMPLATE SELECTION

Setting this field to **TRUE** enables showing link to **Order Templates** on Customer dashboard, if there are any. Read more about this functionality in chapter [Order Template on SA Portal](#)

DEFAULT ORDER TYPE

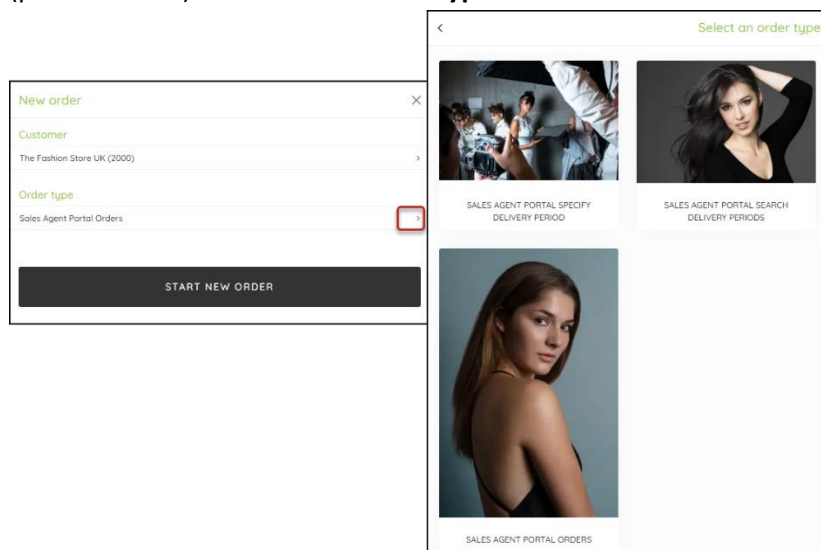
Appose to having the Sales Agent selecting the **Order Type**, you can set a default one, which will be forced for any new Order created by Sales Agents attached to this Portal Profile.

NOTE

This functionality is available for B2B Webshop as well

ORDER TYPE MANDATORY

Setting this field to **TRUE** will force the Sales Agent to select an **Order Type** code when starting a new Order (picture below) if no **Default Order Type** has been entered.



Order Type is a template setting various default values; please see TRIMIT documentation **White Paper – TRIMIT Collection Management** for further information on **Order Type** functionality. When setting this field to **TRUE** you will have to go to the **Order Type** card in TRIMIT and under FastTab **CPO** set the field **Show on Web = TRUE**. Only Order Types set to **Show on Web** will turn up in the selection list on the SA.

Concerning **Order Type Mandatory**, there is an additional setup in the Portal Profiles. If this field is marked, then all the Order Types which have **Show on Web = TRUE** will be shown on the Portal.

In order to assign dedicated Order Types to a Sales Agent Profile: click **Order Type Setup**.

Edit - Sales Agent Portal Profile - AGENT

Manage

Order Type Setup

Customer Templates Setup

Page

Related

Fewer options

In the **Profile Order Type Relations** select the Order Types, which must be shown on the SA in connection to a specified Profile.

Profile Order Type Relations Work Date: 6-9-2020					✓ Saved			
Search	+ New	Edit List	Delete	Order Type Card	More options			
Portal Profile ID ↑ ▼		Order Type ↑	Order Type Description		Alternative Sorting			
→ AGENT		02SS_CY_PRE	Spring/Summer Current Year Presales		7			
AGENT		03FW_CY_PRE	Fall/Winter Current Year Presales		6			
AGENT		10AFTERSALES	Aftersales		5			
AGENT		SA	Sales Agent Portal Orders		2			
AGENT		SA-SEARCH	Sales Agent Portal Search Delivery Periods		1			
AGENT		SA-SPECIFY	Sales Agent Portal Specify Delivery Period		0			

This functionality overrides **Show on Web** option on the Order Type itself. In other words: if the Order Type has been added to the **Profile Order Type Relations** it will be shown on the Portal under a specific Portal Profile no matter if field **Show on Web** in the Order Type is set to *TRUE* or *FALSE*.

If field **Order Type Mandatory** on Sales Agent profile is set to *TRUE*, then Order list on Sales Agent Portal will be filtered to show only Orders where Order Type applied.

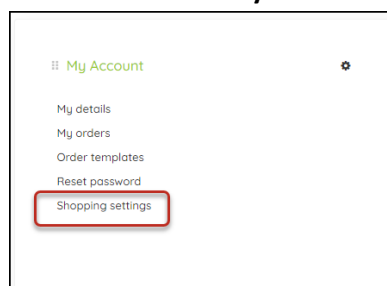
If this field is set to *FALSE*, then the filter will be removed and both Orders with and without Order Type will be shown.

NOTE

If **Default Order Type** is <empty> and **Order Type Mandatory** is *TRUE*, the SA Portal will nevertheless show an **Order Type** when creating a new order: the Order Type from the **Profile Order Type Relations** with the lowest **Alternative Sorting**.

This functionality is also available for the **B2B Webshop**.

It is also possible to set the default **Order Type** via the **Shopping settings** of the SA Portal, which can be found in the dock **My Account**:

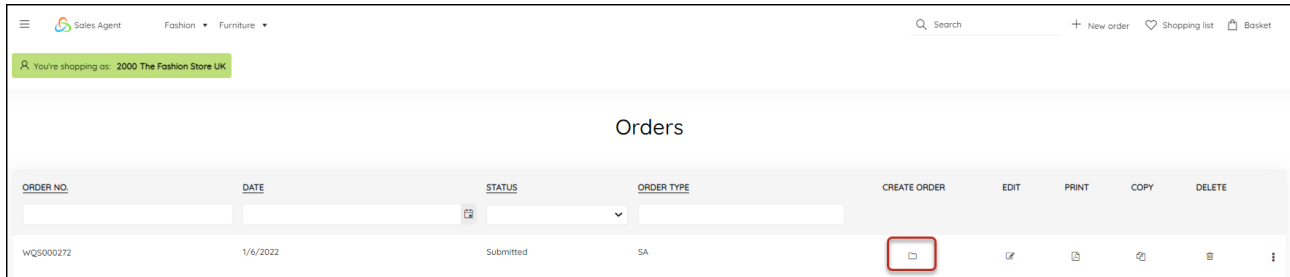


ALLOW QUOTE TO ORDER

If this option is set to **TRUE**, then the Sales Agent will be able to create a Sales Order from the Sales Quote directly on the Sales Agent Portal Orders page.

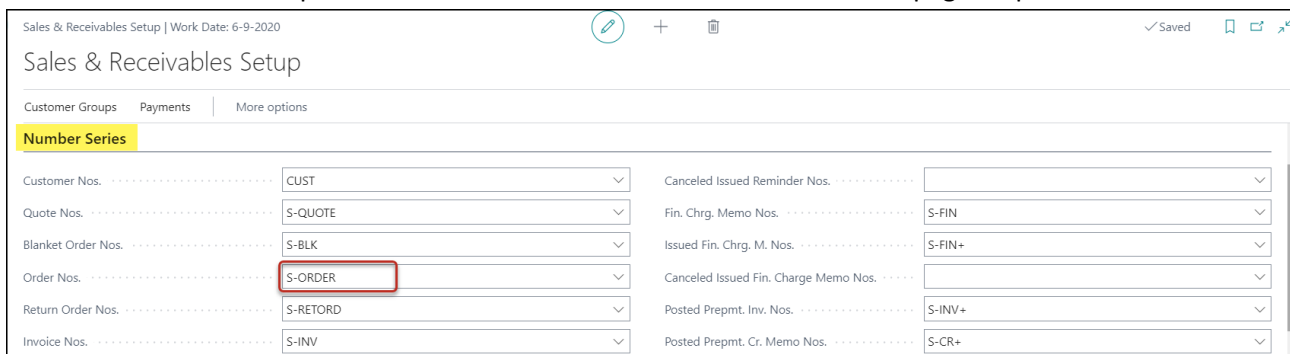
This is however only possible for Sales Quotes that have been created before through the Sales Agent Portal.

The Sales Quote document in the Orders list on Sales Agent Portals looks as follows:



ORDER NO.	DATE	STATUS	ORDER TYPE	CREATE ORDER	EDIT	PRINT	COPY	DELETE
WQ5000272	1/6/2022	Submitted	SA					

Clicking an icon in **Create order** column will initiate Sales Order creation in TRIMIT. No confirmation or other actions will be needed. Sales Order number will be assigned according to **Order Nos.** parameter in Sales & Receivables Setup in TRIMIT. Sales Order can be found in Orders list page on portals and TRIMIT.



Number Series	
Customer Nos.	CUST
Quote Nos.	S-QUOTE
Blanket Order Nos.	S-BLK
Order Nos.	S-ORDER
Return Order Nos.	S-RETORD
Invoice Nos.	S-INV

QUOTE NOS.

Specify Quote No. Series for Sales Documents created on portal. This field works in combination with field [Create Web Order as](#) (described further in this document).

ORDER NOS.

Specify Order No. Series for Sales Documents created on portal. This field works in combination with field [Create Web Order as](#) (described further in this document).

ALLOW CHANGE OF PRICE

Setting this field to **TRUE** will allow the Sales Agent to override **Unit Price** given through the regular price search in TRIMIT.

NOTE

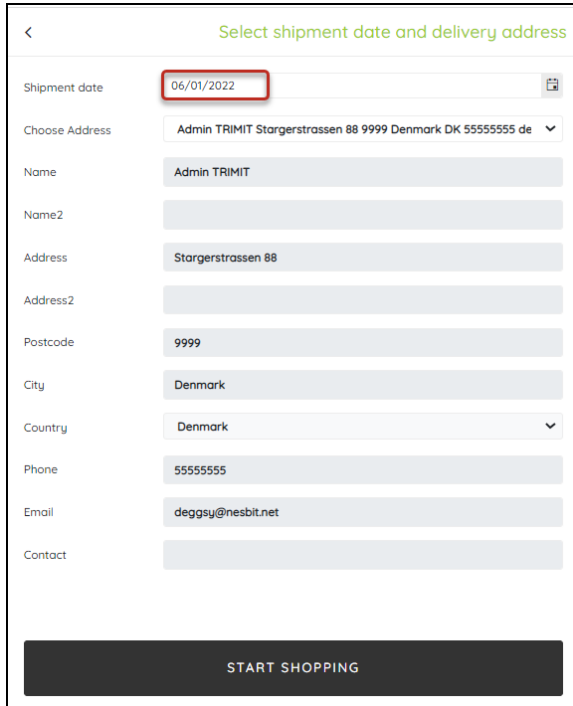
Keep in mind, that the Unit Price will then always override the different Unit Prices based on Search Tables or Formulas in case of a Matrix; the Unit Price you have on the record in the Table 7002 will then become the price for all the Colors/Sizes/Variants.

ALLOW CHANGE OF LINE DISCOUNT

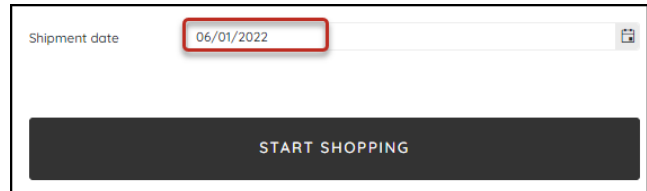
Setting this field to **TRUE** will allow the Sales Agent to enter a **Discount %** on a specific product.

ALLOW CHANGE OF SHIPMENT DATE ON SALES HEADER

If this field is set to *TRUE*, it allows the Sales Agent to set a general Shipment Date for the Sales Header when initiating a new Order.



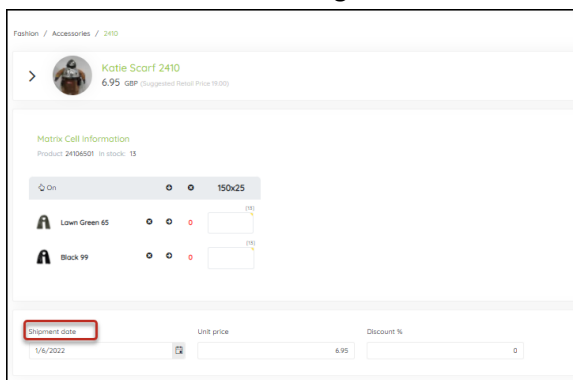
or



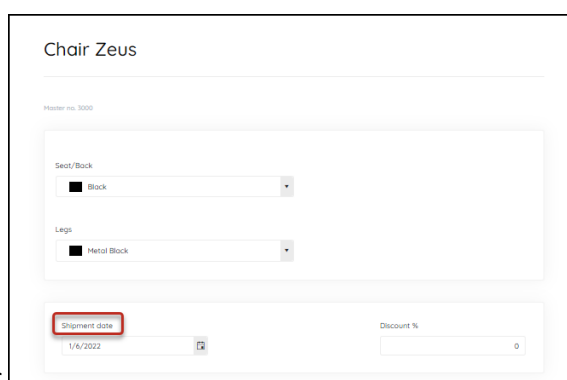
If **Allow Alternate Ship-to Code** and **Allow Change of Ship-to Code** are set to *FALSE* and **Allow Change of Shipment Date on Sales Header** is set to *TRUE* then the page will still be shown on order start, showing only the *Shipment date* field.

ALLOW CHANGE OF SHIPMENT DATE ON SALES LINE

Allows the Sales Agent to set free of choice Shipment Date that will be applied to the Sales Lines of a Matrix or for a Sales Line of a configurable Item.



or



ALLOW LINE COMMENT

If this option is set to *TRUE*, then there will be shown a **Comments** box on Product page as follows:

KBI Daisy Dress

55.00 GBP (Suggested Retail Price 145.00)

Master no. KBI2300

Comes in these colors

Comes in these sizes

ENTER QUANTITIES

Comments

Chair Zeus

Master no. 3000

Seat/Back

Legs

Shipment date

Discount %

Quantity

Calculate

Total price

104.00 GBP

Comments

or

Entered Product Comments will then be available under Sales Line Comments in TRIMIT:

Sales Order | Work Date: 6-9-2020

WOS000599 - The Fashion Store UK

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

General >

Lines Manage Line Order Fewer options

Functions Item Availability by Related Information Inventory Profile VarDim

Matrix 2190

Matrix KBI2300

Master Card

Bottleneck Capacity

Reservation Entries

Item Tracking Lines

Select Item Substitution

Dimensions

Comments

Invoice Details

Your Reference

COMMENT CODE

If a **Comment** is created on **Product details** page (Sales Line) or on Order details page (Sales Header) then it is possible to provide a **Comment Code**, which will be reflected on the Comment Line in TRIMIT.

This **Comment Code** allows distinguishing the origin of the Comment.

B2C, B2B and Sales Agent Portal Profiles have the possibility to provide this **Comment Code**.

Sales Order | Work Date: 6-9-2020

WOS000602 - The Fashion Store UK

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

Order Variant & Dimensions Documents Warehouse Prepayment History Web

Statistics

Customer

Dimensions

Approvals

Comments

No.	Item Reference No.	Description	Description 2	Collect...	Peri...	Shipment Date
KBI2300		KBI Daisy Dress				7-1-202

Lines Manage Line Order Fewer options

Functions Item Availability by Related Information Inventory Pro

Matrix KBI2300

Master Card

Bottleneck Capacity

Reservation Entries

Item Tracking Lines

Select Item Substitution

Dimensions

Comments

Item Charge Assignment

Invoice Details

Your Reference

Currency Code

GBP

Edit - Comment Sheet - Order · WOS000602

Search
New
Edit List
Delete

Date	Code	Comment
→ 7-1-2022	SA	Product Comments on SA

Code is not by default visible; you need to add it with **Personalize**

FASTTAB ITEM

Item

Category Structure
AGENT

Calculate Prices in Item Menu

Availability Check Method
Available

Inventory Profile Setup
SALESAGENT

Hide Available Qty.

Hide Availability Markers

Show Available Dates as
Date

Set Item Shipment Date

Allow Change of Shipment Date on Sales Header

Allow Change of Delivery Period

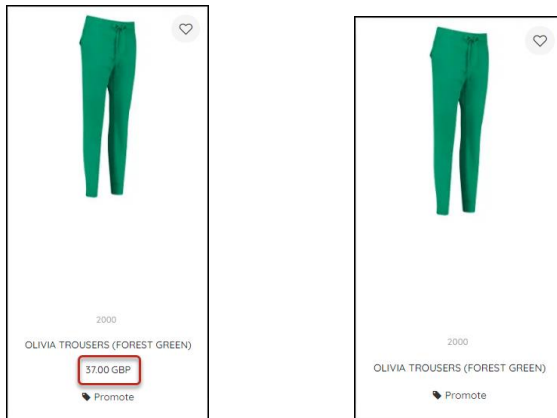
CATEGORY STRUCTURE

This field is mandatory. Select the root Category Structure.

For more information see chapter [Categories](#).

CALCULATE PRICES IN ITEM MENU

If set to **TRUE**, it enables showing the Price Tag on Portals Category page



TRUE

FALSE

AVAILABILITY CHECK METHOD

This field is mandatory. Option in this field defines a way the **Item Availability** is calculated in the SA Portal.

You can choose between the following three options:

No	No availability method is used. All items will be set to unavailable.
Inventory	The Item Availability is calculated in accordance with the Inventory Profile Setup which is specified in field Inventory Profile Setup The system calculates Inventory “–” Deductions (1) “+” Increase (2) (1) <i>All deductions are Sales Orders, Transfer Orders, Production Orders (depending on what has been chosen in the Inventory Profile Setup) – and is calculated with</i>

	a date filter "... Horizon Date". Horizon date is calculated from today (Work Date) based on the date formula in the field Horizon Availability Check from the Inventory Profile Setup. (2) Increase is Purchase Orders, Transfer Orders, Production Orders (depending on what has been chosen in the Inventory Profile Setup)– and is calculated with a date filter "... Requested Date". Requested date is the date stamped on the relevant document (Shipment Date on a Sales Order etc.) It's a static picture and only one calculation.
Available	This is a more dynamic method. The system creates a timeline with a date mark on Requested Date, and Horizon Date and on each date for an increase. On each of the dates, the above calculation (of the option Inventory) is done, and the one with the lowest Available Quantity is set as Available Quantity. By this, the system makes sure that every order is fulfilled taking in consideration whether there is an increase coming in that can fulfill some deductions from a later date. Note, that this option is also based on the Inventory Profile Setup so only the processes marked will be taken into consideration. This option should be used for B2C Portal Profile.

After changing a value in this field, it is required to run schedules to synchronize data in SA Soft Admin.

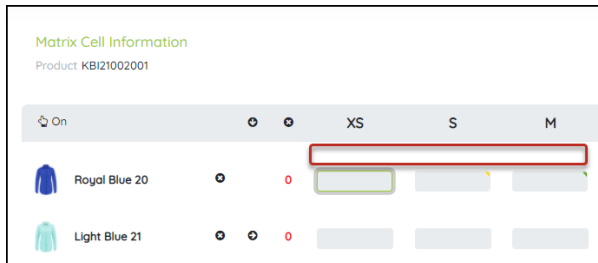
INVENTORY PROFILE SETUP

This field is mandatory if field **Available Method** is set to *Inventory* or *Available*.

Select required **Inventory Profile Setup**.

HIDE AVAILABLE QTY.

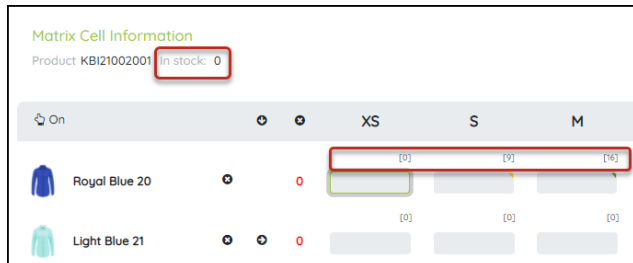
If this field is set to *TRUE*, then there will be no Item **Available Quantity** shown on **Product details** page.



Matrix Cell Information
Product KBIZ1002001

On			XS	S	M
Royal Blue 20		0			
Light Blue 21		0			

If set to *TRUE*



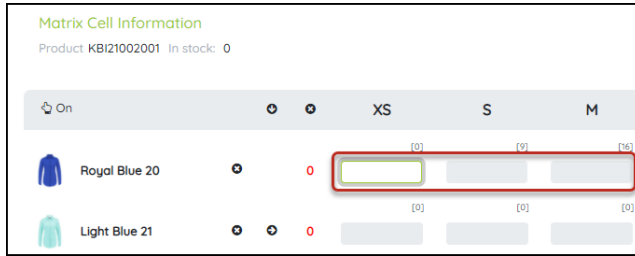
Matrix Cell Information
Product KBIZ1002001 In stock: 0

On			XS	S	M
Royal Blue 20		0	[0]	[9]	[16]
Light Blue 21		0	[0]	[0]	[0]

If set to *FALSE*

HIDE AVAILABILITY MARKERS

If this field is set to *TRUE*, then there will be no colored Markers in Matrix Cells reflecting Availability.



If set to *TRUE*

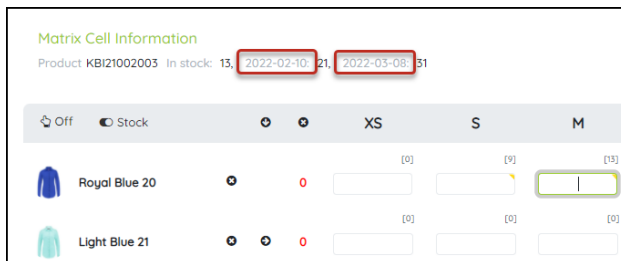


If set to *FALSE*

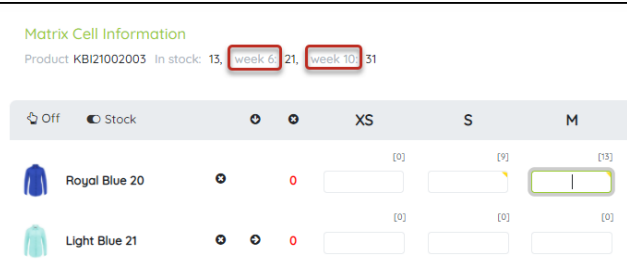
SHOW AVAILABLE DATES AS

Available options are *Date* and *Week*.

It will only show these *Dates* or *Weeks* if there are increases (Purchase Lines or Production Orders) to be expected after the **Shipment Date** of the Order Line.



If set to *Date*



If set to *Week*

See [Item Availability and Sales Import Lines](#) for more details regarding Availability.

SET ITEM SHIPMENT DATE

Available values *blank* and *Earliest Possible*.

If set to *Earliest Possible* then the Sales Line **Shipment Date** will be set to the date when the full desired availability is provided (this depends on **Inventory Profile Setup** and what is selected there, i.e., Purchase Orders, Sales Orders etc.).

The **Shipment Date** depending on Item Availability will be reflected in **Earliest Shipment Date** field on the Sales Line.

Therefore, it is possible to add Item to Basket based on availability and not on actual stock.

I.e., to buy more than in stock but the Shipment Date will be set to the date when the desired availability is in stock.

NOTE

If the **Availability Check Method** is set to *Available* and **Availability Check on Submit** is set to *TRUE*, then it is important that **Set Item Shipment Date** is set to *Earliest Possible*. The checkout verification will use the Shipment Date on the Basket Line as reference point and if that is set to *Work Date* - a buy into the future is not possible.

Example (look at the top of the snippet):

1. Available in stock on 10-01-22 (24 pieces), Quantity on Purchase Order in TRIMIT with **Expected Receipt Date** on 10-02-22 (5 pieces)

Matrix Cell Information

Product KBI20109946 In stock: 24, 2022-02-11: 29

Off	Stock			36	38	40	42	44	46	48
				[16]	[8]	[1]	[2]	[25]	[24]	[32]
	Black 99	+	0						1	
	Snowwhite 01	+	0							

2. Available in stock on 10-01-22 (13 pieces), Quantity on Purchase Order 1 in TRIMIT with **Expected Receipt Date** on 10-02-22 (5 pieces) and Purchase Order 2 with **Expected Receipt Date** on 01-03-22 (10)

Matrix Cell Information

Product KBI20109946 In stock: 24, 2022-02-11: 29, 2022-03-02: 39

Off	Stock			36	38	40	42	44	46	48
				[16]	[8]	[1]	[2]	[25]	[24]	[32]
	Black 99	+	0						1	
	Snowwhite 01	+	0							

3. Available in stock on 10-01-22 (13 pieces), Quantity on Purchase Order 1 in TRIMIT with **Expected Receipt Date** on 10-02-22 (5 pieces) and Purchase Order 2 with **Expected Receipt Date** on 01-03-22 (10), Quantity on Sales Order in TRIMIT on **Shipment Date** 15-03-22 (6)

Matrix Cell Information

Product KBI20109946 In stock: 24, 2022-02-11: 29, 2022-03-02: 33

Off	Stock			36	38	40	42	44	46	48
				[16]	[8]	[1]	[2]	[25]	[24]	[32]
	Black 99	+	0						1	
	Snowwhite 01	+	0							

4. Available in stock on 10-01-22 (13 pieces), Quantity on Purchase Order 1 in TRIMIT with **Expected Receipt Date** on 10-02-22 (5 pieces) and Purchase Order 2 with **Expected Receipt Date** on 01-03-22 (10), Quantity on Sales Order in TRIMIT on **Shipment Date** 15-03-22 (20)

Matrix Cell Information

Product KBI20109946 In stock: 19

Off	Stock			36	38	40	42	44	46	48
				[16]	[8]	[1]	[2]	[25]	[19]	[32]
	Black 99	+	0						1	
	Snowwhite 01	+	0							

The 5 and 10 of the Purchase Orders are in this case already reserved for the Sales Order of 15-03-20, but also an extra 5 of the Stock (it changed from 24 in example 3 to 19 in example 4)

If **Set Item Shipment Date** is set to *blank*, then the Shipment Date will be handled according to the normal rules (i.e., Set to Order Date).

Examples of Shipment Dates on Sales Line:

- **Set Item Shipment Date** is blank and **Shipment Date** on Product details page on portal is set to 01/18/2022. Work date in 01/11/2022. The full availability on the order is on 03/02/2022.

Matrix Cell Information

Product KBI20109946 In stock: 23, 2022-02-11: 28, 2022-03-02: 38

Off Stock 36 38 40 42 44 46 48

Black 99 30 [16] [8] [1] [2] [25] [23] [32]

Snowwhite 01 0 [14] [10] [1] [8] [9] [10] [19]

Shipment date 1/18/2022 Unit price 39.00 Discount % 0

The Sales Order Lines in TRIMIT will look like:

Lines	Manage	Line	Order	Fewer options						
Exp... Mat...	Type	No.	Complete Shipment of Sales Line	Qty. to Assign	Qty. Assigned	Planned Delivery Date	Planned Shipment Date	Shipment Date	Earliest Shipment Date	
→ ☒	Matrix	KBI2010	No	0	—	18-1-2022	18-1-2022	18-1-2022	11-7-2022	
☐	Item	KBI20109946	No	0	—	18-1-2022	18-1-2022	18-1-2022	11-7-2022	

- **Set Item Shipment Date** is Earliest possible and **Shipment date** on product page on portal is set to 01/18/2022. Work date in 01/11/2022. The full availability on the order is on 03/02/2022.

Matrix Cell Information

Product KBI20109946 In stock: 23, 2022-02-11: 28, 2022-03-02: 38

Off Stock 36 38 40 42 44 46 48

Black 99 30 [16] [8] [1] [2] [25] [23] [32]

Snowwhite 01 0 [14] [10] [1] [8] [9] [10] [19]

Shipment date 1/18/2022 Unit price 39.00 Discount % 0

The Sales Order Lines in TRIMIT will look like:

Lines	Manage	Line	Order	Fewer options						
Exp... Mat...	Type	No.	Complete Shipment of Sales Line	Qty. to Assign	Qty. Assigned	Planned Delivery Date	Planned Shipment Date	Shipment Date	Earliest Shipment Date	
→ ☒	Matrix	KBI2010	No	0	—	18-1-2022	18-1-2022	2-3-2022	11-7-2022	
☐	Item	KBI20109946	No	0	—	18-1-2022	18-1-2022	2-3-2022	11-7-2022	

ALLOW CHANGE OF DELIVERY PERIOD

If this field is set to *TRUE*, the Sales Agent can select from the list of **Shipment Group Code** (Shipment Groups or Collection Delivery Periods) that the product is attached to in the Product page.

This is however only possible if the Sales Agent has chosen an **Order Type** with field **Delivery Period Handling** set to *Specify Delivery Periods*.

Select delivery period before entering quantities

- May - (26/05/2022)
- June - (25/06/2022)
- July - (26/07/2022)
- August - (27/08/2022)

	Off		XS	S	M	L	XL	XXL	3XL
 Royal Blue 20									
 Light Blue 21									
 Yellow 30									
 Dark Orange 37									
 Forest Green 60									

FASTTAB CHECK-OUT

Check-Out

Allow Alternate Ship-to Code		Create Web Orders as	Order
Allow Change of Ship-to Code		Signature in Checkout	
Skip Confirmation E-Mail		Instant ASI Posting	
Allow Skip E-Mail Online		Posting Lines Threshold	100
Edit Order Confirmation E-Mail		Availability Check on Submit	

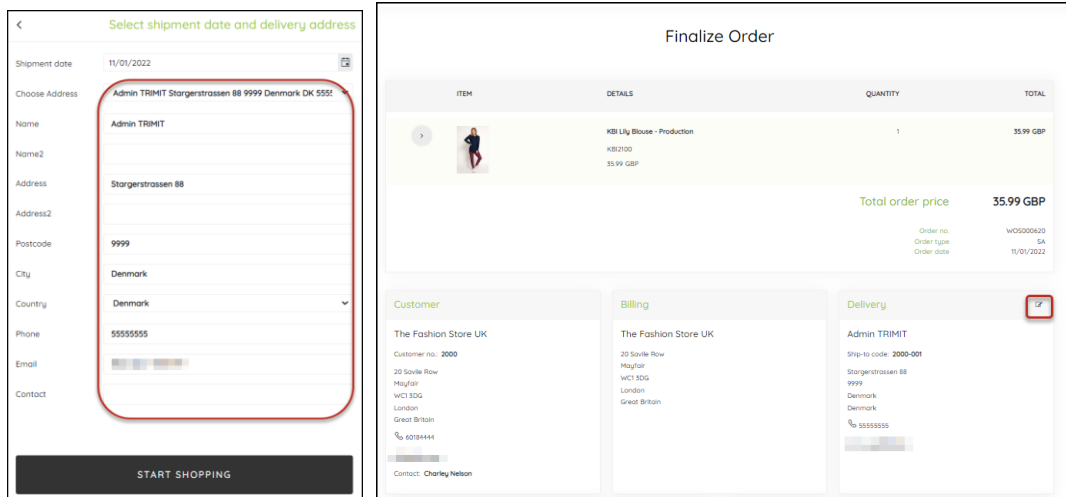
ALLOW ALTERNATE SHIP-TO CODE

SA Portal Profile.

This is a Boolean field. Setting this field to *TRUE* activates **Select shipment date and delivery address** page after initializing a new Order in which the Salesperson/Agent can choose a **Ship-to Code**.

This may be important if **Choose Address** (Ship-to Code) has a **Location Code** value assigned, which affects Item Availability.

If set to *TRUE*, then default **Ship-to Code** of the Customer will be shown on Order start even if Customer has only one **Ship-to Code**, and the salesperson/agent is even able to change the details of a chosen **Ship-to Code** for this specific Order.

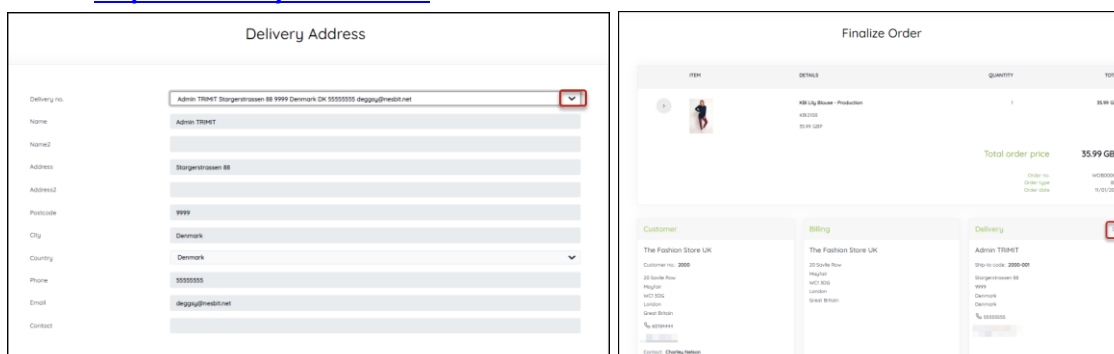


Setting this field to **TRUE** also enables ability of changing **Ship-to Code** on **Finalize order** page, i.e., final stage in order creation process.

B2B Webshop profile.

If this field is set to **TRUE**, then it will be possible to select a different **Delivery Address** (Ship-to Code) on Order start (from drop down field) or on **Finalize order** page if alternative Ship-to Codes are available in TRIMIT for the Customer.

If this field is set to **FALSE**, then **Delivery Address** page will not be shown on Order start on B2B Webshop even if [Ship-to Code by Order Start](#) field is set to **TRUE**.



Considerations regarding Location Code. Depending on the fields in the **Portal Profile Card**, the Location Code can be taken from different places in the system.

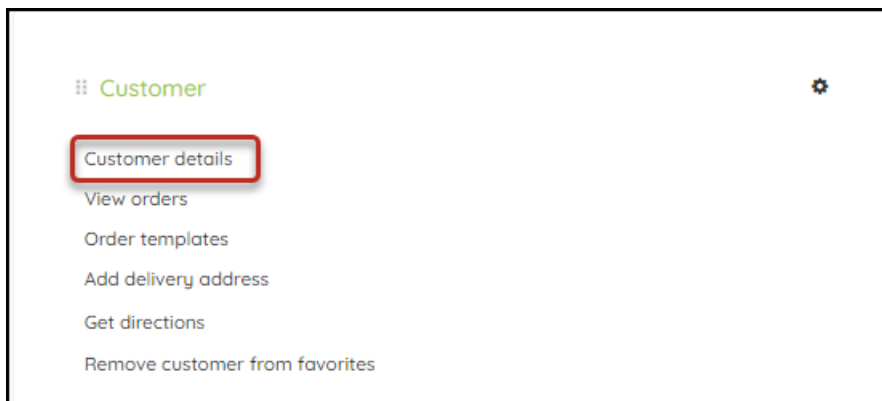
Following table describes the different combinations:

Mandatory Change of Order Type	Allow Alternate Ship-to Code	Location Code from
+	+ (default +/-)	Order Type
+	- (default +/-)	Order Type
-	+ (default +)	Ship-to Code Card
-	+ (default -)	Customer
-	- (default +)	Ship-to Code Card
-	- (default -)	Customer
-	- (default -)	Extended location search

(default +/-) is value in **Default Ship-to Code** field on **Ship-to Address Card**: + = **TRUE**, - = **FALSE**

ALLOW CHANGE OF SHIP-TO CODE

If this field is set to *TRUE*, then it is possible to edit the Customer's Ship-to Address on SA Customer dashboard under **Customer/Customer details**

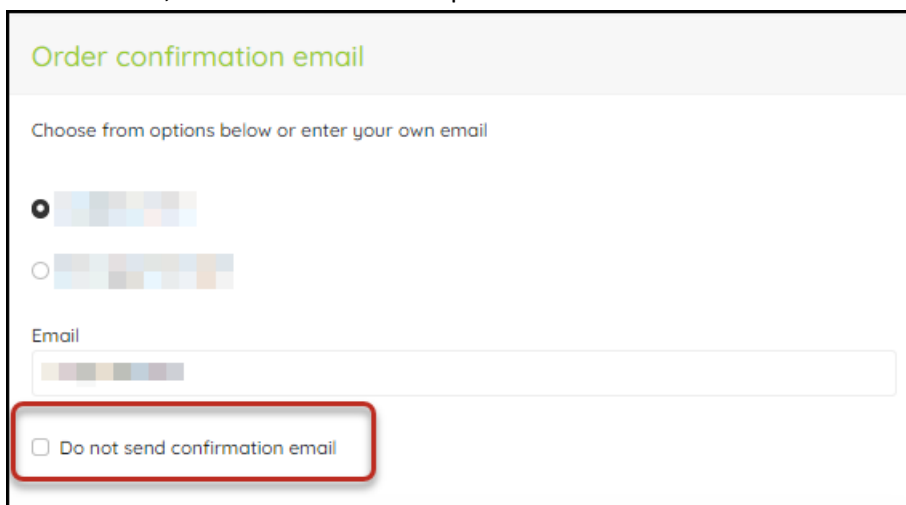


SKIP CONFIRMATION E-MAIL

If set to *TRUE*, then it will be possible to submit Order without sending the Order Confirmation E-Mail to the Customer.

ALLOW SKIP E-MAIL ONLINE

If set to *TRUE*, then there will be an option to **Do not send confirmation email** on **Finalize order** page.



Setting **Do not send confirmation email** field to *TRUE* will disable sending any Order Confirmation E-Mails to recipients. If the Order is reopened for editing then the value is not persisted, i.e., if originally was set to *TRUE* then on reopen will be set to *FALSE* again.

EDIT ORDER CONFIRMATION E-MAIL

This option is common to SA and B2B. If the value is set to *TRUE*, then it is possible to manually type an E-Mail Address an Order Confirmation will be sent to. If set to *FALSE*, then it will only be possible to select an E-Mail Address from available options.

It is possible to select a needed E-Mail Address on **Finalize order** page – the last page in order creation process on SA Portal and B2B Shop.

CREATE WEB ORDERS AS

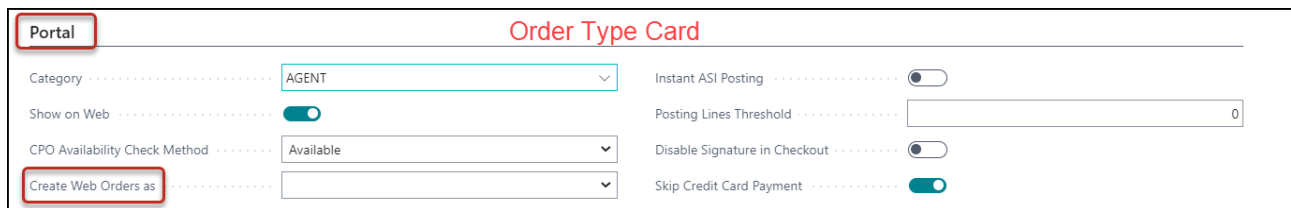
Select Document Type that should be created when submitting the Order from the Portal.

Possible values are *Order* and *Quote*.

The SA Portal and B2B Webshop have an option to choose which Document Type is created, Sales Order or Sales Quote, when the Order is submitted.

After submitting on the Portal, the Sales Document can be landing in the **Advanced Sales Integration** table, after posting from which the document appears whether as a Sales Order or a Sales Quote or the Sales Document will be created directly based on the [Instant ASI Posting](#).

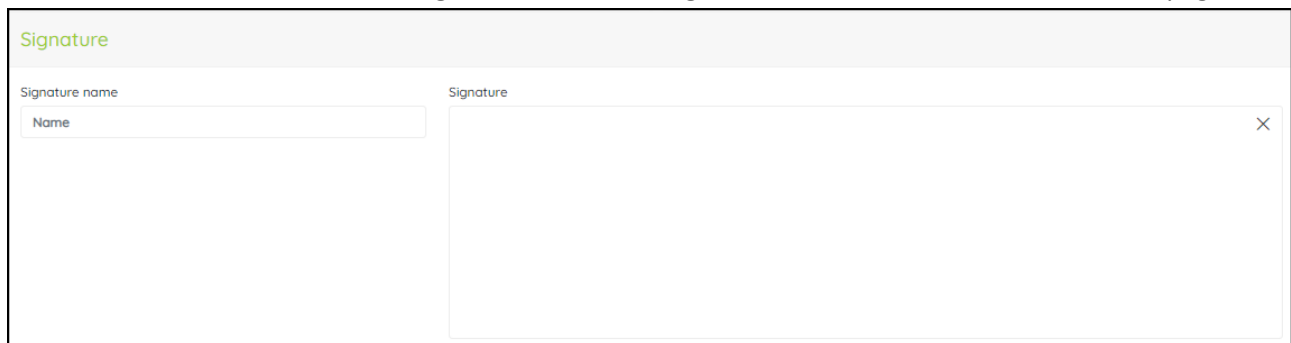
This field is also available on **Order Type** Card, FastTab **Portal**, which will – if filled - overrule the content of this field in the Portal Profile.



The screenshot shows the 'Order Type Card' FastTab 'Portal'. The 'Create Web Orders as' field is highlighted with a red box. Other fields include 'Category' (AGENT), 'Show on Web' (toggle on), 'CPO Availability Check Method' (Available), 'Instant ASI Posting' (toggle on), 'Posting Lines Threshold' (0), 'Disable Signature in Checkout' (toggle on), and 'Skip Credit Card Payment' (toggle on).

SIGNATURE IN CHECKOUT

If set to *TRUE*, then new fields for **Signature name** and **Signature** will be shown on **Finalize order** page.

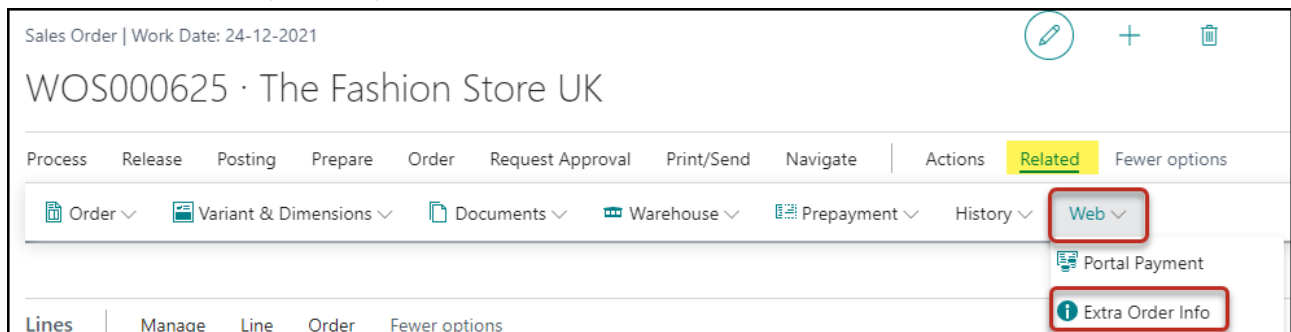


The screenshot shows the 'Signature' section in the checkout process. It contains two fields: 'Signature name' (with a sub-field 'Name') and 'Signature'.

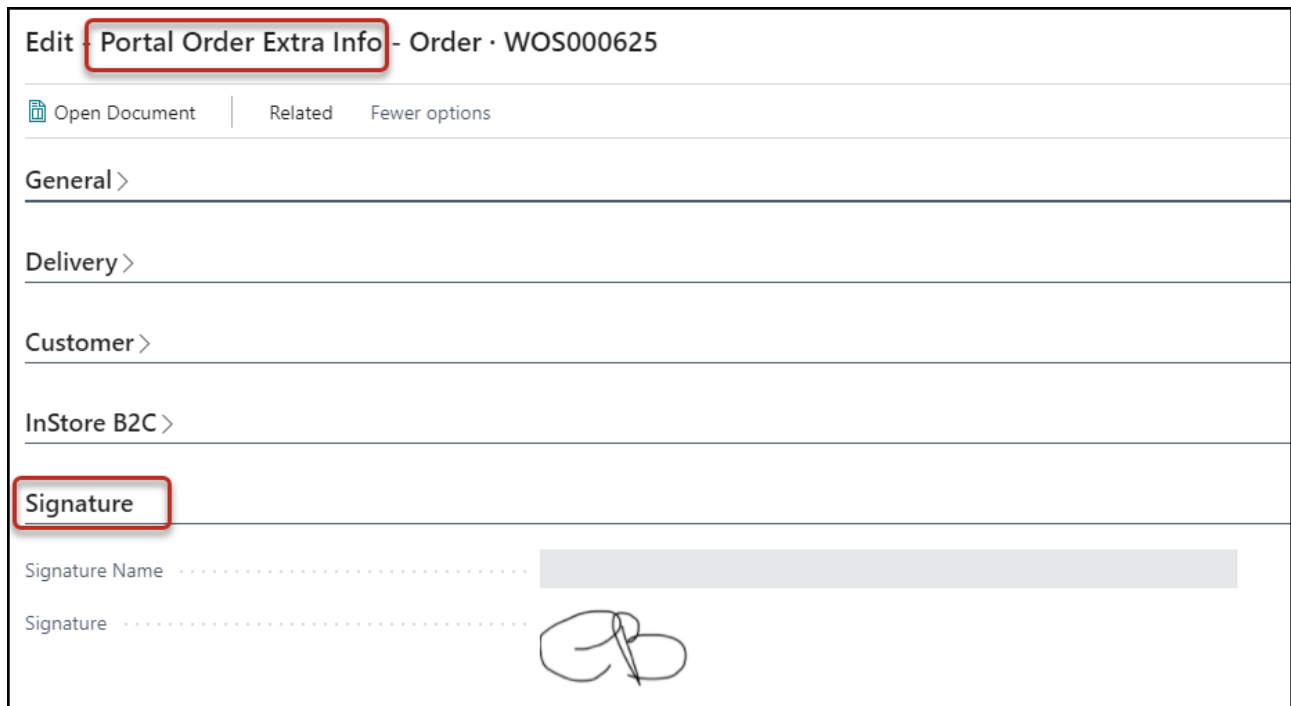
And submitting an Order will not be possible without filling these fields.

This field is also available on **Order Type** Card as field **Disable Signature in Checkout**, which will overrule the content of this field in the Portal Profile.

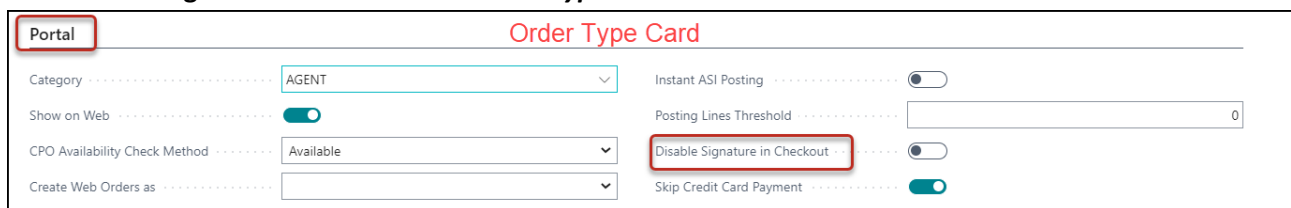
Signature name and **Signature** can then be seen in **Extra Order Info** page in TRIMIT, which can be opened from **Sales Order** card, **Related, Web**.



The screenshot shows the 'Sales Order' card for 'WOS000625 · The Fashion Store UK'. The 'Web' dropdown menu is highlighted with a red box, and the 'Extra Order Info' link is also highlighted with a red box. The card includes a top bar with 'Sales Order | Work Date: 24-12-2021' and a bottom bar with 'Lines', 'Manage', 'Line', 'Order', and 'Fewer options'.



Signature functionality on Portals can be disabled per Order Type. This can be done by setting value *TRUE* in field **Disable Signature in Checkout** on **Order Type** card:



INSTANT ASI POSTING

Setting this field to *TRUE* activates Instant Posting of Portals Sales Documents in ASI – meaning that an Order on the Portal will immediately be created as a Sales Quote or Sales Order when finalizing the Order on the Portal.

Read more information about this field in **White Paper – TRIMIT Portals Advanced Sales Integration**.

This field can also be overruled by the corresponding field in the Order Type (see picture above).

POSTING LINES THRESHOLD

Specify the maximum number of Sales Lines in the Portals Sales Document, which allows Instant Posting. This works in combination with field **Instant ASI Posting**. Read more information about this field in **White Paper – TRIMIT Portals Advanced Sales Integration**.

This field can also be overruled by the corresponding field in the Order Type (see picture above).

AVAILABILITY CHECK ON SUBMIT

Usually, an **Inventory Profile Setup** uses **Include Sales Import Documents** = *TRUE* – in this way Availability is checked as soon as Item being added to basket. And oversell is impossible for two simultaneous users which are trying to add the same Item with the same last quantity to basket.

Some Customers though do not to use **Include Sales Import Documents** on Inventory Profile Setup.

That is why there is another option on portal profile – **Availability Check on Submit**. This option allows adding to basket the last available quantity for two different users and first check the Item Availability on order submit. So, two different users cannot submit order with last available quantity – only one of them can, the first who clicked **Finalize order** button.

This though will not work if **Replenishment Policy** on the Item Card is set to *Order* (the availability will not be checked) but will work if it is set to *Inventory*.

FASTTAB PAGE ACTIONS

Page Actions						
Dashboard		5	...	Order Document	4	...
Customer		4	...	Order History	1	...

DASHBOARD

You can determine which **Actions** should be shown on the **Sales Agent Dashboard** of the SA Portal (or **Customer Dashboard** of the B2B Webshop) in the dock **Actions**.

Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

Edit - Portal Action Setup				
Search + New Edit List Delete				
Type	No. / Link	Name	Custom Parameter	
Header		Header on Dashboard		
Report	111	Customer - Top 10 List		
Link	https://trimit.com	https://trimit.com		
Sales Statistics	MASTEREXP	Expected Revenue per Master (+/- 1Y)		
→ Statistics Overview	SA_BASKET	Sales Agent Portal Basket		

TYPE

You can choose the Types *Report*, *Link*, *Sales Statistic* or *Statistics Overview*.

The other available options *XMLport* and *Page* are not applicable and will not be shown in the dock **Actions** on the Portal.

NO./LINK

Based on the **Type** you can choose a *Report*, *Website*, *Extended Sales Statistics Setup* or *Extended Statistics Overview*.

For setting up the *Extended Sales Statistics Setup* or *Extended Statistics Overview*: see details in **White Paper – TRIMIT Extended Sales Statistics**

NAME

The name of the **No./Link** will be shown automatically, but you can change it.

Then this will become the Name that will be shown in the dock **Actions** on the Portal.

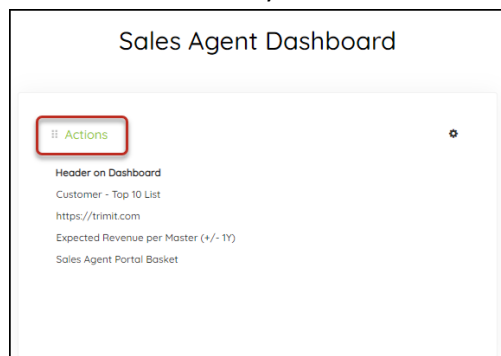
CUSTOM PARAMETER

Especially for customized Reports, you could enter the Parameters needed for this Report.

Type Report and **Sales Statistics** will result in a pdf-file of the Report/Sales Statistic if you click on the **Name** in the dock **Actions**.

Type Link will open the website of the **No./Link** if you click on the **Name** in the dock **Actions**.

Type Statistics Overview will show a webpage with the individual Sales Statistics that are connected to the Statistics Overview if you click on the **Name** in the dock **Actions**.



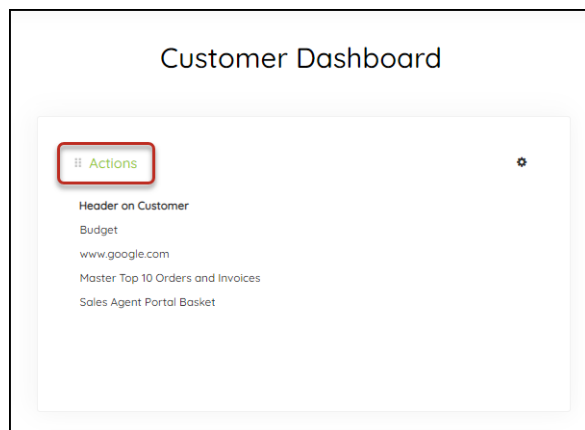
CUSTOMER

You can determine which **Actions** should be shown on the **Customer Dashboard** of the SA Portal – after you have chosen the Customer for which you want to see/create Orders/History - in the dock **Actions**.

Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

Edit - Portal Action Setup				
Search + New Edit List Delete				
Type	No. / Link	Name		Custom Parameter
Header		Header on Customer		
Report	8	Budget		
Link	www.google.com	www.google.com		
Sales Statistics	MASTERTOP10	Master Top 10 Orders and Invoices		
→ Statistics Overview	SA_BASKET	Sales Agent Portal Basket		

For details of the fields see [Dashboard](#).



ORDER DOCUMENT

You can determine which **Actions** should be shown on the **Orders/Quote** page of a Customer (which can be found in dock **History**) of the SA Portals (or B2B Webshop Customer Dashboard) – after you have chosen the Customer for which you want to see the Orders/Quotes.

Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

Edit - Portal Action Setup				
Search + New Edit List Delete				
Type	No. / Link	Name		Custom Parameter
→ Header		Order header		
Sales Statistics	CUSTOMERTOP10	Customer Top 10 Invoices		
Statistics Overview	SA_BASKET	Sales Agent Portal Basket		
Sales Statistics	MASTERTOP10	Master Top 10 Orders and Invoices		
Link	https://trimit.com	https://trimit.com		

For details of the fields see [Dashboard](#).



You're shopping as: 2000 The Fashion Store UK

Quotes / Orders

DOCUMENT TYPE	ORDER NO.	DATE	DOCUMENT AMOUNT	COPY	OPEN AS PDF
Order	WOS000610	1/29/2022	27.00		
Order	WOS000627	1/11/2022	71.98		
Order	WOS000625	1/11/2022	35.99		

Order header

- Customer Top 10 Invoices
- Sales Agent Portal Basket
- Master Top 10 Orders and Invoices
- https://trimit.com

ORDER HISTORY

You can determine which **Actions** should be shown on the **Invoices/Credit Memos** page of a Customer (which can be found in dock **History**) of the SA Portals (or B2B Webshop Customer Dashboard) – after you have chosen the Customer for which you want to see the Invoices/Credit Memos.

Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

Edit - Portal Action Setup

Search + New Edit List Delete

Type	No. / Link	Name	Custom Parameter
Header		order history header	
Statistics Overview	SA_BASKET	Sales Agent Portal Basket	
Sales Statistics	CUSTOMERTOP10	Customer Top 10 Invoices	

For details of the fields see [Dashboard](#).



You're shopping as: 2000 The Fashion Store UK

Invoices / Credit Memos

DOCUMENT TYPE	DOCUMENT NO.	DATE	SHIPMENT NO.	DOCUMENT AMOUNT	OPEN AS PDF
Invoice	103081	06/09/2020	102092	40.00	
Invoice	103080	06/09/2020	102091	1,515.00	

order history header

- Sales Agent Portal Basket
- Customer Top 10 Invoices

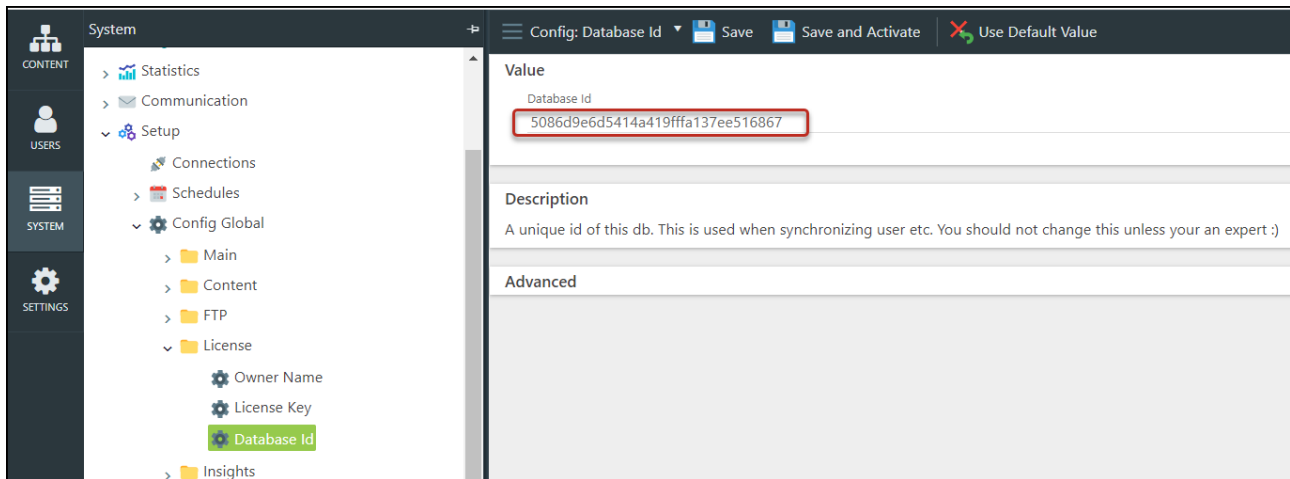
FASTTAB ADVANCED

Advanced	
Portal Database Id	

PORTAL DATABASE ID

If you only have 1 SA Portal (or B2B Webshop or Supplier Portal), this field is not mandatory. However, if you have several SA Portals (or B2B Webshops or Supplier Portals) this field is mandatory to identify the right Portal Database with its unique **Database Id**.

The Portal Database Id can be taken from Modelyn **System/Setup/Config Global/License/Database Id**:



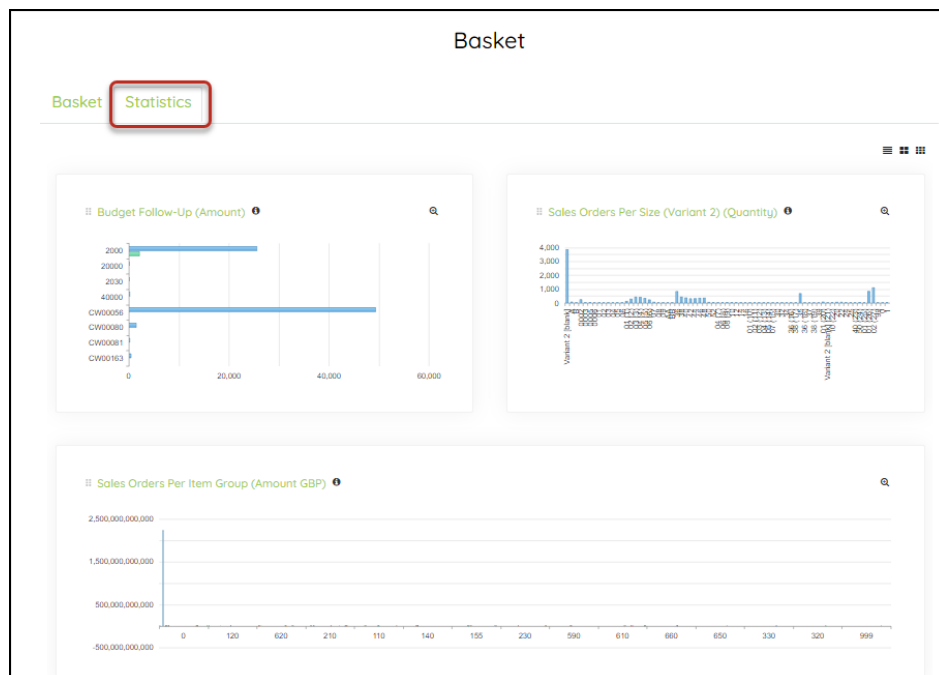
The screenshot shows the 'System' configuration page in the TRIMIT Business Central interface. The left sidebar contains a tree view with categories: CONTENT, USERS, SYSTEM, and SETTINGS. Under 'SYSTEM', the 'Config Global' option is selected, and the 'License' sub-menu is expanded, highlighting 'Database Id'. The main content area shows the 'Config: Database Id' configuration. It includes a 'Value' field with the text '5086d9e6d5414a419ffa137ee516867' highlighted in a red box. Below this is a 'Description' field with the text: 'A unique id of this db. This is used when synchronizing user etc. You should not change this unless your an expert :)'. At the bottom, there is an 'Advanced' section which is currently empty.

FASTTAB STATISTICS

Statistics	
Basket Statistics	SA_BASKET
Customer Aging Starting Date Formula	-CY-1M
Period Length for Customer Aging	1M

BASKET STATISTICS

You can choose a **Statistics Overview** that will be shown in the Basket page of the SA (or B2B).



CUSTOMER AGING STARTING DATE FORMULA

In this field, you can enter a Date Formula for the Starting Date of the Customer Aging that can be shown on the SA.

I.e., if today is *January 11th, 2022*, and this field is *-CY-1M*, that the Starting Date will be *December 1st, 2021*. In the dock **Customer Aging** you will then see a column with *..November 30th, 2021*.

Customer Aging			Balance
	.. 11/30/21		
30000 John Haddock Insurance Co.	349,615.40		349,615.40
10000 The Cannon Group PLC	168,364.41		168,364.41
20000 Selangorian Ltd.	96,049.99		96,049.99
3000 The Furniture Shop UK	62,500.00		62,500.00
2000 The Fashion Store UK	49,530.90		49,530.90
Others	36,257.54		36,257.54
Total (LCY)	762,318.24		762,318.24

And if you click the Magnifying Glass:

Customer Aging							Balance
	..before	12/01/21.. 12/31/21	01/01/22.. 01/31/22	02/01/22.. 02/28/22	After...		
30000 John Haddock Insurance Co.	349,615.40	0.00	0.00	0.00	0.00		349,615.40
10000 The Cannon Group PLC	168,364.41	0.00	0.00	0.00	0.00		168,364.41
20000 Selangorian Ltd.	96,049.99	0.00	0.00	0.00	0.00		96,049.99
3000 The Furniture Shop UK	62,500.00	0.00	0.00	0.00	0.00		62,500.00
2000 The Fashion Store UK	49,530.90	0.00	0.00	0.00	0.00		49,530.90
49658585 Hotel Pterdesee	14,395.75	0.00	0.00	0.00	0.00		14,395.75
49625252 Beef House	11,941.36	0.00	0.00	0.00	0.00		11,941.36
49633663 Autohaus Mielberg KG	7,924.80	0.00	0.00	0.00	0.00		7,924.80
40000 Deerfield Graphics Company	1,328.88	0.00	0.00	0.00	0.00		1,328.88
50000 Guildford Water Department	666.75	0.00	0.00	0.00	0.00		666.75
Total (LCY)	762,318.24	0.00	0.00	0.00	0.00		762,318.24

PERIOD LENGTH FOR CUSTOMER AGING

The content of this field (a Date Formula) determines the **Period** between the columns in the details Customer Aging; see picture above.

FASTTAB REPORT

Report			
Quote Report No.	6036700	Quote Report (ASI)	0
Order Confirmation Report No.	6036701	Order Confirmation (ASI)	0
Invoice Report No.	0	Posted Invoice Report No.	6036702
Credit Memo Report No.	0	Posted Credit Memo Report No.	6036703
Return Order Confirmation	0	Statement Report No.	6036650
Blanket Sales Order No.	0	Customer Aging Report No.	0

In this FastTab you need to enter the relevant Report Nos. that will be used in the SA portal.
If no **Customer Aging Report No.** is entered, report **105 Customer - Summary Aging** will be used.

ACTIONS IN SA PORTAL PROFILE

Edit - Sales Agent Portal Profile - AGENT

Manage
Order Type Setup
Customer Templates Setup
Page
Related
Fewer options

ORDER TYPE SETUP

Via **Order Type Setup**, you can choose the **Order Types** that can be selected in the SA (B2B).

Profile Order Type Relations | Work Date: 1-1-2022

✓ Saved

Search

+ New

Edit List

Delete

Order Type Card

More options

Portal Profile ID ↑ ▼	Order Type ↑	Order Type Description	Alternative Sorting	
→ AGENT ▼	⋮	02SS_CY_PRE	Spring/Summer Current Year Presales	7
AGENT		03FW_CY_PRE	Fall/Winter Current Year Presales	6
AGENT	⋮	10AFTERSALES	Aftersales	5
AGENT		SA	Sales Agent Portal Orders	2
AGENT		SA-SEARCH	Sales Agent Portal Search Delivery Periods	1
AGENT		SA-SPECIFY	Sales Agent Portal Specify Delivery Period	0

The **Alternative Sorting** determines in which sorting the Order Types will be shown when creating a new Order on the SA (B2B).

CUSTOMER TEMPLATES SETUP

Via **Customer Templates Setup**, you can select the Configuration Templates that are related to Table **18 Customer**. These Customer Templates can then be selected by the Sales Agent when creating a new Customer via the SA.

Portal Customer Templates | Work Date: 1-1-2022

✓ Saved

Search + New Edit List Delete

Customer Template ↑

→	CUSTOMER01	
	CUSTOMER02	
	CUSTOMER03	

PAGE

Edit - Sales Agent Portal Profile - AGENT

Manage Order Type Setup Customer Templates Setup **Page** Related Fewer options

◀ Previous ▶ Next

If there are several **Portal Profiles** of the same **Type SalesAgent**, you can see the *Next* Portal Profile Card and/or the *Previous* Portal Profile Card.

RELATED IN SA PORTAL PROFILE

Edit - Sales Agent Portal Profile - AGENT

Manage Order Type Setup Customer Templates Setup Page **Related** Fewer options

Order Type Setup Customer Templates Setup Order Templates

Under **Related**, you see the same **Actions** as described earlier besides:

ORDER TEMPLATES

Portal Document Templates | Work Date: 24-12-2021

✓ Saved

Search Manage Document Templates Actions Related Fewer options

Document Type	No.	Order Type	Global Order Template	Salesperson Code	User E-Mail
→ Order	WOS000078	SA	☒	JR	
Order	WOS000189	SA	☐	JR	
Order	WOS000299	SA	☐	JR	
Order	WOS000513	SA	☒	JR	
Order	WOS000543	SA	☐	JR	
Order	WOS000544	SA	☐	JR	
Order	WOS000545	SA	☒	JR	
Order	WOS000631	SA	☒	JR	

See [Order Template on SA Portal](#) for more details.

ORDER TEMPLATE ON SA PORTAL

When creating an Order on SA Portal, it is possible to mark this Order (on **Order Details** page) as *Order Template*. It is a good idea to add an **Order comment**, which becomes an Order Template Description and makes it easier to differentiate between Order Templates. If portals order is marked as *Template* – it can only be closed by clicking **Close order template** button. This saves the Template.

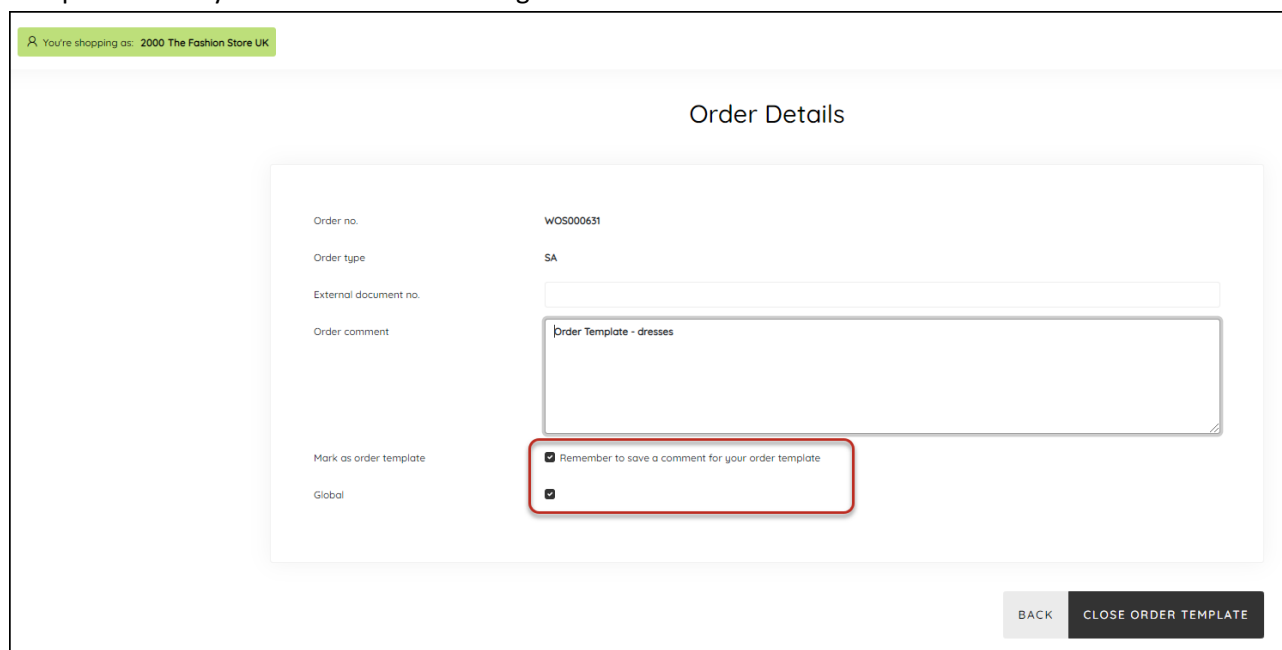
To locate the created Templates - navigate to **Sales Agent Dashboard**, click **Order templates** (within **My account** dock). Here it is possible to Edit or Delete the Order Template.

A Sales Agent can only see his own and *Global* Order Templates from other Sales Agents, but he can only Edit or Delete his own Order Templates.



Order Templates						
GLOBAL	COMMENT	ORDER TYPE	ORDER NO.	DATE	EDIT	DELETE
✓	This is a comment for the order with a lot of epic information	SA	WOS000078	9/30/2021		
✓	Bicycle order template	SA	WOS000513	11/26/2021		
✓	Global with dress 2300	SA	WOS000545	12/6/2021		
✓	Order Template - dresses	SA	WOS000631	1/11/2022		

Global Templates are available for all Sales Agents. Sales Agent with administrative privileges can mark an Order Template to be *Global* (on **Order Details** page). The actions like Edit and Delete Global Order Template are only available for the Sales Agent who created it.



The screenshot shows the 'Order Details' page with the following information:

- You're shopping as: 2000 The Fashion Store UK
- Order no.: WOS000631
- Order type: SA
- External document no.: (empty field)
- Order comment: Order Template - dresses
- Mark as order template: ☒ Remember to save a comment for your order template
- Global: ☒
- Buttons: BACK, CLOSE ORDER TEMPLATE

It is possible to choose whether to show Order Templates on start new Order or not. There is a field [Enable Template Selection](#) in the Portal Profile. If this field is set to *TRUE* then Order Templates, if there are any, will be shown on start new order. If this option is set to *FALSE*, then Order Templates will not be shown on order start.

Order Templates are filtered out and not shown on **Advanced Sales Documents** page in TRIMIT. Therefore, they cannot be posted from ASI.

In order to see Order Templates in TRIMIT, if using the Role Center **TRIMIT Portal Administrator, Sales, Portals Sales Document Templates** or use **Tell me Portal Sales Document Templates**:

CRONUS TRIMIT W1 Ltd. Sales ▾ Purchase ▾ Payments ▾ Customer Club ▾ Interaction ▾ ConnectPortal ▾ Setup ▾ ≡									
Portal Sales Documents Portal Sales ...ts with Errors Portal Sales D...ent Templates Posted Portal Sales Documents									
Portal Sales Document Templates: All ▾ 🔍 Search 🗑️ Delete Document ▾ Templates ▾ More options									
Document Type	No.	Order Type	Global Order Template	Salesperson Code	User E-Mail				
Order	WOS000078	SA	☒	JR		Notes + (There is nothing to show in this view)			
Order	WOS000189	SA	☐	JR					
Order	WOS000299	SA	☐	JR					
Order	WOS000513	SA	☒	JR					
Order	WOS000543	SA	☐	JR					
Order	WOS000544	SA	☐	JR					
Order	WOS000545	SA	☒	JR					
Order	WOS000631	SA	☒	JR					

DOCUMENT TYPE

Type of the Order Template document. Available values are *Order* and *Quote*. These values depend on [Create Web Order as](#) field on Portal Profile Setup page.

NO.

Number of the Order Template document.

ORDER TYPE

Order Type used on the Template.

GLOBAL ORDER TEMPLATE

This Boolean field indicates whether the Template is set to be *Global*. This value can only be changed by creator Sales Agent on SA Portal.

SALESPERSON CODE

Code of creator Sales Agent.

USER E-MAIL

E-Mail of creator Sales Agent.

Hidden fields

SELL-TO CUSTOMER NO.

Sell-to Customer Number used on Order Template.

LOCATION CODE

Location Code used on Order Template.

SELL-TO CUSTOMER NAME

Sell-to Customer name used on Order Template.

CREATION DATE

Date of Order Template creation.

MODIFIED DATE

Date the Order Template was last modified on.

IMPORT STATUS

Advanced Sales Integration status.

DOCUMENT

Portal Sales Document Templates: All ▾ Search Delete Document ▾ Templates ▾ More options					
Document Type	No.	Order Type	Global Order Templ...	Sale Cod	Import Status

CARD

This will open the **Portal Sales Document** page with the details of the Template Order.

Edit - Portal Sales Document - CPO · Order · WOS000631

Manage | Post | Page | More options

General

Document Type	Order	Sell-to Address	20 Savile Row	Sell-to Country/Region Code	GB
No.	WOS000631	Sell-to Address 2	Mayfair	Posted Date	
Sell-to Customer No.	2000	Sell-to Post Code	WC1 3DG	Posted Document Type	Quote
Sell-to Customer Name	The Fashion Store UK	Sell-to City	London	Posted Document No.	
Sell-to Customer Name 2		Sell-to County	Jutland	End Customer No.	

Portal Sales Document Lines | Line | More options

Skip Post...	Type	No.	Description	Description 2	Quantity	Qty. per Unit of Measure	Shipment Date	Period Code	Unit Price	Line Discount %	Line Discount Amount	Line Amount	Brand Code	Season Code
→	Matrix	KBI2300	KBI Daisy Dress		2	1	11-11-2022		44.00	0	0.00	88.00	FASHION	02-SUMMER
	Item	KBI23002042	KBI Daisy Dress	Royal Blue,42	1	1	11-11-2022		44.00	0	0.00	44.00	FASHION	02-SUMMER
	Item	KBI23007042	KBI Daisy Dress	Red,42	1	1	11-11-2022		44.00	0	0.00	44.00	FASHION	02-SUMMER
	Matrix	KBI2320	KBI Zoe Dress		2	1	11-11-2022		55.00	0	0.00	110.00	FASHION	02-SUMMER
	Item	KBI23202540	KBI Zoe Dress	Navy,40	1	1	11-11-2022		55.00	0	0.00	55.00	FASHION	02-SUMMER
	Item	KBI23207540	KBI Zoe Dress	Magenta,40	1	1	11-11-2022		55.00	0	0.00	55.00	FASHION	02-SUMMER

Invoicing >

COMMENTS

This will show the **Order Comment**, that has been entered on the SA Portal.

Sales Comment List | Work Date: 24-12-2021

CPO · Order · WOS000631 · 0 · 10000

No. ↑ ▾	Date	Comment
→ WOS000631	11-1-2022	Order Template - dresses

TEMPLATES

Portal Sales Document Templates: All ▾ Search Delete Document ▾ Templates ▾ Actions ▾ Related ▾ Fewer options					
Document Type	No. ▾	Order Type	Global Order Templ...	Salesperson Code	Import Status

USER TEMPLATES

This will filter the Template Orders and show only the Template Orders in the list that don't have a checkmark in **Global Order Template**.

GLOBAL TEMPLATES

This will filter the Template Orders and show only the Template Orders in the list that have a checkmark in **Global Order Template**.

ACTIONS

Has the same options as [Document](#).

RELATED

Has the same options as [Templates](#).

CLOSING ORDER TEMPLATE ON SA

If Sales Agent wants to create an Order Template, it is needed to create an Order with required Items and proceed from **Basket** page to **Order Details** page.

Here it is necessary to set field **Mark as order template** to **TRUE**. Then it is also possible to mark Template as **Global** by setting checkmark in field **Global** (after **Mark as order template** is set to **TRUE**).

This action is only available for Sales Agent admin users.

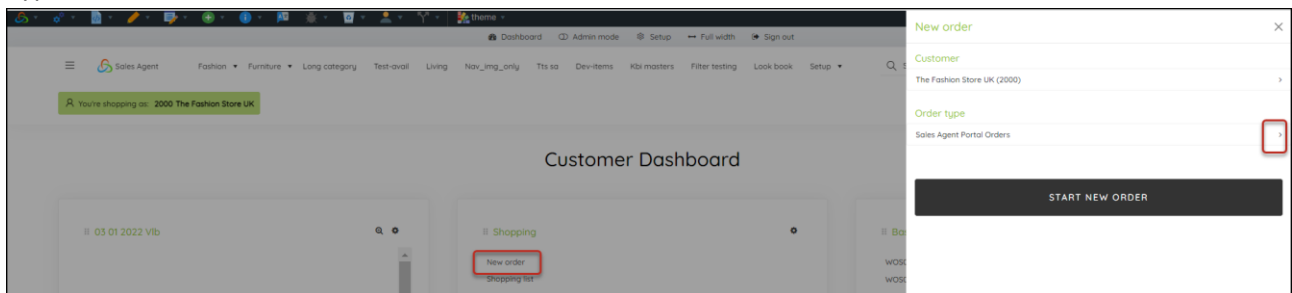
If this is done – then button **Close order template** is shown instead of **Next** button.

Close order template button is also shown on the **Edit order** page. Clicking this button finalizes the Template, i.e., this Order Template can be found on **Order type selection** page when starting a new order.

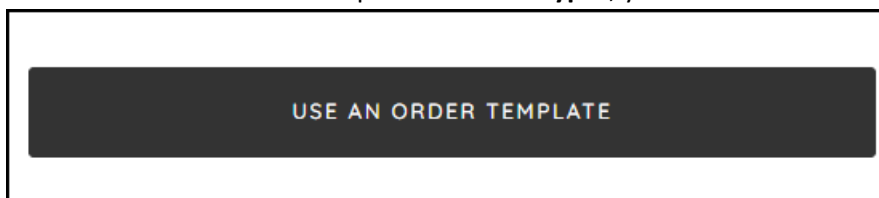
CREATE ORDER BASED ON TEMPLATE ORDER

After Order Templates have been created, they can be used to create new Orders on the SA Portal.

After a Customer has been chosen, and you clicked **New order**, you need to click on the > of the Order Types:



In the bottom of the list with possible **Order Types**, you will now see:



If you click on this, **Use an Order Template**, you can see the Order Templates after clicking **Start New Order**:

New order

Customer

The Fashion Store UK (2000)

Order type

Use an order template

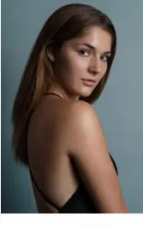
START NEW ORDER

The only Order Templates that will be shown, are the Order Templates created by the current Sales Agent, and the Order Templates with checkmark in **Global Order Template**.

Select Order Template



THIS IS A COMMENT FOR THE ORDER WITH A LOT OF EPIC INFORMATION SA



BICYCLE ORDER TEMPLATE SA



GLOBAL WITH DRESS 2300 SA



ORDER TEMPLATE - DRESSES SA

After choosing an **Order Template**, the order lines will automatically be copied into a new Order, and you are able to edit them or add new lines to it.

Basket

ITEM	DETAILS	QUANTITY	TOTAL
	KBI Daisy Dress KBI2300 44.00 GBP 55.00	2	88.00 GBP × Remove
	KBI Zoe Dress KBI2320 55.00 GBP	2	110.00 GBP × Remove
Total saved amount			22.00 GBP
Total order price			198.00 GBP
Order no.			WOS000633
Order type			SA
Order date			11/01/2022

DELETE ORDER

COPY

NEXT

B2B PROFILE

To open the B2B Portal Profile (called *B2B* in our Demo Company) page click on **Code B2B**.

Or click **+ New** to create a new Portal Profile with **Type BusinessToBusiness**.

The **Type** and **Description** were already filled in the **Portal Profiles**.

Based on the **Type BusinessToBusiness** the page **B2B Portal Profile** will open.

Most of the Fields and Actions are the same as in [SA Profile](#) and will not be described again.

Only new Fields will be described below.

FASTTABS GENERAL AND CUSTOMER

Edit - B2B Portal Profile - B2B

Manage
Order Type Setup
Tag Filters
Page
More options

General

Type
BusinessToBusiness
Description
B2B Basic Setup

Customer

Customer Newsletter
B2B
Sales Channel
B2B

Type needs to be *BusinessToBusiness* for the Portal Profiles that are applicable for **B2B Webshop(s)**.

FASTTAB ORDER

Order

Default Order Type
B2B
Payment on Lists
Mandatory Change of Order Type
Quote Nos.
S-QUO-WB
Comments Code
B2B
Order Nos.
S-ORD-WB

PAYMENT ON LISTS

If this field is set to **TRUE**, then Payment-icon will be shown for the relevant Sales Documents in the **My Orders** and **Invoices/Credit Memos** pages (in the **My Account** dock) and in dock **Overdue Entries** on B2B dashboard. Clicking on this Payment-icon will open Payment pop up window. Read more about Payment in chapter [B2B Webshop Payment](#).

My Account

My details
My orders
Reset password
Add delivery address
Sign out

Quotes / Orders
Invoices / Credit Memos
Account statement

My Account

My details
My orders
Reset password
Add delivery address
Sign out

Quotes / Orders
Invoices / Credit Memos
Account statement

Orders

ORDER NO.	DATE	STATUS	ORDER TYPE	EDIT	PRINT	DELETE	PAY	FILES
WO8000641	16/01/2022	Submitted	10APTERSALSALES					
WO5000645	14/01/2022	Submitted	SA					
WO8000635	14/01/2022	Submitted	B2B					
WO8000634	14/01/2022	Submitted	10APTERSALSALES					

Invoices / Credit Memos

DOCUMENT TYPE	DOCUMENT NO.	DATE	SHIPMENT NO.	DOCUMENT AMOUNT	OPEN AS PDF	PAY	FILES
Invoice	103081	06/09/2020	102092	40.00			
Invoice	103080	06/09/2020	102091	1,515.00			
Invoice	103079	06/09/2020	102090	855.00			
Invoice	103078	06/09/2020	102089	412.36			

Overdue Entries (12)	
103054 (2019-12-20)	31,250.00 GBP
103058 (2020-01-10)	14,845.88 GBP
103076 (2020-07-10)	400.00 DKK
103068 (2020-09-06)	800.00 DKK
103069 (2020-09-06)	791.95 DKK
103071 (2020-09-06)	243.75 GBP
103072 (2020-09-06)	37.50 GBP
103075 (2020-09-06)	98.75 GBP

FASTTAB ITEM

Item	
Category Structure	B2B
Calculate Prices in Item Menu	☒
Availability Check Method	Available
Inventory Profile Setup	B2B
Hide Available Qty.	☐
Hide Availability Markers	☐
Show Available Dates as	Date
Set Item Shipment Date	Earliest Possible
Allow Change of Delivery Period	☒

FASTTAB CHECK-OUT

Check-Out	
Allow Alternate Ship-to Code	☒
Ship-to Code by Order Start	☒
Allow Customer Detail Edit	☒
Allow Change of Ship-to Code	☒
Allow Direct Consumer Delivery	☒
Create Web Orders as	Order
Skip Confirmation E-Mail	☐
Edit Order Confirmation E-Mail	☒
Signature in Checkout	☒
Instant ASI Posting	☒
Posting Lines Threshold	100
Availability Check on Submit	☒

SHIP-TO CODE BY ORDER START

This is a Boolean field. Allows whether to set or not set **Delivery Address** page right after initiating a new Order on B2B Webshop.

If value in this field is set to *FALSE*, then **Delivery Address** page will not be shown right after initiating the Order. Selecting a different Delivery Address in this case is possible on the **Finalize Order** page, i.e., on the last stage of the Order creation process.

Setting value of this field to *TRUE* requires setting the value of the field **Allow Alternate Ship-To Code** to *TRUE*.

Delivery Address

Delivery no.

Name

Name2

Address

Address2

Postcode

City

Country

Phone

Email

Contact

Admin TRIMIT Stargerstrassen 88 9999 Denmark DK 55555555 deggsy@nesbit.net

Admin TRIMIT

Stargerstrassen 88

9999

Denmark

Denmark

55555555

deggsy@nesbit.net

NEXT

After initiating Order

Finalize Order

ITEM	DETAILS	QUANTITY	TOTAL
	KBI Lily Blouse - Production KBI/2100 35.99 GBP	1	35.99 GBP
Total order price			35.99 GBP
Order no. WOB000644 Order type B2B Order date 1/18/2022			

Customer

The Fashion Store UK

Customer no.: 2000

20 Savile Row
Mayfair
WC1 3DG
London
Great Britain

60184444

Billing

The Fashion Store UK

20 Savile Row
Mayfair
WC1 3DG
London
Great Britain

Delivery

Admin TRIMIT

Ship-to code: 2000-001

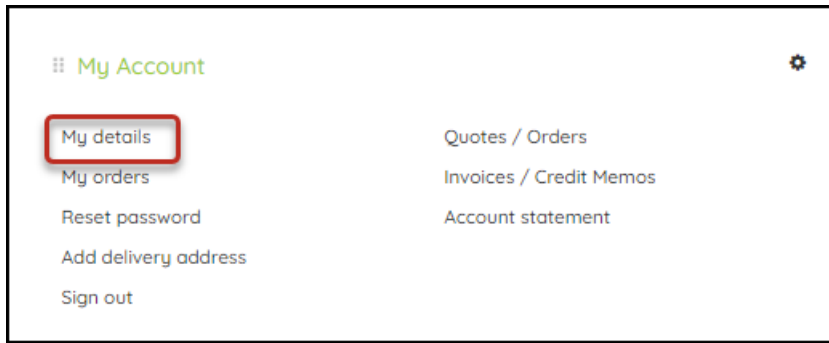
Stargerstrassen 88
9999
Denmark
Denmark

55555555

When finalizing the Order.

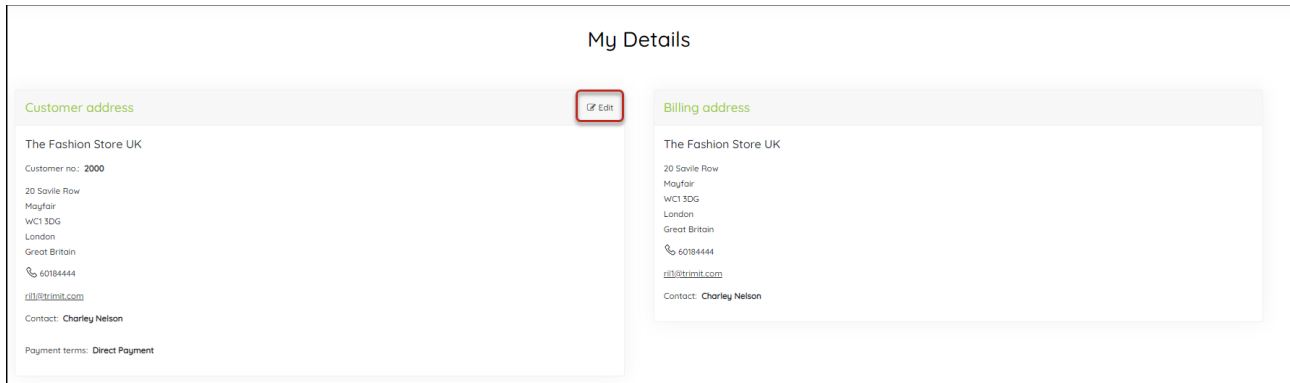
ALLOW CUSTOMER DETAIL EDIT

This is a Boolean field. If the value is *TRUE*, then it is possible to edit Customer data on **My details** page of the B2B Webshop. If the value is set to *FALSE*, then customer data editing will be disabled.



My Account

- My details
- My orders
- Reset password
- Add delivery address
- Sign out
- Quotes / Orders
- Invoices / Credit Memos
- Account statement



My Details

Customer address

The Fashion Store UK

Customer no: 2000

20 Savile Row
Mayfair
W1T 3DG
London
Great Britain

60184444

trimit.com

Contact: Charley Nelson

Payment terms: Direct Payment

Edit

Billing address

The Fashion Store UK

20 Savile Row
Mayfair
W1T 3DG
London
Great Britain

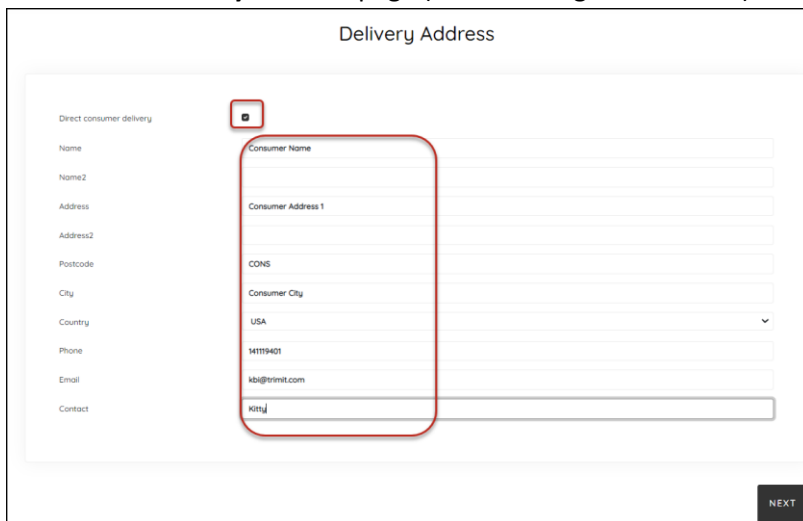
60184444

trimit.com

Contact: Charley Nelson

ALLOW DIRECT CONSUMER DELIVERY

This is a Boolean field. If the value is set to **TRUE**, then it will be possible to insert a Consumer Delivery Address on **Delivery Address** page (after starting a new Order)



Delivery Address

Direct consumer delivery ☒

Name

Name2

Address

Address2

Postcode

City

Country

Phone

Email

Contact

Consumer Name

Consumer Address 1

CONS

Consumer City

USA

141119401

kb@trimit.com

http

NEXT

After entering a checkmark in **Direct consumer delivery**, you can enter the details of the Consumer Delivery Address.

After the Order has been submitted to TRIMIT, this Address will be shown as **Ship-to Address** in the Sales Order.

Sales Order | Work Date: 1-1-2022 ✓ Saved

WOB000645 · The Fashion Store UK

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

Shipping and Billing Show more

Ship-to: Custom Address Bill-to: Default (Customer)

Code: Location Code: BLUE

Name: Consumer Name Shipment Date: 18-1-2022

Address: Consumer Address 1

Address 2:

City: Consumer City

Post Code: CONS

Contact: Kitty

Shipment Method:

Ready for Shipping:

FASTTAB ACTIONS

Actions

Dashboard: 6 ... Order History: 4 ...

Order Document: 3 ...

See [FastTab Page Actions](#) for more details, but the **Customer** of this FastTab in the SA Portal Profile is the **Dashboard** field in this FastTab in the B2B Portal.

FASTTAB STATISTICS

Statistics

Basket Statistics: SA_BASKET

FASTTAB REPORT

Report

Quote Report No.: 6036700 ... Quote Report (ASI): 0 ...

Order Confirmation Report No.: 6036701 ... Order Confirmation (ASI): 0 ...

Invoice Report No.: 0 ... Posted Invoice Report No.: 6036702 ...

Credit Memo Report No.: 0 ... Posted Credit Memo Report No.: 6036703 ...

Return Order Confirmation: 0 ... Statement Report No.: 6036650 ...

Blanket Sales Order No.: 0 ...

FASTTAB ADVANCED

Advanced

Portal Database Id:

ACTIONS IN B2B PORTAL PROFILE

Edit - B2B Portal Profile - B2B

Manage Order Type Setup Page Related Fewer options

RELATED IN B2B PORTAL PROFILE

Edit - B2B Portal Profile - B2B

Manage Order Type Setup Page Related Fewer options

Order Type Setup

DELIVERY ADDRESS ON B2B

When a new Order is created on B2B Webshop then Customer has a possibility to select **Order delivery address**. The prerequisite is as follows:

- *Customer has created one or more Delivery Addresses (Ship-to Codes) in advance (this can be done from the B2B Shop dashboard or in TRIMIT)*
- **Allow alternate Ship-To Code field on FastTab Check-Out in B2B Portal Profile is set to TRUE.**

If Customer has one or more Delivery Addresses but none of them is set as default (field **Default Ship-to Code** is set to *TRUE* in TRIMIT) then, when entering **Delivery Address** page, it displays Customer address data by default.

Different Delivery Address can be selected from **Delivery no.** drop-down field on **Delivery Address** page. Selecting blank value in **Delivery no.** drop-down allows sending to a free Address. If customer does not have a separate Delivery Address, then fields on the **Delivery Address** page will display Customer Address. If Customer has several Delivery Addresses and one of them is set as default, then this Address will be displayed.

It is not possible to edit the date of a Ship-To Address on **Delivery Address** page - the details fields are non-editable. In order to edit Ship-To Address user must visit **My details** page.

Direct consumer delivery is possible as well. This can be useful in cases when i.e., needed Item is out of stock and shop assistant can order this Item directly from supplier delivered directly to the end consumer. In order to enable **Direct consumer delivery** option on **Delivery Address** on B2B Webshop it is required to set both fields **Allow Alternate Ship-To Code** and **Allow Direct Consumer Delivery** on FastTab **Check-Out** in **B2B Portal Profile** to *TRUE*. On **Delivery Address** web page in Order creation process the **Direct consumer delivery** field is placed on the top of the page. Set this field to *TRUE* and **Delivery Address** fields below are ready to be filled in. This direct consumer delivery address is specific only for this Order and will not be saved in any place else but only on current Order.

It is also possible to make changes to Delivery Address on the **Finalize Order** page, i.e., the final page of the Order creation process. Here it is also possible to set **Direct consumer delivery address**. The precondition is that both fields **Allow Alternate Ship-To Code** and **Allow Direct Consumer Delivery** on FastTab **Check-Out** in **B2B Portal Profile** are set to *TRUE*. Changes made to Delivery Address on this page will be relevant only for current Order and will not be reflected in other places.

ITEM AVAILABILITY AND SALES IMPORT LINES

Inventory Profile Setup page (via **Tell me Inventory Profile Setup**) has an additional field called **Include Sales Import Lines**. Setting this field to **TRUE** includes Advanced Sales Integration Orders to the calculation of Item Availability. Item Availability setup on **B2B Portal Profile**:

Item	
Category Structure	B2B
Calculate Prices in Item Menu	☒
Availability Check Method	Available
Inventory Profile Setup	B2B
Hide Available Qty.	☐
Hide Availability Markers	☐
Show Available Dates as	Date
Set Item Shipment Date	Earliest Possible

Inventory Profile Setup page:

Code	Description	Locked	Include Inventory	Include Sales Quotes	Include Sales Orders	Include Sales Invoices	Include Sales Blanket Orders	Include Sales Credit Memos	Include Complaints	Include Sales Import Lines	Include Production Suggestions	Include Production Orders	Include Transfer Orders	Include Purchase Quotes	Include Purchase Orders	Include Purchase Invoices	Include Purchase Blanket Orders	Include Purchase Credit Memos	Include Intercompany	Location Filter
ALL		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
B2B		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	BLUE
B2C		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	BLUE
INVENTORY		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
INVPU		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
INV-SALES		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
INVSALPU		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
INVSALPUP		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
ISP		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
PRODUCTION		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
PURCHASE		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
SALES		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
SALESAGENT		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	BLUE

NOTE

In order to compare the Availability shown on Matrices in B2B Webshop and the Availability in TRIMIT (via a Master or Order Line), following fields in TRIMIT need to have the same value, i.e., **ALL**.

Fields **Standard Inventory Profile Setup** and **Availability Check by Location** in **Sales & Receivables Setup** (via **Tell me Sales & Receivables Setup**)

Sales & Receivables Setup Work Date: 1-1-2022	
Sales & Receivables Setup	
Customer Groups Payments More options	
Info and Prices	
Availability Check	
Standard Inventory Profile Setup	ALL
Availability Date Format	Week
Availability Message Type	Notification
Availability Check by Location	☒
Availability Check on Make-To-Order I...	☐
Discounts	
Extended Discount Search	Automatically per Line
Line Discount Combination	☐
Show Line Discounts of 0 %	☐
Approve Change of Line Discount %	Ask if existing Line Discount % is larger than 0 (Defau
Date Management	

Field **Profile Type** in **Matrix Inventory Profile**

(I.e., via Master Card of 2130, click **Process, Inventory Profile**)

Matrix Inventory Profile Work Date: 1-1-2022	
Search Change Transaction Type Update Inventory Profile More options	
Options	
Type	Matrix
Master No.	2130
Y-Axis	01
Y-Axis Title	White
Location Filter	
Global Dimension 1 Filter	
Global Dimension 2 Filter	
Profile Type	ALL
Show Transaction Type	Transaction
Lookup Company	
Limit Horizon	☐
Horizon Date	
Calculate Assortment	Quantity
Transaction Line Quantity XS S M L XL XXL 3XL AA BB CC DD EE	
Inventory	15 0 2 3 3 2 2 1 1 0 0 0 0 1
Sales Quotes	0 0 0 0 0 0 0 0 0 0 0 0 0 0
Sales Blanket Orders	0 0 0 0 0 0 0 0 0 0 0 0 0 0

Then Item Availability corresponds (on page **Sales Order** while adding new Item to a Sales Line):

Edit - - Sales Order 0100117 - No. 2130 - Rose Shirt -													
Search New Edit List Process More options													
Variant 1	Variant Description	Line Quantity	XS	S	M	L	XL	XXL	3XL	AA	BB	CC	DD
→ 30	Yellow		[1]	[2]	[1]	[0]	[1]	[0]	[0]	[0]	[1]	[0]	[0]
65	Lawn Green		[0]	[0]	[0]	[0]	[0]	[0]	[0]	[0]	[0]	[1]	[0]
99	Black		[0]	[2]	[4]	[3]	[1]	[0]	[0]	[0]	[0]	[0]	[1]
01	White		[0]	[0]	[2]	[3]	[2]	[2]	[1]	[1]	[0]	[0]	[0]

Fields **Location Filter**, **Availability Check** and **Inventory Profile Setup** in **Order Type** (Tell me Order Type):

Order Type Card | Work Date: 1-1-2022

B2B

Related

Sales

Requested Delivery Date [Calendar Icon]

Shipment Date [Calendar Icon]

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

Default Quantity to Ship [Dropdown]

Set Ready for Shipping [Dropdown]

Set Ready for Invoicing [Dropdown]

Sales Price Search Dimension [Dropdown]

Unit Price Date Handling [Dropdown]

Skip Campaign Unit Prices [Toggle]

Skip Unit Cost Check Sales [Toggle]

Sales Channel B2B [Dropdown]

Availability Check

Location Filter [Dropdown]

Availability Check [Dropdown]

Inventory Profile Setup [Dropdown]

Horizon Availability Check [Calendar Icon]

Availability in TRIMIT and Portals can also depend on the fields regarding **Replenishment** in the Master/Item Card:

Master Card | Work Date: 1-1-2022

2130 · Rose Shirt

New Process Reports Actions Related Reports Fewer options

New by Wizard

Planning

Purchase

Vendor No. 2300 [Dropdown]

Vendor Item No. SH-ROSE [Dropdown]

Purch. Unit of Measure PCS [Dropdown]

Over-Receipt Code [Dropdown]

MRP

Include in MRP [Toggle]

Automatic Replenishment [Toggle]

Replenishment System Purchase [Dropdown]

Replenishment Policy Inventory [Dropdown]

Create Related Order Instantly [Toggle]

MRP Method Net Requirement [Dropdown]

Lead Time Calculation 3M [Dropdown]

Time Final Handling Production [Dropdown]

Reduce Production Order Quantity None [Dropdown]

Process Waste 0 [Dropdown]

Scrap % 0 [Dropdown]

Lock by Release of Related Order None [Dropdown]

Material Consumption Method General [Dropdown]

Material Consumption on Demand [Toggle]

Finishing Method Related Order Automatically by Shipment [Dropdown]

Production Order No. Mandatory [Toggle]

BOM Information

BOM No [Dropdown]

ITEM RESERVATION AND AVAILABILITY ON PORTALS

Product related data is synchronized between TRIMIT and SA Portal and B2B Webshop (read more about this in **White Paper – TRIMIT Portals Schedules**).

It is also possible to 'reserve' Items on B2B Webshop and SA Portal. Item is included in Availability when placed into Basket, under condition that the appropriate **Inventory Profile Setup** has a checkmark in **Include Sales Import Lines**.

Here is described a scenario to illustrate how the Item Availability is affected on Portals when **Include Sales Import Lines** is set to Yes:

User logged in to SA or B2B. Opening **Product** page shows availability for each variant (i.e., 10).

User adds some quantity to the basket (i.e., 8). Here is what happens afterwards to Item variant Availability:

- If user goes to basket and edits the product – remaining variant availability would still be 10
- If user opens the same product in Category Structure – remaining variant availability would be 2 (the 8 in the Basket would not be available anymore)
- If another user opens the same product in category structure - remaining variant availability would also be 2

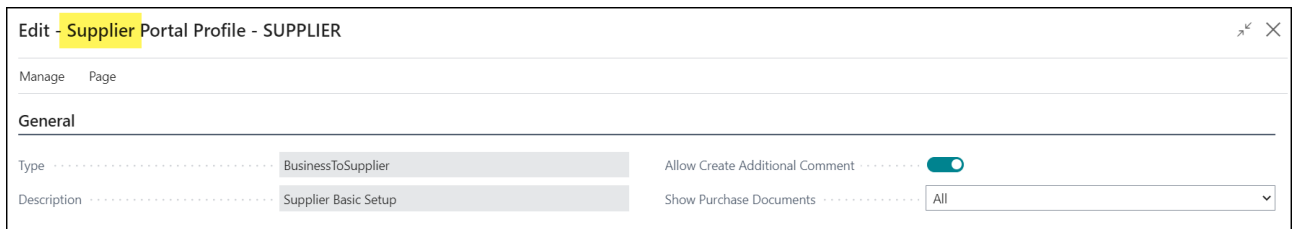
SUPPLIER PROFILE

To open the Supplier Portal Profile (called **SUPPLIER** in our Demo Company) page click on **Code SUPPLIER**. Or click + **New** to create a new Portal Profile with **Type BusinessToSupplier**.

The **Type** and **Description** were already filled in the **Portal Profiles**.

Based on the **Type BusinessToSupplier** the page **Supplier Portal Profile** will open.

FASTTAB GENERAL



TYPE

Select Portal Profile Type.

Available options are *BusinessToBusiness*, *BusinessToConsumer*, *SalesAgent*, *BusinessToSupplier*, *InstoreB2C*, *PIR*, *InSite*.

DESCRIPTION

Enter a Portal Profile Description.

ALLOW CREATE ADDITIONAL COMMENTS

A checkmark in this field allows a Supplier to create **Additional Comments** for a product.

However, if the field **SupplierPortal** of the specific **Additional Comment Code** is not set to *Add* or *Create* the Supplier will not be able to create **Additional Comments**.

Select - Group Codes - Additional Comments

+

 New
 Edit List

...

Code ↑	Description	Supplier Portal
ACCESS	Accessories Comments	Read
CUSTOMER	Customer Comments	Read
→ DESIGN	Design Comments	Read No Access Read Add Create
LABEL	Label Comments	
PACKING	Packing Comments	
PRODUCTION	Production Comments	
PROTO	Prototype Comments	Add
PURCHASE	Purchase Comments	Create
QUALITY	Quality Comments	Read
SALES	Sales Comments	No Access
WEB	Web Comments	No Access

OK

Cancel

Via Master List, click Process, Additional Comments. Press Alt+Arrow Down in field Code and click Select from full list

SHOW PURCHASE DOCUMENT

This field determines which Purchase Document (Quotes and/or Orders) will be shown on the Supplier Portal. You can choose between the following three options:

All	All Purchase Quotes and Purchase Orders will be shown.
Only Open	Only Purchase Quotes and Purchase Orders with Status = <i>Open</i> will be shown.
Only Released	Only Purchase Quotes and Purchase Orders with Status = <i>Released</i> will be shown.

FASTTAB ACTIONS

Actions

Dashboard 2 ... Master 3 ...

DASHBOARD

You can determine which **Actions** should be shown on the **Supplier Dashboard** of the Supplier Portal (or **Customer Dashboard** of the B2B Webshop) in the dock **Actions**.

Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

Edit - Portal Action Setup

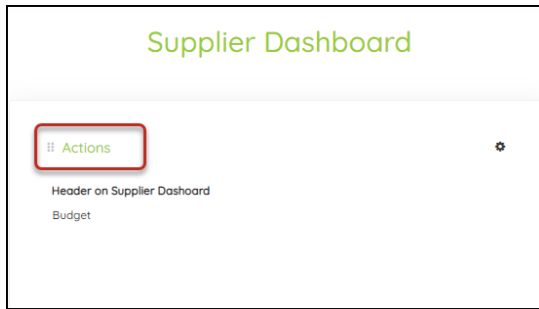
Search

+

 New
 Edit List
 Delete

Type	No. / Link	Name	Custom Parameter
→ Header		Header on Supplier Dashboard	
Report	8	Budget	

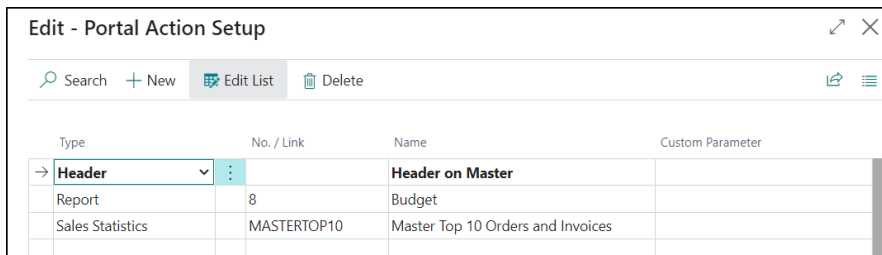
See [FastTab Page Actions](#) for more details.



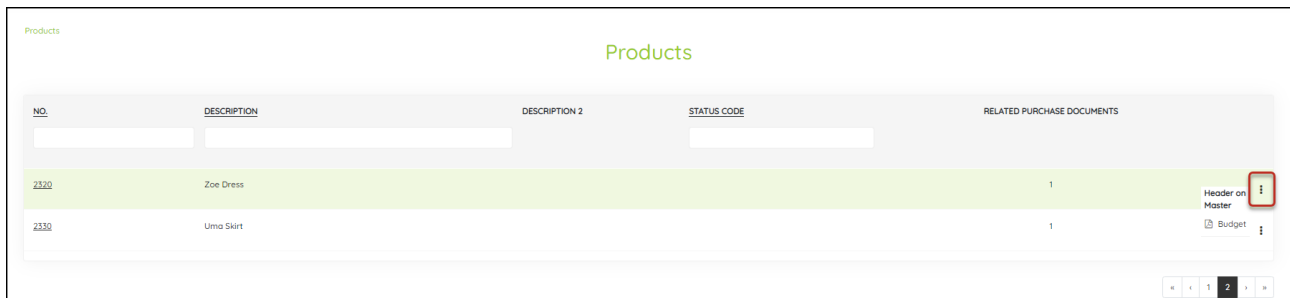
MASTER

You can determine which **Actions** should be shown on the **Products** page of a Supplier.

Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.



See [FastTab Page Actions](#) for more details.



FASTTAB REPORT

Report	
Open Documents Purchase Quote Report No. 404 Purchase Order Report No. 6036730	
Pending Documents Purchase Quote Report (API) 0 Purchase Order Report (API) 0	
Product Reports General Info Report No. 6037200 Additional Info Report No. 6037209 Bill of Materials Report No. 6037204 BOM Report No. 2 0 BOM Report No. 3 0 Measurement Report No. 6037206 Workflow Report No. 0 Product Comments Report No. 6037207	
XMLPorts XMLport No. (Product Data) 0	

You can have customized Reports for the Supplier, so in that case you need to fill in other Report Nos. as the ones shown in the figure above.

FASTTAB ADVANCED

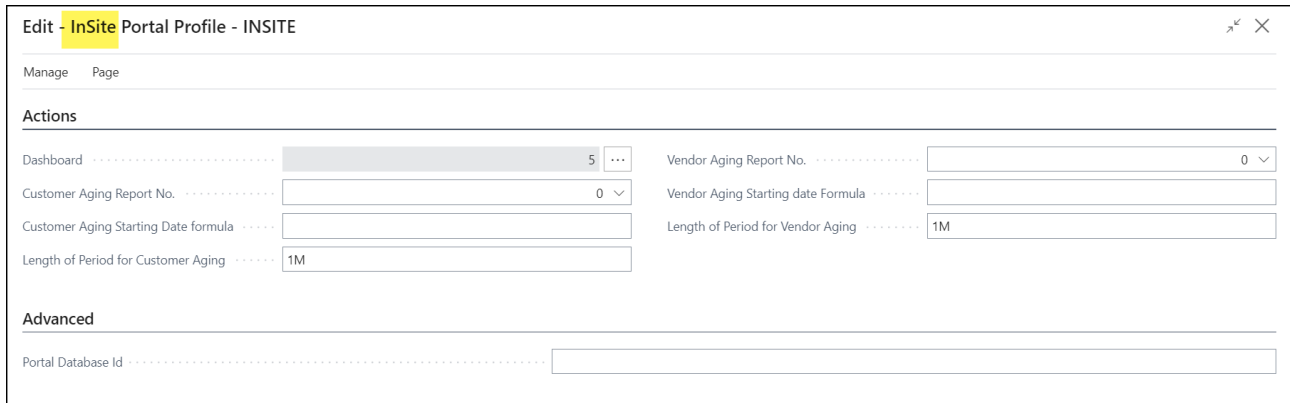
Advanced	
Portal Database Id	

See [FastTab Advanced](#) for the details.

INSITE PROFILE

To open the InSite Portal Profile you can create a new Portal Profile by clicking **+ New** to create a new Portal Profile with **Type InSite** in the list, after which you can open the underlying Card by clicking **Related, Card**.

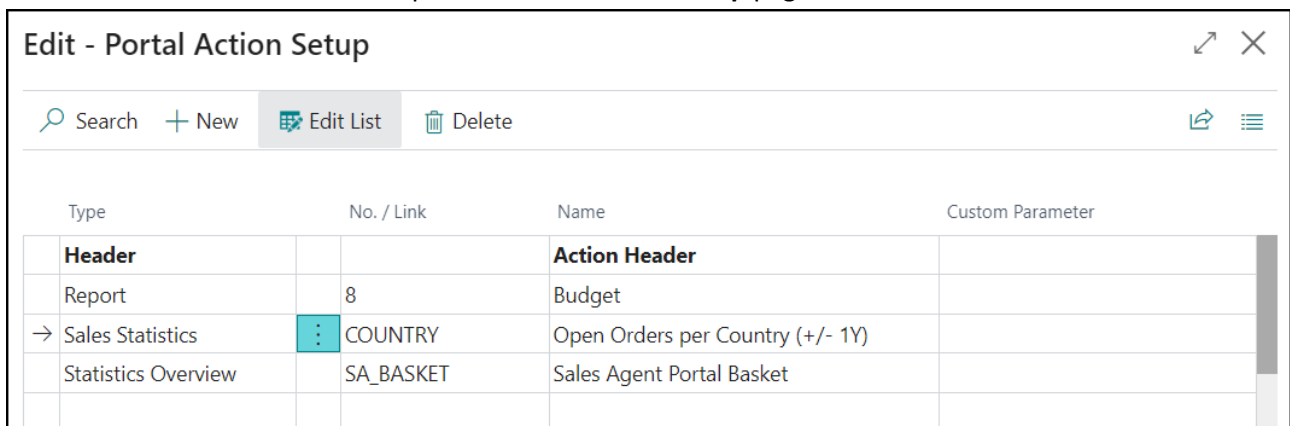
Based on the **Type InSite** the page **InSite Portal Profile** will open.



FASTTAB ACTIONS

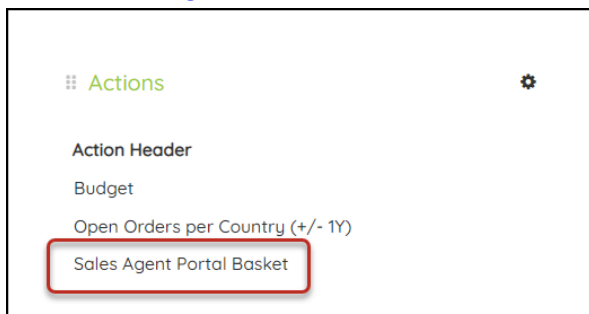
DASHBOARD

You can determine which **Actions** should be shown on the **InSite Portal** in the dock **Actions**. Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.



Type	No. / Link	Name	Custom Parameter
Header		Action Header	
Report	8	Budget	
→ Sales Statistics	COUNTRY	Open Orders per Country (+/- 1Y)	
Statistics Overview	SA_BASKET	Sales Agent Portal Basket	

See [FastTab Page Actions](#) for more details.



CUSTOMER AGING REPORT NO.

If no **Customer Aging Report No.** is entered, report **105 Customer - Summary Aging** will be used.

CUSTOMER AGING STARTING DATE FORMULA

If no **Date Formula** is entered the current Date will be used when showing the **Customer Aging**

LENGTH OF PERIOD FOR CUSTOMER AGING

If no **Length of Period** is entered, it will be set to *1M*.

VENDOR AGING REPORT NO.

If no **Vendor Aging Report No.** is entered, report *305 Vendor - Summary Aging* will be used.

VENDOR AGING STARTING DATE FORMULA

If no **Date Formula** is entered the current Date will be used when showing the **Vendor Aging**

LENGTH OF PERIOD FOR VENDOR AGING

If no **Length of Period** is entered, it will be set to *1M*.

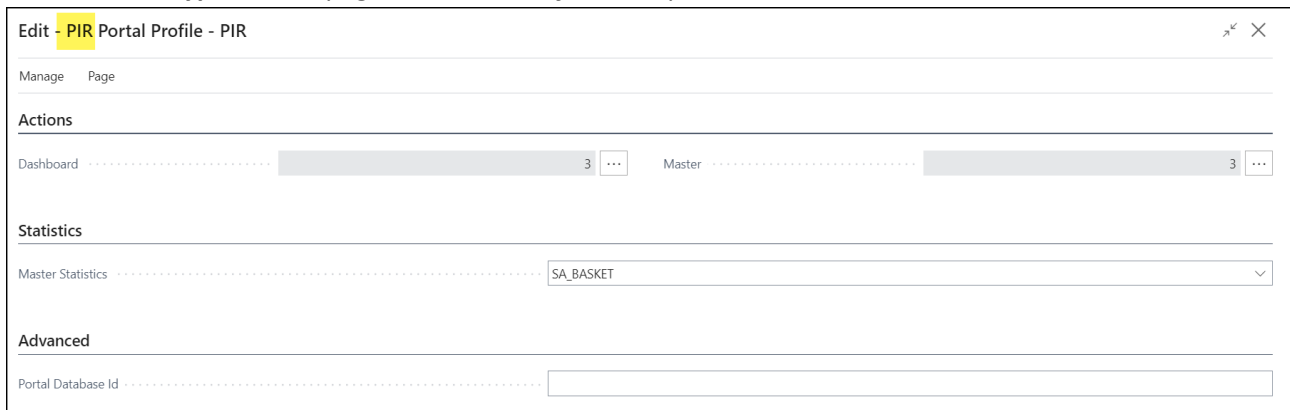
FASTTAB ADVANCED

PORTAL DATABASE ID

See [Portal Database Id](#) for details.

PIR PROFILE

To open the PIR Portal Profile you can create a new Portal Profile by clicking **+ New** to create a new Portal Profile with **Type PIR** in the list, after which you can open the underlying Card by clicking **Related, Card**. Based on the **Type PIR** the page **PIR Portal Profile** will open.



The screenshot shows the 'Edit - PIR Portal Profile - PIR' form. It has a title bar with 'Edit - PIR Portal Profile - PIR' and a close button. Below the title bar is a 'Manage Page' section. The main form area is divided into sections: 'Actions' with 'Dashboard' and 'Master' fields, each with a value of '3' and a dropdown arrow; 'Statistics' with a 'Master Statistics' field set to 'SA_BASKET'; and 'Advanced' with a 'Portal Database Id' field.

FASTTAB ACTIONS

DASHBOARD

You can determine which **Actions** should be shown on the **PIR** in the dock **Actions**. Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

Edit - Portal Action Setup

Search
New
Edit List
Delete

Type	No. / Link	Name	Custom Parameter
→ Header		Dashboard PIR Actions	
Sales Statistics	Mastertop10	Master Top 10 Orders and Invoices	
Statistics Overview	SA_BASKET	Sales Agent Portal Basket	

See [FastTab Page Actions](#) for more details.

Actions

Dashboard PIR Actions

Master Top 10 Orders and Invoices

Sales Agent Portal Basket

MASTER

You can determine which **Actions** should be shown on the **Master Admin** page of a Product on the PIR. Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

Edit - Portal Action Setup

Search
New
Edit List
Delete

Type	No. / Link	Name	Custom Parameter
→ Header		Master Actions	
Sales Statistics	MasterTop10	Master Top 10 Orders and Invoices	
Statistics Overview	SA_BASKET	Sales Agent Portal Basket	

See [FastTab Page Actions](#) for more details.

Master Admin

KBI2300 KBI Daisy Dress
BC
DOWNLOAD
SYNC
Last synchronized: 1/16/2022 1:15 AM

General
Statistics

Actions

Master Actions

- Master Top 10 Orders and Invoices
- Sales Agent Portal Basket

Publish

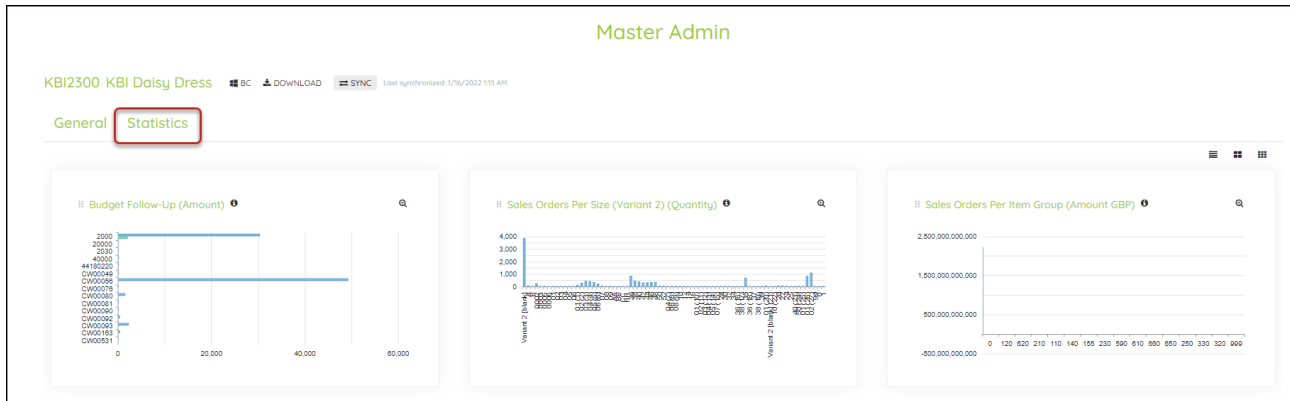
Click checkbox to publish or unpublish master/item per portal

External	B2C	B2B	Sales Agent
☐	☒	☒	☒

FASTTAB STATISTICS

MASTER STATISTICS

You can choose a **Statistics Overview** that will be shown in the **Master Admin** page on Tab **Statistics** of the PIR.



FASTTAB ADVANCED

PORTAL DATABASE ID

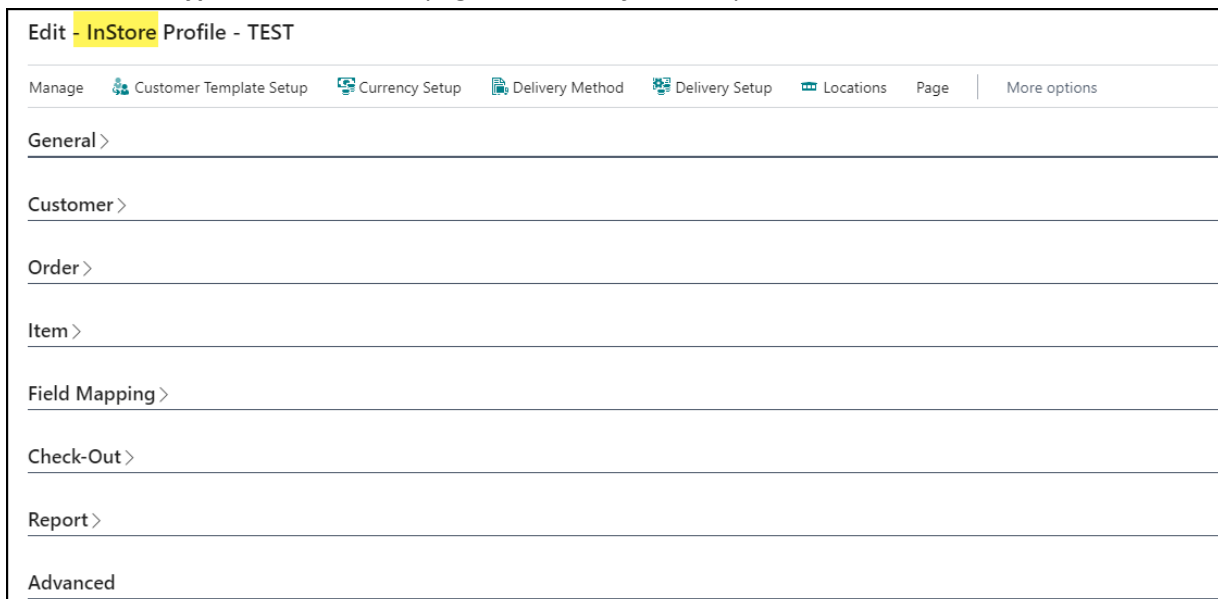
See [Portal Database Id](#) for details.

INSTORE B2C PROFILE

InStore B2C can be used by an employee in a Store that will enter a Sales Order for a Consumer for products that might not be available in the physical Store.

To open the InStore B2C Portal Profile you can create a new Portal Profile by clicking **+ New** to create a new Portal Profile with **Type InStore B2C** in the list, after which you can open the underlying Card by clicking **Related, Card**.

Based on the **Type InStore B2C** the page **InStore Profile** will open.



The screenshot shows the 'Edit - InStore Profile - TEST' page. At the top, there's a header with 'Edit - InStore Profile - TEST'. Below this, there's a navigation bar with options: 'Manage', 'Customer Template Setup', 'Currency Setup', 'Delivery Method', 'Delivery Setup', 'Locations', 'Page', and 'More options'. The main area is divided into sections: 'General', 'Customer', 'Order', 'Item', 'Field Mapping', 'Check-Out', 'Report', and 'Advanced'. The 'General' section is currently expanded, showing a list of items with columns for 'Item', 'Quantity', and 'Amount'.

Most of the Fields on the **InStore Profile** page are comparable with the fields in the Portal Profile of **Type = BusinessToConsumer** (B2C) which is described in detail in **White Paper – TRIMIT B2C Setups in Business Central**. There are some extra fields:

FASTTAB CHECK-OUT

Check-Out	
Disable Online Payment	☒
Disable Voucher/Gift Card	☒

DISABLE ONLINE PAYMENT

In case the Consumer would usually always pay via the Till of the Shop instead of via the Instore B2C Webshop, it might be necessary to put this field to **TRUE**; otherwise, the Consumer might pay twice.

DIABLE VOUCHER/GIFT CARD

In case Vouchers and/or Gift Cards would always already be reducing the payment that takes place via the Till of the Shop, it might be necessary to put this field to **TRUE**; otherwise, the Voucher/Gift Card would be posted twice.

USERS

Information on setup and maintenance of Users for Modelyn is described in the **White Paper – TRIMIT Portals User Setup**.

USER RELATIONSHIP MANAGEMENT

User Relationship connects a Portal User to a Customer, Vendor, Salesperson/Purchaser, etc. in TRIMIT.

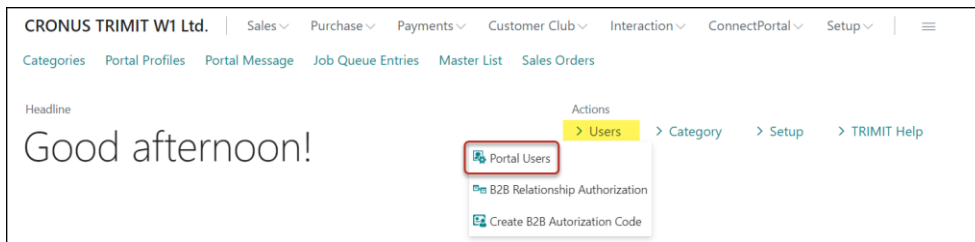
Example:

Andy Teal is a person working for *The Cannon Group PLC* and he is the person going to do the purchase through the B2B Webshop. Then you must go through 3 steps:

1. Andy must get a Portal User Login to the B2B Webshop (via **Modelyn**).
2. His Portal User Login must be synchronized to the **User Relationship** table in TRIMIT.
3. Andy's Portal User Login must be related to the **Customer No.** that *The Cannon Group PLC* already has in TRIMIT. That Relationship is created in the **User Relationships**.

This chapter shows how to create the User Relationships.

In the Role Center **TRIMIT Portal Administrator**, you can click **Users, Portal Users** or you can use **Tell me User Relationship Management** to open the **User Relationship Management** page.



This page will show the Users created in Modelyn which have been synchronized to TRIMIT from the Portal.

User Relationship Management Work Date: 1-1-2022						
Search Edit List Delete Actions Related Fewer options						
General						
Status Filter: Related						
Status	User information	Relationships	Profile	Last Login	Last Synchronized	ConnectPortal Domain
Related		3	B2B[SUPPLIER]AGENT		2-3-2021 09:22	
→ Related		4	B2B[SUPPLIER]AGENT INSITE	21-1-2022 13:24	22-12-2021 10:55	
Related		3	B2B[SUPPLIER]AGENT	24-1-2022 14:30	1-9-2021 10:24	
Related		4	B2B[SUPPLIER]AGENT INSITE	21-1-2022 14:49	2-3-2021 09:08	
Related		1	B2C		5-5-2020 12:00	
Related		1	B2B	24-1-2022 15:34	3-12-2018 14:16	
Related		4	B2B[SUPPLIER]AGENT INSITE		24-11-2015 13:24	

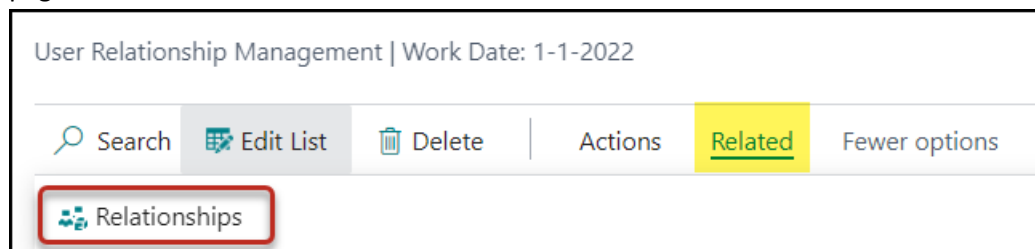
Change the **Status Filter** to see different filters on the synchronized Users.

You can choose between the following four options for the **Status Filter**:

New	The synchronization sets this as the default value, when creating new users for the Portals
No Relation	Shows all users that are not related to a table in TRIMIT
Related	Shows all users who are already related to a table in TRIMIT
All	Shows all users of the above three options

USER RELATIONSHIPS

To create/maintain a new Relationship click **Related, Relationships** in the **User Relationship Management** page.



This will open the **User Relationship List** page, where it is possible to create multiple Relationships per Portal user:

Type ↑	No.	Name	Profile 1	Creation Date	Token Available	Token Created Date	User information
→ Customer	2000	The Fashion Store UK	B2B	5-5-2020 10:35	☐		..
Vendor	2300	Oriental Production Services	SUPPLIER	5-5-2020 10:35	☐		..
Salesperson/Purchaser	JR	John Roberts	AGENT	5-5-2020 10:35	☐		..
Business Central User			INSITE	22-4-2021 09:23	☒	22-4-2021	..

DESCRIPTION OF THE FIELDS

TYPE

To create a relationship, start by selecting **Type**; the options are:

<i>Employee</i>	The portal user will be related to the Employee table (5200) in TRIMIT
<i>Contact Company</i>	The portal user will be related to the Contact table (5050) in TRIMIT, where Type is <i>Company</i>
<i>Contact Person</i>	The portal user will be related to the Contact table (5050) in TRIMIT, where Type is <i>Person</i>
<i>Customer</i>	The portal user will be related to the Customer table (18) in TRIMIT
<i>Vendor</i>	The portal user will be related to the Vendor table (23) in TRIMIT
<i>Resource</i>	The portal user will be related to the Resource table (156) in TRIMIT
<i>Salesperson/Purchaser</i>	The portal user will be related to the Salesperson/Purchaser table (13) in TRIMIT
<i>Business Central User</i>	The portal user will be related to the User Setup table (91) in TRIMIT

NO.

Enter the **No.** related to the **Type** field.

Lookup in this field will open the relevant list, depending on the **Type** field.

NAME

Name of the **No.** will be shown based on the **Type** field.

PROFILE

Enter the **Portal Profile** for which the **No.** is applicable.

Lookup in this field will open the **Portal Profile List**. This field defines if the User will have access to the Portal related to the **Portal Profile** and as which User (Customer, Vendor, Salesperson).

CREATION DATE

This field will be filled automatically with the Date and Time of creation.

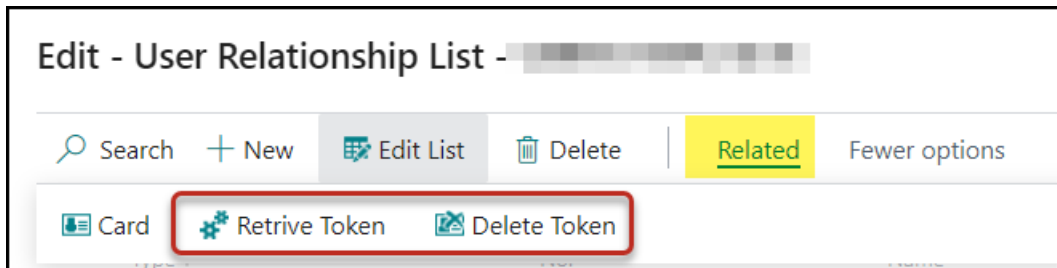
TOKEN AVAILABLE

Related to a feature which allows opening Portal pages from TRIMIT. If **Type** field is set to *Business Central User*, then under **Related**, it is possible to **Retrieve Token** or **Delete Token**.

After clicking **Retrieve Token**, if succeeded, field **Token Available** will be set to *TRUE*.

After clicking **Delete Token** this field will be set to *FALSE*.

Read more about this functionality in chapter [User Mapping and Token Authentication](#).



TOKEN CREATED DATE

After clicking **Retrieve Token**, if succeeded, field **Token Created Date** will contain the current date.

After clicking **Delete Token** this field will be set to blank.

Read more about this functionality in chapter [User Mapping and Token Authentication](#).

USER INFORMATION

The details of the Portal User that you were coming from when clicking **Related, Relationships**.

CREATE NEW CUSTOMER ON B2B

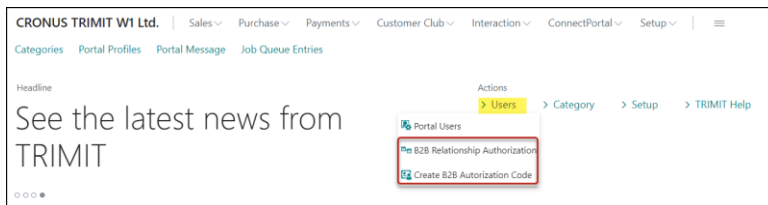
It is possible for a User to register on B2B Shop (see [Registration on the B2B Webshop](#)).

In order to do this, it is also needed to get a **Customer No.** and **Authorization Code** from TRIMIT.

This can be done in two ways:

Via **Create B2B Authorization Code** or via **B2B Relation Authorization**.

Both can be found in the Role Center of **TRIMIT Portal Administrator** or via **Tell me:**



CREATE B2B AUTHORIZATION CODE

This is a batch job/report creating several Authorization Codes for Customers within the filter specified (i.e., for all Customers in DK).

Create B2B Authorization Code

Options

Create

Only if no Authorization Code exists

Portal Profile

B2B

E-Mail

☒

Filter: Customer

×

No.

×

Country/Region Code

×

Currency Code

×

Language Code

×

Sell-to Group

+

Filter...

Filter totals by:

+

Filter...

Schedule...

OK

Cancel

CREATE

You can select *Only if no Authorization Code exists* or *Also if an Authorization Code exists*.

The first option will only create Authorization Codes for Customers for which no Authorization Codes have been created before.

The second option will create Authorization Codes for all filtered Customers, regardless if an Authorization Code has been created before.

PORTAL PROFILE

You need to select the Portal Profile for your B2B Webshop or B2C InStore Shop.

E-MAIL

If set to *TRUE*, then an E-Mail with the Authorization Code will be sent to Customer(s) based on the E-Mail Template that has been setup for report **6038101 trm Create B2B Author. Code**.

Here is a description on how to setup sending E-Mail with Authorization Code to a Customer.
In order to be able to send an E-Mail, it is required to create an E-Mail Template for sending Authorization Codes. E-Mail Template can be created via **Tell me E-Mail Template**.

E-Mail Template List Work Date: 1-1-2022									
Search + New Manage Recipient Setup Activate Deactivate More options									
No. ↑	Description	Report ID	Report Name	Default Templ... for Report	E-Mail Defau...	Status	Recipients	Template for E-Mail Addresses	
B2B AUTHORIZATION	B2B Authorization	6038101	trm Create B2B Author. Code	☒	☒	Active	1		
CHARGE_MEMO	Finance Charge Memo	6036652	trm Finance Charge Memo	☒	☐	Active	0	SALES_ORD	
COMM	Commission Settlement	6036710	trm Commission Settlement	☒	☐	Active	2		
PDM_REPORT_SET	PDM Report Set	6037208	trm PDM Report Set	☒	☒	Active	0	PURCHASE_ORD	
PURCHASE_ORD	Purchase Orders	6036730	trm Purchase - Order	☒	☒	Active	10		

To see the E-Mail Template Card, click **No. B2B Authorization**, to create new E-Mail Template, click **+ New**. Here set a **No.** and **Description** to your template. Click **Activate** in ribbon **Manage** to make Template active.

FASTTAB GENERAL

General	
No.	B2B AUTHORIZATION
Description	B2B Authorization
Status	Active
Report	
Report ID	Create B2B Authorization Code (6038101) ...
Report File Name	Authorization Code
Report File Type	PDF
E-Mail Default=Yes	☒

In FastTab **General** specify the **Report ID**, in this case **6038101**. This report will be used to generate Authorization Codes and sending E-Mails to Recipients if required.
Set **Report File Name** and select **Report File Type** if required.

FASTTAB SETUP

Setup	
Relations	Misc.
Table ID	Customer (18) ...
Recipient Table ID	Customer (18) ...
Relation Field No.	No. (1) ...
Extra Fields Relations (Optional)	
Recipient Name Field No.	Name (2) ...
	Default Template for Report ☒
	Log E-Mail ☐ Yes
	Codeunit ID Last ☐

In FastTab **Setup** connect the right Tables based on the chosen **Report ID**. Set field **Table ID** to **Customer (18)**. Set **Recipient Table ID** to **Customer (18)**. Set **Relation Field No.** to **No. (1)**. Set **Recipient Name Field No.** to **Name (2)**.

FASTTAB VARIABLES

Variables Manage							
Code ↑	Text Replace	Type	Table ID / Value	Field No. / Value	Related Table ID	Related Table Field No.	Codeunit I La
→ CE	#CE#	Table	User Setup (91)	E-Mail (17)			
CN	#CN#	Table	Customer (18)	No. (1)			
COMPANY	#COMPANY#	Table	Company Information (79)	Name (2)			
CONTACT	#CONTACT#	Table	User (2000000120)	Full Name (3)			
EM	#EM#	Table	Customer (18)	Email (102)			
LOGO	#LOGO#	Table	Company Information (79)	Picture (29)			
NM	#NM#	Table	Customer (18)	Name (2)			

In FastTab **Variable**, create required variables. Variables are used the Body Text of the E-Mail.
In this case Variables are used for Customer No., Customer Name, Customer E-Mail, Company Name, Company Logo, Sender E-Mail and Sender Name. Variable **AUTHCODE** is predefined in the AL Code of the Report itself by default. Fill the other Variables as shown in the picture above (these Variables are also used in the example of the Body Text).

FASTTAB ADDRESS

Addresses	
Sender Name	#CONTACT#
Sender E-Mail	#CE#
Archive E-Mail (Bcc)	
Recipients	1
Template for E-Mail Addresses	

In FastTab **Address**, specify **Sender Name** and **Sender E-Mail**.

In this example it will be the Name of the **User** and the E-Mail of the **User Setup** of the user that creates the E-Mail to the Customer, but you also use an actual Name/E-Mail from which you want to send the E-Mail, i.e., portaladministrator@companyname.com

FASTTAB SUBJECT- / BODY TEXT

Subject- / Body Text	
Manage	
New Line	Delete Line
Edit	View
New	
ENU	
Authorization Code to register on our TRIMIT B2B Solution	Dear #NM# You can register an InStore user here..

Click **Manage, New** under **Subject- / Body Text**. And create your E-Mail template text, i.e.:

Edit - E-Mail Template Text Card - B2B AUTHORIZATION - ENU	
Language Code	ENU
Default	☒
Subject	Authorization Code to register on our TRIMIT B2B Solution
Body	
Dear #NM#	

The total **Body** could look as follows – based on the Variables defined and the **XXXXXXXXXX** being the domain of your portals:

Dear #NM#
You can register an InStore user here:
InStore Portal User Registration
You can register a B2B user here:
B2B Portal User Registration
Enter your Customer No. :
#CN#
and this authorization code :
#AUTHCODE#
Kind Regards,
#COMPANY#
#CONTACT#

Click **Recipient Setup** to open **E-Mail Template Recipient List**. Add a line as shown on picture below.

E-Mail Template Card | Work Date: 1-1-2022

B2B AUTHORIZATION · B2B Authorization

Recipient Setup ☒ Activate ☐ Deactivate

Edit - E-Mail Template Recipient List

Search + New Edit List Delete Card Extra Addresses More options

Recipient No.	Relation Name	To E-Mail	Cc E-Mail	Alt. Output File Type	Alt. Output Report ID	Alt. Output Report Name	Extra Addresses	Info
→	Used if specific not found	#EM#					0	

After the setup is done it is possible to create Authorization Codes and send them by E-Mail to Customers
The E-Mail received by the Customer (based on the above Template) will then look as follows:

Authorization Code to register on our TRIMIT B2B Solution

 To 

di 12:11

Dear 

You can register an InStore user here:
[InStore Portal User Registration](#)

You can register a B2B user here:
[B2B Portal User Registration](#)

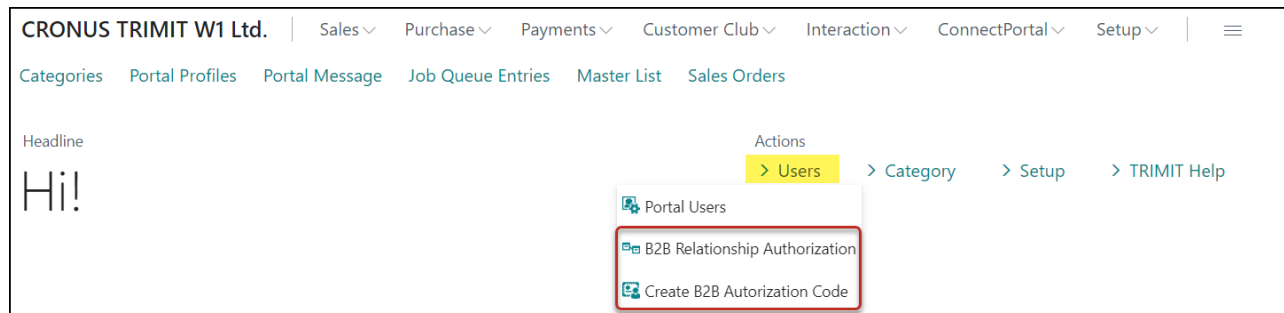
Enter your Customer No. :
CW00163
and this authorization code :
F7JREVPHXNGCWG8P6XAP

Kind Regards,
CRONUS TRIMIT W1 Ltd.

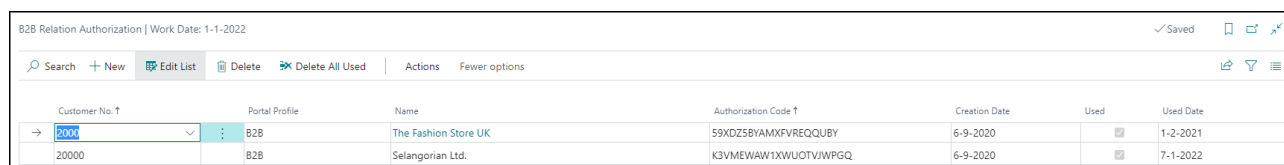

 **TRIMIT**

For more information regarding E-Mail Templates refer to **White Paper – TRIMIT E-Mail**.

You can see the result of this report batch in page **B2B Relation Authorization** via Role Center of **TRIMIT Portal Administrator**.



B2B RELATION AUTHORIZATION



Customer No. ↑	Portal Profile	Name	Authorization Code ↑	Creation Date	Used	Used Date
→ 20000	B2B	The Fashion Store UK	59XDZ58YAMXFVREQQUBY	6-9-2020		1-2-2021
20000	B2B	Selangorian Ltd.	K3VMEWAW1XWUOTVJWPGQ	6-9-2020		7-1-2022

In this page you will see the Authorization Codes that have been created via the **Create B2B Authorization Code** report, but you are also able to create new Authorization Codes for Customers.

CUSTOMER NO.

You can select a **Customer** for which you want an **Authorization Code** to be created.

PORTAL PROFILE

Select the **Portal Profile**.

NAME

Will be filled with the Name of the **Customer No.**

AUTHORIZATION CODE

This Code will be created automatically for the entered **Customer No./Portal Profile**.

CREATION DATE

Date on which the **Authorization Code** has been created.

USED

This field is automatically set to **TRUE** when the Customer has registered himself on the B2B Webshop or on the InStore B2C Webshop.

It is possible to relate one B2B User to several B2B Customers using this methodology.

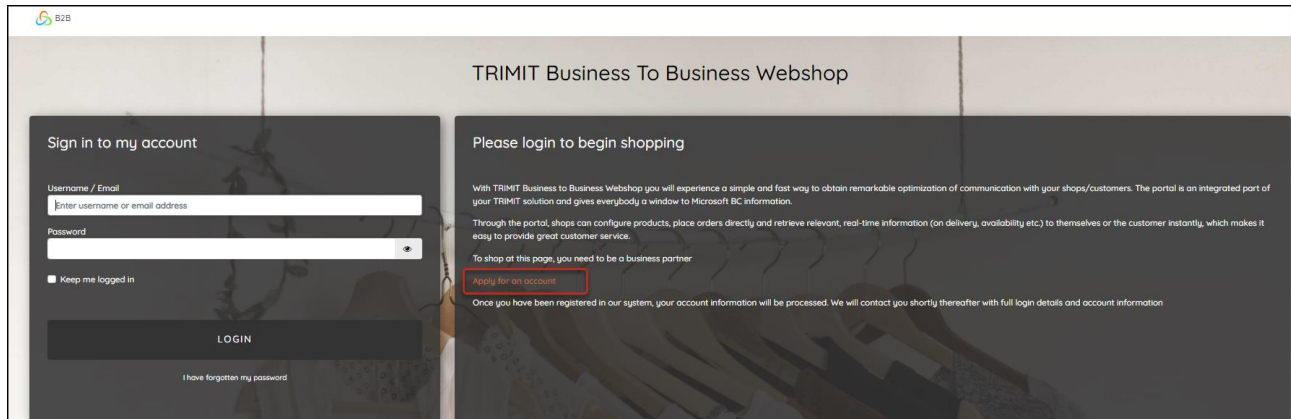
USED DATE

This field is automatically set to Date when the Customer has registered himself on the B2B Shop or on the InStore B2C Webshop.

After the new **Authorization Code** is created, it can be handed out to the Customer together with **Customer No.** in order to use for registration on B2B Webshop or on the InStore B2C Webshop.

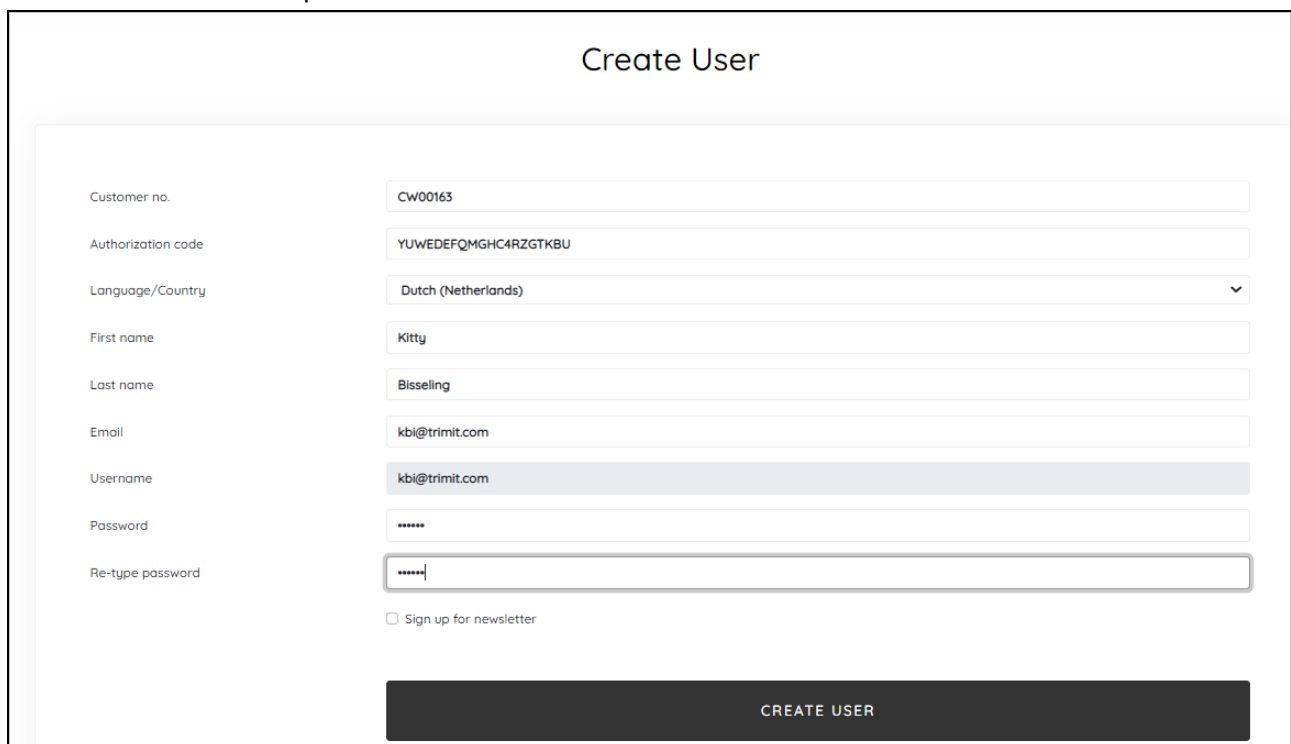
REGISTRATION ON THE B2B WEBSHOP

In order to register, user must open B2B Webshop login page. Then click **Apply for an account**:



NOTE: Showing **Apply for an account** link on the login page is optional and relays on a theme value **"B2BSignUpButton"**. Read more information about this topic in **White Paper – TRIMIT Portals Soft Admin**.

Clicking **Apply for an account** opens **Create user** page. Here it is needed to enter the following fields after which the User needs to press **Create user**:



CUSTOMER NO.

Customer Number taken from TRIMIT or received in the E-Mail.

AUTHORIZATION CODE

Authorization Code taken from TRIMIT or received in the E-Mail.

LANGUAGE/COUNTRY

User's Language

FIRST NAME

User's First Name

LAST NAME

User's Last Name

EMAIL

User's E-Mail Address

USERNAME

User Id is set by default to user's E-Mail and cannot be changed.

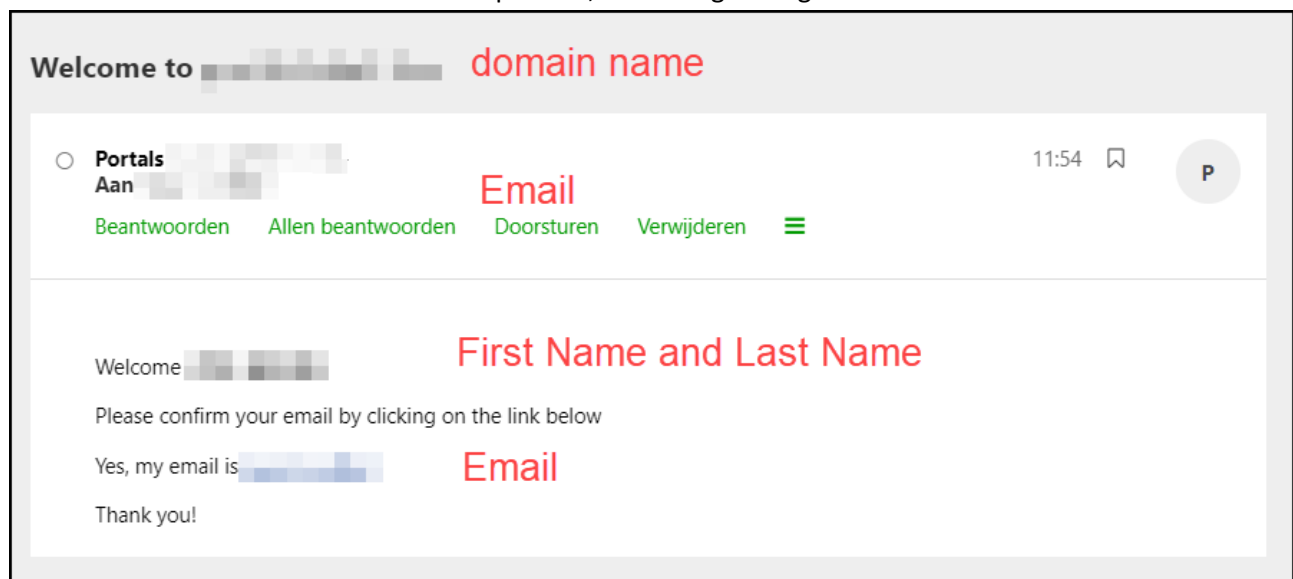
PASSWORD

User's Password

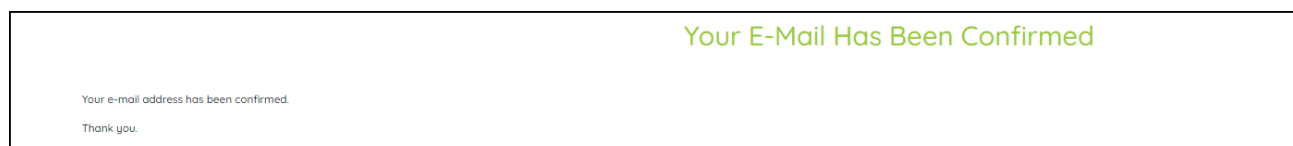
RE-TYPE PASSWORD

User's Password retyped

After the **CREATE USER** button has been pressed, the User gets Registration Confirmation E-Mail.



The user needs to confirm his email after which he will see:



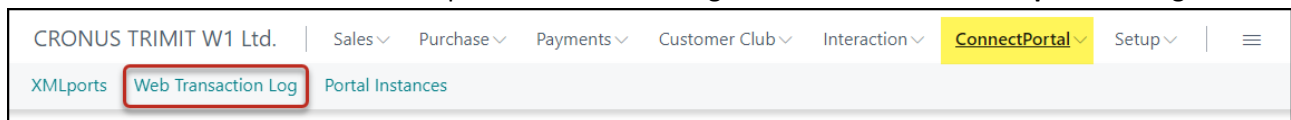
WEB TRANSACTION LOG

One of the most important tools when developing is the **Web Transaction Log**. It has proven to be essential in development for debugging, performance measurement and more.

The idea is that the **Web Transaction Log** records all incoming requests, which allows the developer to inspect performance, request volume and even do playback on particular requests. This section will go through the log and explain the different developer tools embedded.

Web Transaction Log allows recording Requests from Portals to TRIMIT and responses from TRIMIT to Portals. You can open the page in the Role Center **TRIMIT Portal Administrator** via **ConnectPortal**, **Web Transaction Log** or use **Tell me Web Transaction Log**.

How to work with the **Web Translation Log** and how it can help you solve issues in the Requests from Portals to TRIMIT and vice versa is explained in detail during the **TRIMIT Portal Developers** training.



Stored transactions can be run within TRIMIT and debugged for errors if needed.

Web Transaction Log: Custom filtered										
Search New Delete Edit List Actions Fewer options										
ID	Type	Date Time	Duration	View Called	User Identity	Do not Delete	Description	Parameters	Command	
(8e52c617-1be9-4a23-be8b-3e17e95d964)	Request	24-1-2022 16:46		B2C-BASKETHEADER		☒	submit	BROWSERLANGUAGE: DA; CO...	INSERT	
	Import	24-1-2022 16:46	235 milliseconds			☒				
	Export	24-1-2022 16:46	24 milliseconds			☒				
(bb80ac59-384d-4a45-a788-6c3179e54a64)	Request	24-1-2022 16:46		B2C-BASKETHEADER		☒	clear	ACTION: PAYMENTRETURN: BR...	INSERT	
	Import	24-1-2022 16:46	1 second 641 milli...			☒				
	Export	24-1-2022 16:46	7 milliseconds			☒				
(3bfc6a10-e226-441c-92ff-1786b534e811)	Request	28-1-2022 08:21		B2C-PRICELIST		☒		CURRENCY: CHF; PORTALID: B2...	GET	
(4249b5cb-eacc-4d8e-9e57-7bc8591282d4)	Request	28-1-2022 08:45		B2C-PRICELIST		☐		CURRENCY: CHF; PORTALID: B2...	GET	
	Export	28-1-2022 08:45	1 minute 21 secon...			☐				
(27aed07a-19da-486a-9c9c-44415e38d4d9)	Request	28-1-2022 08:45		\$PING		☐			GET	
	Export	28-1-2022 08:45	47 milliseconds			☐	No xml doc...			
(9f465243-964e-40e6-8731-7d8ea596509f)	Request	28-1-2022 08:46		\$PING		☐			GET	
	Export	28-1-2022 08:46				☐	No xml doc...			
(a5457a4d-90a9-4232-bc79-3d1a20f69ae7)	Request	28-1-2022 08:47		B2C-CURRENCY		☐		ACTION: SYNCH: PORTALID: B2...	GET	
	Export	28-1-2022 08:47				☐				

DESCRIPTION OF THE FIELDS

ID

This field is a unique Identifier for a request. The type is a GUID.

TYPE

There are 3 different types:

- **Request**
This **Type** holds an XML document with all sorts of information about the call e.g., specifies parameters, commands, user information.

- *Import*
This **Type** holds an XML document with the data received from the portal.
- *Export*
This **Type** holds an XML document with the data the request generated and sent to the web page.

DATETIME

Shows the execution Date and Time.

DURATION

Shows how long the request type took including all code execution and generating the data XML document.

VIEW CALLED

Specifies the View called. If the view has a "\$" at start it indicates a system call e.g., "\$IMAGE" which is a call to fetch an image from the database, otherwise it can also be an **XMLPort Header** Code that has been called during the Transaction.

USER IDENTITY

Specifies the User that generated the request, but only if the request was generated by a logged in User. It is blank for all system calls.

DO NOT DELETE

Set this to true if you want to keep the request permanently.

DESCRIPTION

This is a free text area in which the administrator i.e., can explain more about a particular request.

PARAMETERS

Parameters used for this request.

COMMAND

Command for this request. I.e., *INSERT*, *EXEC* or *GET*.

COMMAND ARGUMENT

Command Arguments for this request. I.e., *SUBMIT*, *AGENT*, *B2B*, or *UPDATE*.

PAGE URL

The URL of the page where the request took place.

RECORDING**STATUS**

After you clicked **Actions, Start Logging**, this field will be set to *Recording*, so you know that the Logging is started.

TEST UNITS EXIST

Test units just shows if such are present in the list (field **Test Function** is set to Yes).
A recording can be flagged as a test unit.

USER FILTER

You can fill it with a User, or it can be filled automatically when clicking **Actions, Set User Filter**.

VIEW FILTER

You can fill it with a **View Called**, or it can be filled automatically when clicking **Actions, Set View Filter**.

ACTIONS

Web Transaction Log: Custom filtered			Search	New	Delete	Edit List	Actions	Fewer options
ID	Type	Date Time						
{8e52c617-1be9-4a23-be8b-3e17e95df964}	Request	24-1-2022 16:4						
{bb80ac59-384d-4a45-a788-6c3179e54a64}	Request	24-1-2022 16:4						
{26e8cab7-226a-4a29-acfb-a53ba437e4f3}	Request	28-1-2022 09:0						
{f8c31174-7600-40ff-bb7a-4701546ce3da}	Request	28-1-2022 09:0						
{089a7ac0-ba4b-4639-8e23-9c43c4326ed4}	Request	28-1-2022 09:0						
{a81bc9ed-02ea-4a55-91cf-1302a67d5705}	Request	28-1-2022 09:2						
{a2c6d06d-3b0b-4c3b-a3dc-083c7bafecb8}	Request	28-1-2022 09:2						
{8c1bd3c9-12c8-4838-a5eb-a179f37dccbb}	Request	28-1-2022 09:2						
{3a2abfb4-c249-4e22-a46b-702a926ad81e}	Request	28-1-2022 09:2						
{8e5567ea-b6d9-4d08-ab84-f734b195a772}	Request	28-1-2022 09:2						
{2ca92b34-f2b6-4220-874b-df52f8b0a10e}	Request	28-1-2022 09:2						
{0d430895-d6b1-4be8-a306-14dbf10bb828}	Request	28-1-2022 09:2						
{74a2d609-8bd6-4bb8-a979-9f31c2748d12}	Request	28-1-2022 09:2						
{85d1698e-04e9-44dc-9688-767cbde327cf}	Request	28-1-2022 09:2						

View XMLPort Card

View XML of Document

Start Logging

Stop Logging

Run Transaction

Clear Log

Unmark All

Set User Filter

Set View Filter

Clear Log Filter

Toggle Test Units

Export Document

Create Transaction Set

Copy Transaction Set

VIEW XMLPORT CARD

If the **View Called** is an XMLPort Header, it will show the Card of this XMLPort Header.

VIEW XML OF DOCUMENT

This will show the XML File with data which is sent on request or response.

START LOGGING

Start the recording of request/response Transactions.

STOP LOGGING

Stop the recording of request/response Transactions.

RUN TRANSACTION (CTRL+R)

Simulates running request Transaction within TRIMIT.

CLEAR LOG (CTRL+D)

Clears all the Transaction Log Lines except marked for **Do not Delete**.

UNMARK ALL (CTRL+SHIFT+D)

Unmark all Transaction Log Lines marked for **Do not Delete**.

SET USER FILTER

You can set a User Filter (based on the **User Identity** of the record you are standing on) , so only the requests of that specific User will be logged.

If you click *Edit List* in the **Web Transaction Log** page, you can fill the field **User Filter** in the bottom of the page itself.

SET VIEW FILTER

You can set a View Filter (based on the **View Called** of the record you are standing on) , so only the requests of that specific View will be logged.

If you click *Edit List* in the **Web Transaction Log** page, you can fill the field **View Filter** in the bottom of the page itself.

CLEAR LOG FILTER

This action will clear the **User Filter** and the **View Filter**.

TOGGLE TEST UNITS

Switch between showing or not **test** unit transaction lines.

Lines can be marked as test units with field **Test Function**, which is not shown in the page by default, but you can add it by using *Personalize*.

EXPORT DOCUMENT

Export XML data which is sent on request or response.

CREATE TRANSACTION SET

Creates empty lines for request, import and export transactions.

COPY TRANSACTION SET

Copies the transaction set.

CREATE A WEB TRANSACTION LOG

To start logging incoming request from **Modelyn** (admin layer of the Portals) simply click **Actions, Start Logging**. Go to your web site call a page with Business Central integration.

Return to the **Web Transaction Log** page and click **Actions, Stop Logging**.

The page now shows all the requests that were logged (you might have to press **F5**).

A request is often a set of records. The largest set is when a view is called with “insert, get” or “update, get”. In such a set you find a Request record, Import Record and finally an Export record.

ID	Type	Date Time	Duration	View Called	User Identity	Do not Delete	Descripti...	Parameters	Command	Command Argument	Page Url
→ [Re52c617-1be9-4a23-be8b-3e17e95df964]	Request	24-1-2022 16:46		B2C-BASKETHEADER		☒	submit	BROWSERLANGUAGE: DA; COU...	INSERT	SUBMIT	https://portals.trimit.dev/b2c/c
	Import	24-1-2022 16:46	235 milliseconds			☒					
	Export	24-1-2022 16:46	24 milliseconds			☒					

WHAT CAN YOU LEARN FROM THE WEB TRANSACTION LOG?

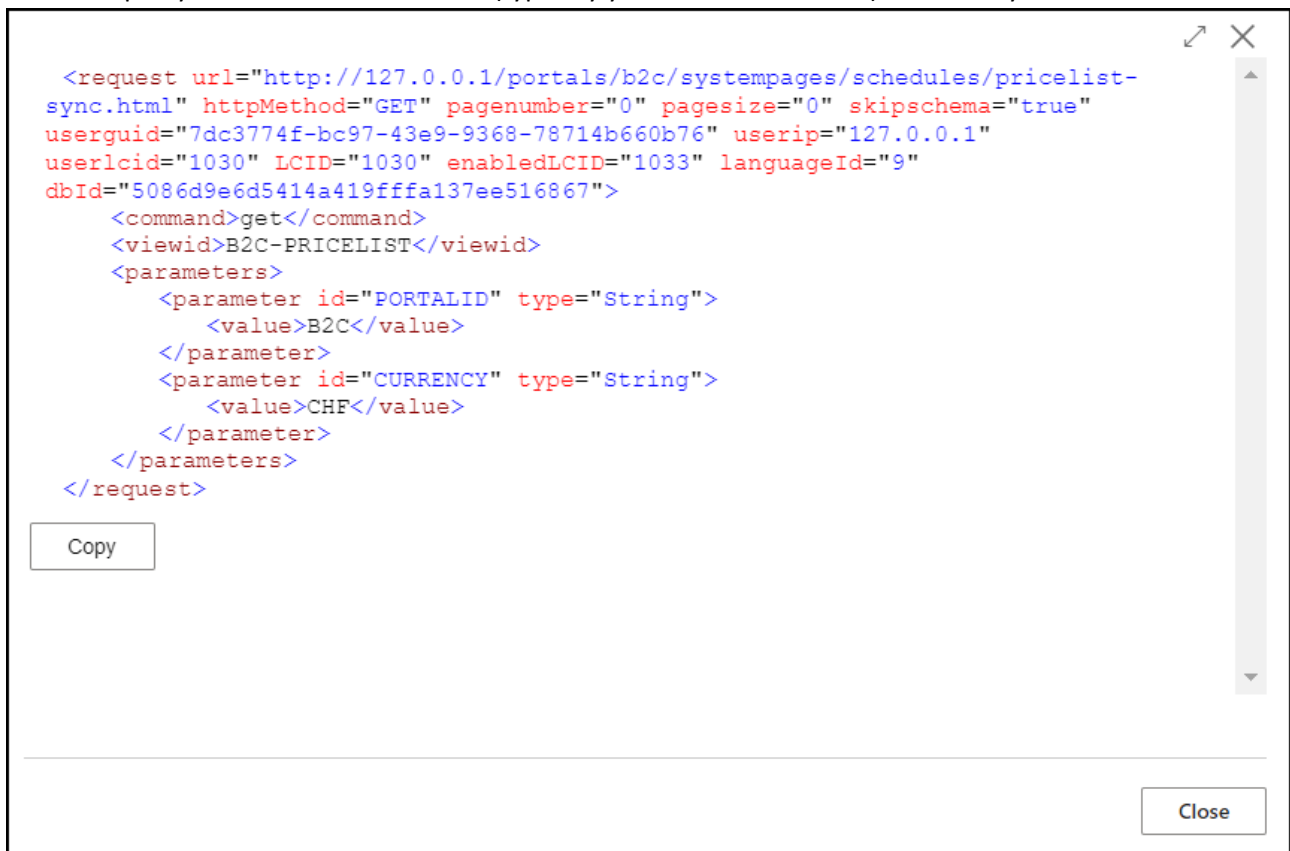
If you filter on *Request* in the field **Type** you will get a nice indication on what Requests were fired from the web site. If you find that a particular **View Called** is called frequently, you should consider performance and the possibilities for caching the view data on **Modelyn**.

Take a good look at the individual Request and consider the **Duration**. If for instance the Import/Export on a Request takes notably longer than others it might indicate poor performance.

You can examine the data in the Request lines, validating that the input or output data is as expected.

Simply go to a particular line and click **Actions, View XML of Document**.

This will open your default XML browser (typically your internet browser) and allow you to see data.



```
<request url="http://127.0.0.1/portals/b2c/systempages/schedules/pricelist-sync.html" httpMethod="GET" pagenumber="0" pagesize="0" skipschema="true"
userguid="7dc3774f-bc97-43e9-9368-78714b660b76" userip="127.0.0.1"
userlcid="1030" LCID="1030" enabledLCID="1033" languageId="9"
dbId="5086d9e6d5414a419ffa137ee516867">
  <command>get</command>
  <viewid>B2C-PRICELIST</viewid>
  <parameters>
    <parameter id="PORTALID" type="String">
      <value>B2C</value>
    </parameter>
    <parameter id="CURRENCY" type="String">
      <value>CHF</value>
    </parameter>
  </parameters>
</request>
```

Copy

Close

REPLAY A REQUEST

When developing or debugging the records are valuable since you can replay them. Also, you can now activate the **Business Central** debugger before replaying and debug in the familiar development environment. It is not recommended to replay (imports) in a live scenario, since a request could be saving a Sales Order or doing other write transactions. So, you must make sure you know what the Requests do in order not to create “bad” data.

In order to replay a Request, you simply mark the Request you want to execute and click **Action, Run Transaction (Ctrl + R)**. The Request is processed, and the result is a new Request set.

ADVANCED FEATURES

In some cases, a **Business Central** developer is depending on some Requests to do his development in **Business Central**. But being in the process of development the web site is also being worked on. So, in order to simulate different Requests, you can work with and create your own Request directly in the page.

As an advanced feature you can alter the data documents – this makes sense for the *Request* and *Import Document*. For editing the XML document, you must have **Visual Studio** present on your computer. The advantage is that you can alter the content in the Request and test different data scenarios etc.

You can export the content of a document to disk by clicking **Actions, Export Document**. This comes in handy if you want to send the XML data to another person for inspection.

But remember that if you import content, the content still needs to match the Business Central View definition. If the content does not match the View, you will in most cases get a runtime error when running the Request.

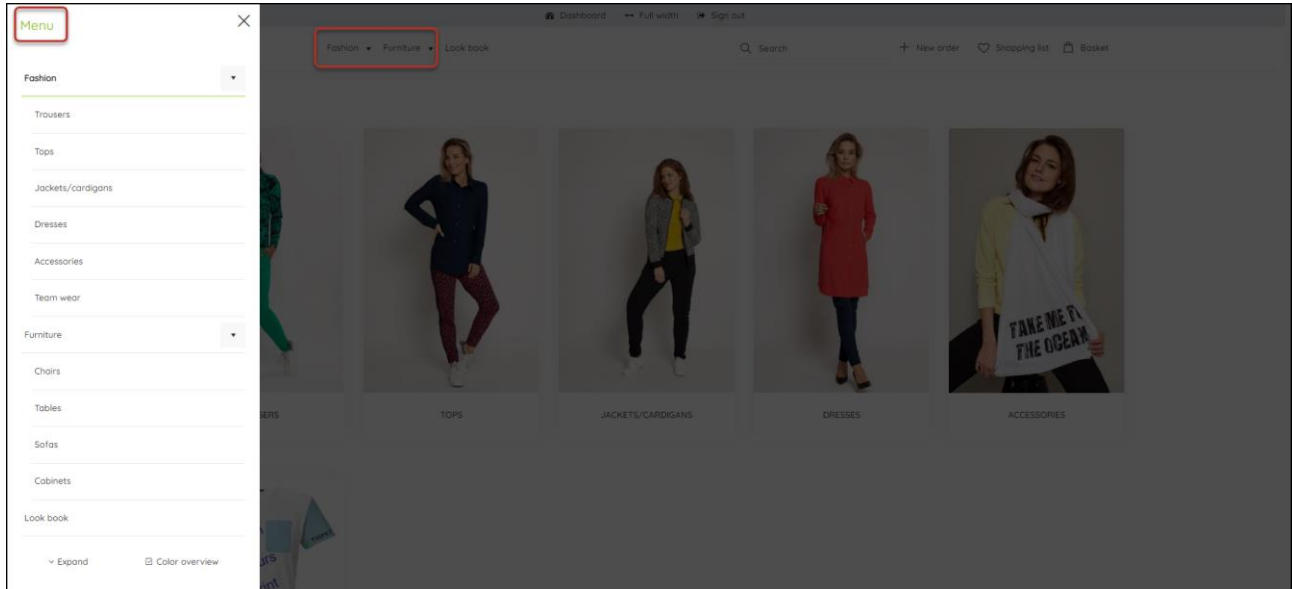
Create a new Transaction Set by clicking **Actions, Create Transaction Set**. You now have a Transaction set with all 3 Types of Requests. It does not contain any data so you can import XML from disk to populate it.

Copy a Transaction Set by selecting an existing Request set by clicking **Actions, Copy Transaction Set**. This can be used if you want to keep the original set and want to create a new one in which you alter data.

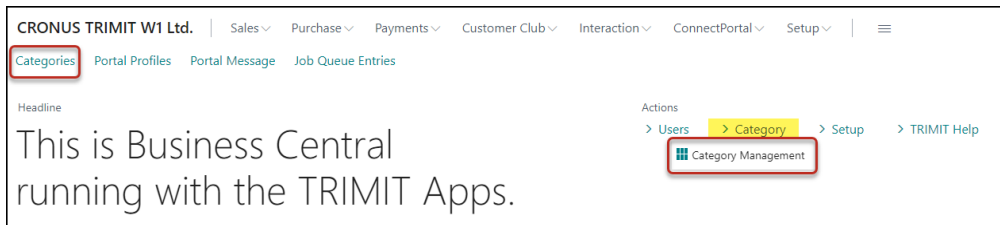
CATEGORIES

The Categories are used to select Items that are available in the TRIMIT Webshops/Portals. The Categories are also the easy guide for the User to find an Item.

The Categories are shown on the portal in the left menu as a tree-view and in the content area drill-down menus and pictures:



Via the Role Center **TRIMIT Portal Administrator** you can create and maintain the Categories via **Categories** and you can attach many Items to a Category in a simply step via **Category, Category Management**.



Creating the Category tree-view is like creating BOM's in TRIMIT. First, create the Categories, and then attach them to each other to build a structure.

To see the whole Category Structure of a Portal you need to select a Top-Level Category (i.e., **B2B**) in the **Categories** and click **Show Category**.

Categories: All ▾ 🔍 Search + New 🗑️ Delete 📋 Edit List 📊 Category Lines Show Category 🔄 Copy Wizard 📄 Card 💬 Comments						
No.	Description	Matrix Limitation	Do not show on First Level	Alternative Sorting ↑	Customer Club Level	Collection
B2B	B2B Toplevel		☐		0 Level 0	
B2B_F_CABINETS	Cabinets		☐		0 Level 0	
B2B_F_CHAIRS	Chairs		☐		0 Level 0	

Now you can see the whole Category Structure. I.e.:

Edit - Category Tree View						
Related Record Category Line Related Fewer options						
Category Type	No.	Description	Description 2	Matrix Limitation	Alternative Sorting	
→ Category	B2B					0
Category	B2B_FASHION	Fashion				0
Category	B2B_W_TROUSERS	Trousers				0
Master	2000	Olivia Trousers				0
Master	2010	Amelia Trousers				0
Master	2020	Isla Trousers				0
Master	2030	Ella Trousers				0
Category	B2B_W_TOPS	Tops				0
Master	2100	Lily Blouse				0
Master	2110	Mia Blouse				0
Master	2120	Sophia Shirt				0
Master	2130	Rose Shirt				0
Master	2600	Helen Blouse				0
Master	2610	Hope Shirt				0

To create a new Category, simply click **+ New** in the **Categories** page and enter the new **No.** and **Description**. To attach Categories in a structure, click **Category Lines**:

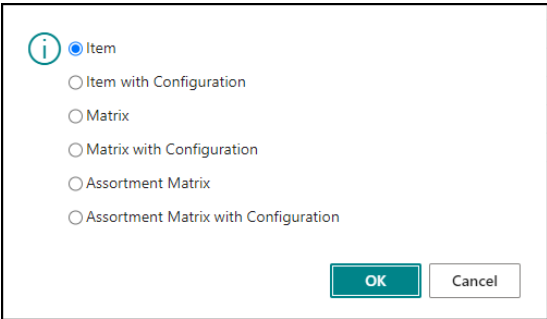
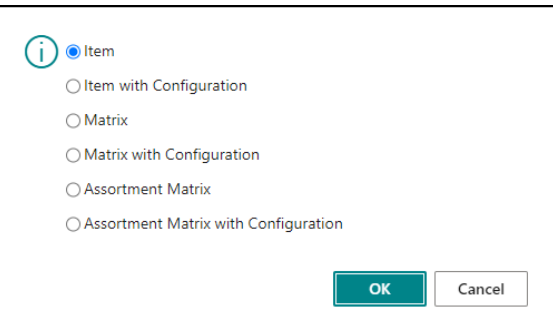
Categories Work Date: 9/6/2020				
Search + New Edit List Delete Category Lines Show Category Copy Wizard				
No.	Description	Matrix Limitation	Do not show on First Level	
AGENT_W_TROUSERS	Trousers		☐	
→ NEW_CATEGORY	New Category		☐	
B2B	B2B Toplevel		☐	
B2B_F_CABINETS	Cabinets		☐	

This will open the **Category Lines** page as shown below:

Edit - Category Lines - NEW_CATEGORY														
Search + New Edit List Delete Related Fewer options														
Category Card Next Level Matrix Limitation Setup Comment Translation Text Picture Move Content To Copy Content To														
Type	No.	Matrix Limitation	Description	Logo Placement	Visual Configuration	Configuration filters Y-axis	Allow Bulk Sale on Webshop	Filter Deliv... Period	Category Lines	Gift Card	Customer Club Level	Alternative Sorting	Effective Date	Expiry Date
→ Matrix	2100		Lily Blouse	No	No	Yes	☐		☐	☐	Level 0	0		
Matrix	2120		Sophia Shirt	No	No	Yes	☐		☐	☐	Level 0	0		
Category	B2B_GIFTCARDS		Gift Cards	No	No	Yes	☐		☐	☐	Level 0	0		
Item	3000		Chair Zeus	No	No	Yes	☐		☐	☐	Level 0	0		
Assortment Matrix	2110		Mia Blouse	No	No	Yes	☐		☐	☐	Level 0	0		

First, fill out the field **Type**. You can choose between the following 16 options:

User Defined Category	Category or Subcategory created by user, and which is not defined under the Category List
Category	The selected Category (No.) becomes a Subcategory
Item	The selected Item number (No.) will be shown under the Category
Matrix	The selected Item (No.) is a Master Item setup as Matrix. Example: Master 2100 <i>Lily Blouse</i> in the demo company
Assortment Matrix	The selected Item (No.) is a Master Item setup as an Assortment Matrix. Example: Master 2110 <i>Mia Blouse</i> in the demo company
Create Variant Combinations	The selected Item (No.) is a Master Item setup for Inventory Configuration. All the possible variant combinations will be created and shown

Collection	This Type allows you to select a Collection. All Masters/Items related to the Collection will automatically be populated at runtime. When a Collection has been selected you must choose the way the Items are to be sold. 
Global Dimension 1 -2	The selected Global Dimension 1 – 2 (No.) becomes a Category
Statistics Group 1 - 5	The selected Item Statistic Group 1 – 5 (No.) becomes a Category
Period Code	The selected Shipment Group (No.) becomes a Category
Collection from Category	This Type allows you to automatically take the Collection from a higher Category – in the Category structure. This means, that if the Collection would change, you don't have to change all the Category Lines, but can simply change the Collection on the highest level, and this will also influence the lower levels with Type Collection for Category. You still need to choose one of the following options – just as with Type Collection. 

Then choose value in **No.** field by look-up the relevant list, depending on the **Type** field.

Read more information about Portal Categories in document **White Paper – TRIMIT Category Management**.

NOTE 1

Be aware that the Portals do not support Items without related Masters. That means, that a flat Item should always have a Master.

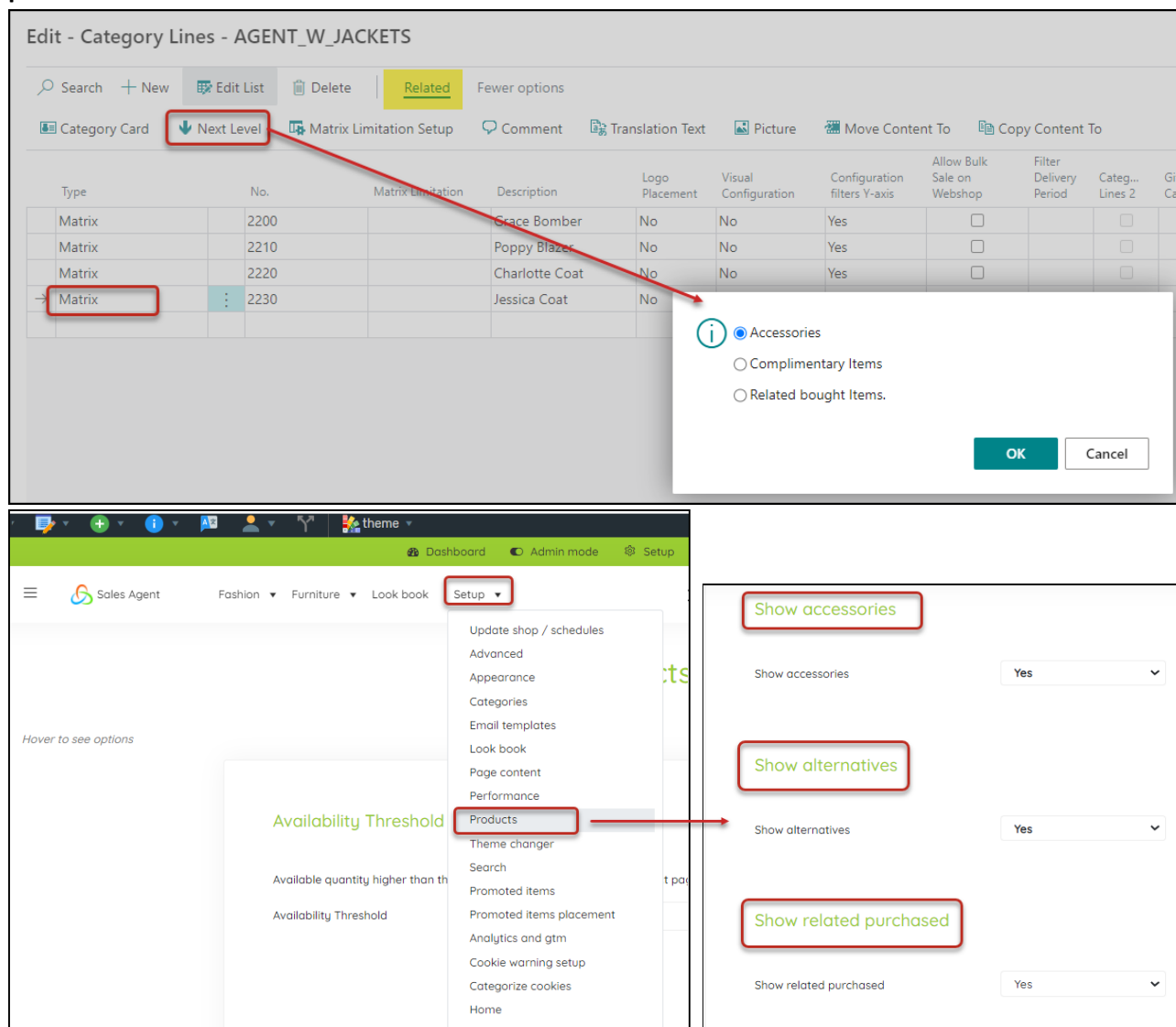
NOTE 2

B2C Webshop does not support the following **Handle Item as** : *Assortment Matrix, Matrix with Configuration and Assortment with Configuration*.

RELATED, NEXT LEVEL

Clicking **Related, Next Level** on a Category Line with **Type = Master** or **Item**, the Next Level can only be **Accessories, Complementary Items** or **Related bought Items**.

If those are chosen then in order to make them visible on the Portals it is needed to set the following fields on Soft Admin's **Product details** page to **TRUE**: **Show accessories, Show alternatives, Show related purchased**.

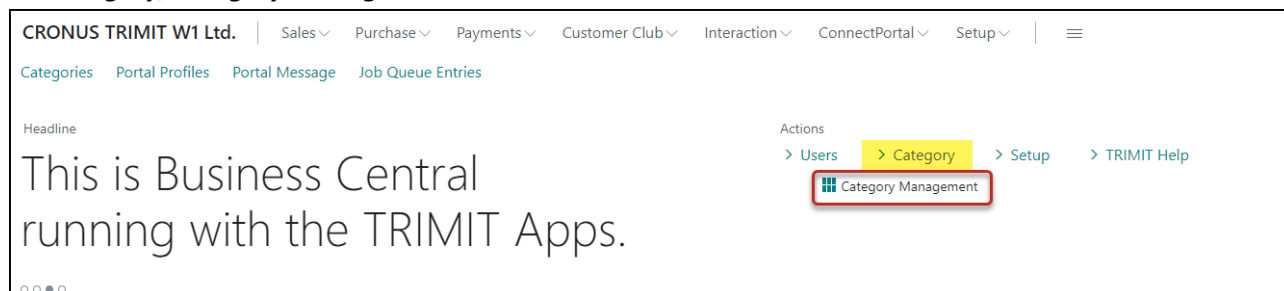


The first screenshot shows the 'Edit - Category Lines - AGENT_W_JACKETS' screen. The 'Next Level' button is highlighted in the top toolbar. A red arrow points from this button to a dropdown menu that lists 'Accessories', 'Complimentary Items', and 'Related bought Items'. Below this, another screenshot shows the 'Setup' menu in the 'Sales Agent' portal, with a red box around 'Products' and a red arrow pointing to a 'Show accessories' dropdown menu. To the right, a third screenshot shows the 'Show accessories', 'Show alternatives', and 'Show related purchased' dropdown menus, all set to 'Yes'.

For more details regarding Categories, see **White Paper – TRIMIT Category Management**.

CATEGORY MANAGEMENT

Via the Role Center **TRIMIT Portal Administrator** you can attach many Items to a Category in a simply step via **Category, Category Management**.



Category Management page looks as follows:

Category Management | Work Date: 9/6/2020

Search

Attach Line to Category

Attach Selected Lines to Category

Actions

Related

Fewer options

Item Type	No. ↑	Attached to Category	Master No.	Master Attached to Category	Description	Description 2	Brand Code	Season Code	Item Category Code	Design	Item Statistics Group 5
Finished Go...	1996-S			2	ATLANTA Whiteboard, base	—			MISC	0	0
Master Item	2000	3	2000	3	Olivia Trousers	—	FASHION			1	10
Finished Go...	20002036		2000	3	Olivia Trousers	Royal Blue,36	FASHION			1	10
Finished Go...	20002038		2000	3	Olivia Trousers	Royal Blue,38	FASHION			1	10
Finished Go...	20002040		2000	3	Olivia Trousers	Royal Blue,40	FASHION			1	10

Filter Area

Lines

Manage

Parent No.	Type	No. ↑	Description	Description 2	Effective Date	Expiry Date	Alternative Sorting	Category Lines
AGENT_W_TROUSERS	Matrix	2000	Olivia Trousers					0
B2B_W_TROUSERS	Matrix	2000	Olivia Trousers					0
B2C_W_TROUSERS	Matrix	2000	Olivia Trousers					0

Attachments

On the FastTab **Lines** you can see which Categories the Items in Filter Area are already attached to. In the Filter Area you can use the filtering options to define which Items you want to attach to a Category by using the action **Attach Line to Category** or **Attach Selected Lines to Category**.

Read more information about Portal Category Management in document **White Paper – TRIMIT Category Management**.

NOTE

In order to filter out (hide) certain Items being synchronized with TRIMIT Portals, you can create a new Portal Profile and assign a new Category Structure to it. This Category Structure should have the hidden products. Assign this Portal Profile to an admin user. Another way is to make products published or unpublished in PIR. This way they are only visible for admins.

PORTALS NEWSLETTER

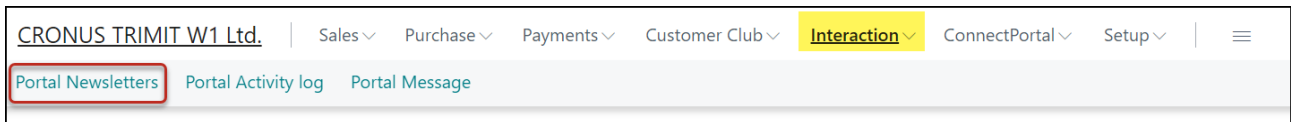
When the Salesperson creates a new Customer on the SA Portal, it is possible to set a checkmark in the field **Newsletter**. When doing so, the Customer is created as **Recipient** in the **Portal Newsletter Code** in TRIMIT based on the field **Customer Newsletter** in the SA Portal Profile.

The same approach is used in the B2B Webshop – the customer can set a checkmark in field **Newsletter** on the **Customer Address Edit** (via **My details**) page. When done, the corresponding Customer will be added to the **Recipients** of the **Portal Newsletter Code** in TRIMIT based on the field **Customer Newsletter** in the B2B Webshop Portals Profile. Sending Newsletters can be done manually.

The same approach is used on B2C Webshop – when a Consumer registers on the web site it is possible to set a checkmark in field, **I wish to receive newsletters** in the **Join** or **My Account/Checkout** page on B2C Webshop. When done, the corresponding Customer will be added to the **Recipients** of the **Portal Newsletter Code** in TRIMIT based on the field **Customer Newsletter** in the B2C Webshop Portals Profile. Sending Newsletters can be done manually.

It is possible to create different **Portal Newsletter Codes**. The Code can be assigned on SA and B2C Portal Profile Cards in **Customer Newsletter** field.

To create a **Portal Newsletter Code**, in the Role Center **TRIMIT Portal Administrator** you can go to **Interaction, Portal Newsletters**. Otherwise, use **Tell me Portal Newsletters**



go to **Departments/Portals/Setup/Portals/Newsletters**.

This will open the list of Portal Newsletters:

Select - Portal Newsletter				
Code ↑		Description		Recipients
→ AGENT	:	Sales Agent Newsletter		5
B2B		Business-To-Business Newslet.		7
CONSUMER		Consumer Newsletter		39

To see the Recipients –double click in the field **Recipients**.

Portal Newsletter Recipients Work Date: 6-9-2020			
Search + New Edit List Delete			
Relation Type ↑	Relation ID ↑	Name	Name 2
→ Customer	CW00061		
Customer	CW00073		
Salesperson/Purchaser	CE	Christine Everton	
Salesperson/Purchaser	JR	John Roberts	
Salesperson/Purchaser	TR	Theodor Rudolphs	

You are also able to enter the **Portals Newsletter Recipients** manually in this page.

The **Relations Type** can be *Employee, Contact Company, Contact Person, Customer, Vendor, Resource* or *Salesperson/Purchaser*. The **Relation ID** will then be related to the **Relation Type**.

NOTE

TRIMIT does not provide the solution for sending actual Newsletter E-Mails. Instead, this can be handled by third party software like MailChimp or other specifically developed for these purposes' applications.

CUSTOMER TEMPLATES

The SA Portal enables the logged in Salesperson to create new Customers entering information shown on screenshot below:

Create New Customer

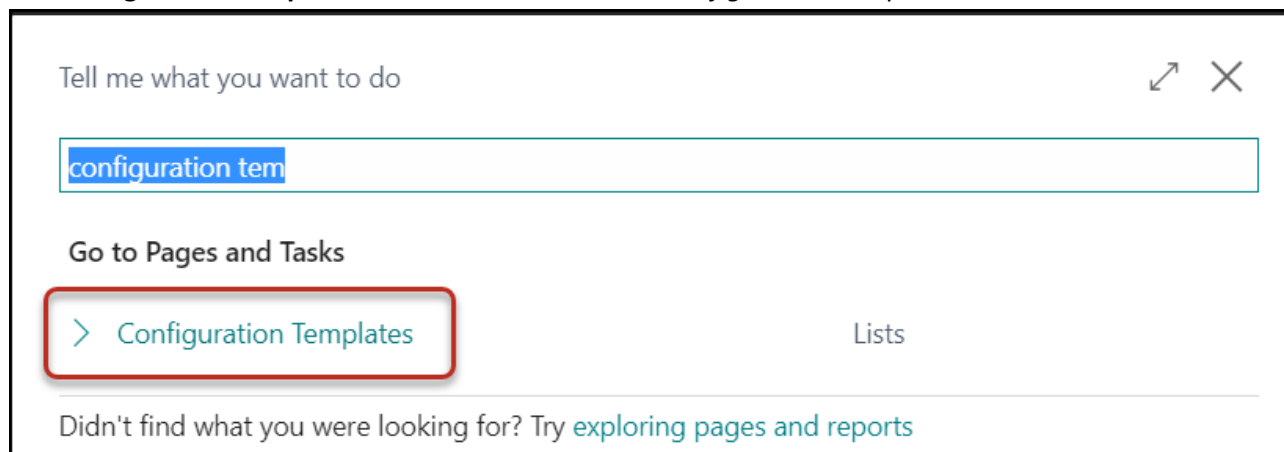
Template	Choose template
Name	Customer name
Name2	Other name
Address	Address line 1
Address2	Address line 2
Postcode	Postcode
City	City
Country	Choose country
Phone	Phone no.
Fax	Fax no.
Email	Email address
Contact	Contact name
VAT registration no.	VAT no.
☐ Newsletter	
Create new customer	

Before the Customer in TRIMIT can be used for creating Sales Orders, information regarding Posting Groups, Currency Code, Payment Terms, etc. also must be filled.

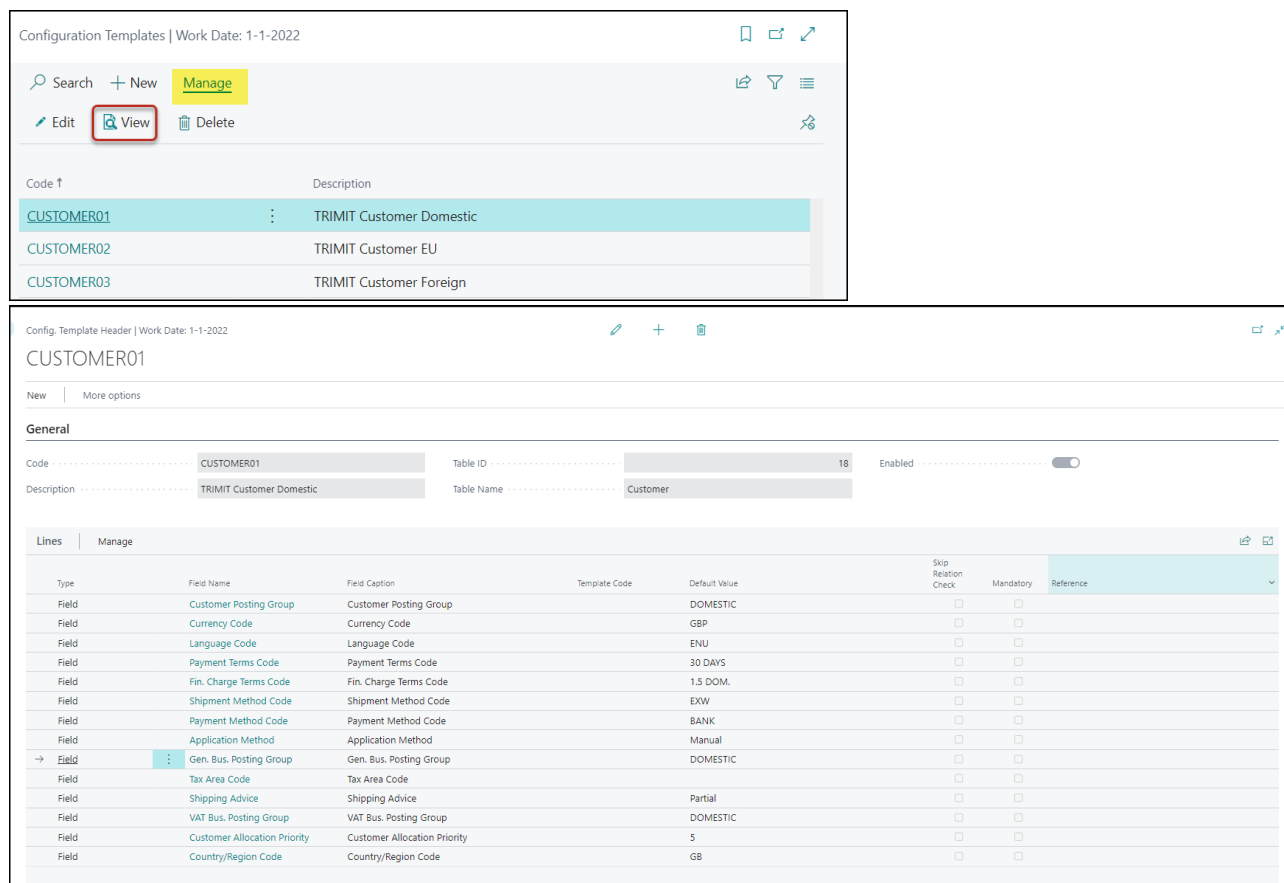
It is not expected that the Salesperson is able to decide on that type of information.

Hence, TRIMIT Salesperson makes use of the Configuration Templates in TRIMIT. When the Salesperson creates a new Customer, the first field **Choose template** is where the Template needs to be selected.

The **Configuration Templates** can be found via **Tell me Configuration Templates**

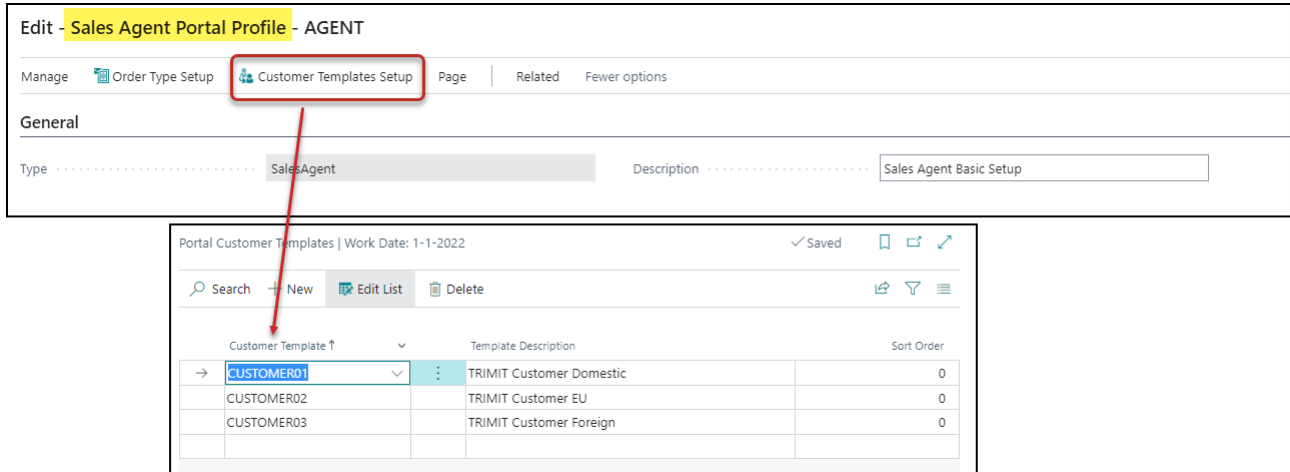


The CRONUS TRIMIT W1 Ltd. Demo company includes some examples of how the Template can be made. It is important to define just enough Templates, to make it easy for the Salesperson to quickly create new Customers. I.e.:



Type	Field Name	Field Caption	Template Code	Default Value	Skip Relation Check	Mandatory	Reference
Field	Customer Posting Group	Customer Posting Group		DOMESTIC	☐	☐	
Field	Currency Code	Currency Code		GBP	☐	☐	
Field	Language Code	Language Code		ENU	☐	☐	
Field	Payment Terms Code	Payment Terms Code		30 DAYS	☐	☐	
Field	Fin. Charge Terms Code	Fin. Charge Terms Code		1.5 DOM.	☐	☐	
Field	Shipment Method Code	Shipment Method Code		EXW	☐	☐	
Field	Payment Method Code	Payment Method Code		BANK	☐	☐	
Field	Application Method	Application Method		Manual	☐	☐	
Field	Gen. Bus. Posting Group	Gen. Bus. Posting Group		DOMESTIC	☐	☐	
Field	Tax Area Code	Tax Area Code			☐	☐	
Field	Shipping Advice	Shipping Advice		Partial	☐	☐	
Field	VAT Bus. Posting Group	VAT Bus. Posting Group		DOMESTIC	☐	☐	
Field	Customer Allocation Priority	Customer Allocation Priority		5	☐	☐	
Field	Country/Region Code	Country/Region Code		GB	☐	☐	

Customer Templates Setup for the SA Portal can be done in the **Portal Profile** Card of the SA Portal by clicking **Customer Templates Setup**. I.e.:



Edit - Sales Agent Portal Profile - AGENT

Manage   Page | Related | Fewer options

General

Type SalesAgent Description Sales Agent Basic Setup

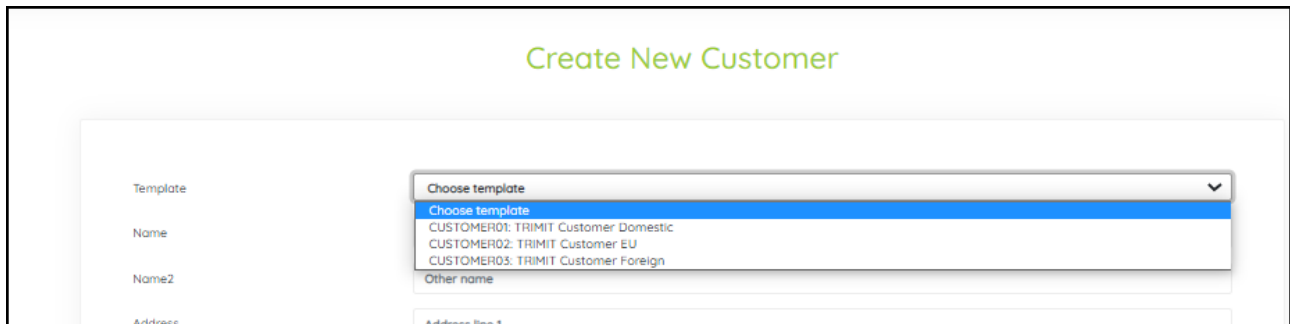
Portal Customer Templates | Work Date: 1-1-2022

✓ Saved   

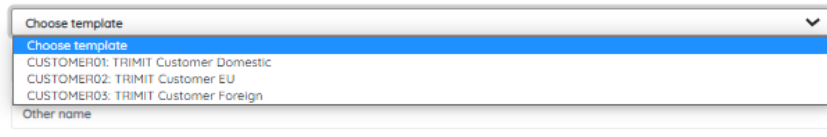
 Search  New  Edit List  Delete   

Customer Template ↑	Template Description	Sort Order
→ CUSTOMER01	TRIMIT Customer Domestic	0
CUSTOMER02	TRIMIT Customer EU	0
CUSTOMER03	TRIMIT Customer Foreign	0

Here it is possible to define a set of Customer Templates, which will be displayed in drop-down for the field **Template** on **Create New Customer** page on the SA portal. The above example will result on the SA Portal in a selection of only these three Templates:



Create New Customer

Template 

Name

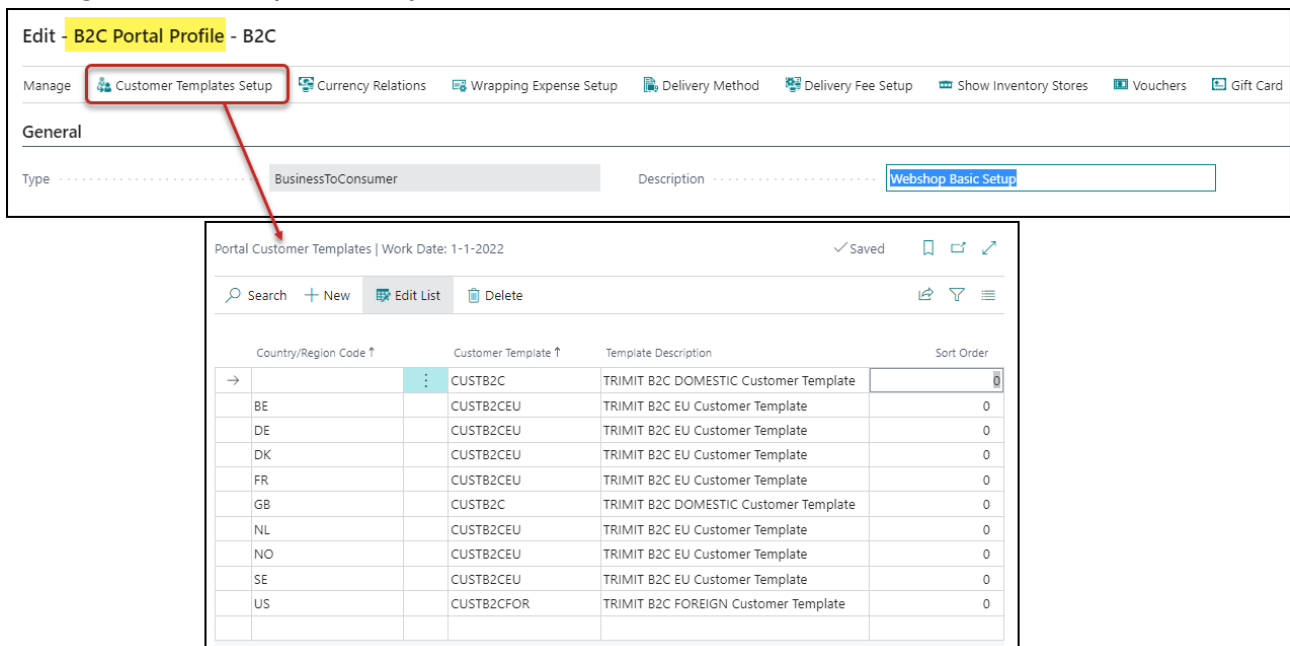
Name2

Other name

Address

Address Row 1

Customer Templates Setup for the B2C Webshop can be done in the **Portal Profile** Card of the B2C Shop by clicking **Customer Templates Setup**. I.e.:



Edit - B2C Portal Profile - B2C

Manage   Currency Relations  Wrapping Expense Setup  Delivery Method  Delivery Fee Setup  Show Inventory Stores  Vouchers  Gift Card

General

Type BusinessToConsumer Description Webshop Basic Setup

Portal Customer Templates | Work Date: 1-1-2022

✓ Saved   

 Search  New  Edit List  Delete   

Country/Region Code ↑	Customer Template ↑	Template Description	Sort Order
→	CUSTB2C	TRIMIT B2C DOMESTIC Customer Template	0
BE	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
DE	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
DK	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
FR	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
GB	CUSTB2C	TRIMIT B2C DOMESTIC Customer Template	0
NL	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
NO	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
SE	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
US	CUSTB2CFOR	TRIMIT B2C FOREIGN Customer Template	0

Here it is possible to define a set of Customer Templates related to the **Country Code** of the Consumer. If no **Customer Template** has been chosen for a specific **Country Code**, the content of the field **Customer Template for Registry** in the Profile Card will be applicable.

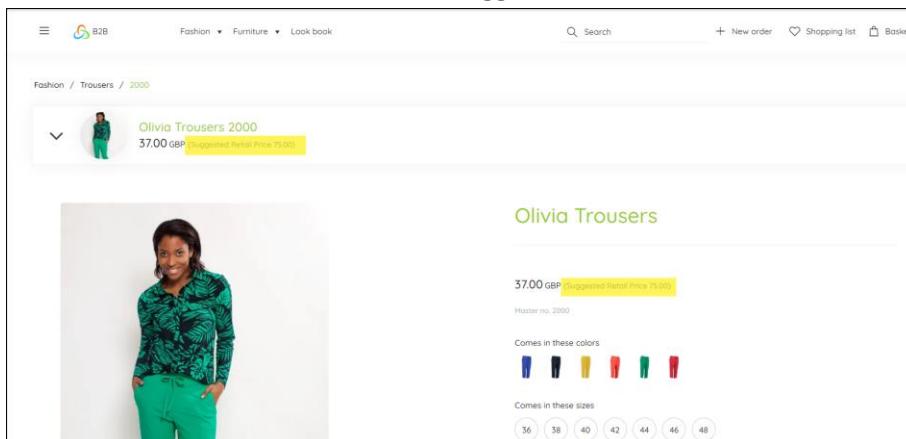
NOTE

Templates are functionality also used for Configuration Packages. If you insert a field requiring a Boolean content, the **Default Value** MUST be stated in the Language of the Web service connection. Boolean in the Template are translated from False to Yes. AL Code will only accept the value if it is in the setup processing language. I.e., if your web service user account is set to work with Language *1033 English (United States)* then a Boolean value must be set to *Yes* not *Si*, *Nein*, *Nee* or like.

SUGGESTED RETAIL PRICE

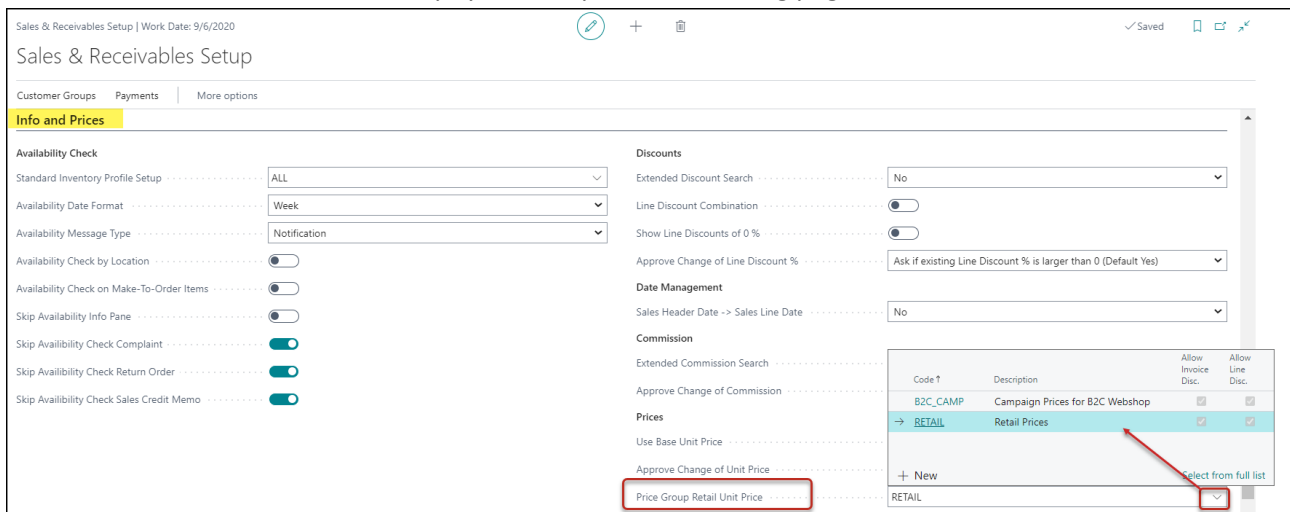
The Fashion industry works with the term *Suggested Retail Price*, being the Sales Price that the end-user must pay when buying the Item in a shop.

In the TRIMIT B2B and SA Portals the **Suggested Retail Price** is shown as follows:



The following shows how to setup the **Suggested Retail Price** in TRIMIT.

Via **Tell me Sales & Receivables Setup**, you can open the following page:



Press look-up button in the field **Price Group Retail Unit Price** and click **Select from full list** to get the list of Customer Price Groups:

Select - Customer Price Groups								
Code ↑	Description	Allow Line Disc.	Allow Invoice Disc.	Price Includes VAT	VAT Bus. Posting Gr. (Price)			
B2C_CAMP	Campaign Prices for B2C Webshop	☒	☒	☒	DOMESTIC			
→ RETAIL	Retail Prices	☒	☒	☒	DOMESTIC			

In the CRONUS TRIMIT W1 Ltd. Demo company, a Customer Price Group called *RETAIL* is created and selected in the field.

Now prices must be filled for this **Customer Price Group**. This can be done on every Master individually via the Master Card or via the Customer Price Group.

Via the Customer Price Group:

Via **Tell me Customer Price Groups** open the page with the Customer Price Groups.

Select *RETAIL* and click **Sales Prices**

Customer Price Group RETAIL Retail Prices Work Date: 9/6/2020															
Sales Prices															
General															
Sales Type Filter	Customer Price Group			Item/Master No. Filter											
Sales Code Filter	RETAIL			Starting Date Filter											
Item Type Filter	None			Currency Code Filter											
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	Form		
Customer Price Group	RETAIL	2000	PCS	0	EUR	115.00	0					Default			
Customer Price Group	RETAIL	2000	PCS	0	GBP	75.00	0					Default			
Customer Price Group	RETAIL	2000	PCS	0	NOK	680.00	0					Default			
Customer Price Group	RETAIL	2000	PCS	0	SEK	750.00	0					Default			
Customer Price Group	RETAIL	2000	PCS	0	USD	118.00	0					Default			
Customer Price Group	RETAIL	2010	PCS	0	DKK	645.00	0					Default			
Customer Price Group	RETAIL	2010	PCS	0	EUR	125.00	0					Default			
Customer Price Group	RETAIL	2010	PCS	0	GBP	85.00	0					Default			
Customer Price Group	RETAIL	2010	PCS	0	NOK	700.00	0					Default			
Customer Price Group	RETAIL	2010	PCS	0	SEK	770.00	0					Default			
Customer Price Group	RETAIL	2010	PCS	0	USD	125.00	0					Default			
Customer Price Group	RETAIL	2020	PCS	0	DKK	550.00	0			SIZE_EU[G0]	ST00012	Default			
Customer Price Group	RETAIL	2020	PCS	0	EUR	100.00	0			SIZE_EU[G0]	ST00013	Default			

You can create new lines for new Masters or Items.

The field **Sales Type** (*Customer Price Group*) and **Sales Code** (*RETAIL*) will already be filled in and you only need to enter the rest of the fields. This is a standard Business Central functionality.

Via the Master List/Master Card

Via **Tell me Master List** open the Master List.

Select the right Master (i.e., 2010) can click **Related, Sales Receivables, Sales Prices**.

The **Sales Prices** page opens. Create a new line where the **Sales Type** = *Customer Price Group* and the **Sales Code** = *RETAIL* and fill in the relevant price:

Item 2010 | Work Date: 9/6/2020 ✓ Saved

Sales Prices | Search | + New | Edit List | Delete | Dimension Prices | Search Table Lines | Formula Lines | More options

General

Sales Type Filter: None | Item/Master No. Filter: 2010

Sales Code Filter: | Starting Date Filter: |

Item Type Filter: Master | Currency Code Filter: |

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
Customer Price Gr	RETAIL	2010	PCS	0	DKK	645.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	EUR	125.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	GBP	85.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	NOK	700.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	SEK	770.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	USD	125.00	0					Default	
All Customers		2010	PCS	0		39.00	0					Default	

In the CRONUS TRIMIT W1 Ltd. Demo company, six lines are created for the Master *2010*, one per **Currency Code**.

Once these Sales Prices have been entered – the **Suggested Retail Price** will be shown on the Portal.

NOTE

Suggested Retail Price on SA comes from Sales & Receivables Setup field **Price Group Retail Unit Price**. Whereas **Unit price** on **product details** page on SA Portal comes from the normal Sales Price Search method in TRIMIT.

NOTE

Portals do not support multiline discounts because of the performance reasons. Therefore, Combination Discounts are not supported.

PRICE DIFFERENTIATION ON ITEM VARIANTS

If a Product must have different Prices for different Variants, i.e., larger Size costs more than smaller Sizes, then this can be reflected in Product Matrix on SA Portal, B2B and B2C Webshops.

Different Item Variant Prices can be specified via **Search Table Lines** page. This page can be accessed from **Sales Prices** page (via **Master List** or **Card, Related, Sales Receivables, Sales Prices**). If Prices are already set, then to set up Variant specific Prices, locate field **Search Expression** on the lines and click look-up button in it. In **Auto generate Formulas** page select which VarDim Type you want to set different Prices for and click **OK**.

Now on **Sales Price** page click **Search Table Lines**. In **Search Table Lines** page set field **Unit Prices** for specific Variant values. Click **OK**. Run schedules on Portal to synchronize Prices.

Item KBI2010 | Work Date: 1-1-2022

Sales Prices | Search | + New | Edit List | Delete | Dimension Prices | **Search Table Lines** | Formula Lines | More options

General

Sales Type Filter: None | Item Type Filter: Master | Starting Date Filter: |

Sales Code Filter: | Item/Master No. Filter: KBI2010 | Currency Code Filter: |

Sales Type	Sales Code	Item No.	Unit of Measure Code	Minimum Quantity	Currency Code	Unit Price	Allow Line Disc.	Dimension Prices	Starting Date	Ending Date	Search Expression	Search Table	Use Search Table Result	Formula
→ All Customers		KBI2010	PCS	0		39,00	☒	0			SIZE_EU		Default	
Customer Price Group	RETAIL	KBI2010	PCS	0	USD	125,00	☒	0					Default	
Customer Price Group	RETAIL	KBI2010	PCS	0	SEK	770,00	☒	0					Default	

Edit - Search Table Lines

Search | + New | Edit List | Delete | Search Table Header | Maintain

Inactive	Not Valid	SIZE_EU ↑	European Sizes 36 - 60	Unit Price
☐	☐	36	36	39,0
☐	☐	38	38	39,0
☐	☐	40	40	39,0
☐	☐	42	42	39,0
☐	☐	44	44	42,0
☐	☐	46	46	42,0
☐	☐	48	48	42,0

Here are some examples of Prices presentations on Portals.

SCENARIO 1:

Master has a default Unit Price and different Color related Unit Prices. Also, Master has default Campaign Unit Prices with different Color related Unit Prices.

Default Sales Price: 500,00 GBP

Sales Price per Color: White 505,00 GBP, Blue 510,00 GBP, Red 515,00 GBP

Default Campaign Price: 250,00 GBP

Campaign Price per Color: White 255,00 GBP, Blue 260,00 GBP, Red 265,00 GBP

Output on **Product** page:

White ~~505,00~~ 255,00 GBP, Blue ~~510,00~~ 260,00 GBP, Red ~~515,00~~ 265,00 GBP

SCENARIO 2:

Master has a default Unit Price and different Color related Unit Prices. Also, Master has default Campaign Unit Price without different Color related Unit Prices.

Default Sales Price: 500,00 GBP

Sales Price per Color: White 505,00 GBP, Blue 510,00 GBP, Red 515,00 GBP

Campaign Price: 250,00 GBP

Output on **Product** page:

White ~~505,00~~ 250,00 GBP, Blue ~~510,00~~ 250,00 GBP, Red ~~515,00~~ 250,00 GBP

SCENARIO 3:

Master has a default Unit Price and different Color related Unit Prices. Also, Master has default Campaign Unit Prices with different Size related Unit Prices.

Default Sales Price: 500,00 GBP

Sales Price per Color: White 505,00 GBP, Blue 510,00 GBP, Red 515,00 GBP

Default Campaign Price: 250,00 GBP

Campaign Price per Size: XS 280,00 GBP, M 285,00 GBP, XL 290,00 GBP

Output on **Product** page: White/XS 505,00 GBP, Blue/M 510,00 GBP, Red/L 515,00 GBP

Output in **Basket**: White/XS 280,00 GBP, Blue/M 285,00 GBP, Red/L 250,00 GBP

SCENARIO 4

Master has a default Unit Price without different variant Unit Prices. Also, Master has default Campaign Unit Prices with different color prices.

Default Sales Price: 500,00 GBP

Default Campaign Price: 250,00 GBP

Campaign Price per Color: White 255,00 GBP, Blue 260,00 GBP, Red 265,00 GBP

Output on **product details** page:

White ~~500,00~~ 255,00 GBP, Blue ~~500,00~~ 260,00 GBP, Red ~~500,00~~ 265,00 GBP.

It is possible to set different Unit Prices per Size and Color at the same time or separately.

Color related Unit Price differentiation will not be reflected in the Master Matrix on **Product** page on B2B and SA by default. But when Master is added to the Basket, it would be possible to expand the Matrix Line and view Color related Prices on sublines:

Basket				
ITEM	DETAILS	QUANTITY	TOTAL	
	Mia Blouse	3	122.97 GBP	
	2110		X Remove	
	40.99 GBP			
	Yellow,XL	1	39.99 GBP	
	21103005		X Remove	
	39.99 GBP			
	Forest Green,XL	1	40.99 GBP	
	21106005		X Remove	
	40.99 GBP			
	Red,XL	1	41.99 GBP	
	21107005		X Remove	
	41.99 GBP			

If Price differs per Size, then Master Matrix can reflect this on **Product** page by default if the parameter **Info on Matrix X-Axis** in the Sales & Receivables Setup is set to **Price**.

Sales & Receivables Setup | Work Date: 9/6/2020

+

✓ Saved

Sales & Receivables Setup

VarDim

Skip Creation of VarDim Order No

VarDim Search String Separator None

Fixed Format Master Search String 0

Order Variant Description No

Sales Line Description 2 Separator None

Matrix/Assortment List

Default Collapse Matrix ☒

Use Existing Matrix ☐

Show Matrix only on Demand ☐

Info on Matrix X-Axis Price

Min. Cells Check On Demand 50

Delivery Period Handling Search Delivery Period

Skip Transfer of Collection and Period Code... ☒

Matrix Cell Information

Product 20002036 In stock: 0

On			36	38	40	42	44	46	48
			37.00	37.00	39.00	39.00	41.00	41.00	43.00
	Royal Blue 20	0	[0]	[2]	[1]	[2]	[0]	[4]	[0]
	Navy 25	0	[3]	[4]	[5]	[5]	[4]	[0]	[0]

Size related Unit Price can then also be viewed on the sublines in the basket.

B2C Webshop can reflect different Prices per Size and Color on the **Product** page. But this can apply either for Retail or Campaign Price Groups This can be set by putting two VarDim types (e.g., Color and Size) into **Search Expression** on the **Sales Prices** page in TRIMIT. This needs Price Synchronization on Portal.

Retail Price cannot be differentiated by Color or Size on SA portal and B2B Webshop. You will only see 1 *Suggested Retail Price* on the **Product** page.

Making changes to Sales Prices in TRIMIT does not require running Modelyn schedules on SA portal and B2B Webshop in contrast to B2C Webshop where Product Prices can be synchronized by a separate Price Schedule in soft admin.

NOTE

Line Discounts based on Combinations of Discount Lines are not supported by TRIMIT portals. If you buy 10 pieces in total of a Master, you will get 5 % Discount.

However, Line Discounts based on single Items are supported.

COMPOSITION, CARE LABEL AND ADDITIONAL INFO

Composition, Care Label and Additional Info functionality extends the Item information shown on B2B and B2C Webshops and on SA and SUP Portals.

COMPOSITION

In order to show the **Composition** of an Item, Portals have an option to show the Master Composition information. This information is displayed on the **Product** page (under the price, in tab **Composition**). This information can be set from the Master Card in TRIMIT (via **Tell me Master List**) by clicking **Process, Composition**. In the **Composition Lines** page, it is possible to set up Master Composition, i.e., specify a particular part of an Item (**MAIN**), type of material (**Polyamide**) and percentage (**70 %**).

Composition Lines Work Date: 1-1-2022									
Search + New Edit List Delete Copy Copy Standard Lines Card Comments Actions Related Fewer options									
Type	Part Item No.	VarDim Type	Value	Description	Percentage %	Picture	Additional Text	Exclude Print	Exclude Portals
Headline						+	Composition From Master M2010 Fabric 70 % Polyamide, 30 % Elastane	☐	☐
Variant	MAIN	COMP	PA	Polyamide	70	+		☐	☐
Variant	MAIN	COMP	EA	Elastane	30	+		☐	☐
Headline						+	Composition From Master M2010 Fabric 70 % Polyamide, 30 % Elastane	☐	☐
Variant	POCKET	COMP	PA	Polyamide	70	+		☐	☐
Variant	POCKET	COMP	EA	Elastane	30	+		☐	☐
Headline						+	Composition From Master M2040 Fabric 100% Polyester	☐	☐
Variant	LINING	COMP	PL	Polyester	100	+		☐	☐
Headline						+	Composition From Master M2210 Buttons 2 cm Metallic	☐	☐
Variant		COMP	SS	Stainless Steel	100	+		☐	☐
Headline						+	Composition From Master M2100 Thread 100% Cotton	☐	☐
Variant		COMP	CO	Cotton	100	+		☐	☐

With a checkmark in **Exclude Portals** a **Composition Line** will not be shown on the TRIMIT Webshops/Portals.

Description	Composition	Add. Info	Wash & Care	Download
Main Fabric/Part				
Polyamide 70%				
Elastane 30%				
Pocket				
Polyamide 70%				
Elastane 30%				
Lining				

CARE LABEL

Care Label functionality shows a way to handle Masters regarding Wash & Care. This information can be displayed as Icons or as a Text, i.e., *Drying, Line Dry*. The Care Label info is placed next to **Add. Info** information under the **Wash & Care** tab on **Product** page on Portals.

This information can be set from the Master Card in TRIMIT (via **Tell me Masters List**) by clicking **Process, Care Label**.

Type field is set to *Variant* option by default. If **Symbol** is set to *Yes*, then the corresponding Wash & Care **Picture** will be displayed on the **Product** page on the portal. If it is set to *No* then corresponding Wash & Care code will be shown as text, i.e., *Iron Low (*)*.

Care Label Lines Work Date: 1-1-2022									
Search + New Edit List Delete Copy Copy Standard Lines Card Comments More options									
Type	VarDim Type	Value	Description	Symbol	Picture	Additional Text	Exclude Print	Exclude Portals	
→ Variant	CARE_1	30	Wash Cold - 30°	☒			☐	☐	
Variant	CARE_2	00	Do not Bleach	☒			☐	☐	
Variant	CARE_3	10	Iron Low (*)	☒			☐	☐	
Variant	CARE_4	20	Dry-clean, any solvent except Trichlo...	☒			☐	☐	
Variant	CARE_5	00	Do Not Tumble Dry	☒			☐	☐	

With a checkmark in **Exclude Portals** a **Care Label Line** will not be shown on the Shops/Portals.

Description

Composition

Add. Info

Wash & Care

Download

Labels







ADDITIONAL INFO

The Additional Info can be used to add extra information to a Master based on Variant Tables.

This information can be set from the Master Card in TRIMIT (via **Tell me Master List**) by clicking **Process, Additional Info**.

The Additional Info is placed next to **Composition** information under the **Add. Info** tab on **Product** page on Portals.

Additional Info Lines Work Date: 1-1-2022									
Search + New Edit List Delete Copy Copy Standard Lines Comments More options									
Type	Symbol	VarDim Type	Value	Description	Picture	Additional Text	Exclude Print	Exclude Portals	
→ Variant	☐	COLLARTYPE	2	English Spread			☐	☐	
Variant	☐	SLEEVE_LEN	4	Long Sleeve	+		☐	☐	
Variant	☐	CUFFSTYLE	8	Two Button			☐	☐	
Variant	☐	POCKETS	2	2 Pockets			☐	☐	

With a checkmark in **Exclude Portals** an **Additional Info Line** will not be shown on the Shops/Portals.

Description

Composition

Add. Info

Wash & Care

Download

English Spread

Long Sleeve

Two Button

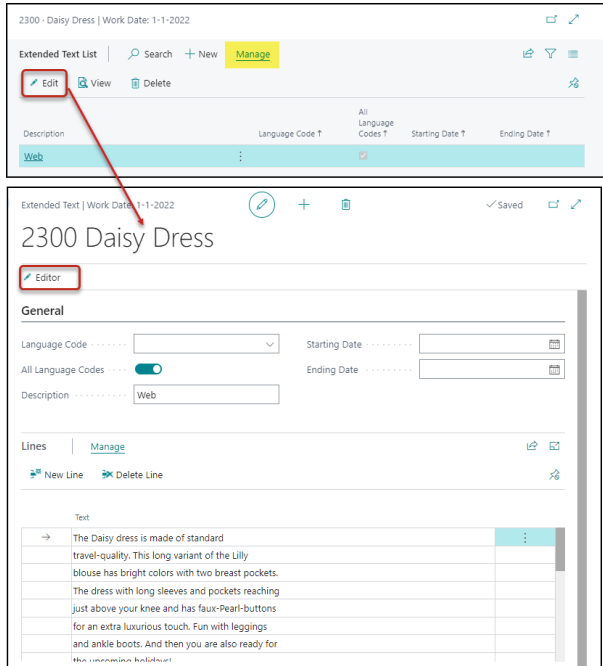
2 Pockets

For more information about Composition, Care label and Additional info functionality refer to **White Paper – TRIMIT Master Additional information**.

EXTENDED TEXTS FOR PRODUCTS

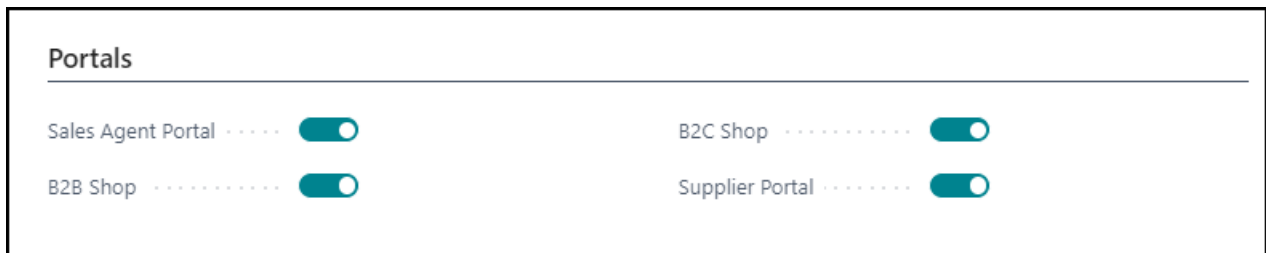
TRIMIT SA Portal, B2B and B2C Webshop have a possibility to show Extended Product Description on a **Product** page (Masters and flat Items) and on **Category overview** pages.

The Extended Text can be set on a Master in TRIMIT (via *Tell me Master List*) by clicking **Related, Master Data, Extended Texts**.



The functionality on this page is a standard Business Central functionality.

The only difference is that page **Extended Text** has additional FastTab **Portals** and a specific TRIMIT **Editor**.



This FastTab includes four check boxes: **Sales Agent Portal**, **B2B Shop**, **B2C Shop** and **Suppliers Portal**. Setting a checkmark in these fields results in showing the Extended Text for the Master/Item on the corresponding Portal.

After setting the Extended Text in TRIMIT it is only required to clear the cache on Portal to see the result.

This example above will result on the Portals in:



NOTE

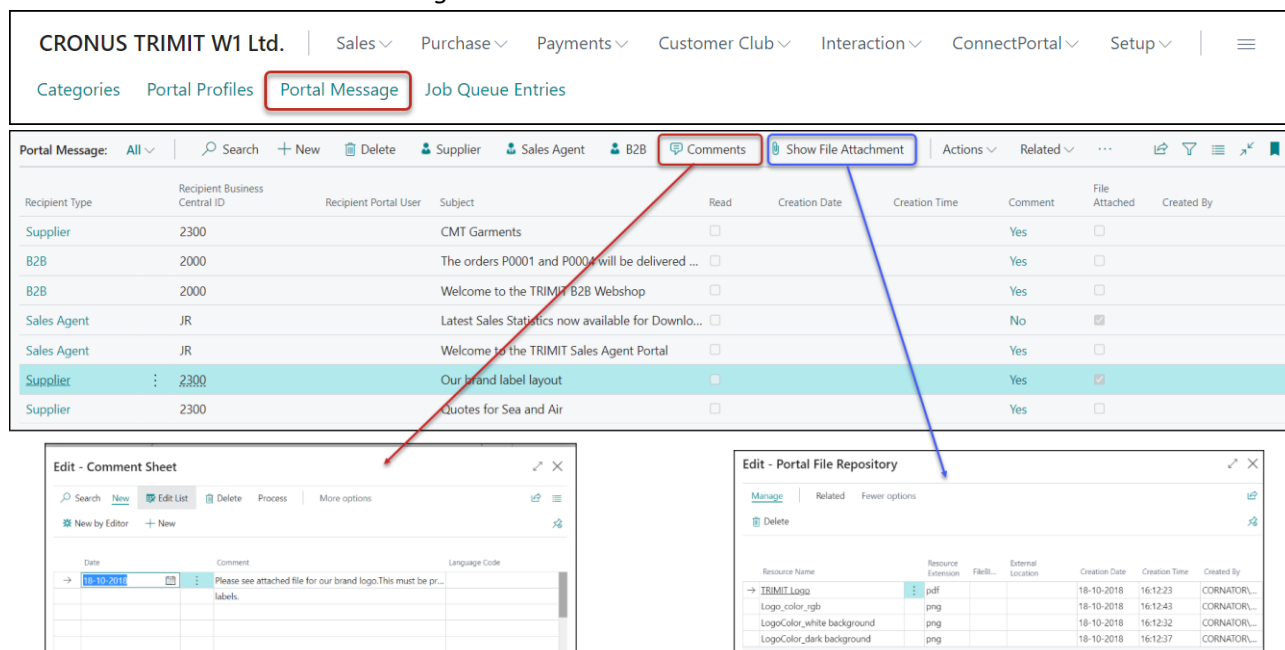
Although **Edit – Extended Text** page has Boolean field **Supplier** – this functionality is not available on Supplier Portal and setting this field to *TRUE* will not have any affect.

If you however want a fancier text shown on the Portals with line breaks or **bold** or *Italic* words in it, it is possible to add Portal Text – that will overrule the Extended Text from TRIMIT – via the PIR. See ***White Paper - Portals Product Information Repository (PIR)***.

PORTAL INTERACTION

PORTAL MESSAGE LIST IN BUSINESS CENTRAL

It is possible to create user **Messages** in TRIMIT and then display them on different portals, i.e., SA, B2B and SUP. In Role Center **TRIMIT Portal Administrator**, you can find the **Portal Message** via **Portal Message** otherwise use **Tell me Portal Message**.



The screenshot shows the TRIMIT Portal Administrator interface. The top navigation bar includes 'CRONUS TRIMIT W1 Ltd.' and various menu items like 'Sales', 'Purchase', 'Payments', 'Customer Club', 'Interaction', 'ConnectPortal', and 'Setup'. Below this, there are tabs for 'Categories', 'Portal Profiles', 'Portal Message' (highlighted with a red box), and 'Job Queue Entries'.

The main area displays a list of Portal Messages. The columns include: Recipient Type, Recipient Business Central ID, Recipient Portal User, Subject, Read, Creation Date, Creation Time, Comment, File Attached, and Created By. The list shows several messages, with one selected (highlighted in blue).

Two pop-up windows are shown below the main list:

- Edit - Comment Sheet:** This window allows editing the comment for a selected message. It includes a 'Date' field (set to 18-10-2018), a 'Comment' field (containing the text 'Please see attached file for our brand logo. This must be pr... labels.'), and a 'Language Code' field.
- Edit - Portal File Repository:** This window allows managing the file attachments for a selected message. It includes a 'Message' tab, a 'Related' tab, and a 'Fewer options' button. The main table lists resources with columns: Resource Name, Resource Extension, FileB..., External Location, Creation Date, Creation Time, and Created By. The table shows three resources: 'TRIMIT Logo' (pdf), 'Logo_color_rgb' (png), and 'LogoColor_dark background' (png).

DESCRIPTION OF THE FIELDS

RECIPIENT TYPE

Displays Portal Type where the message is applied. Available options are *Supplier*, *Sales Agent* and *B2B*

RECIPIENT BUSINESS CENTRAL ID

Displays the Recipient of the Message. Selectable values depend on the **Recipient Type** field and can be whether Vendor Number (*Supplier*), Salesperson/Purchaser (*Sales Agent*) or Customer Number (*B2B*).

RECIPIENT PORTAL USER

Displays the Recipient Modelyn user. This can only be applied for **Recipient Type** *Supplier* and *B2B*. The lookup on this field will show you the **CPO User List**.

SUBJECT

Displays the header of the Message; being a short Description for the content of your Message.

READ

Displays the Status of the Message, i.e., Read (*TRUE*) or Not read (*FALSE*).

CREATION DATE

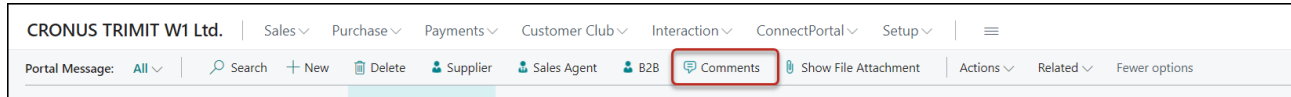
Displays the Creation Date of the Message.

CREATION TIME

Displays the Creation Time of the Message

COMMENT

This field will get a checkmark automatically if **Comments** have been entered.



FILE ATTACHED

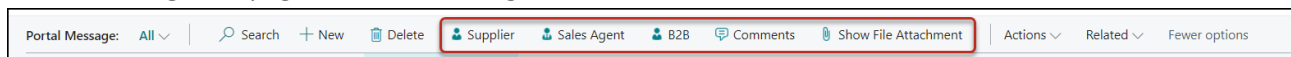
This field will get a checkmark automatically if **Attachments** have been imported.

CREATED BY

Displays TRIMIT User who created the Message.

ACTIONS

Portal Message List page has the following Actions:



SUPPLIER

This will filter the **Portal Messages** base on **Recipient Type = Supplier**.

SALES AGENT

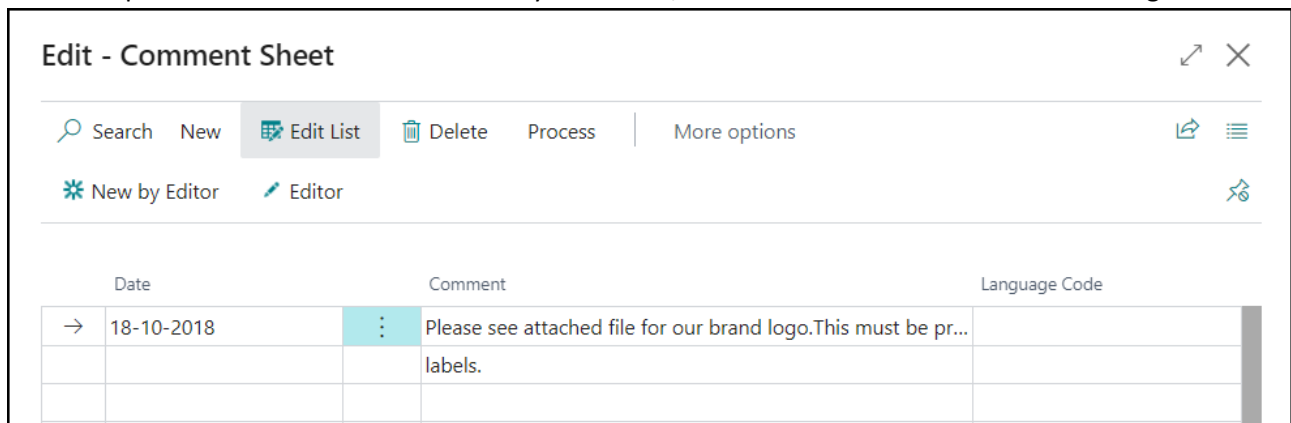
This will filter the **Portal Messages** base on **Recipient Type = Sales Agent**.

B2B

This will filter the **Portal Messages** base on **Recipient Type = B2B**.

COMMENTS

This will open the **Comment Sheet** in which you can see/maintain the Comments for this Message.



SHOW FILE ATTACHMENT

This will open **Portal File Repository** with list of Files that have been attached to a Message.

Via **Manage, Delete**, you can Delete a **Resource Name** (attached File).

Via **Related, Save To Disc**, you can download a **Resource Name** (attached File) to your disc.

Edit - Portal File Repository

Manage

Related

Fewer options

Save To Disk

Resource Name	Resource Extension	FileBlob	External Location	Creation Date	Creation Time	Created By
→ TRIMIT Logo	pdf			18-10-2018	16:12:23	CORNATOR\KBI
Logo_color_rgb	png			18-10-2018	16:12:43	CORNATOR\KBI
LogoColor_white background	png			18-10-2018	16:12:32	CORNATOR\KBI
LogoColor_dark background	png			18-10-2018	16:12:37	CORNATOR\KBI

PORTAL MESSAGE CARD IN BUSINESS CENTRAL

Clicking **+ New** or clicking on the **Recipient Type** in the **Portal Message List**, will open the **Portal Message Card**, which has the following fields:

Recipient Type, Recipient Business Central ID, Recipient Portal User and Subject.

Portal Message Card | Work Date: 7-3-2022

2

Attach File
Comments
Show File Attachment
Actions
Related
Fewer options

General

Recipient Type Supplier
Recipient Portal User

Recipient Business Central ... 2300
Subject Our brand label layout

Description of these fields is same as for page **Portals Message List**.

ACTIONS

Portal Message Card page has the following Actions:

Portal Message Card | Work Date: 1-1-2022

2

Attach File
Comments
Show File Attachment
More options

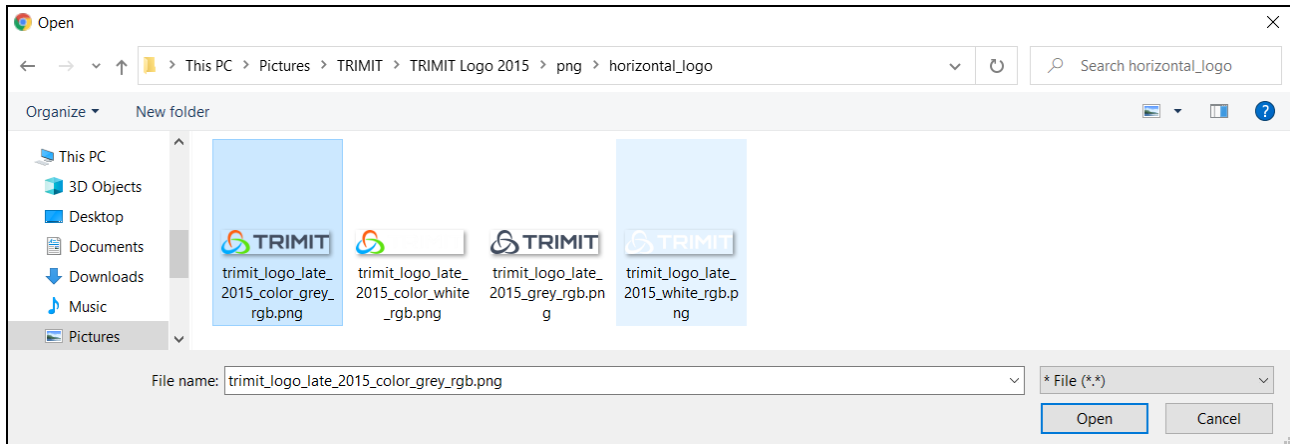
ATTACH FILE

With this Action, you can attach Files.

Import

Choose...
Cancel

Click **Choose** after which you can select a File. I.e.



COMMENTS

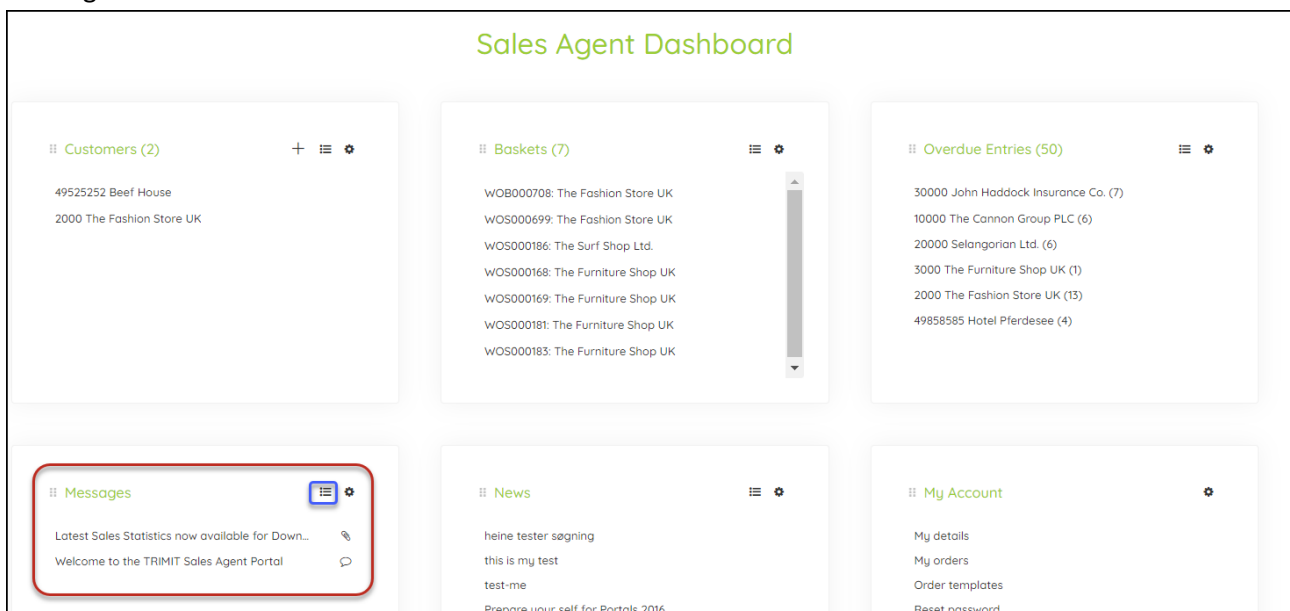
Same Action as in the **Portal Message List**.

SHOW FILE ATTACHMENT

Same Action as in the **Portal Message List**.

PORTAL MESSAGES ON PORTALS

The following Portals have messaging functionality: SA, B2B and SUP. Portal Messages have a simplified functionality, which allows sending Text Messages from TRIMIT to the Portals, which can also include Files. Messages can be sent only one way, i.e., from TRIMIT to Portals. Portals display the list of received Messages.



All three Portals have identical Message functionality.

Here is a description of Message functionality on Portals:

Messages area is a part of the Portal Dashboard. Message contains:

- *Message Subjects as links*
- *Attachment icon if Message contains Attachments*
- *Comment icon if Message contains Comments*

- See all Messages link (blue in above picture) to open Messages overview

Clicking *See all messages* link opens page *Messages*. Message overview contains the following fields:

Messages				
DATE	MESSAGE	COMMENT	ATTACHMENTS	MARK AS READ
	Latest Sales Statistics now available for Download			☐
	Welcome to the TRIMIT Sales Agent Portal			☐

Show read messages ☐

< Back  Save

DATE

Message Creation date

MESSAGE

Subject of a Message

COMMENT

Message Comment icon clicking which opens Dialog Window with Message content (the Comments). I.e.

Comment

×

It is fantastic to have you on board.

With the Sales Agent Portal you can provide your customers with the best service possible.

Boost your order intake through smooth navigation and super product display.

OK

ATTACHMENTS

Message Attachment icon clicking which opens **Attachments** page. Here it is possible to open or download the attachment I.e.

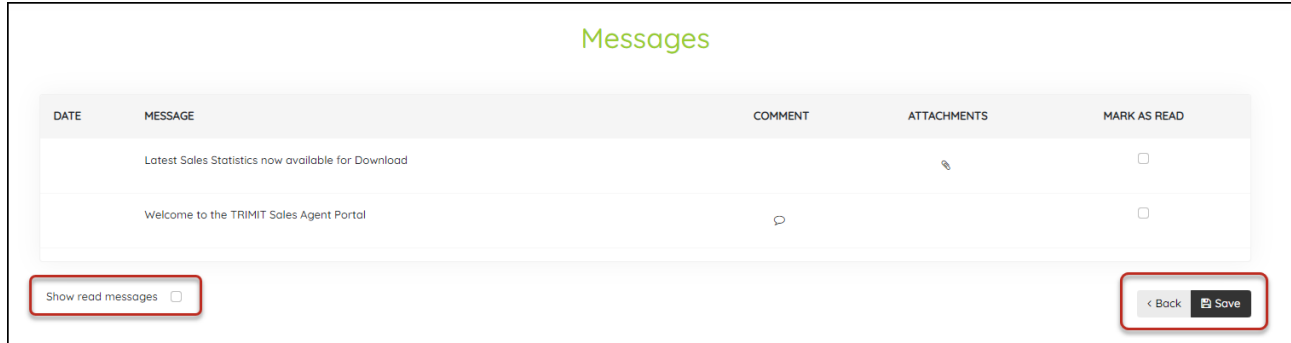
My Account / File list	
FILE	DOWNLOAD
Sales Statistics JR.pdf	

< Back

MARK AS READ

Manually set a checkmark, if a Message has been read.

Messages page has the following actions:



SHOW READ MESSAGES

Setting to *FALSE* filters the list to show only Messages that have not been read. Setting to *TRUE* shows both read and unread Messages

BACK

Navigate to dashboard

SAVE

After Message is marked as read – click **Save** to submit change

PORTALS ACTIVITY LOG

Portals Activity Log collects all the Customer or Sales Agent Actions regarding Sales Quote/Order CRUD and Customer CRUD as well as Vendor Actions regarding Purchase Order CRUS.

In addition, other Actions can be added after customization.

Portals Activity Log can be found in the Role Center *TRIMIT Portal Administrator* via **Interaction, Portal Activity Log** or via **Tell me Portal Activity Log**.

CRONUS TRIMIT W1 Ltd. Sales ▾ Purchase ▾ Payments ▾ Customer Club ▾ Interaction ▾ ConnectPortal ▾ Setup ▾ ≡						
Portal Newsletters Portal Activity log Portal Message						
Portal Activity Log Work Date: 1-1-2022						
Search Manage						
Description	Portal User ID	Business Central Type	Business Central ID	Date ↑	Time	
Customer 2000 created or changed order WOB000604.	3001	Customer	2000	28-12-2021	09:52:09	
Purchase Order 0200002 was checked-out.	1676	Vendor	2300	3-1-2022	11:05:19	
Purchase Order PU0002 was checked-in.	1676	Vendor	2300	3-1-2022	12:23:55	
Purchase Order PU0002 was checked-out.	1676	Vendor	2300	3-1-2022	12:25:56	
Sales Agent (JR) John Roberts created or changed order WOS000593.	2919	Customer	2000	3-1-2022	13:58:48	
Customer 2000 created or changed order WOB000603.	1676	Customer	2000	4-1-2022	08:30:42	
Customer 2000 created or changed order WOS000453.	1676	Customer	2000	5-1-2022	10:35:56	
Sales Agent (JR) John Roberts created or changed order WQS000272.	1904	Customer	2000	6-1-2022	13:41:45	

DESCRIPTION OF THE FIELDS

DESCRIPTION

Description of the Activity, i.e., *“Customer 2000 created or edited order WOB000604”*.

PORTAL USER ID

Id of the Portal User who initiated the Activity.

BUSINESS CENTRAL TYPE

Business Central Type of the user who initiated the activity, i.e., *Customer, Vendor, Sales Agent, etc.*

BUSINESS CENTRAL ID

Number of the *Customer, Vendor, etc.* based on the **Business Central Type**.

DATE

Date the activity was initiated.

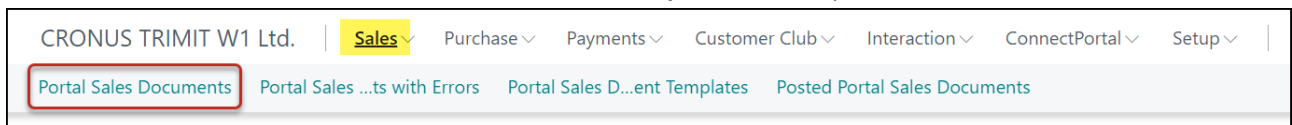
TIME

Time the activity was initiated.

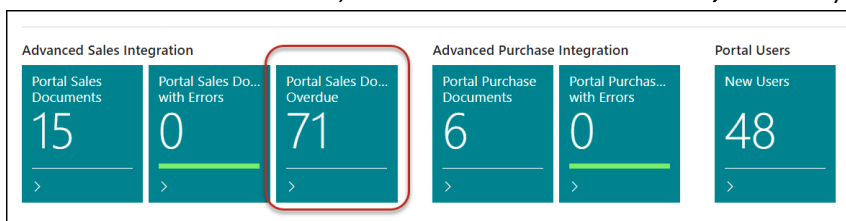
PORTAL OVERDUE DOCUMENTS

Since SA Portal and B2B Webshop got Availability Functionality - this arises a problem with created and not finalized Sales Documents on the portals.

I.e., Portal Sales Document is not finalized when Portal User clicked **New order** on Customer Dashboard and added Item to basket but never finalized this order by clicking **Finalize order** on **Finalize Order** page. Another scenario is when Order was finalized and reopened again on Portal but never finalized again. In these cases, the Sales Document is saved in **Portals Sales Documents** (Role Center *TRIMIT Portal Administrator, Sales, Portals Sales Documents*) with **Import Status** equal to *Active on Portal*.



These Orders reserve Items (are included in the Availability) without further processing in the backend system. **Portal Overdue Document** functionality enables detection of Overdue open Orders of the Webshop/Portal. These documents are collected in a list page **Portal Documents Overdue** (Role Center *TRIMIT Portal Administrator*, stack called **Portals Sales Doc., Overdue**).



Edit - Portal Document Overdue												
Search + New Edit List Delete Process Edit Actions Related Fewer options Finalize Document Clean-up Overdue E-Mail												
No.	Sell-to Customer No.	Sell-to Customer Name	Location Code	Order Type	Salesperson Code	Creation Date	Modified Date	Import Status	Sales Channel	Portal User	Profile Type	Portal Profile
WOB000706	2000	The Fashion Store UK	BLUE	10AFTERSALES	JR	14-2-2022		Active on Portal	B2B		BusinessToBusiness	B2B
WOS000665	CW00098	Alfred A stone		SA	JR	27-1-2022		Active on Portal	SA		Sales Agent	AGENT
WOB000680	2000	The Fashion Store UK	BLUE	10AFTERSALES	JR	27-1-2022		Active on Portal	B2B		BusinessToBusiness	B2B
WOB000679	2000	The Fashion Store UK	BLUE	10AFTERSALES	JR	27-1-2022		Active on Portal	B2B		BusinessToBusiness	B2B
WOS000660	10000	The Cannon Group PLC	BLUE	SA	JR	25-1-2022	15-2-2022	Active on Portal	SA		Sales Agent	AGENT

DESCRIPTION OF THE FIELDS

NO.

Overdue Document Number.

SELL-TO CUSTOMER NO.

Customer Number the Overdue Document is created for.

SELL-TO CUSTOMER NAME

Customer Name the Overdue Document is created for.

LOCATION CODE

Location Code used on the Overdue Document.

ORDER TYPE

Order Type used on Overdue Document.

SALESPERSON CODE

A code of a Salesperson who created the Overdue Document.

CREATION DATE

Overdue Document Creation Date.

MODIFIED DATE

Overdue Document change Date.

IMPORT STATUS

Overdue document Import Status. Available options are *Open*, *Active on Portal*, *Posting is Running*.

SALES CHANNEL

Sales Channel on the Overdue Document.

PORTAL USER

Modelyn user that created the Overdue Document.

PROFILE TYPE

The Type of the Profile on which the Overdue Document has been created. Available options are *BusinessToBusiness*, *BusinessToConsumer*, *SalesAgent* and *BusinessToSupplier*.

PORTAL PROFILE

Portal Profile that was used when creating the Overdue Document.

ACTIONS

Edit - Portal Document Overdue

Search

+ New

Edit List

Delete

Process

Edit

Actions

Related

Fewer options

Finalize Document

Clean-up Overdue

E-Mail

FINALIZE DOCUMENT

Clicking this Action changes **Import status** for the Sales Document in **Portal Sales Documents** page from *Active on Portal* to *Open*.

At the same time, on the portal, Sales Document Status will be changed from *Open* to *Pending*.

CLEAN-UP OVERDUE

Clicking this Action deletes all the Overdue Documents.

E-MAIL

Clicking this Action opens Outlook window and allows sending notification to a Sales Document owner.

It is possible to set a Date Formula, which determines the Sales Documents to be Overdue.

The Date Formula can be set on **ConnectPortal Setup** page in field **Open Orders Date Formula**

CRONUS TRIMIT W1 Ltd.
Sales
Purchase
Payments
Customer Club
Interaction
ConnectPortal
Setup

Categories
Portal Profiles
Portal Message
Job Queue Entries

Headline

Want to learn more about Business Central? >

Actions
> Users
> Category
> Setup
> TRIMIT Help

ConnectPortal Setup
Portal Setup

I.e., setting -2D enables showing Sales Documents, in **Portal Documents Overdue** page, which **Creation Date** or **Changed Date** is older than 2 days from work date.

Portal sales doc, Overdue stack can be found in Role Center **TRIMIT Portal Administrator**.

NOTE

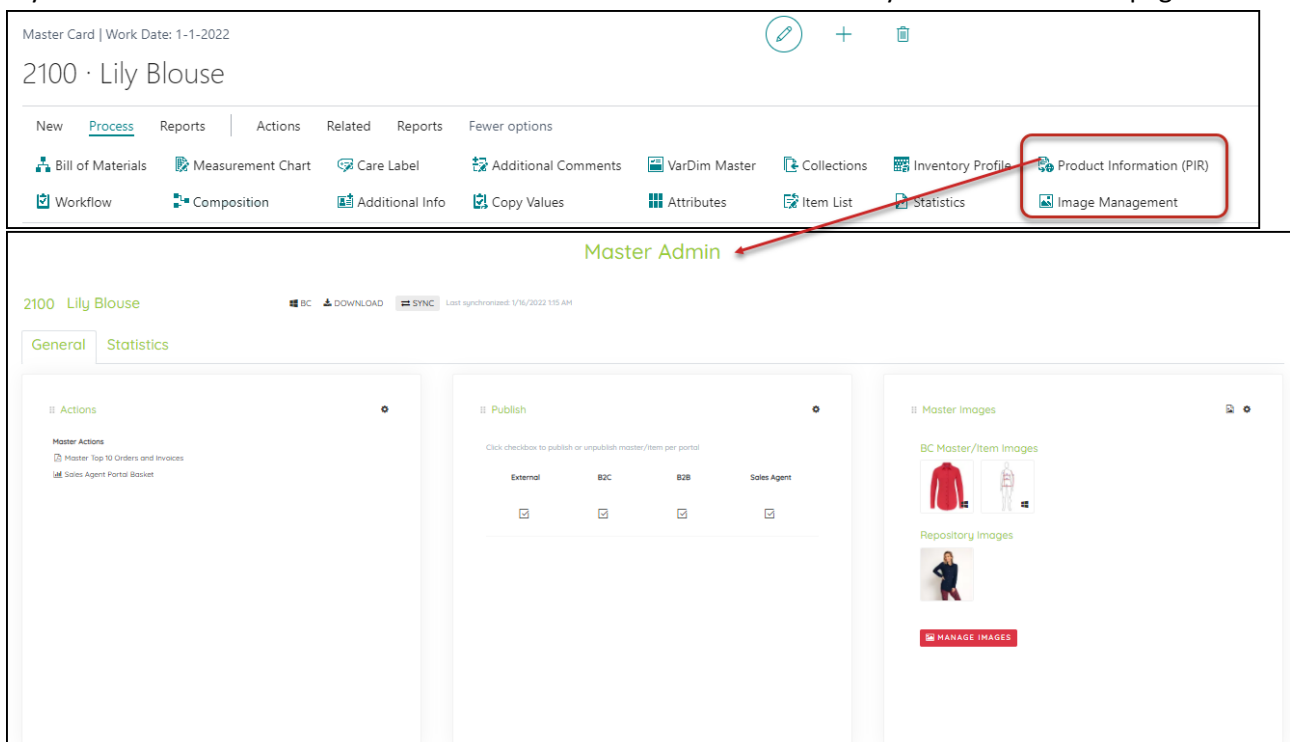
The **Overdue entries** in the dashboard of the B2B Webshop and SA Portal, show Posted Sales Invoices that are due based on the **Due Date** of the Posted Sales Invoice; they are in no way related to the Portal Overdue Documents – which are open Portal Sales Documents.

USER MAPPING AND TOKEN AUTHENTICATION

TRIMIT has a feature of opening Portal pages from within the Business Central application. This is one of the important steps in making TRIMIT and Portals one system for the user.

When you are in TRIMIT you are TRIMIT user like: andrew@trimit.com which means, you are a domain user. Andrew could also be a Portal User, where he is created with his E-Mail and permissions/groups e.g., on the Sales Agent, B2B or another Portal.

If you want others to be able to interact with a Portal from within TRIMIT you can call a Portal page.



When clicking the Action on the master page (**Portal Information (PIR)** and **Image Management**) a new Portal Extension page is called in a browser which calls a page on a given Portal.

The URL is generated dynamically on the call combined by what you have of information in the Portal Instance mapping table (in Role Center **TRIMIT Portal Administrator**, **ConnectPortal**, **Portal Instances**).

For more information about resolving portal instance and user token setup refer to **White Paper – TRIMIT ConnectPortal Instances**.

In the **Portal instances** it is needed to specify the Portals Domain name in field **Domain**.

Set field **Disable SSL** to **FALSE** when using “https”.

Then click **Resolve Instance**. This will create the Portal Instances for you with the right **Portal Path** and **Portal Type**.

Portal Instances | Work Date: 9/6/2020

Search + New Edit List Delete Resolve Instance Synchronize Users More options

Show Paths	Domain	Disable SSL	Portal Path ↑	Name	Portal Type ↑	Repository	Synchronized Users	Last Update
→	trimitdemo.com	☐				☐	12	7/20/2020
☐	trimitdemo.com	☐	/b2b/		BusinessToBusiness	☐	12	7/20/2020
☐	trimitdemo.com	☐	/b2c/		BusinessToConsumer	☐	12	7/20/2020
☐	trimitdemo.com	☐	/demo/			☐	12	7/20/2020
☐	trimitdemo.com	☐	/insite/			☐	12	7/20/2020
☐	trimitdemo.com	☐	/pit/			☒	12	7/20/2020
☐	trimitdemo.com	☐	/salesagent/		Sales Agent	☐	12	7/20/2020
☐	trimitdemo.com	☐	/supplier/		BusinessToSupplier	☐	12	7/20/2020

The URL also contains parameters.

The page that is being called on the portal side resides behind the login. Therefore, there is a need to let system login automatically which is more user friendly. But that means sending Username and Password in the URLs and behind the scenes as clear text. This is of course a major security risk as it could be captured by other software parts e.g., via [fiddler](#).

That is why we use tokens which can be sent in the URL as authentication. In short, a token is generated and attached to a User in the portal database. This token will, when send in parameter, allow the system to login seamlessly and the user is sent directly to the requested page.

How to setup the mapping:

- Create needed user on the portals if not yet created
- Synchronize Users
- Go to **User Relationship List**
- Create a relation of type Business Central User
- Select the Business Central user

Here is a **User Relationship List** with relation **Type** set to **Business Central User**.

The Fashion Store UK | Work Date: 1-1-2022

User Relationship List Search + New Edit List Delete Related Fewer options

Card Retrive Token Delete Token

Type ↑	No.	Name	Profile ↑	Creation Date	Token Available	Token Created Date
→ Customer	2000	The Fashion Store UK	B2B	29-4-2021 09:28	☐	
Vendor	2300	Oriental Production Services	SUPPLIER	29-4-2021 09:28	☐	
Salesperson/Purchaser	JR	John Roberts	AGENT	29-4-2021 09:28	☐	
Business Central user			INSITE	29-4-2021 09:29	☒	29-4-2021

Below is a description of the Actions under **Related**.

DESCRIPTION OF THE ACTIONS

RETRIEVE TOKEN

When this is clicked, the system will make a service call to the Portal repository services (see instance mapping). Where the system will security check the call via token handshakes. If that goes well the Modelyn will generate a token and attach that to the Modelyn user. The Token is then returned to Business Central where it is set on the relationship.

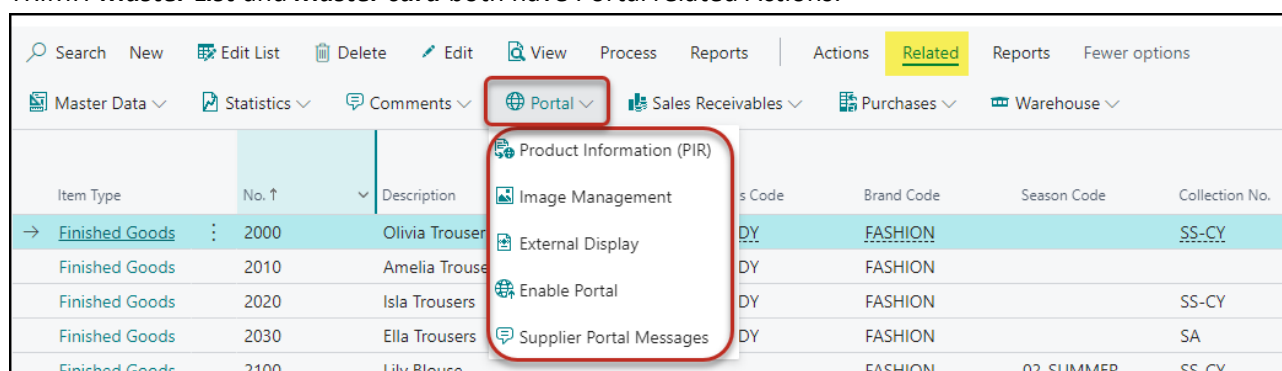
This token is used behind the scenes and applied to any request that needs authentication.

DELETE TOKEN

This action will remove the token and send a request to the Modelyn side to delete the token. After deletion, the auto login ability does not work anymore – any request from Business Central to a page behind login will be redirected to a login page (it is considered that the request should not be executed if a token is not present).

PORTAL INTEGRATION ON MASTER LIST/CARD

TRIMIT **Master List** and **Master card** both have Portal related Actions:



DESCRIPTION OF THE ACTIONS

PRODUCT INFORMATION (PIR)

Clicking this Action for the first time requires login. After the login, it will be possible to see a **Master Admin** page in PIR (Portals Product Information Repository). Here multiple options are available.

Read more details in **White Paper – Portals Product Information Repository (PIR)**.

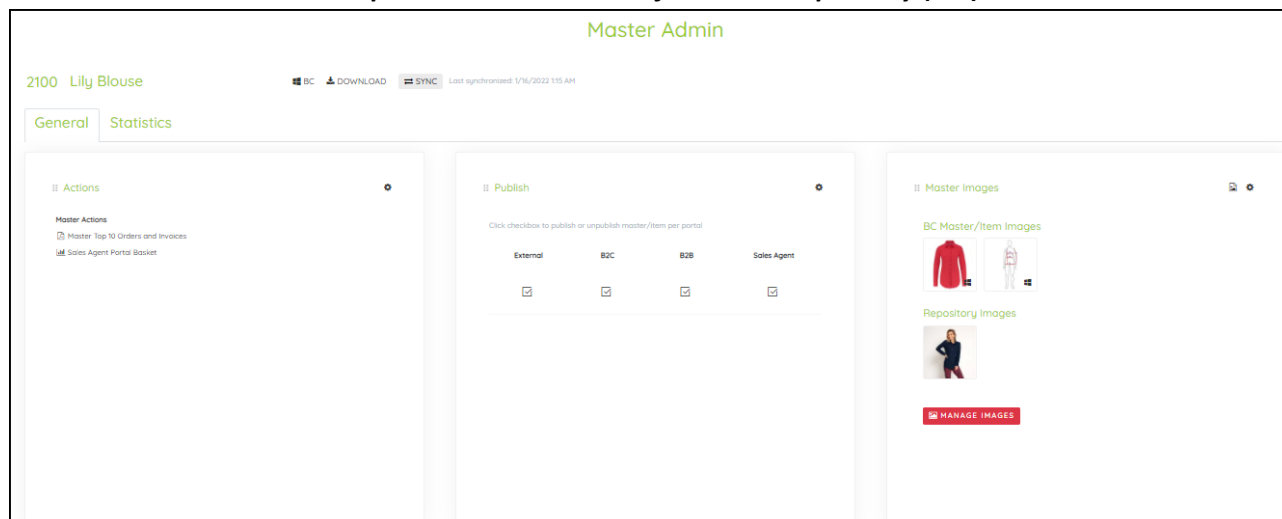
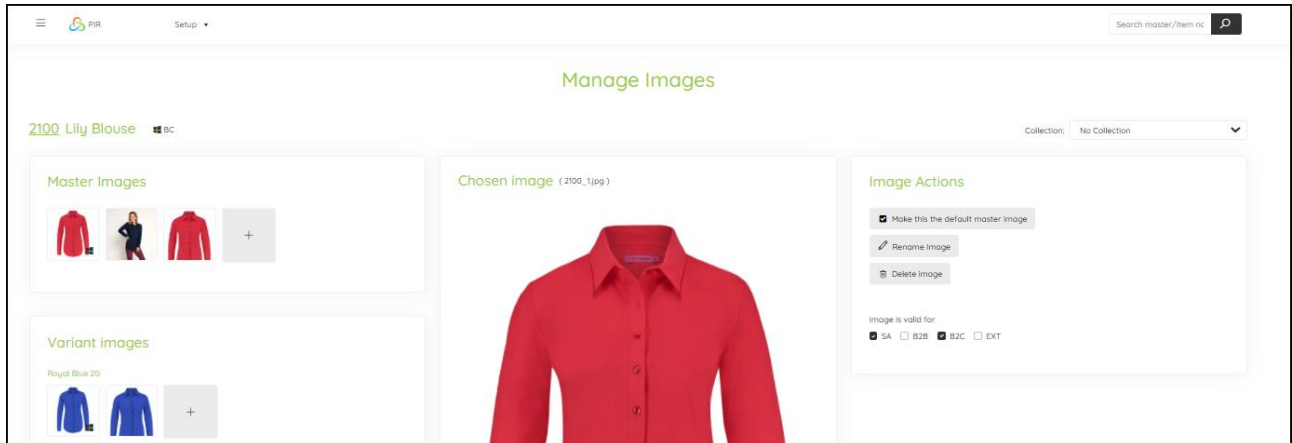


IMAGE MANAGEMENT

Clicking this Action for the first time requires login. After the login, it will be possible to see a **Manage Images** page in PIR (Portals Product Information Repository). Here multiple options are available.

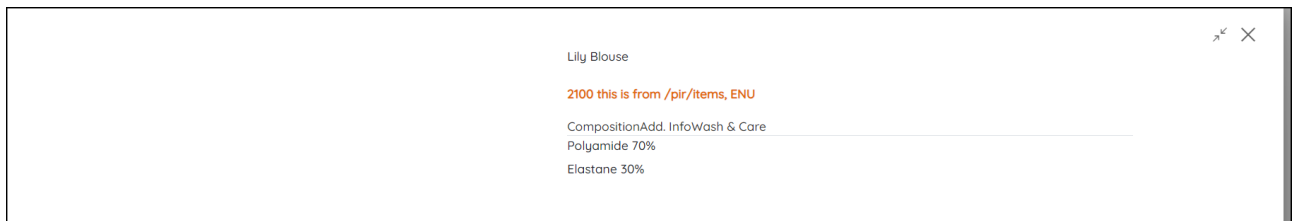
Read more details in **White Paper – Portals Product Information Repository (PIR)**.



EXTERNAL DISPLAY

Clicking this Action will open a Product view for the external systems. The view includes data available for this product.

Read more details in **White Paper – Portals Product Information Repository (PIR)**.



ENABLE PORTAL

Clicking this Action opens a page where it is possible to attach this Product to one or more Portal Categories. You first need to choose a **Select Type** and can attach the Product by checkmarks in the column **Attach**. In the column **Exist in Category** you can see to which Categories the Product already has been attached.

Edit - Attach 2100 to Category - _ROOT

Item to Attach

Item(s) to Attach: 2100

Select Type

Item: ☐ Matrix with Configuration: ☐ Create Variant Combinations: ☐
Item with Configuration: ☐ Assortment Matrix: ☐
Matrix: ☒ Assortment Matrix with Configuration: ☐

Dates

Effective Date: Expiry Date:

Choose Category

Exist in Category	Attach	No. ↑	Description	Description 2
☐	☐	AGENT_W_DRESSES	Dresses/Skirts	
☐	☐	AGENT_W_JACKETS	Blazers	
☒	☐	AGENT_W_TOPS	Tops	
☐	☐	AGENT_W_TROUSERS	Trousers	
☐	☐	AGENT1	SalesAgent1 Top Level	

SUPPLIER PORTAL MESSAGES

Clicking this Action opens [Portal Message List](#)

Portal Messages Work Date: 1-1-2022										
Search + New Manage Supplier Sales Agent B2B Comments Show File Attachment Actions Related Fewer options										
Recipient Type	Recipient Business Central ID	Recipient Portal User	Subject	Read	Creation Date	Creation Time	Comment	File Attached	Created By	
→ Supplier	2300		CMT Garments	☐			Yes	☐		
B2B	2000		The orders P0001 and P0004 will be deliv...	☐			Yes	☐		
B2B	2000		Welcome to the TRIMIT B2B Webshop	☐			Yes	☐		
Sales Agent	JR		Latest Sales Statistics now available for D...	☒			No	☒		
Sales Agent	JR		Welcome to the TRIMIT Sales Agent Portal	☐			Yes	☐		
Supplier	2300		Our brand label layout	☐			Yes	☒		
Supplier	2300		Quotes for Sea and Air	☐			Yes	☐		

B2B WEBSHOP PAYMENT

Here is described B2B Payment setup in TRIMIT.

B2B Portal Profile card has a Boolean field which, when set to *TRUE*, enables Payment icons to appear on Order list pages on B2B. Only relevant Orders will have this Payment icon, i.e., Orders which must be paid, but not yet have been paid.

Edit - **B2B Portal Profile** - B2B

Manage
Order Type Setup
Page
Related
Fewer options

General >

Customer >

Order

Default Order Type B2B

Mandatory Change of Order Type ☒

Quote Nos. S-QUO-WB

Order Nos. S-ORD-WB

Payment on Lists ☒

Allow Line Comments ☒

Comments Code B2B

Payment icons in **Overdue Entries** dock:

Overdue Entries (13)		
103054 (2019-12-20)	31,250.00 GBP	
103058 (2020-01-10)	14,845.88 GBP	
103076 (2020-07-10)	400.00 DKK	
103068 (2020-09-06)	800.00 DKK	
103069 (2020-09-06)	791.95 DKK	

Payment icons on **Orders** page:

Orders									
ORDER NO.	DATE	STATUS	ORDER TYPE	EDIT	PRINT	DELETE	PAY	FILES	
WOS000725	28/02/2022	Submitted	10AFTERSALES						
WOS000699	28/02/2022	Submitted	SA						
WOB000729	28/02/2022	Open	B2B						
WOS000713	22/02/2022	Submitted	10AFTERSALES						
WOB000722	22/02/2022	Submitted	10AFTERSALES						

Payment icons on **Invoices/Credit Memos** page

Invoices / Credit Memos									
DOCUMENT TYPE	DOCUMENT NO.	DATE	SHIPMENT NO.	DOCUMENT AMOUNT	OPEN AS PDF	PAY	FILES		
Invoice	103083	01/01/2022	102094	48.75					
Invoice	103081	06/09/2020	102092	40.00					
Invoice	103080	06/09/2020	102091	1,515.00					
Invoice	103079	06/09/2020	102090	855.00					

After clicking this Payment icon, a new pop-up window will appear which shows Order number, Order Amount and Currency and available Payment Methods.

Make sure you put a checkmark in *I accept terms and conditions*.

Clicking on Payment Methods will create a payment (this requires Credit Card information).

Direct payment

Order no.

103083

Document type

Posted Invoice

Payment amount (GBP)

48.75

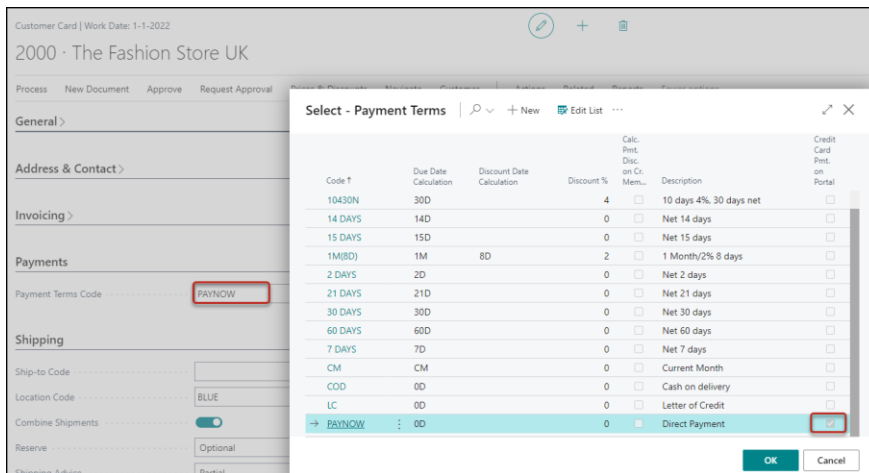
☐ I accept terms and conditions

Pay Simulation

Pay Ogone

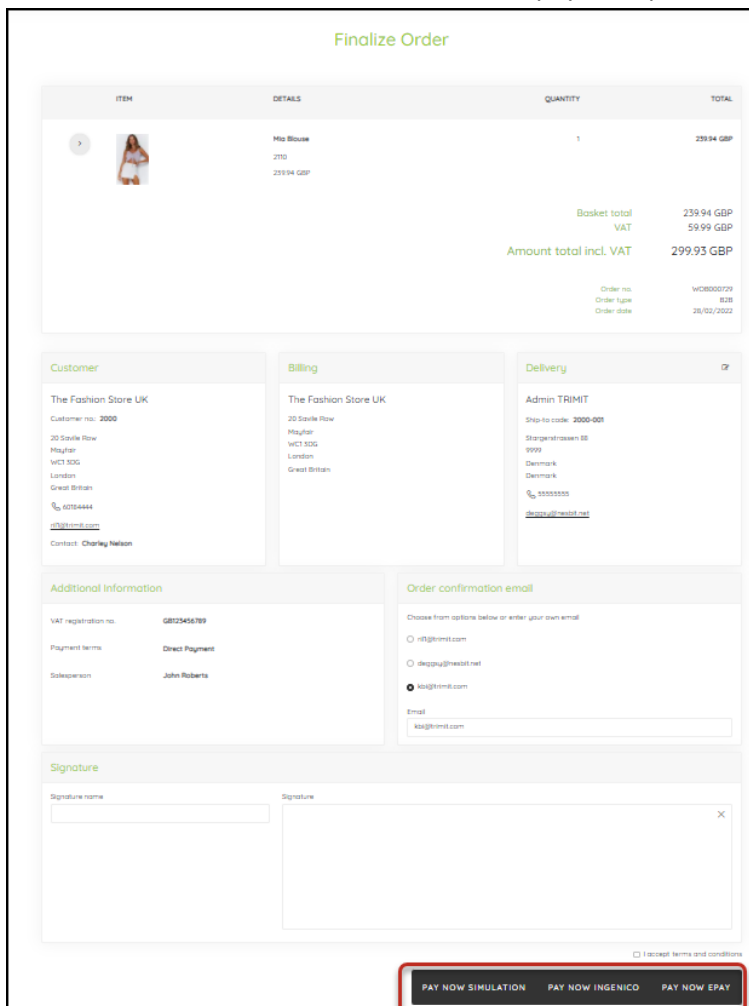
Pay Epay

In order to enable Payment on Orders confirmation page, the customer must have **Payment Terms Code** set as follows.



Code #	Due Date Calculation	Discount Date Calculation	Discount %	Calc. Pmt. Disc. on Cr. Mem...	Description	Credit Card Pmt. on Portal
10430N	30D		4	☐	10 days 4%, 30 days net	☐
14 DAYS	14D		0	☐	Net 14 days	☐
15 DAYS	15D		0	☐	Net 15 days	☐
1M(8D)	1M	8D	2	☐	1 Month/2% 8 days	☐
2 DAYS	2D		0	☐	Net 2 days	☐
21 DAYS	21D		0	☐	Net 21 days	☐
30 DAYS	30D		0	☐	Net 30 days	☐
60 DAYS	60D		0	☐	Net 60 days	☐
7 DAYS	7D		0	☐	Net 7 days	☐
CM	CM		0	☐	Current Month	☐
COD	0D		0	☐	Cash on delivery	☐
LC	0D		0	☐	Letter of Credit	☐
PAYNOW	0D		0	☒	Direct Payment	☒

If **Credit Card Pmt. On Portal** is set to **TRUE**, payment provider buttons appear on **B2B Finalize Order** page:



Finalize Order

ITEM	DETAILS	QUANTITY	TOTAL
	Hia Blouse 2110 239.94 GBP	1	239.94 GBP
Basket total			239.94 GBP
VAT			59.99 GBP
Amount total incl. VAT			299.93 GBP
Order no.			WC00002729
Order type			828
Order date			26/02/2022

Customer
The Fashion Store UK
Customer no: 2000
20 Savile Row
Mayfair
W1C 105G
London
Great Britain
t: +44208844
e: info@fashionstore.uk
Contact: Charley Nelson

Billing
The Fashion Store UK
20 Savile Row
Mayfair
W1C 105G
London
Great Britain

Delivery
Admin TRIMIT
Ship-to code: 2000-001
Strøget 10
8000
Copenhagen
Denmark
t: +4533333333
e: orders@trimit.net

Additional Information
VAT registration no: GB25456789
Payment terms: Direct Payment
Salesperson: John Roberts

Order confirmation email
Choose from options below or enter your own email
☐ info@trimit.com
☐ deppay@trimit.net
☒ koi@trimit.com
 Email: koi@trimit.com

Signature
Signature name:
Signature:

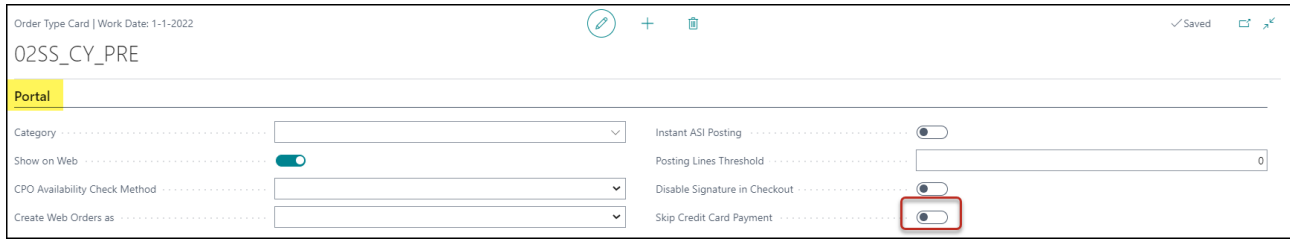
☐ I accept terms and conditions

PAY NOW SIMULATION **PAY NOW INGENICO** **PAY NOW EPAY**

NOTE

Entering **Finalize Order** page on B2B Webshop initiates creation of temporary order in TRIMIT. This triggers all needed calculations, defining that this is a payment mode (if payment is activated) and at this stage it is possible to retrieve all the extra information using e.g., credit card fees, shipment cost etc.

The Credit Card payment can be disabled on **Order Type** card:



Order Type Card | Work Date: 1-1-2022

02SS_CY_PRE

Portal

Category: [Dropdown]

Show on Web: ☒

CPO Availability Check Method: [Dropdown]

Create Web Orders as: [Dropdown]

Instant ASI Posting: ☐

Posting Lines Threshold: [Input: 0]

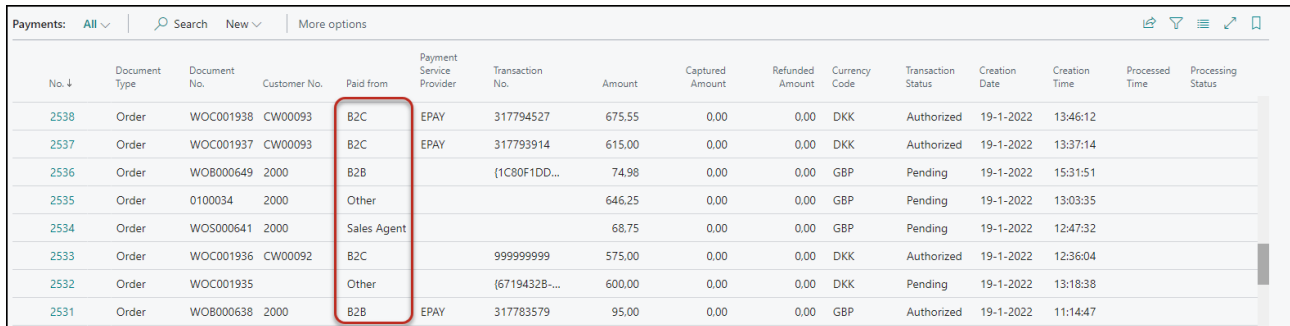
Disable Signature in Checkout: ☐

Skip Credit Card Payment: ☒

Payment in B2B Webshop cannot be made for a quote – if **Create Web Order as** (on B2B Portal Profile) is set to *Quote* the payment cannot be applied.

Order must be posted in ASI in order to see the Payment icon in Order list.

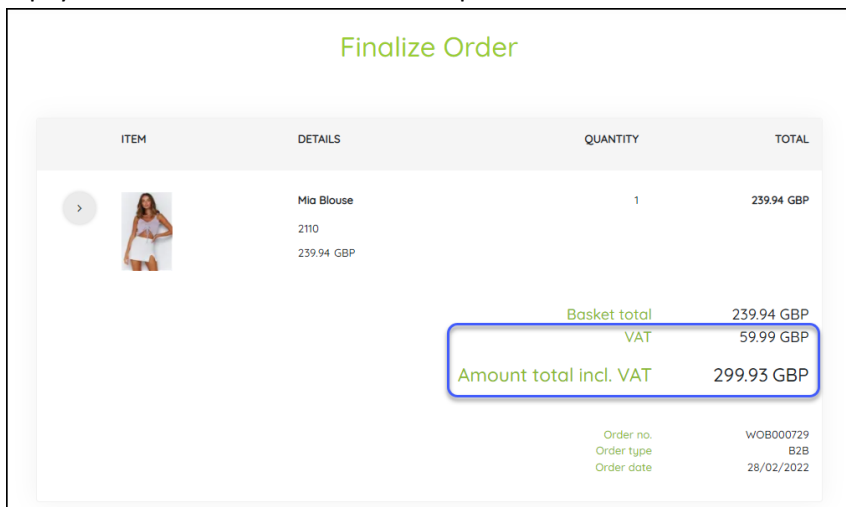
If Order was made on SA Portal but paid from B2B Webshop then on **Payments** (Role Center **TRIMIT Portal Administrator, Payments, Payments**) in Business Central, the **Paid from** will be stated as *Sales Agent*.



No.	Document Type	Document No.	Customer No.	Paid from	Payment Service Provider	Transaction No.	Amount	Captured Amount	Refunded Amount	Currency Code	Transaction Status	Creation Date	Creation Time	Processed Time	Processing Status
2538	Order	WOC001938	CW00093	B2C	EPAY	317794527	675.55	0.00	0.00	DKK	Authorized	19-1-2022	13:46:12		
2537	Order	WOC001937	CW00093	B2C	EPAY	317793914	615.00	0.00	0.00	DKK	Authorized	19-1-2022	13:37:14		
2536	Order	WOB000649	2000	B2B		{1C80F1DD...	74.98	0.00	0.00	GBP	Pending	19-1-2022	15:31:51		
2535	Order	0100034	2000	Other			646.25	0.00	0.00	GBP	Pending	19-1-2022	13:03:35		
2534	Order	WOS000641	2000	Sales Agent			68.75	0.00	0.00	GBP	Pending	19-1-2022	12:47:32		
2533	Order	WOC001936	CW00092	B2C		999999999	575.00	0.00	0.00	DKK	Authorized	19-1-2022	12:36:04		
2532	Order	WOC001935		Other		{6719432B-...	600.00	0.00	0.00	DKK	Pending	19-1-2022	13:18:38		
2531	Order	WOB000638	2000	B2B	EPAY	317783579	95.00	0.00	0.00	GBP	Authorized	19-1-2022	11:14:47		

If B2B Customer goes to Payment, selects Payment Provider but then goes back by clicking browser **Back** button, it will still be possible to pay at a later point of time. But the Payment line is already created in **Payments** in TRIMIT with no Payment Service provider filled in. When customer will go to Payment again this line in **Payments** will be finished.

If payment is enabled on B2B Webshop then there will be added VAT to the order on **Finalize Order** page.



Finalize Order

ITEM	DETAILS	QUANTITY	TOTAL
Mia Blouse	2110	1	239.94 GBP
			239.94 GBP
Basket total			239.94 GBP
VAT			59.99 GBP
Amount total incl. VAT			299.93 GBP
Order no.			WOB000729
Order type			B2B
Order date			28/02/2022

If an Order has been paid, then it will not be possible to reopen it for editing anymore on B2B Webshop.

NOTE

Order Type Presale must be considered to have ***Skip Credit Card Payment*** field set to ***TRUE*** (payment not available on Finalize Order page on B2B). This is because of the presale nature, where order conditions can be modified in the future.

Payment details can be seen in **Portal Payment** card which can be opened from **Sales Order** card, **Related, Web, Portal Payment**.

Sales Order | Work Date: 1-1-2022

WOB000638 · The Fashion Store UK

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

Order Variant & Dimensions Documents Warehouse Prepayment History Web Portal Payment Extra Order Info

Customer Name: The Fashion Store UK
Contact: Charley Nelson
Posting Date: 19-1-2022
Order Date: 19-1-2022
Due Date: 19-1-2022
Requested Delivery Date:
External Document No.: 1000

Status:
Use Value Date:
Blocked:
Ignore Blocking:
Skip Availability Check:
Order Type: 10AFTERSALES
Collection No.:

Sell-to Customer Sales History

Customer No.		
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
2	1	334
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	4
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
25	25	0
Posted Sales Credit Memos		
0		

Customer Details

Portal Payment Card | Work Date: 1-1-2022

2531

New Process Related Fewer options

Create Capture Cancel Payment Attention List Navigate Open Sales Document Payment Info

General

No.	2531	Captured Amount	0.00
Document Type	Order	Refunded Amount	0.00
Document No.	WOB000638	Paid by Gift Card/Points	
Customer No.	2000	Transaction Status	Authorized
Payment Service Provider	EPAY	Paid from	B2B
Transaction No.	317783579	Creation Date	19-1-2022
Card No.	333333XXXXX3000	Creation Time	11:14:47
Card Type	VISA / VISA ELECTRON	Allow Posting on Error	
Amount	95.00	Processing Status	
Currency Code	GBP	Processed Time	

Lines Manage

Transaction Type	Transaction Result	Trigger Document Type	Trigger Document No.	Amount	Currency Code	Transaction No.	Split Payment	Close Payment	Response Description	Processed Date/Time
------------------	--------------------	-----------------------	----------------------	--------	---------------	-----------------	---------------	---------------	----------------------	---------------------

FILTER GROUPS/ITEM ATTRIBUTES IN VARDIM TYPES

In comparison to older versions of the Portals, the field **Filter Group** in the VarDim Types (*Tell me VarDim Type*) has almost lost his influence on the Filters on the Portals.

Filters on the Portals are now initiated by the Business Central **Item Attributes**, which can be attached to Masters, Items and Variants of VarDim Types (in case you have filled the **VarDim Attribute Name** in the VarDim Type). I.e., an **Item Attribute** with **Type Option** for Colors, could be setup and connected to a VarDim Type, so it can be used as a Filter on the Portals:

VarDim Type Card | Work Date: 7-3-2022

+

+

+

COLOR_1

Variant Table / Assortment

More options

Groupings

Filter Group

Filter Group 1

VarDim Attribute Name

TRIMIT_COLOR

VarDim Variant Option No. COLOR_1 - 10

+

+

+

+

Value ↑	Description	Short Description	Hex Code	No Image	Picture	Attribute Value
→ 00	Mixed Colors	Mixed		☒	+	Mixed
01	White	White	#FFFFFF	☐	+	White
02	No Color	No Color		☒	+	
03	Snow	Snow	#F7F7F7	☐		White
04	No Pocket	No Pocket		☒	+	
20	Royal Blue	Blue	#0000CC	☐		Blue
21	Light Blue	Lt Blue	#ADD8E6	☐		Blue
23	Ocean Blue	Ocean	#007AE4	☐		Blue
25	Navy	Navy	#000080	☐		Blue
27	Steelblue	Steelblue	#0059A4	☐		Blue
30	Yellow	Yellow	#FFFF01	☐		Yellow
35	Orange	Orange	#FFA500	☐		Red
37	Dark Orange	Dk Orange	#F29100	☐		Red
40	Brown	Brown	#8B4513	☐		Brown

In the Product Overview, you can click the **Filter** icon, and see the possible Filters:

Tops

Sort

Filters



LILY BLOUSE
35.99 GBP



MIA BLOUSE
39.99 GBP



SOPHIA SHIRT
35.99 GBP



ROSE SHIRT
6.00 GBP



HELEN BLOUSE
30.00 GBP 55.99 GBP

Filters

Color

White

Blue

Green

Yellow

Red

Black

Style

Casual

Dressed

Apply

For the **Color** it is based on the VarDim Type *COLOR_1* with the **VarDim Attribute Name**.

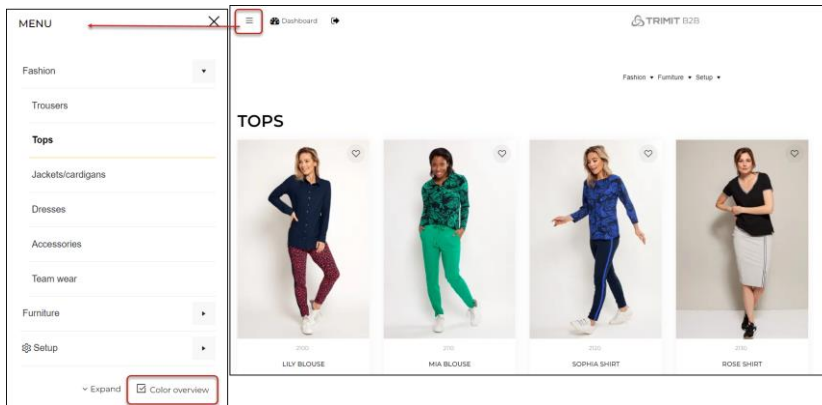
But these Products also have **Item Attributes** filled for *STYLE*, so also that Filter is shown.

The Filters shown depend on the **Item Attributes** that have been used for the Products in this Product Overview page.

The only way the **Filter Group** in the VarDim Type influences the product overview is for the Colors:
Only if you enter a **Filter Group** *Filter Group 1*, you are able to see Color-related pictures in the product overview page. I.e.:



After you change the **Filter Group**, it is required to run **Schedules** in order to see the updated result.
If **Filter Group** is empty, you will only see Product (Master) related products.



If the **Filter Group** is filled (i.e. for VarDim Type *COLOR_1*) and you enter a checkmark in **Color Overview** on the Portal, the Product Overview page will look as follows – with Product/Color related Pictures:

