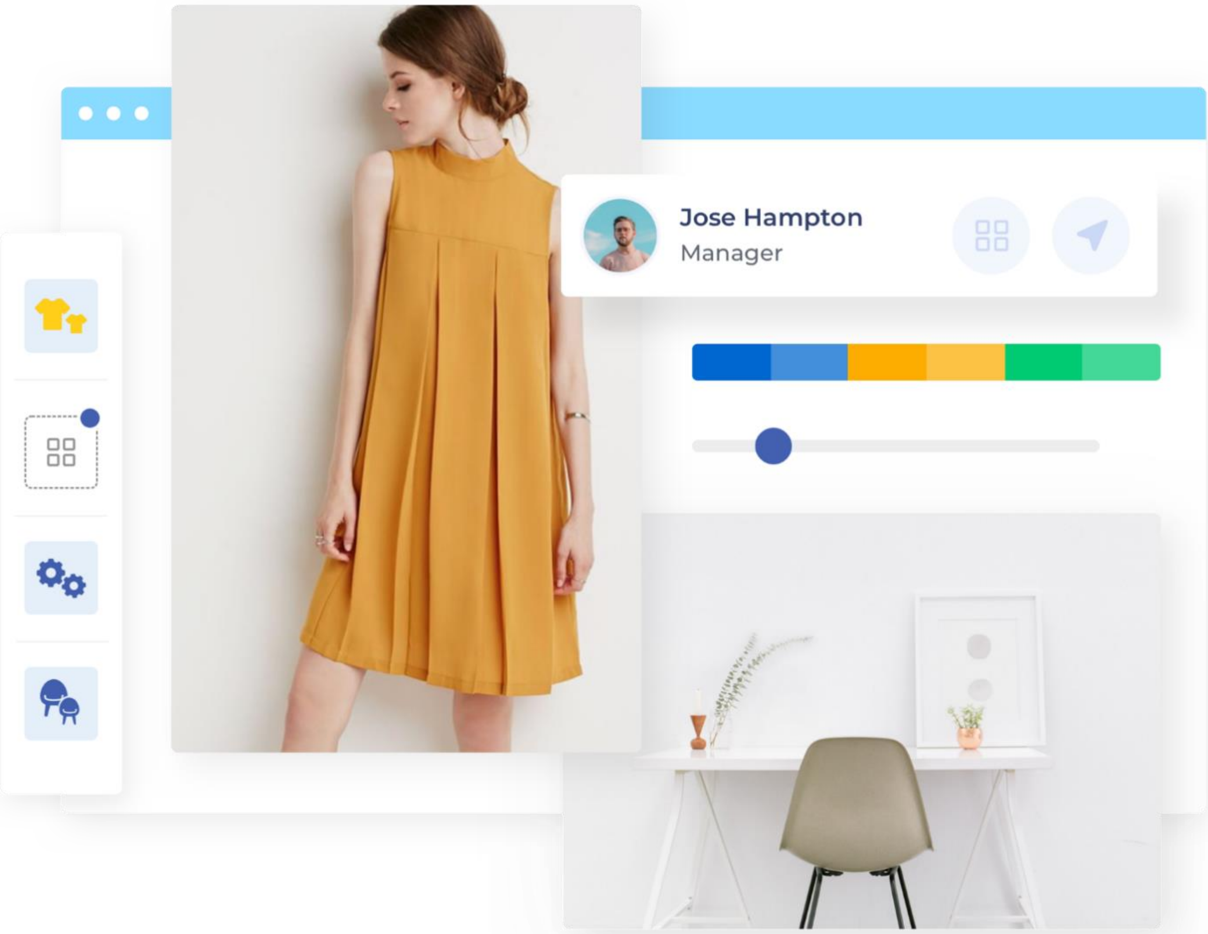


WHITE PAPER

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

CONTENTS

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

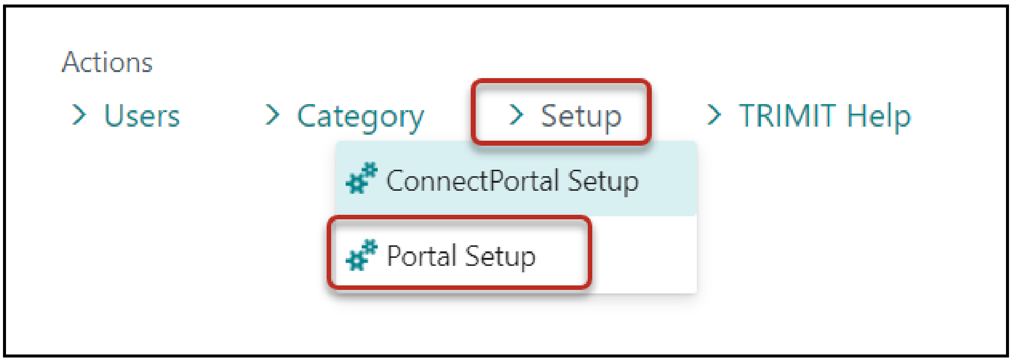
TRIMIT Portals Setups in Business Central contains the following objects:

The tables	***6036327***	***trm Temp Category Management***
	6036856	***trm Statistics Overview Header***
	6037028	***trm Sales Import Journal Line***
	6037029	***trm Sales Import Jnl Header***
	6038101	***trm User Relationship Mgt***
	6038103	***trm User Relationship***
	6038108	***trm Web Transaction Log***
	6038109	***trm File Repository***
	6038110	***trm Portal Control Setup***
	6038117	***trm Portal Activity log***
	6038118	***trm Portal Message***
	6038120	***trm Category***
	6038121	***trm Category Line***
	6038122	***trm Category Buffer***
	6038123	***trm Portal Action Setup***
	6038125	***trm Portal Profile***
	6038126	***trm Portal Newsletter***
	6038127	***trm Portal News Recipient***
	6038128	***trm Profile Order Type Relat***
	6038129	***trm Portal Customer Template***
	6038169	***trm B2B Relation Authorization***
	6036190	***trm Portals Setup***
The pages	***6036865***	***trm Statistics Overview***
	6036867	***trm Statistics Overview List***
	6037018	***trm Portal Sales Document***
	6037019	***trm Portal Sales Doc Subpage***
	6038101	***trm User Relationship Man.***
	6038103	***trm User Relationship List***
	6038116	***trm Web Transaction Log***
	6038118	***trm Portal File Repository***
	6038119	***trm Category Line Card***
	6038120	***trm Category Card***
	6038121	***trm Category List***
	6038122	***trm Category Lines***
	6038125	***trm Category Man Subform***
	6038124	***trm Category Management***
	6038126	***trm Portal Newsletter***
	6038127	***trm Portal Newsletter Recip***
	6038128	***trm Profile Order Type Relat***
	6038129	***trm Portal Customer Templates***

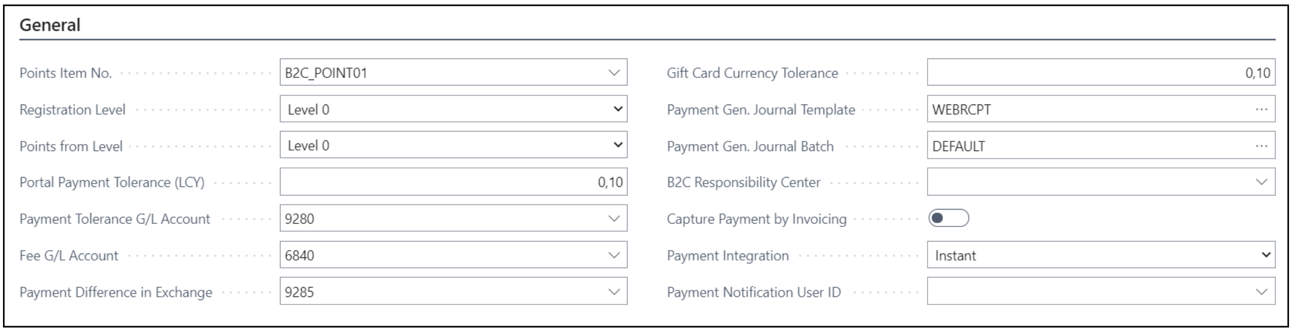
	6038130	***trm Portal Profiles List***
	6038131	***trm B2B Portal Profile***
	6038133	***trm SalesAgent Portal Profile***
	6038134	***trm Supplier Portal Profile***
	6038135	***trm Attach to Category***
	6038136	***trm Category TreeView***
	6038137	***trm Instore Portal Profile***
	6038138	***trm Portal Action Setup***
	6038139	***trm PIR Portal Profile***
	6038140	***trm Portal Control Setup***
	6038146	***trm Insite Portal Profile***
	6038154	***trm Category Copy Wizard***
	6038162	***trm Portal Activity Log***
	6038163	***trm Portal Message List***
	6038164	***trm Portal Message Card***
	6038167	***trm Portal Document Overdue***
	6038168	***trm Portal Document Templates***
	6038169	***trm B2B Relation Authorization***
	6038190	***trm Portal Setup***
The reports	***6038101***	***trm Create B2B Author. Code***
	6038129	***trm Batch Delete ASI Document***

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



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

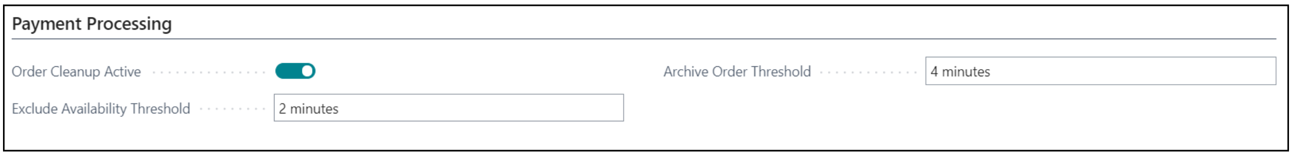
This field indicates how the payment capture is executed.
You can choose the following two options:

<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



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).

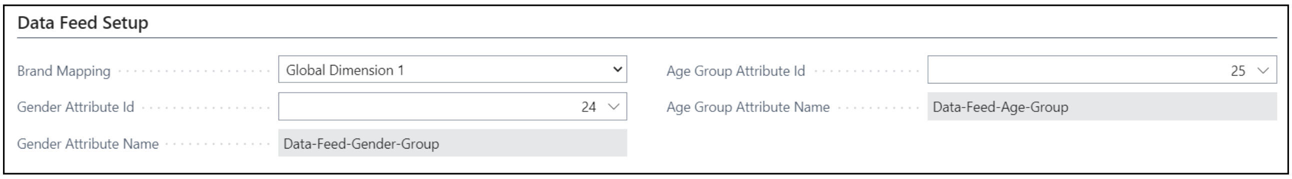
FASTTAB ADVANCED SALES INTEGRATION

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



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

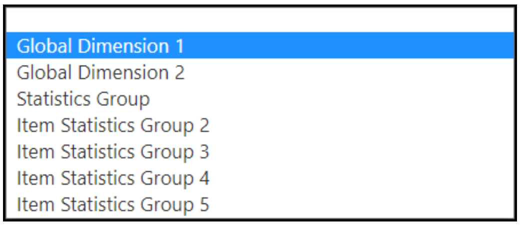
The **Attribute Id's**, **Attribute Names** and their options can be created via the Actions, Create Data Feed Attributes

DESCRIPTION OF THE FIELDS

BRAND MAPPING

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

You can choose the following options:



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

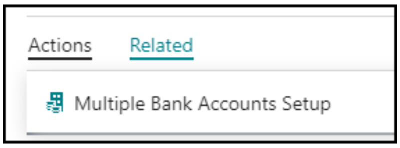
After choosing an **Age Group Attribute ID**, the Name will be displayed automatically.

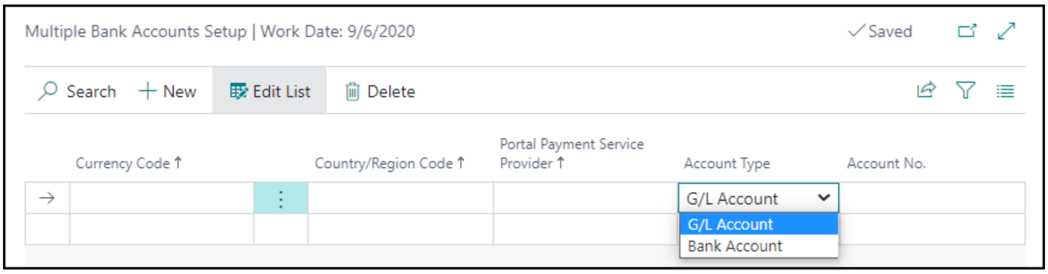
ACTIONS, CREATE DATA FEED ATTRIBUTES

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



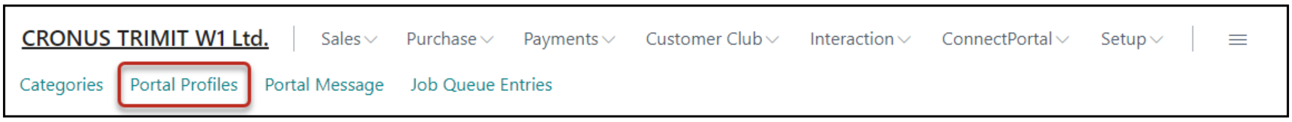


Per **Currency Code, Country/Region Code** and **Portal Payment Service Provider** you can enter a **G/L Account** or a **Bank Account** for the Payments.

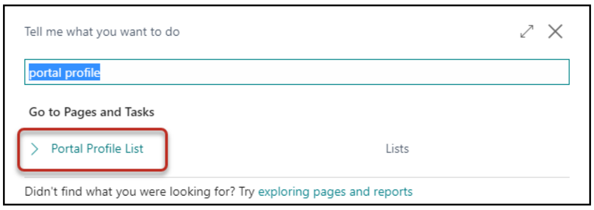
PORTAL PROFILES

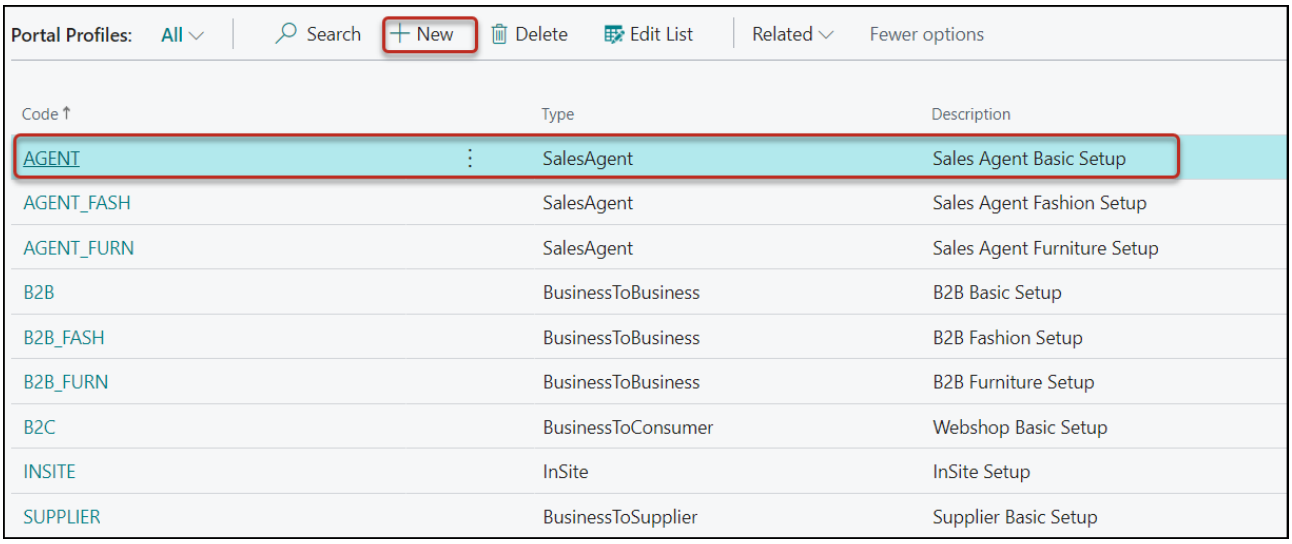
When Modelyn is used with the TRIMIT Sales Agent Portal (SA), TRIMIT B2B Webshop (B2B) or Supplier Portal (SUP), a specific setup of fields needs to be filled.
The **B2C Webshop Portal Profile** is described in document ***White Paper - TRIMIT B2C Webshop Setups in Business Central***.
The fields in 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:*





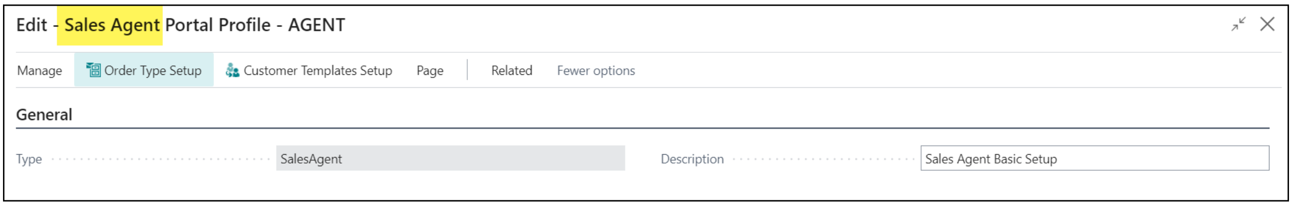
Code	Type	Description
AGENT	SalesAgent	Sales Agent Basic Setup
AGENT_FASH	SalesAgent	Sales Agent Fashion Setup
AGENT_FURN	SalesAgent	Sales Agent Furniture Setup
B2B	BusinessToBusiness	B2B Basic Setup
B2B_FASH	BusinessToBusiness	B2B Fashion Setup
B2B_FURN	BusinessToBusiness	B2B Furniture Setup
B2C	BusinessToConsumer	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



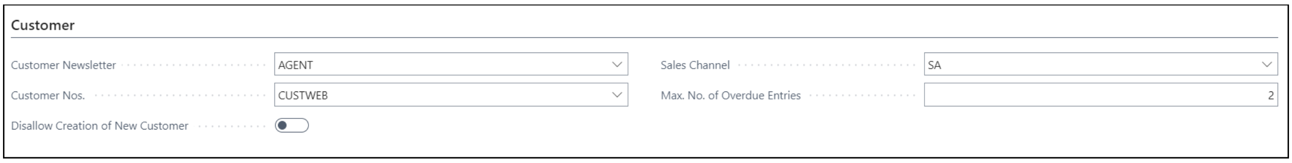
TYPE

Select Portal Profile Type.
Available options are *BusinessToBusiness, BusinessToConsumer, SalesAgent, BusinessToSupplier, InstoreB2C, PIR, InSite.*

DESCRIPTION

Enter a Portal Profile Description.

FASTTAB CUSTOMER

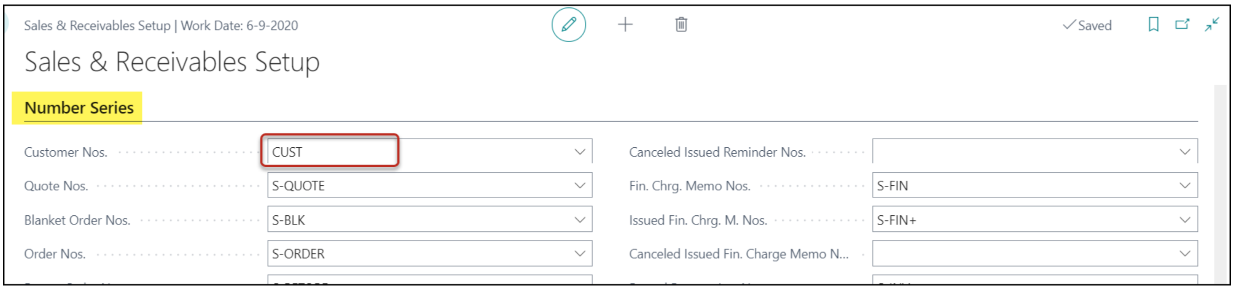


CUSTOMER NEWSLETTER

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

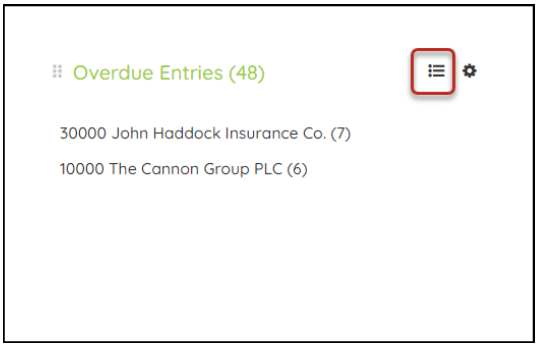
If this field is set to *TRUE,* it will not be possible to create a new Customer on Sales Agent Portal

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.

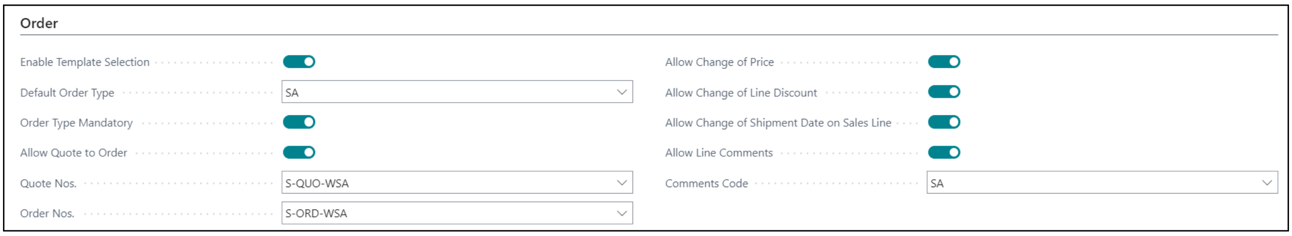


If you then click on **See all overdue entries** a new page will open will all the Customers with Overdue Entries. The sorting of the Customers is based on the total Overdue Amount.

Overdue Entries

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



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

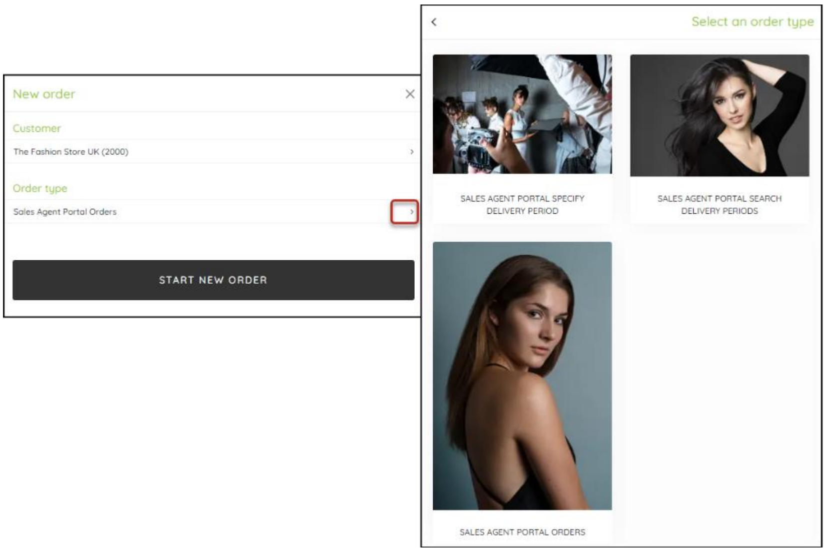
Appose to having the Sales Agent selecting the **Order Type,** you can set a default one, which will be forced for any new Order created by Sales Agents attached to this Portal Profile.

NOTE

This functionality is available for B2B Webshop as well

ORDER TYPE MANDATORY

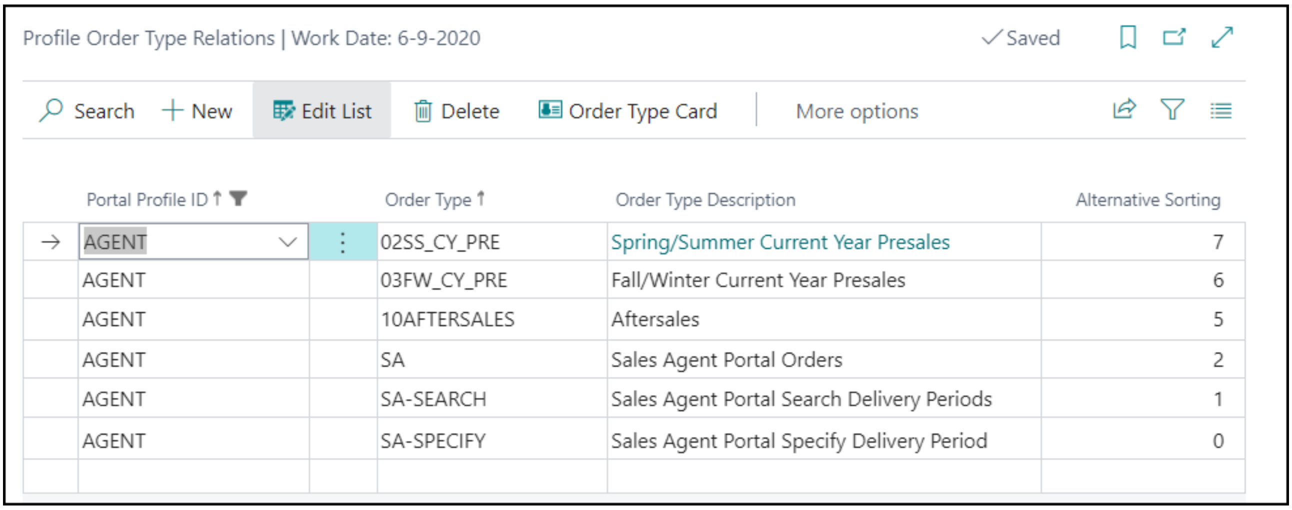
Setting this field to *TRUE* will force the Sales Agent to select an **Order Type** code when starting a new Order (picture below) if no **Default Order Type** has been entered.



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.***

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



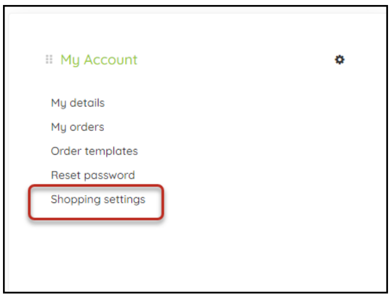
Portal Profile ID	Order Type	Order Type Description	Alternative Sorting
AGENT	02SS_CY_PRE	Spring/Summer Current Year Presales	7
AGENT	03FW_CY_PRE	Fall/Winter Current Year Presales	6
AGENT	10AFTERSALES	Aftersales	5
AGENT	SA	Sales Agent Portal Orders	2
AGENT	SA-SEARCH	Sales Agent Portal Search Delivery 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**.

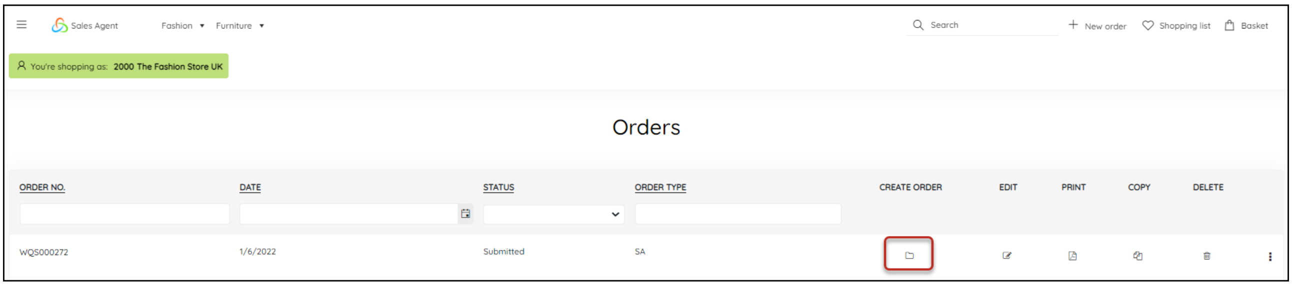
It is also possible to set the default **Order Type** via the **Shopping settings** of the SA Portal, which can be found in the dock **My Account**:



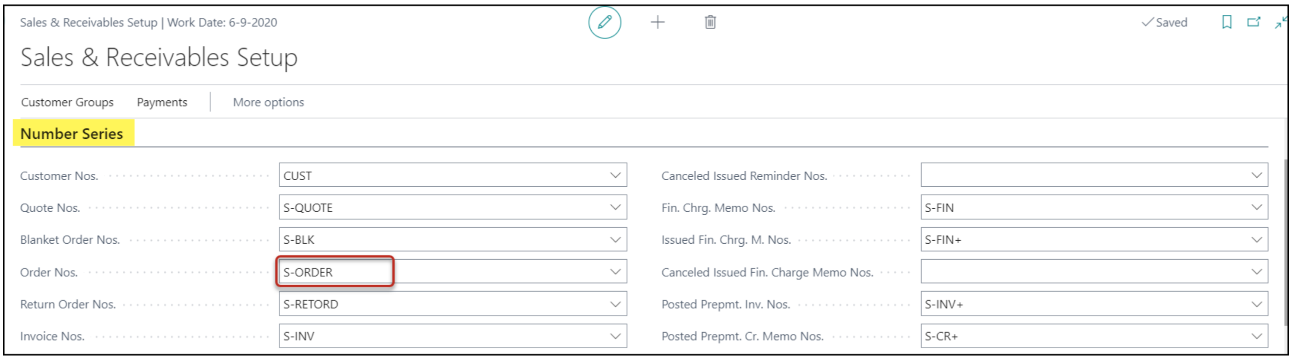
ALLOW QUOTE TO ORDER

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:



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.



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

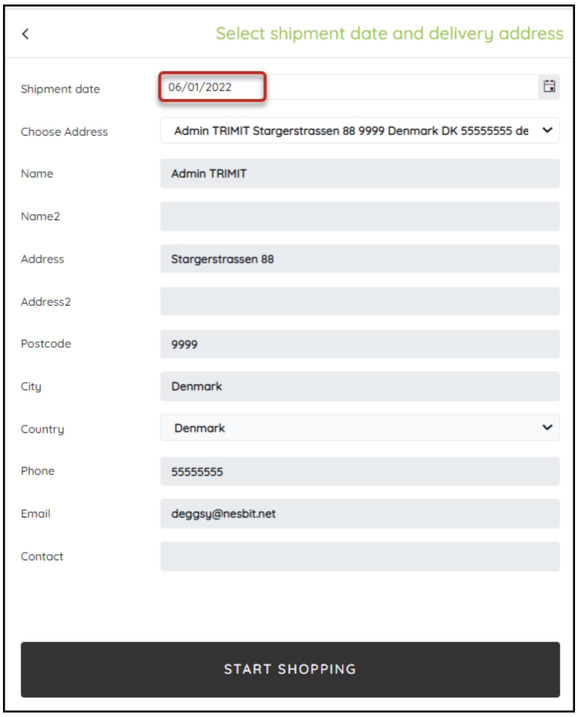
Keep in mind, that the Unit Price will then always override the different Unit Prices based on Search Tables or Formulas in case of a Matrix; the Unit Price you have on the record in the Table 7002 will then become the price for all the Colors/Sizes/Variants.

ALLOW CHANGE OF LINE DISCOUNT

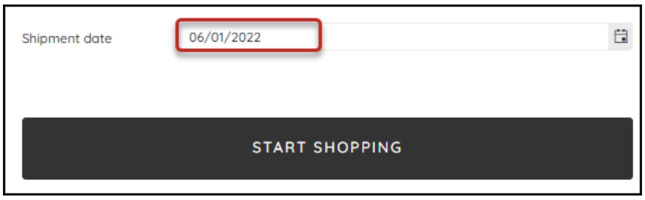
Setting this field to *TRUE* will allow the Sales Agent to enter a **Discount %** on a specific product.

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.



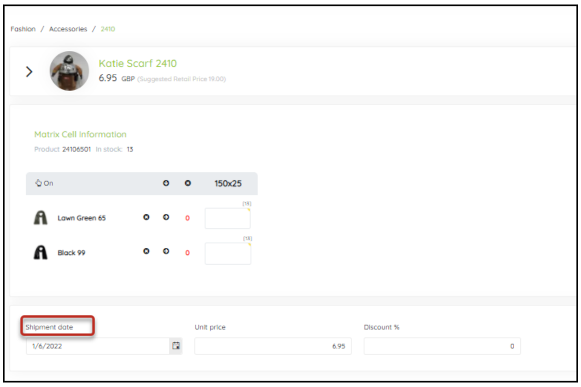
or



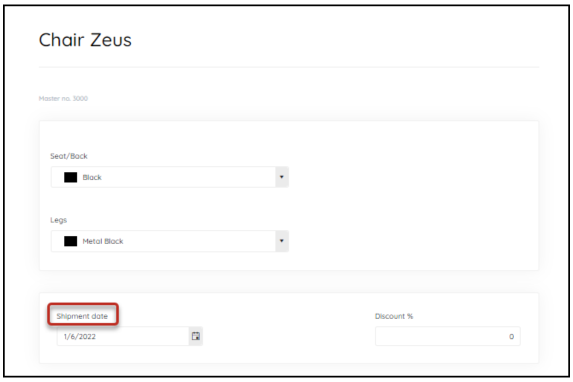
If **Allow Alternate Ship-to Code** and **Allow Change of Ship-to Code** are set to *FALSE* and **Allow Change of Shipment Date on Sales Header** is set to *TRUE* then the page will still be shown on order start, showing only the ***Shipment date*** field.

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.

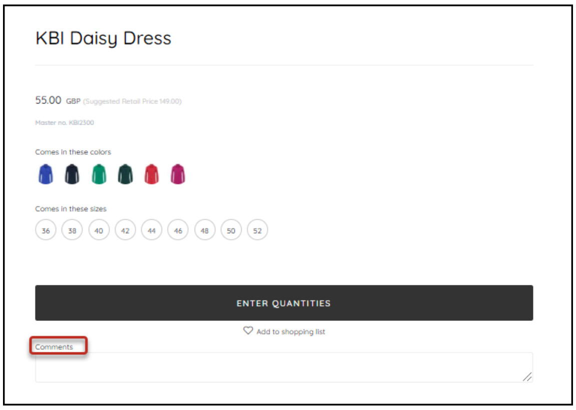


or

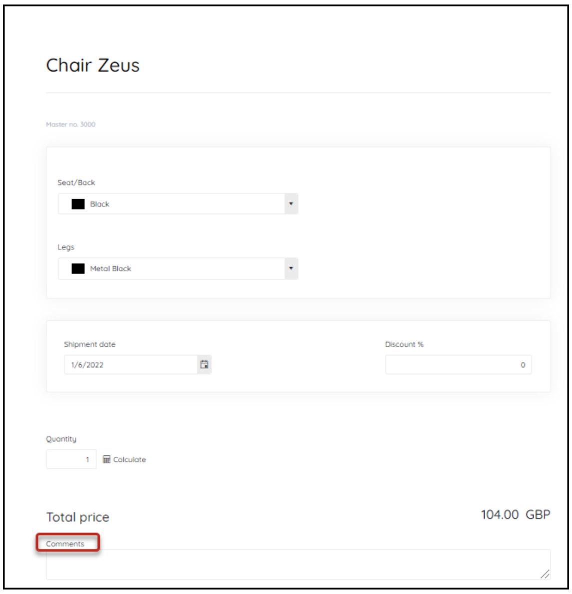


ALLOW LINE COMMENT

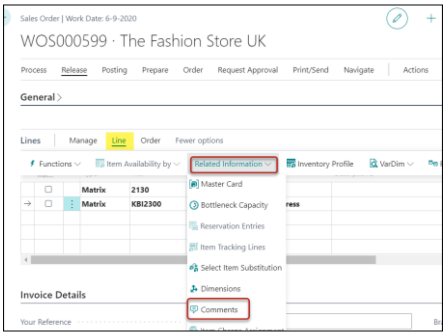
If this option is set to *TRUE,* then there will be shown a **Comments** box on Product page as follows:



or



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

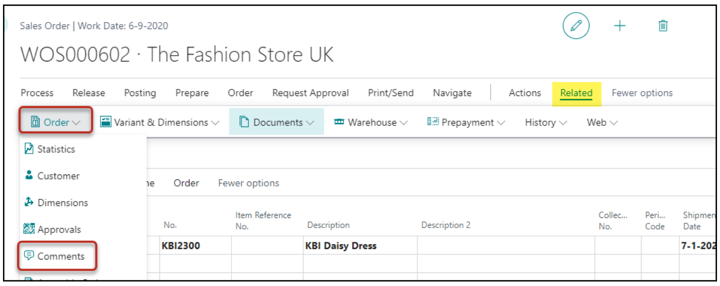


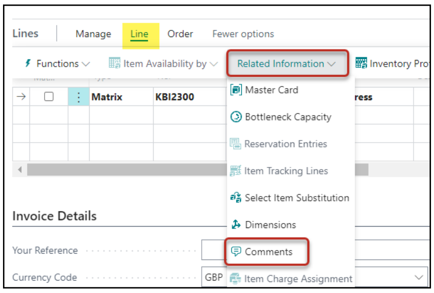
COMMENT CODE

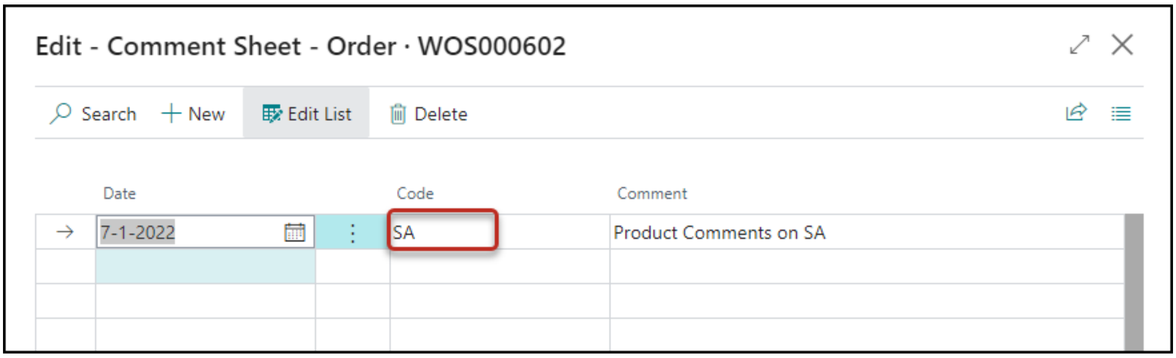
If a **Comment** is created on **Product details** page (Sales Line) or on Order details page (Sales Header) then it is possible to provide a **Comment Code**, which will be reflected on the Comment Line in TRIMIT.

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**.

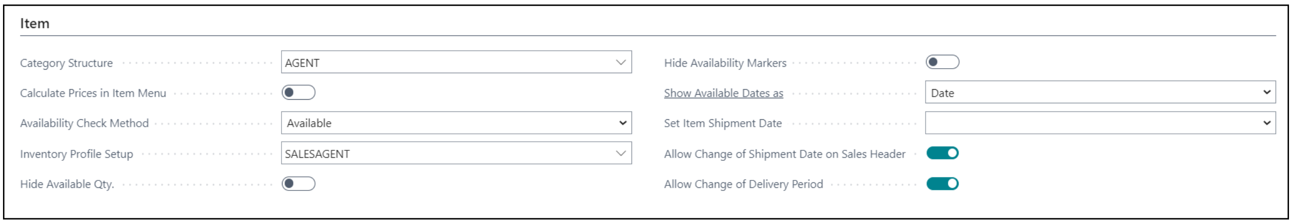






Code *is not by default visible; you need to add it with* ***Personalize***

FASTTAB ITEM



CATEGORY STRUCTURE

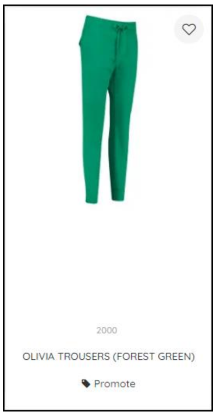
This field is mandatory. Select the root Category Structure.

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) All deductions are Sales Orders, Transfer Orders, Production Orders (depending on what has been chosen in the Inventory Profile Setup) – and is calculated with*

	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.

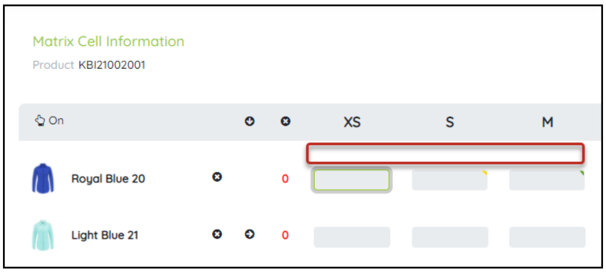
INVENTORY PROFILE SETUP

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

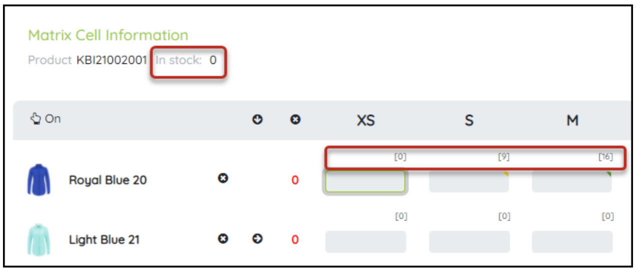
Select required **Inventory Profile Setup.**

HIDE AVAILABLE QTY.

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



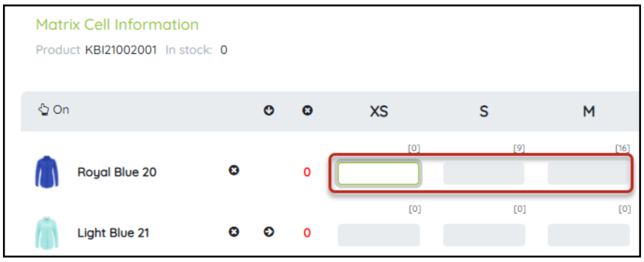
If set to *TRUE*



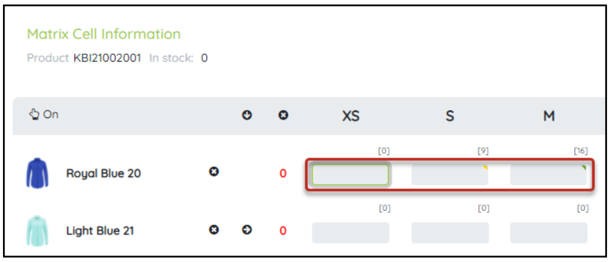
If set to *FALSE*

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*

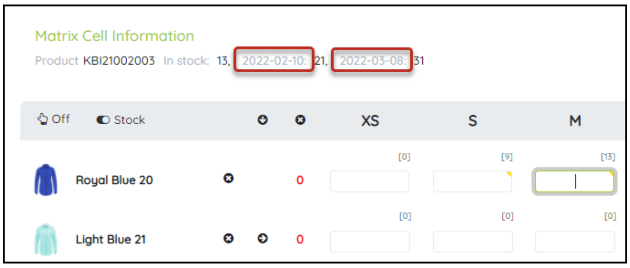


If set to *FALSE*

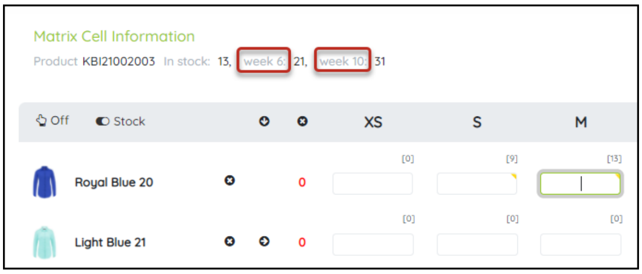
SHOW AVAILABLE DATES AS

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.

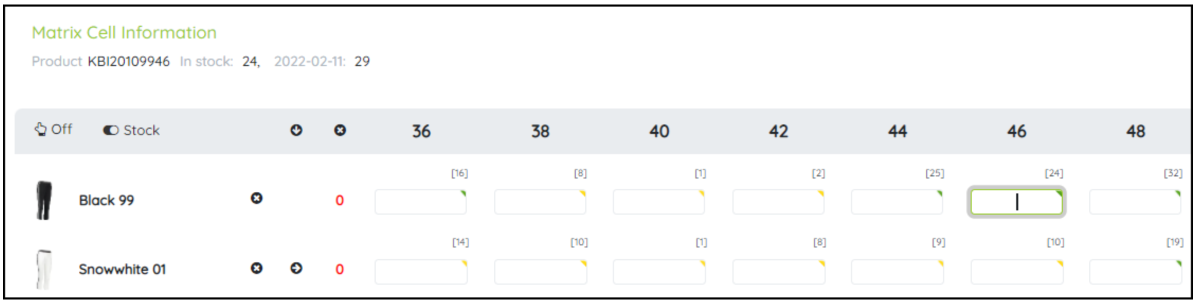
I.e., to buy more than in stock but the Shipment Date will be set to the date when the desired availability is in stock.

NOTE

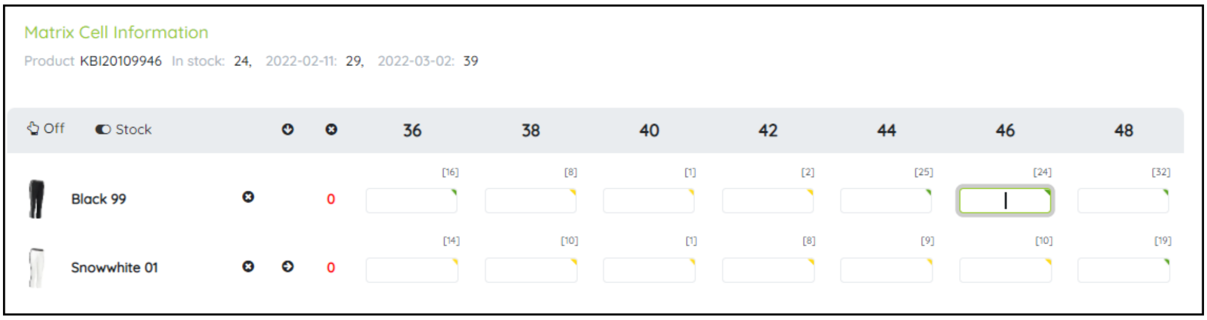
If the **Availability Check Method** is set to *Available* and **Availability Check on Submit** is set to *TRUE*, then it is important that **Set Item Shipment Date** is set to *Earliest Possible*. The checkout verification will use the Shipment Date on the Basket Line as reference point and if that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

Example (look at the top of the snippet):

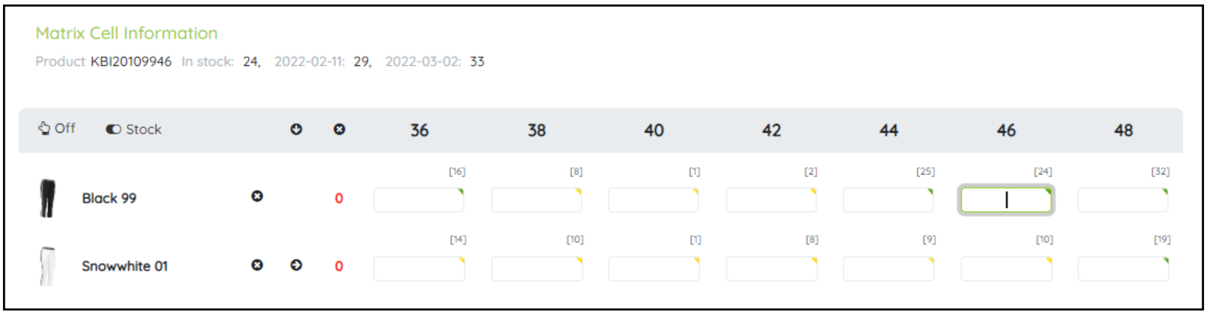
1. *Available in stock on 10-01-22 (24 pieces), Quantity on Purchase Order in TRIMIT with **Expected Receipt Date** on 10-02-22 (5 pieces)*



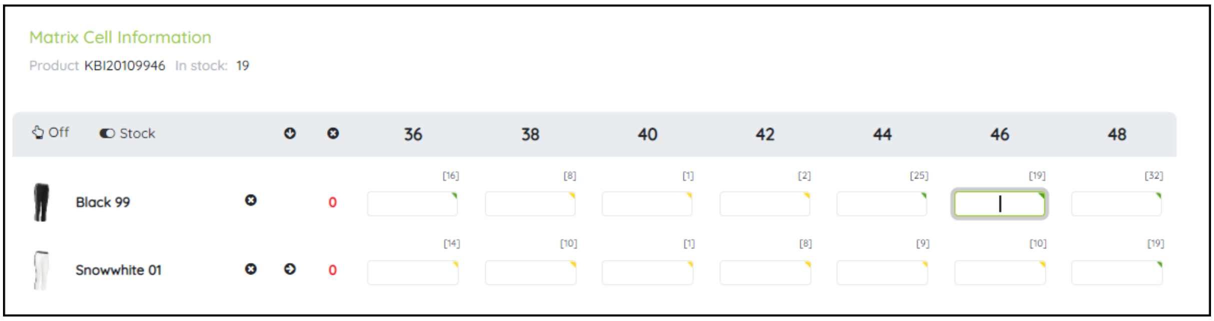
2. *Available in stock on 10-01-22 (13 pieces), Quantity on Purchase Order 1 in TRIMIT with **Expected Receipt Date** on 10-02-22 (5 pieces) and Purchase Order 2 with **Expected Receipt Date** on 01-03-22 (10)*



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)*



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)*



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.*

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.*

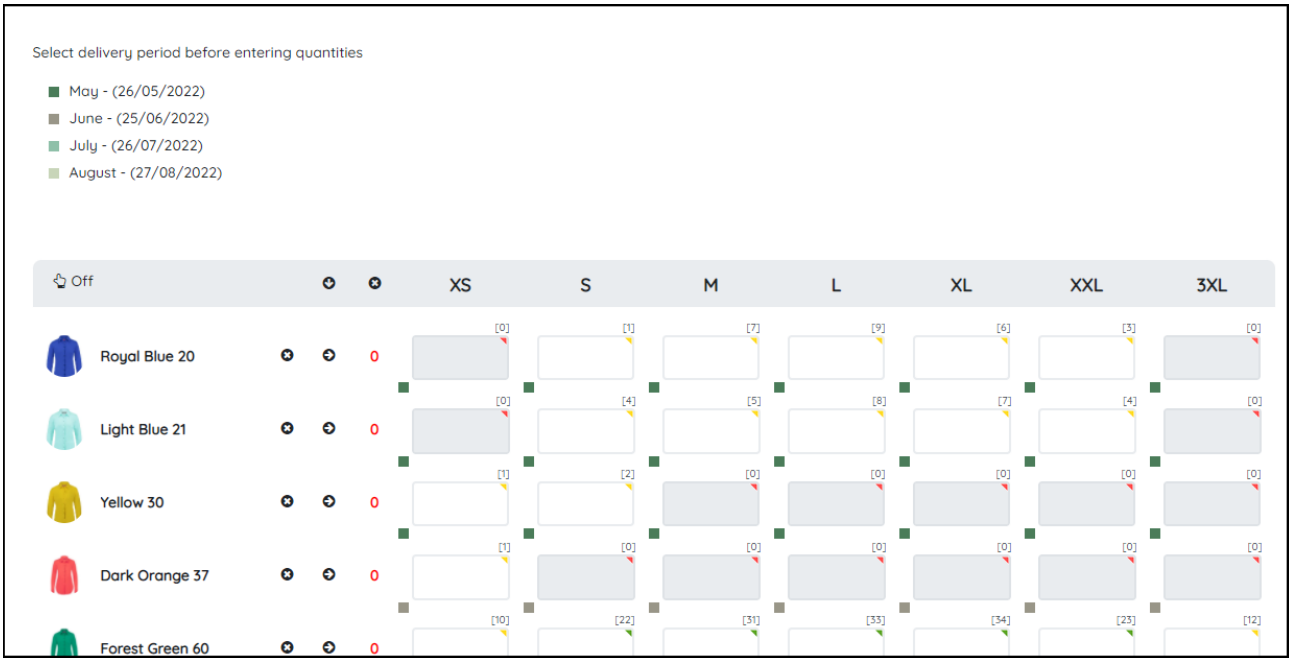
The Sales Order Lines in TRIMIT will look like:

Lines | Manage | Line | Order | Fewer options

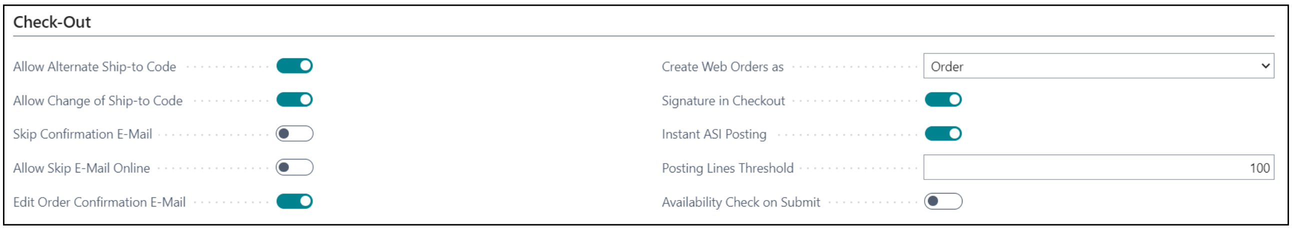
Exp... Mat...	Type	No.	Complete Shipment of Sales Line	Qty. to Assign	Qty. Assigned	Planned Delivery Date	Planned Shipment Date	Shipment Date	Earliest Shipment Date
☑	**Matrix**	**KBI2010**	**No**	**0**	_	**18-1-2022**	**18-1-2022**	**2-3-2022**	**11-7-2022**
☐	Item	KBI20109946	No	0	_	18-1-2022	18-1-2022	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.*



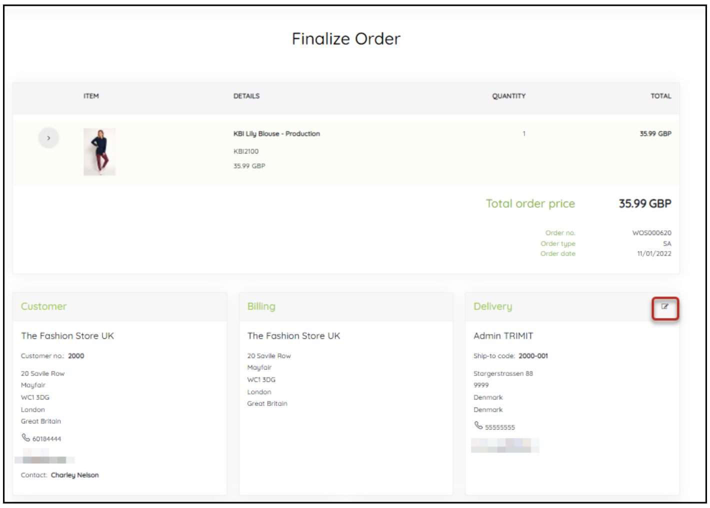
FASTTAB CHECK-OUT



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**.**

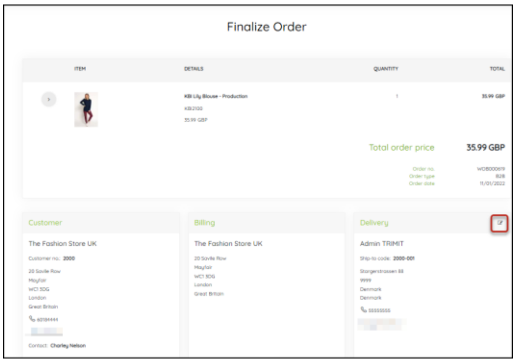


Setting this field to *TRUE* also enables ability of changing **Ship-to Code** on **Finalize order** page, i.e., final stage in order creation process.

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.

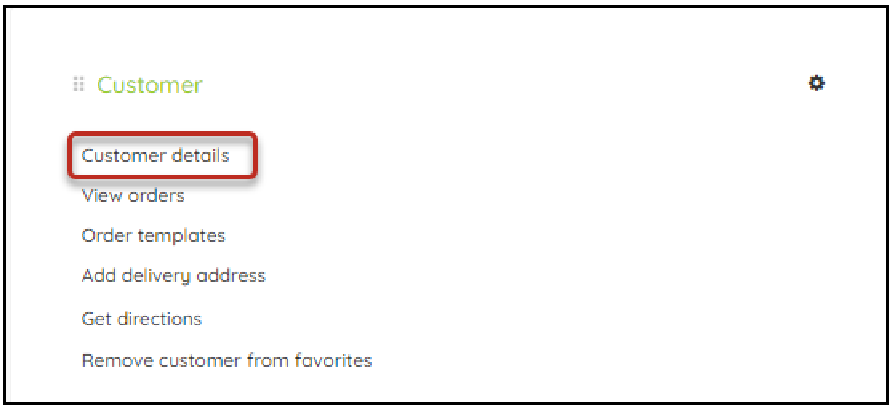
Following table describes the different combinations:

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***

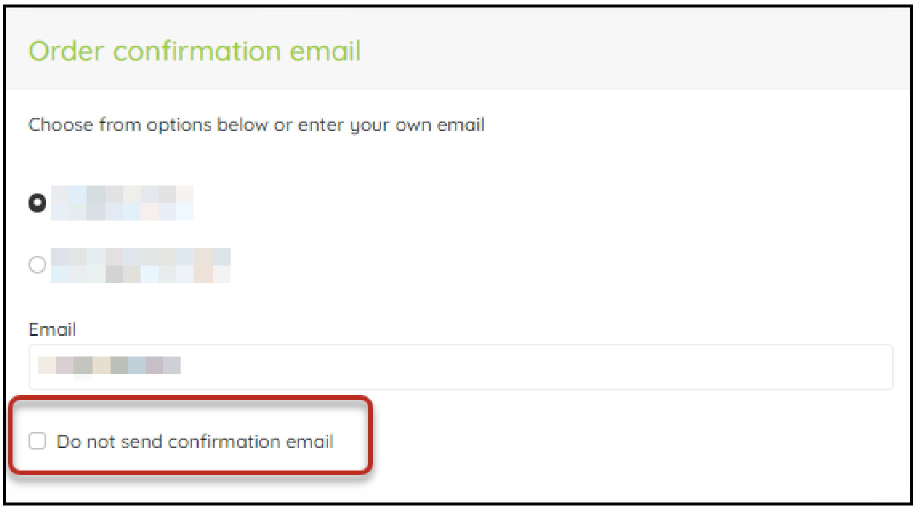


SKIP CONFIRMATION E-MAIL

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.



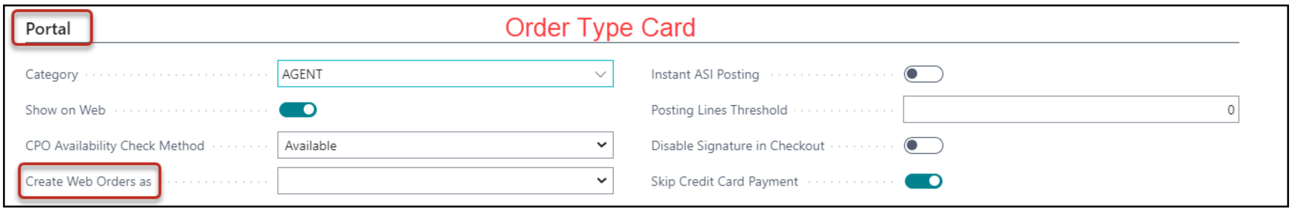
Setting **Do not send confirmation email** field to *TRUE* will disable sending any Order Confirmation E-Mails to recipients. If the Order is reopened for editing then the value is not persisted, i.e., if originally was set to *TRUE* then on reopen will be set to *FALSE* again.

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

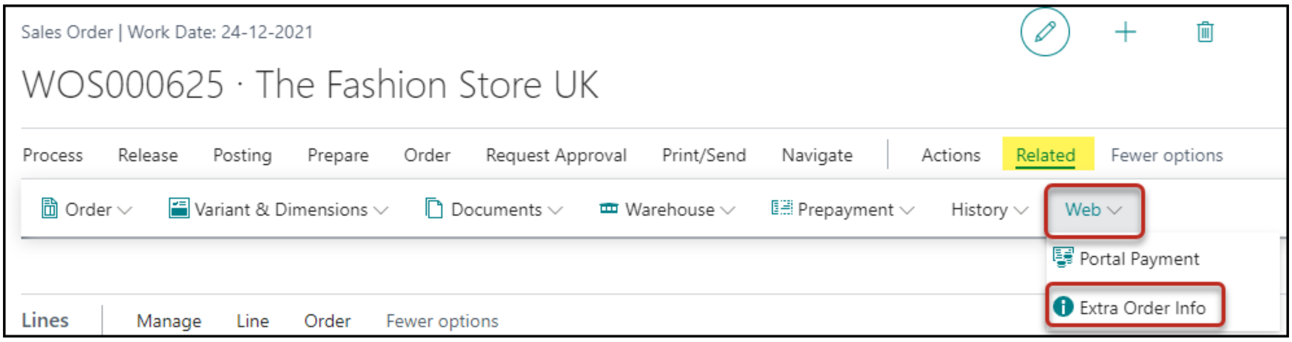
Select Document Type that should be created when submitting the Order from the Portal.
Possible values are *Order* and *Quote.*
The SA Portal and B2B Webshop have an option to choose which Document Type is created, Sales Order or Sales Quote, when the Order is submitted.
After submitting on the Portal, 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.

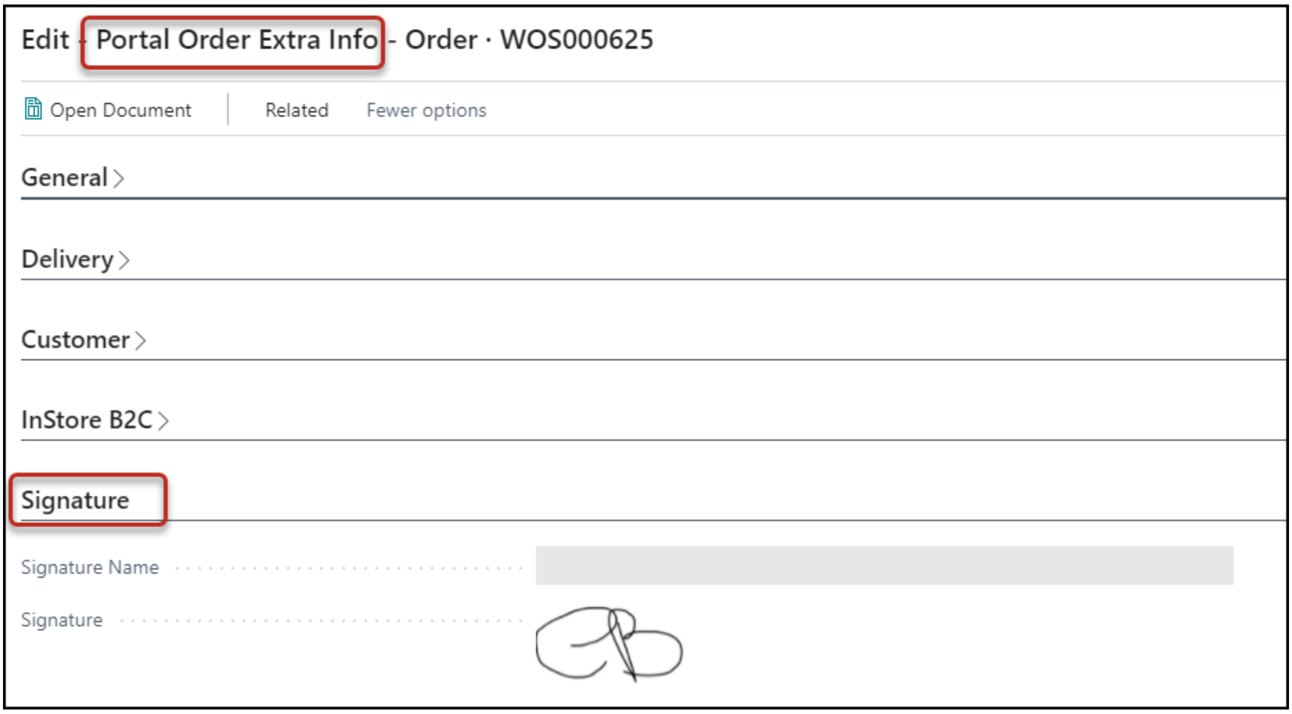


SIGNATURE IN CHECKOUT

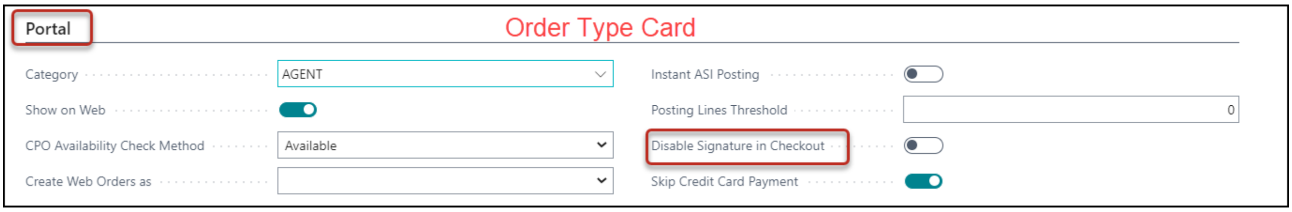
If set to *TRUE,* then new fields for **Signature name** and **Signature** will be shown on **Finalize order** page.

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***.





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

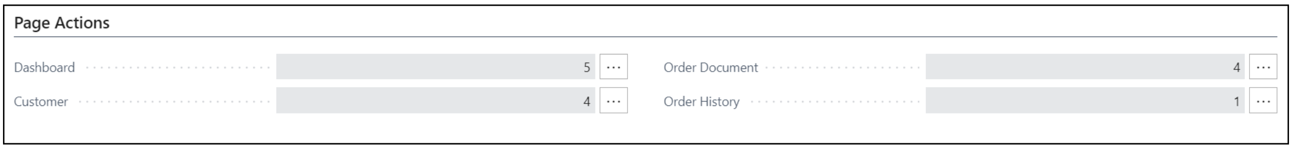
Specify the maximum number of Sales Lines in the Portals Sales Document, which allows Instant Posting. This works in combination with field **Instant ASI Posting**. Read more information about this field in ***White Paper – TRIMIT Portals Advanced Sales Integration***.
This field can also be overruled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

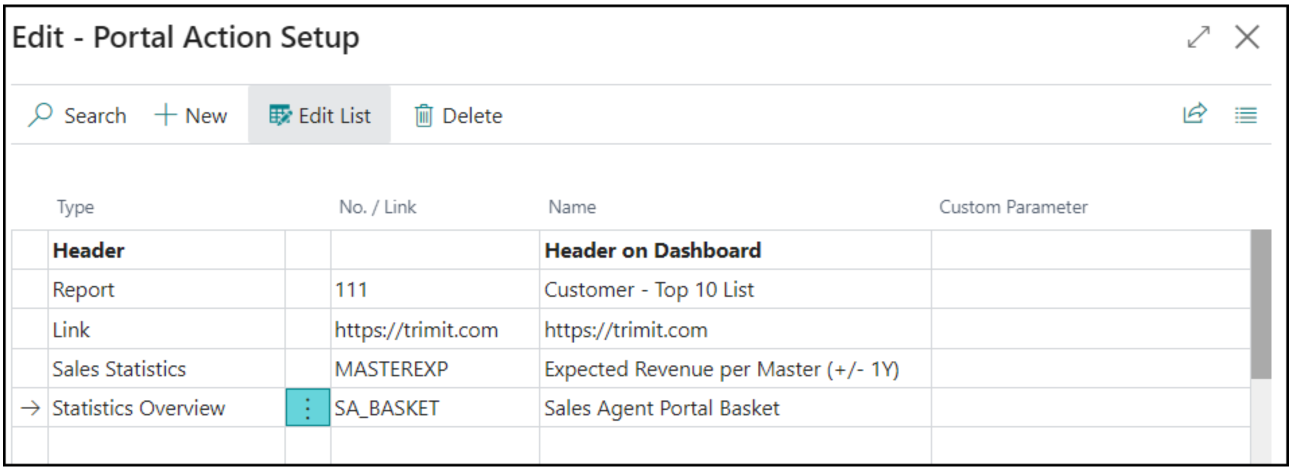
That is why there is another option on portal profile – **Availability Check on Submit**. This option allows adding to basket the last available quantity for two different users and first check the Item Availability on order submit. So, two different users cannot submit order with last available quantity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



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.



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***

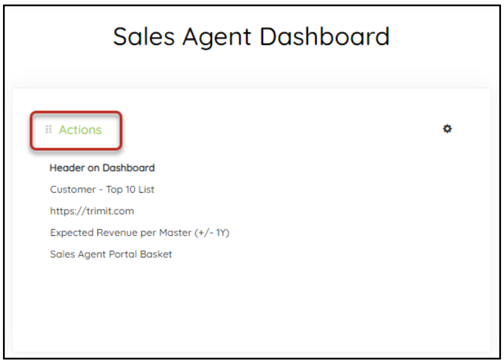
NAME

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

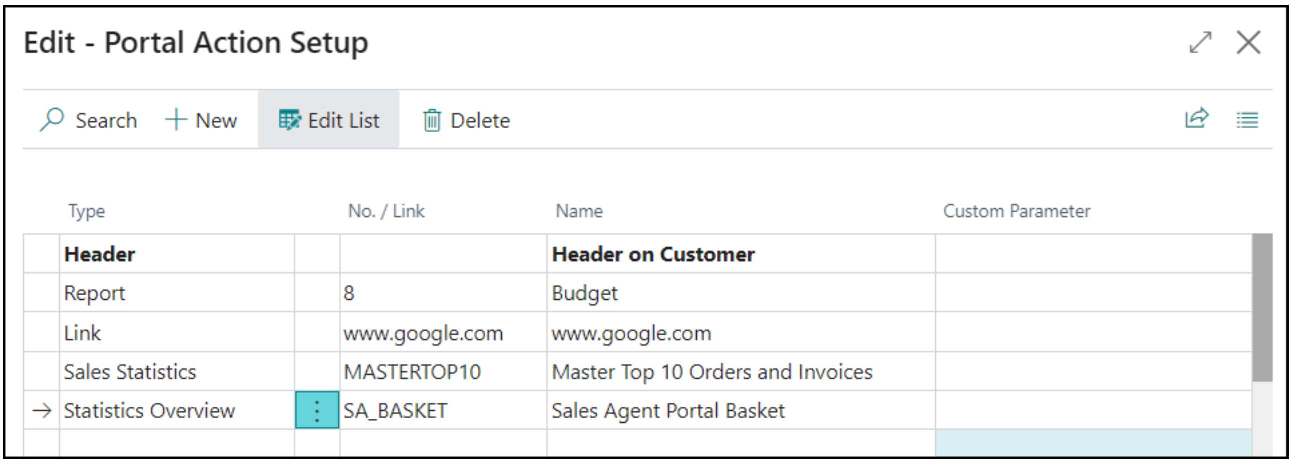
Especially for customized Reports, you could enter the Parameters needed for this Report.

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.***



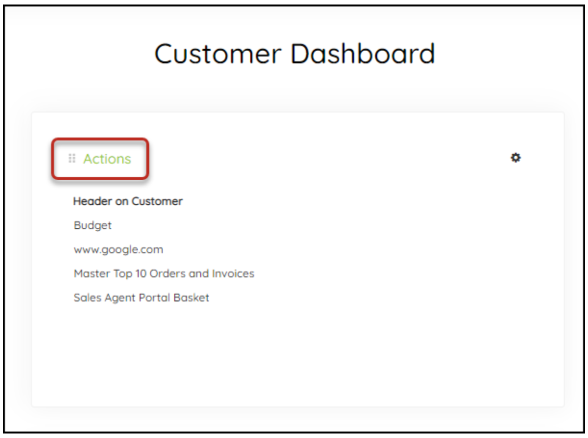
CUSTOMER

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.



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	

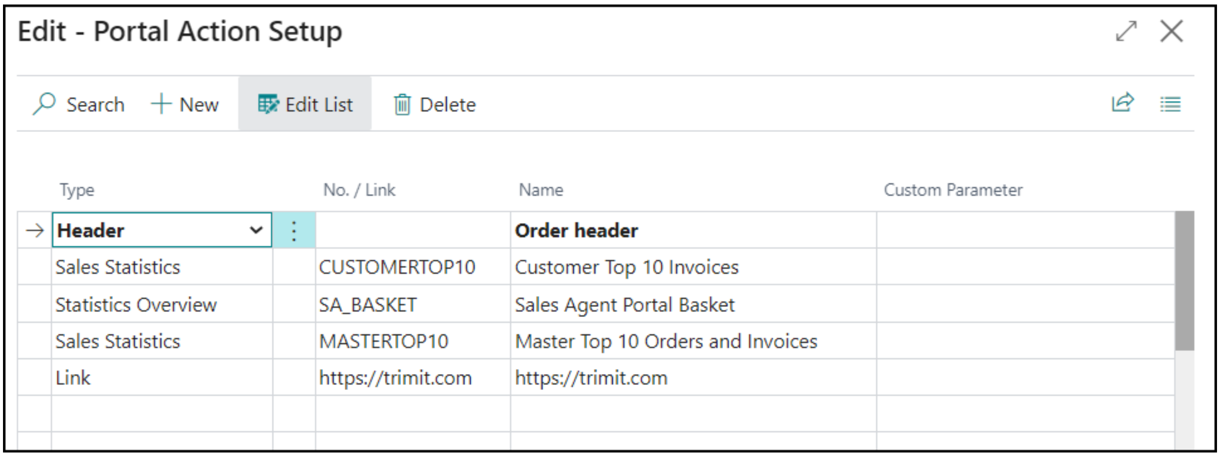
For details of the fields see Dashboard.



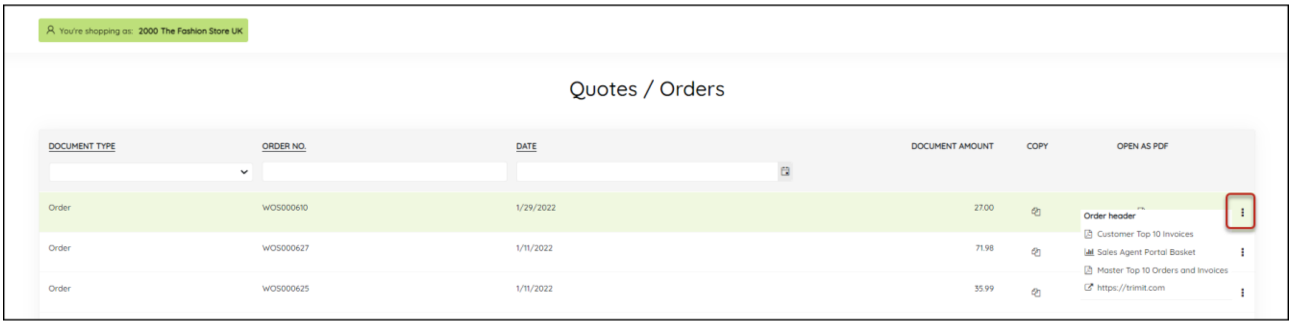
ORDER DOCUMENT

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.

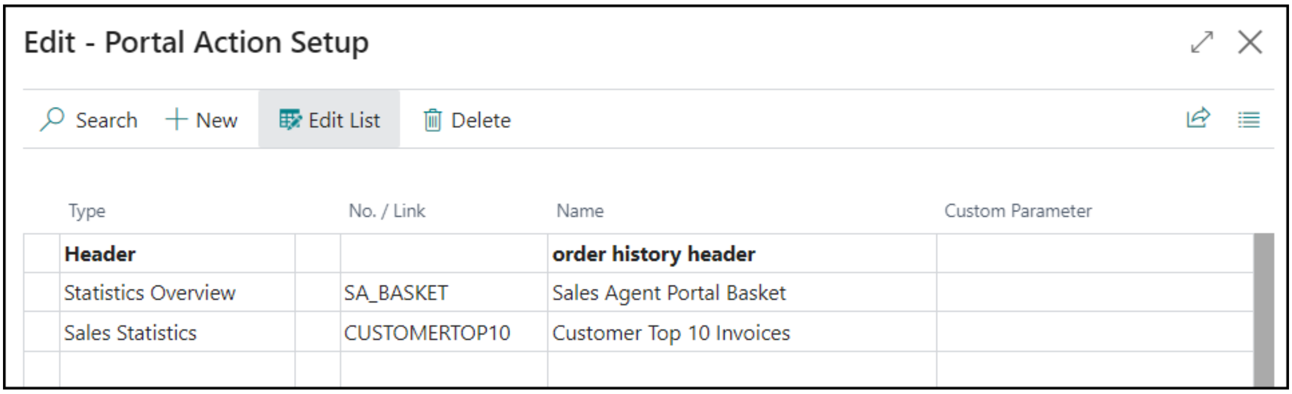


For details of the fields see Dashboard.

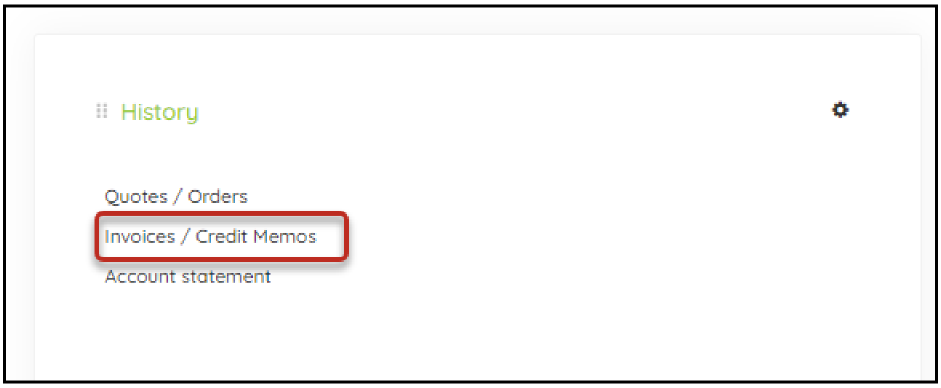


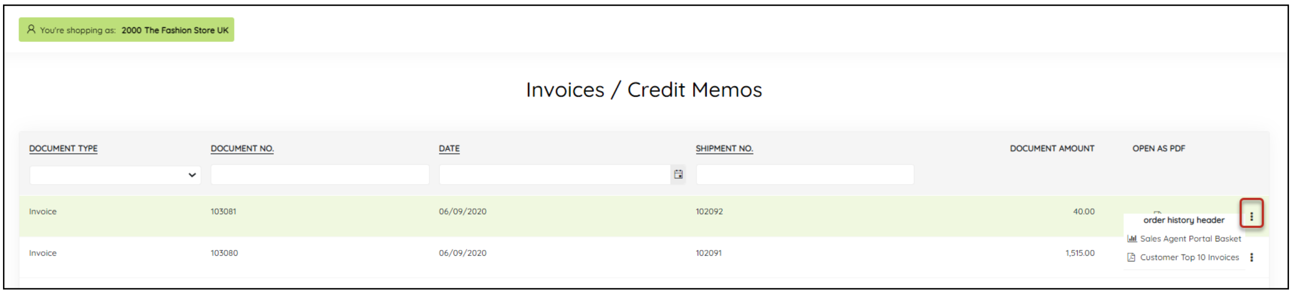
ORDER HISTORY

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.

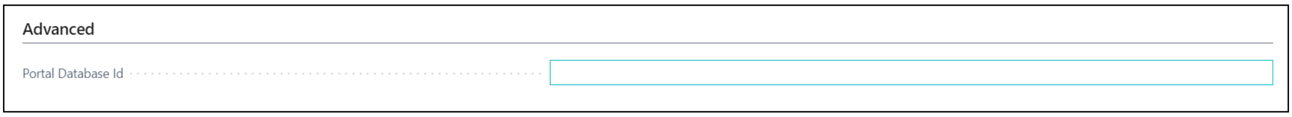


For details of the fields see Dashboard.



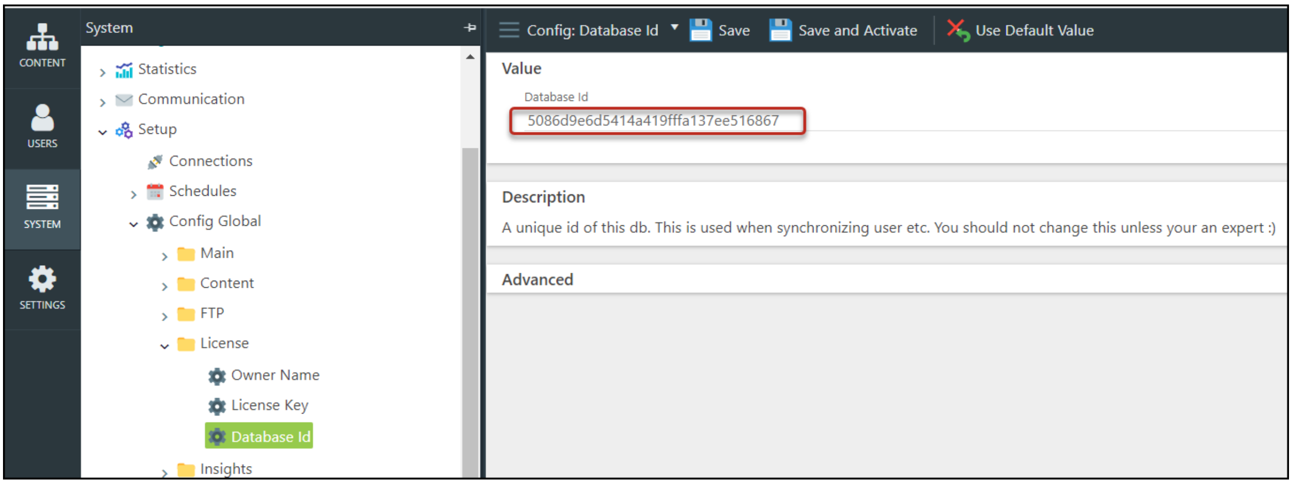


FASTTAB ADVANCED

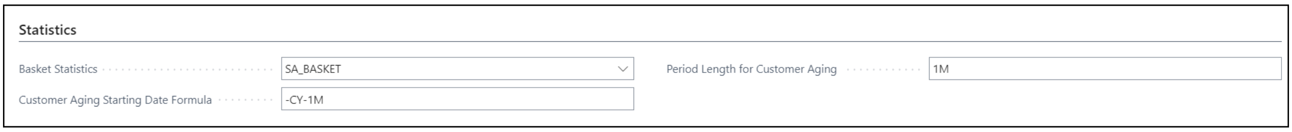


PORTAL DATABASE ID

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:***

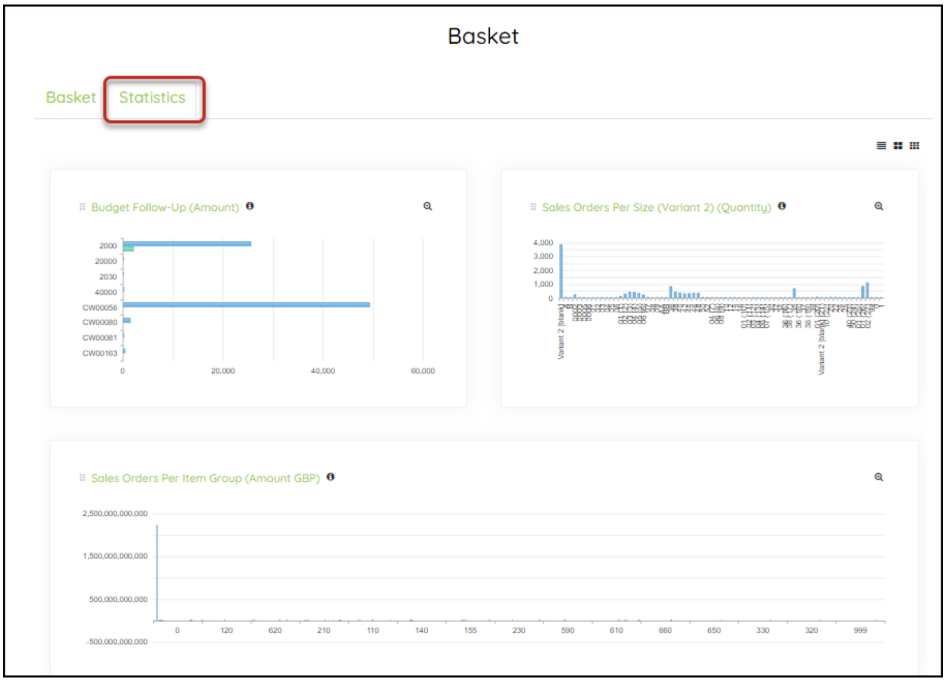


FASTTAB STATISTICS



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

	.. 11/30/21	Balance
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:

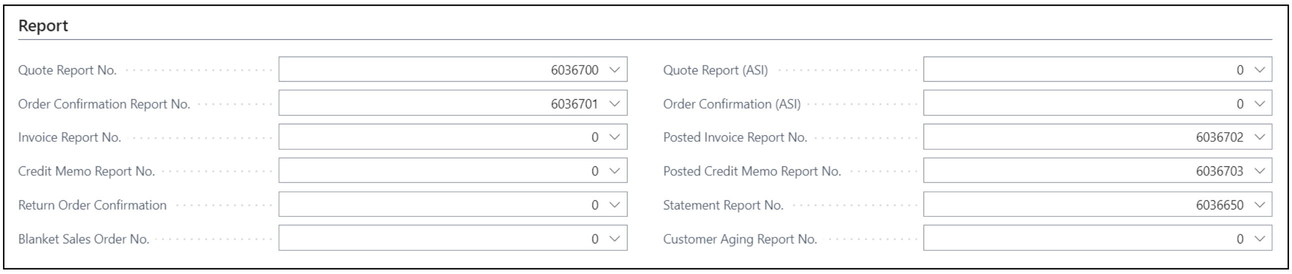
Customer Aging

	...before	12/01/21.. 12/31/21	01/01/22.. 01/31/22	02/01/22.. 02/28/22	After...	Balance
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
49858585 Hotel Pferdesee	14,395.75	0.00	0.00	0.00	0.00	14,395.75
49525252 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

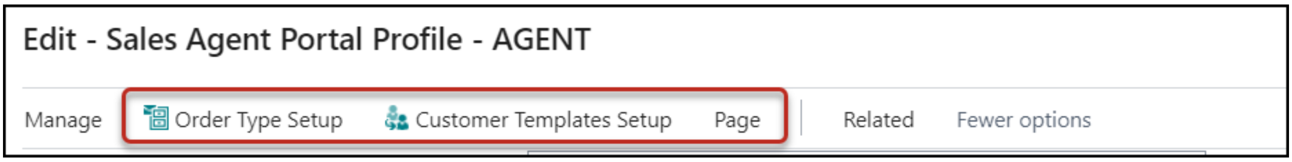
The content of this field (a Date Formula) determines the **Period** between the columns in the details Customer Aging; see picture above.

FASTTAB REPORT



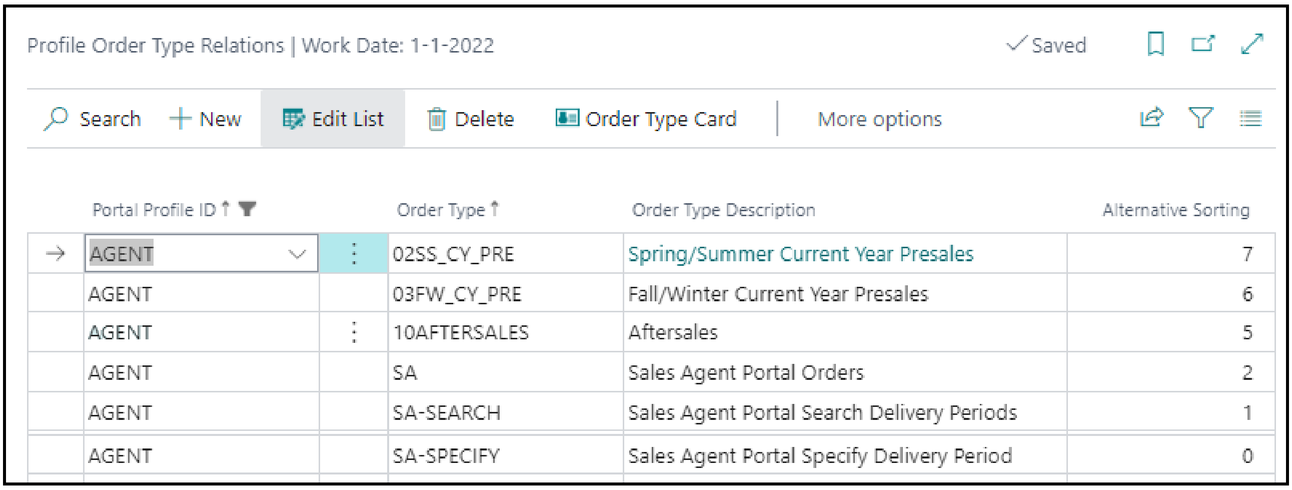
In this FastTab you need to enter the relevant Report Nos. that will be used in the SA portal.
If no **Customer Aging Report No.** is entered, report ***105 Customer - Summary Aging*** will be used.

ACTIONS IN SA PORTAL PROFILE



ORDER TYPE SETUP

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

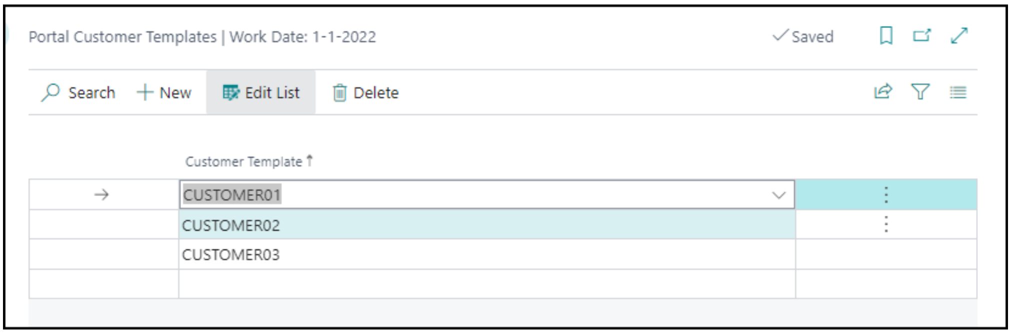

Profile Order Type Relations | Work Date: 1-1-2022

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

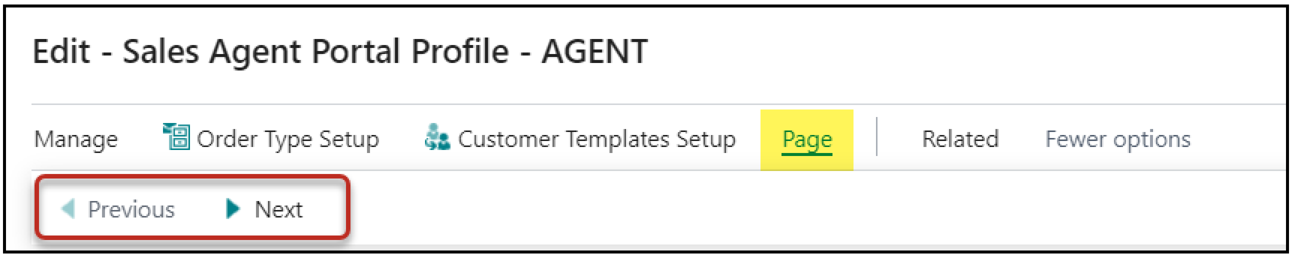
The **Alternative Sorting** determines in which sorting the Order Types will be shown when creating a new Order on the SA (B2B).

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.

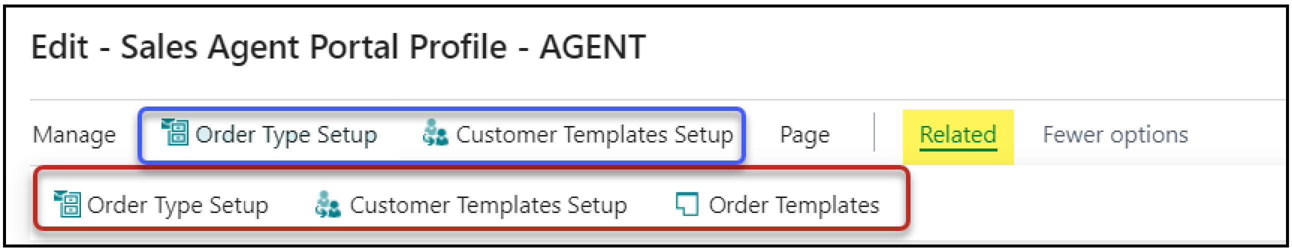


PAGE



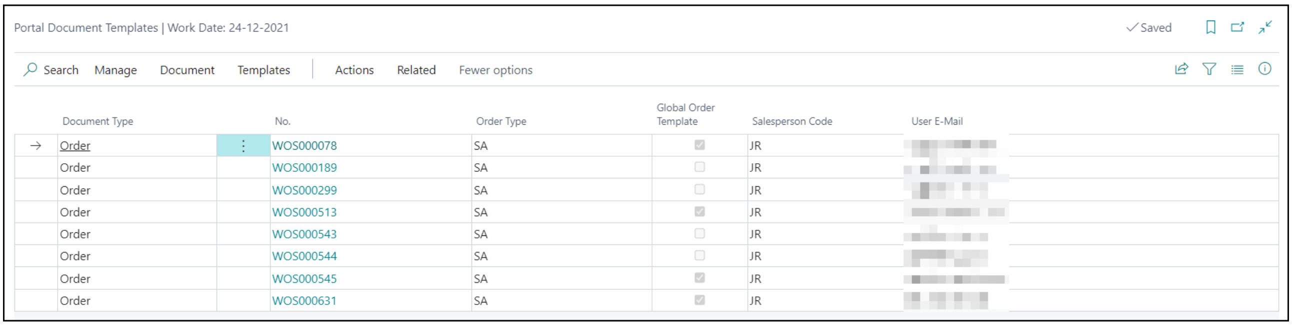
If there are several **Portal Profiles** of the same **Type** *SalesAgent,* you can see the *Next* Portal Profile Card and/or the *Previous* Portal Profile Card.

RELATED IN SA PORTAL PROFILE



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

ORDER TEMPLATES

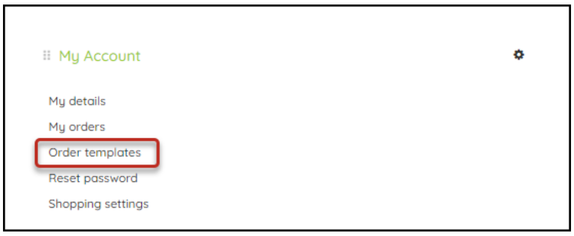


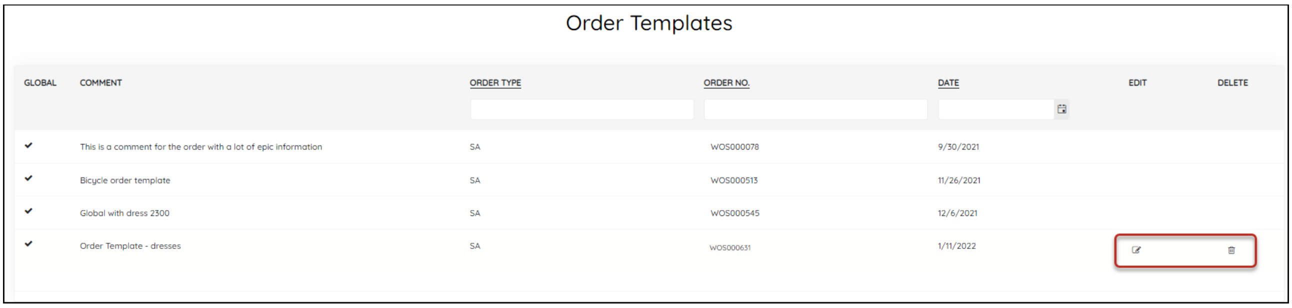
See Order Template on SA Portal for more details.

ORDER TEMPLATE ON SA PORTAL

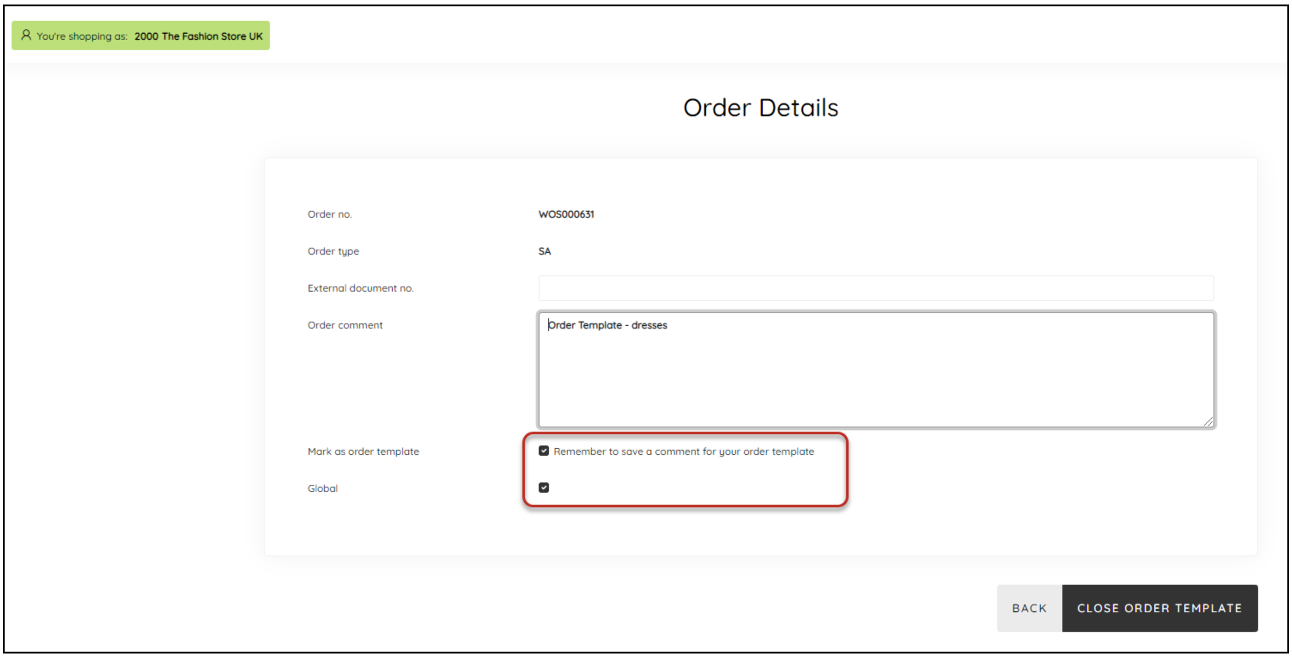
When creating an Order on SA Portal, it is possible to mark this Order (on **Order Details** page) as *Order Template*. It is a good idea to add an **Order comment**, which becomes an Order Template Description and makes it easier to differentiate between Order Templates. If portals order is marked as *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.



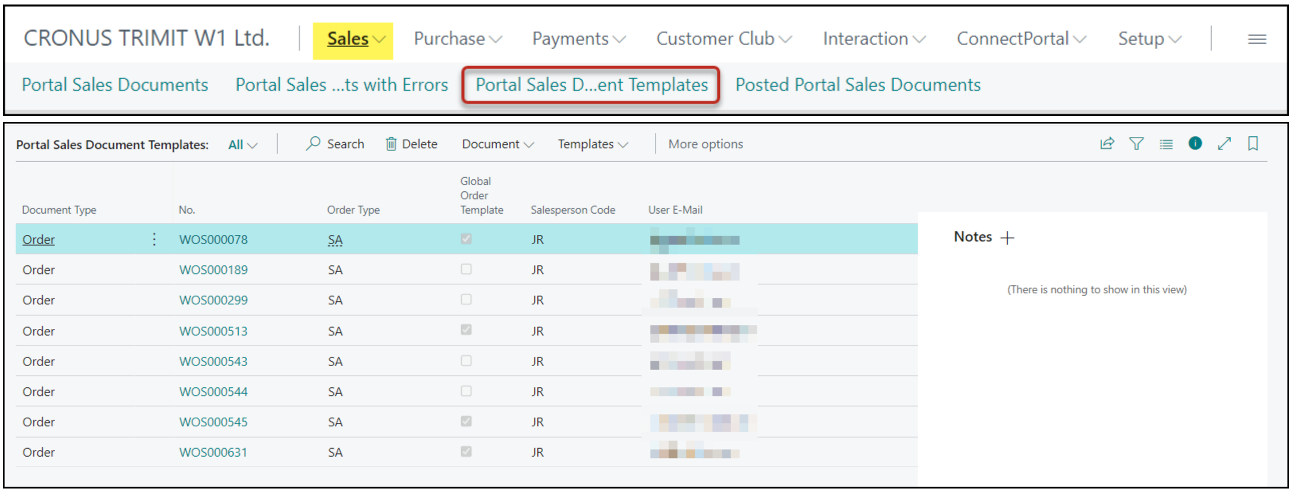


Global Templates are available for all Sales Agents. Sales Agent with administrative privileges can mark an Order Template to be *Global* (on **Order Details** page). The actions like Edit and Delete Global Order Template are only available for the Sales Agent who created it.



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*:



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.

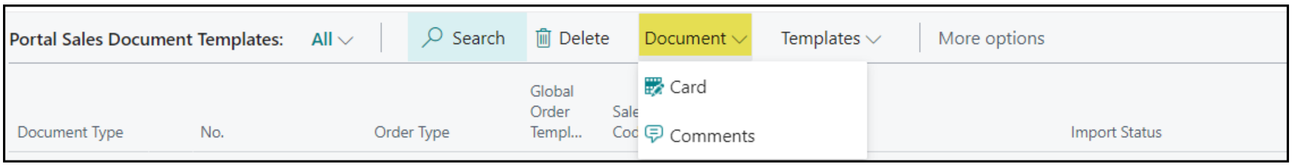
MODIFIED DATE

Date the Order Template was last modified on.

IMPORT STATUS

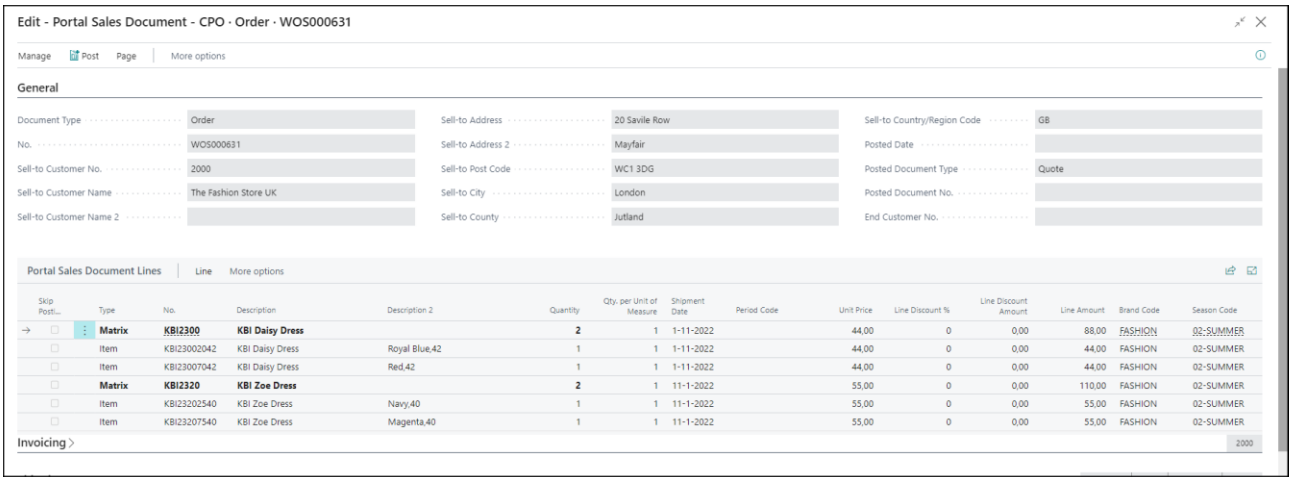
Advanced Sales Integration status.

DOCUMENT



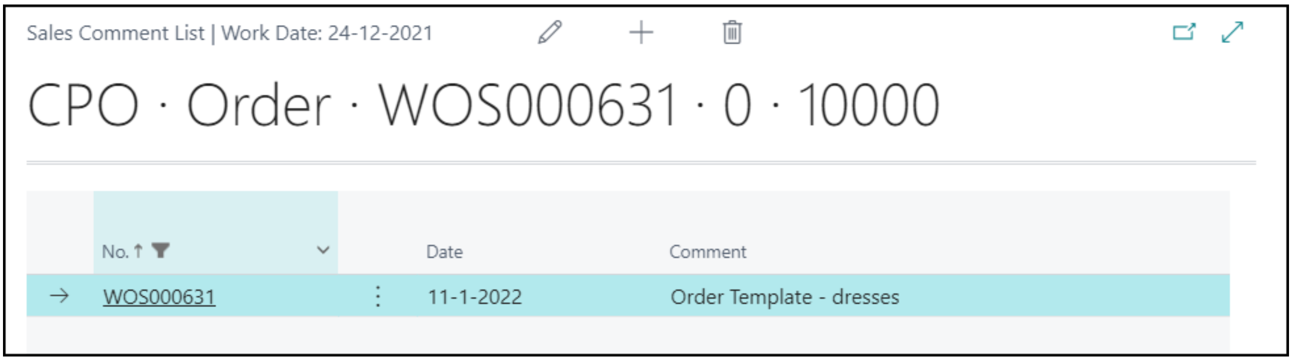
CARD

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

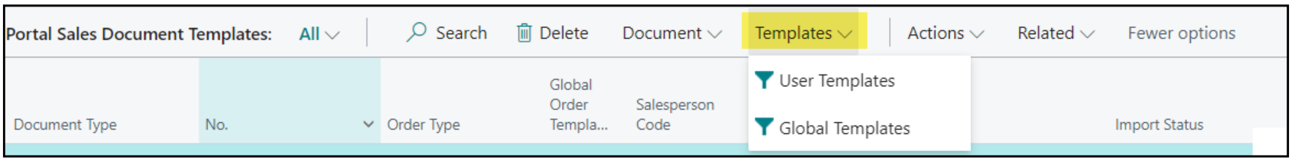


COMMENTS

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



TEMPLATES



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

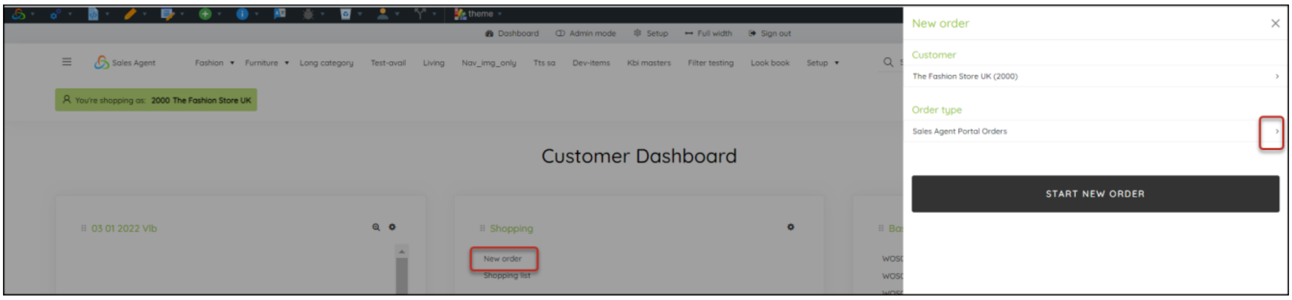
Has the same options as ***Templates*.**

CLOSING ORDER TEMPLATE ON SA

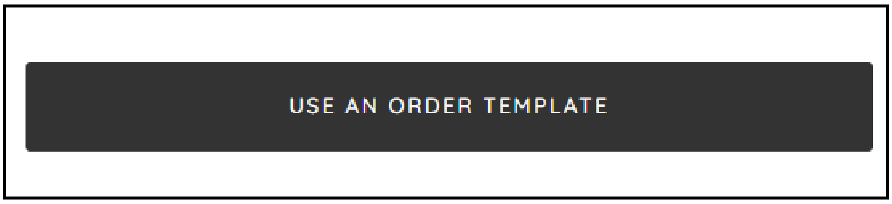
If Sales Agent wants to create an Order Template, it is needed to create an Order with required Items and proceed from **Basket** page to **Order Details** page.
Here it is necessary to set field **Mark as order template** to *TRUE*. Then it is also possible to mark Template as *Global* by setting checkmark 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

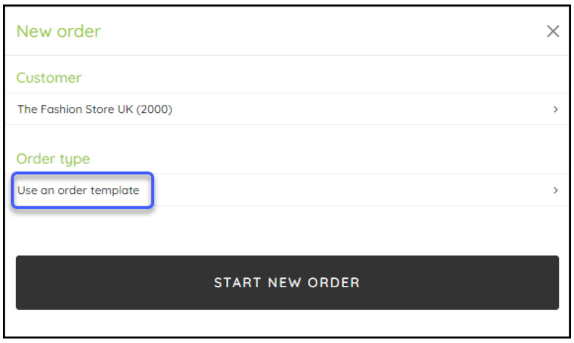
After Order Templates have been created, they can be used to create new Orders on the SA Portal.
After a Customer has been chosen, and you clicked ***New order***, you need to click on the **>** of the Order Types:



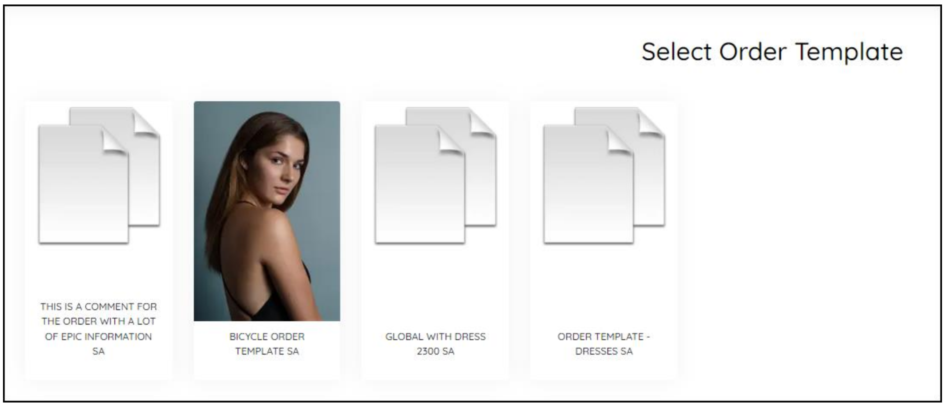
In the bottom of the list with possible **Order Types**, you will now see:



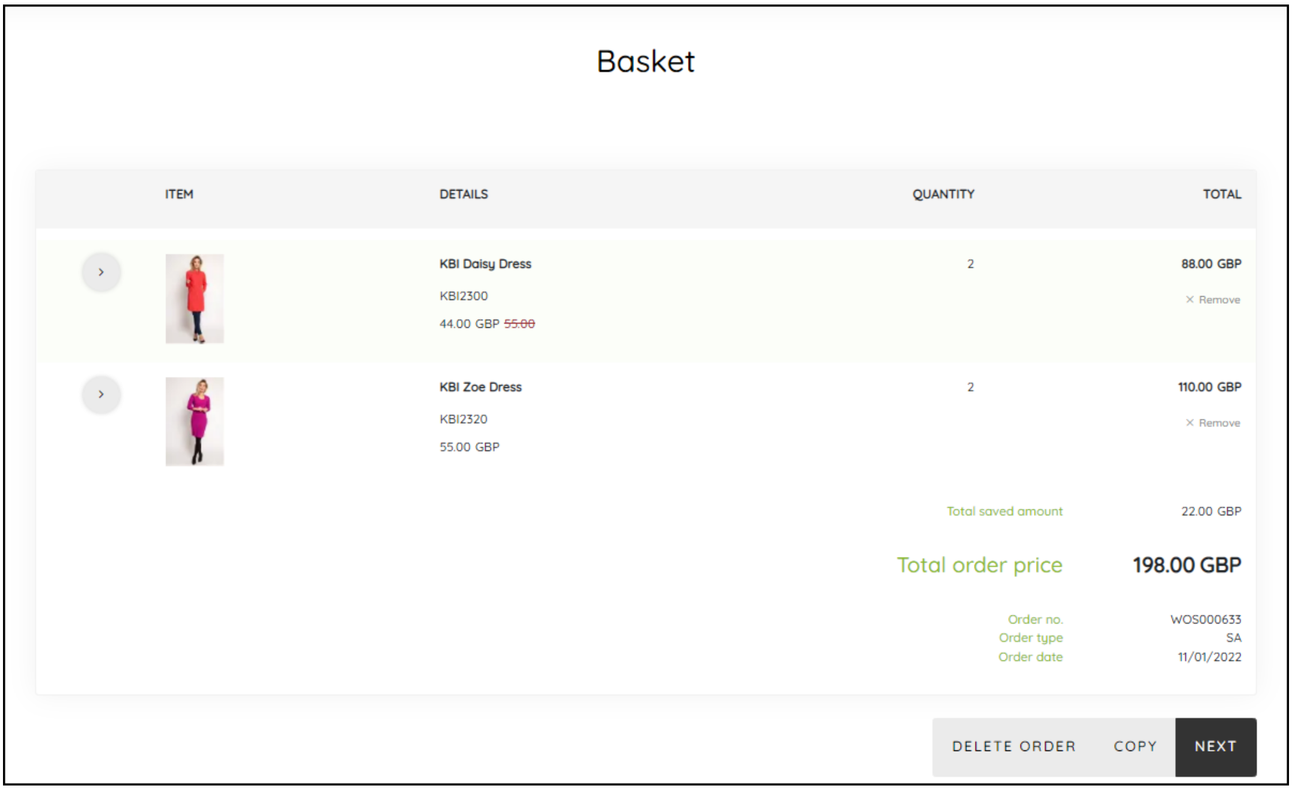
If you click on this, **Use an Order Template**, you can see the Order Templates after clicking **Start New Order:**



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.**



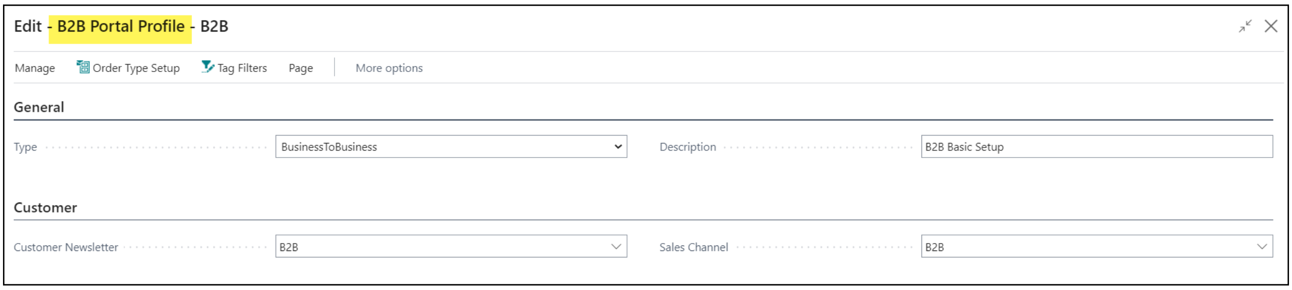
After choosing an **Order Template**, the order lines will automatically be copied into a new Order, and you are able to edit them or add new lines to it.



B2B PROFILE

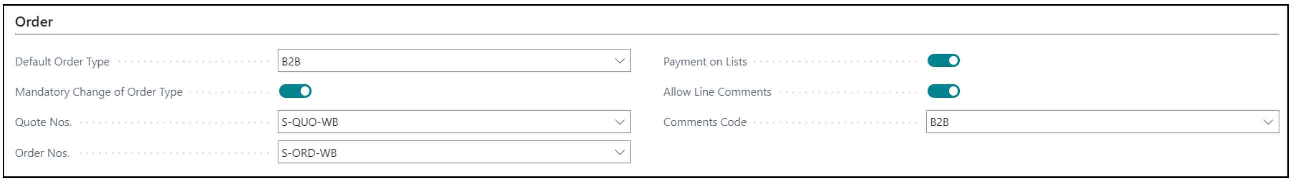
To open the B2B Portal Profile (called *B2B* in our Demo Company) page click on **Code** *B2B.*
Or click ***+ New*** to create a new Portal Profile with **Type** *BusinessToBusiness.*
The **Type** and **Description** were already filled in the **Portal Profiles**.
Based on the **Type** *BusinessToBusiness* 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



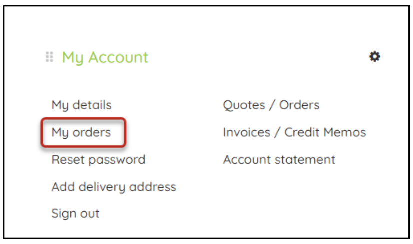
Type needs to be *BusinessToBusiness* for the Portal Profiles that are applicable for **B2B Webshop(s).**

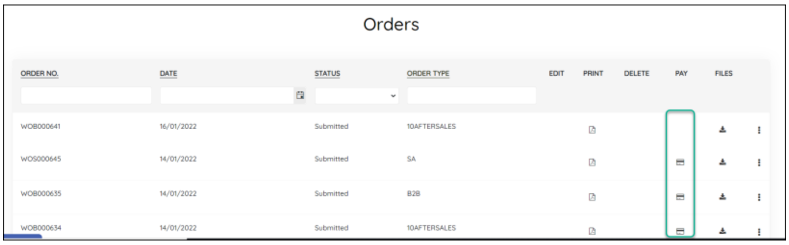
FASTTAB ORDER

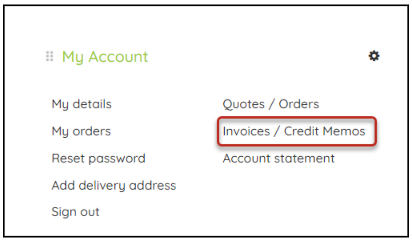


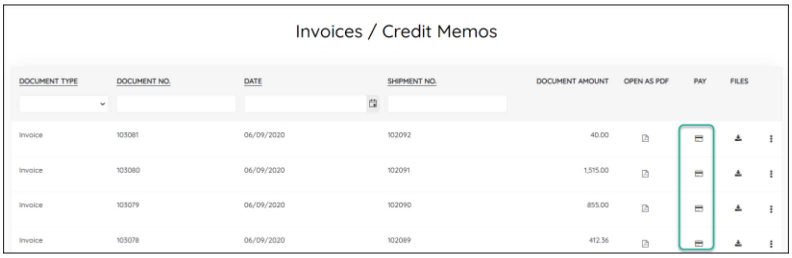
PAYMENT ON LISTS

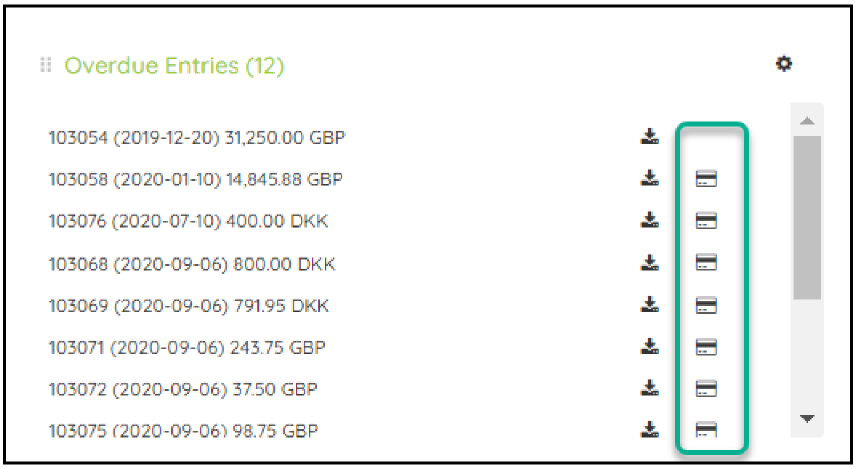
If this field is set to *TRUE*, then Payment-icon will be shown for the relevant Sales Documents in the ***My Orders*** and ***Invoices/Credit Memos*** pages (in the ***My Account*** dock) and in dock ***Overdue Entries*** on B2B dashboard. Clicking on this Payment-icon will open Payment pop up window.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



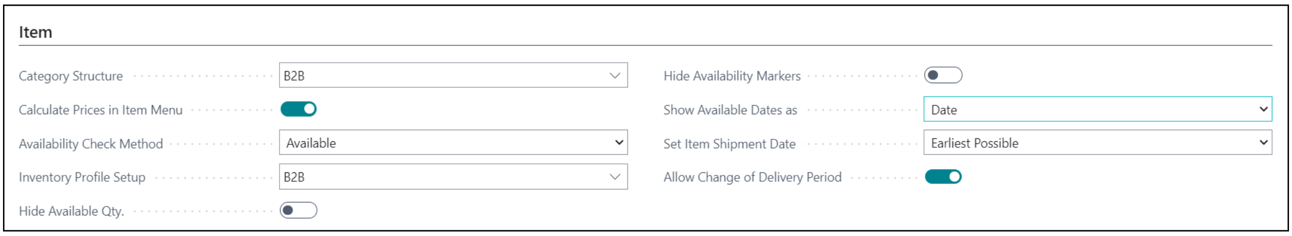




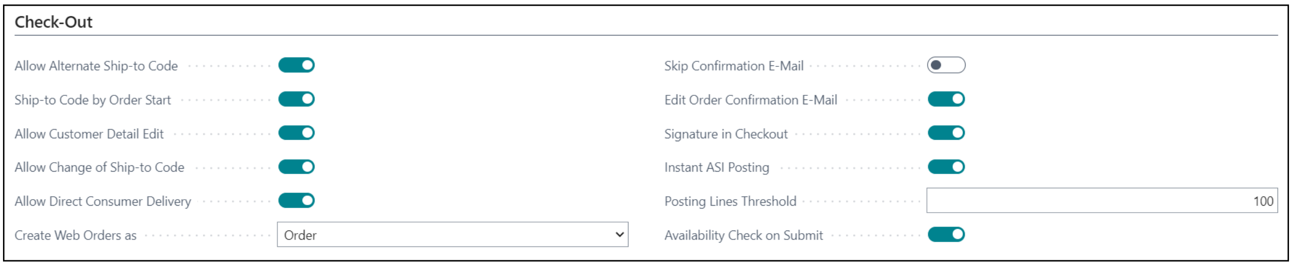




FASTTAB ITEM



FASTTAB CHECK-OUT

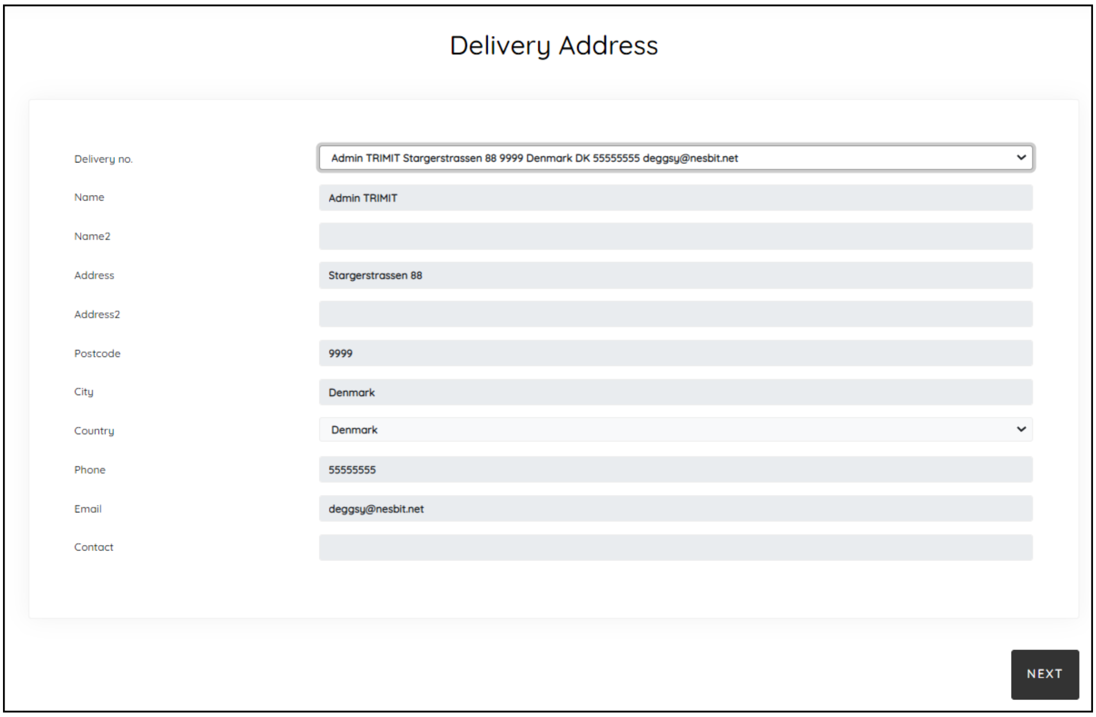


SHIP-TO CODE BY ORDER START

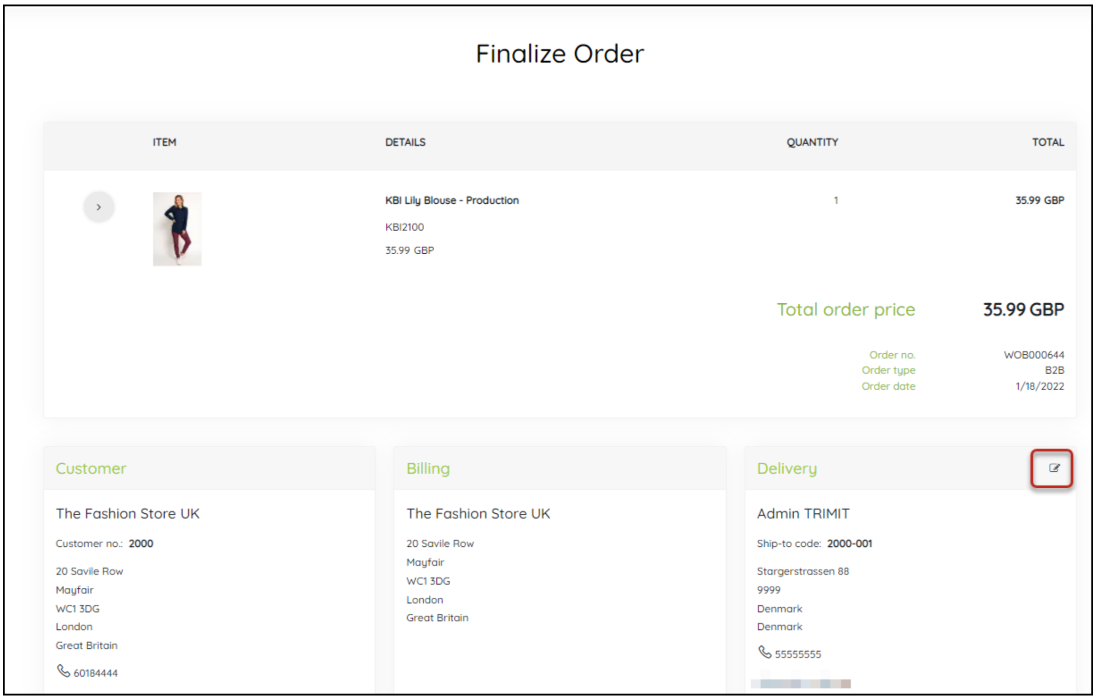
This is a Boolean field. Allows whether to set or not set **Delivery Address** page right after initiating a new Order on B2B Webshop.

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.*



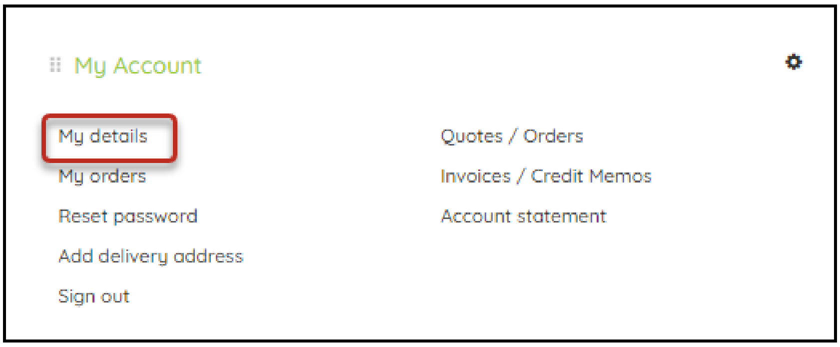
After initiating Order

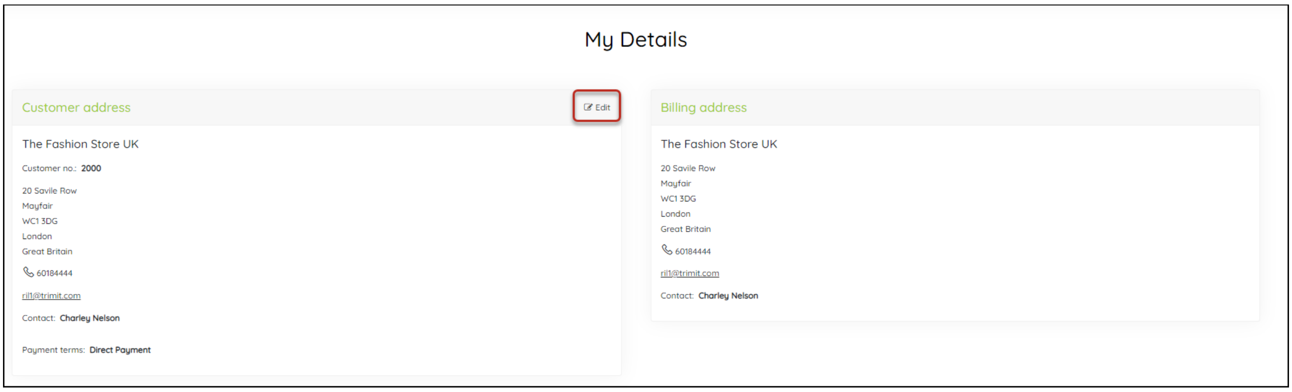


When finalizing the Order.

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.



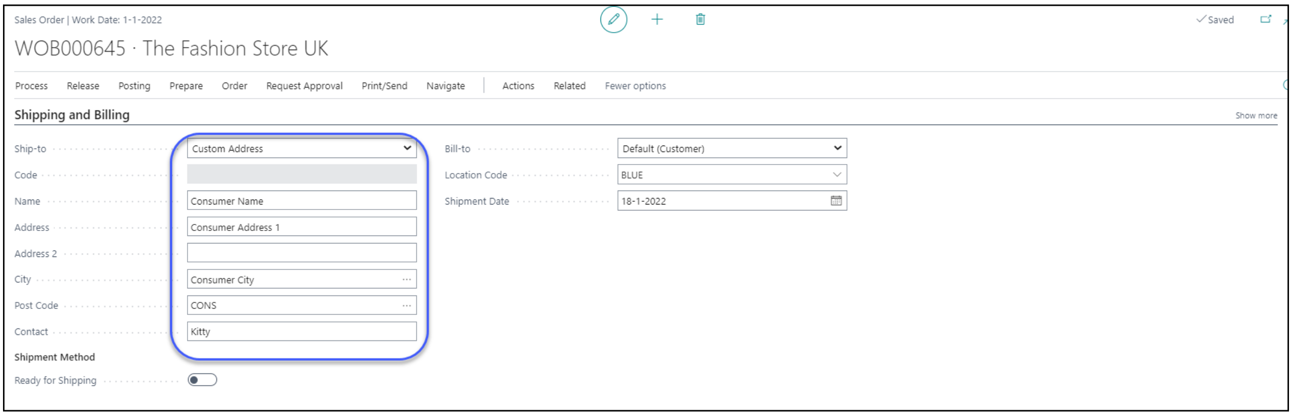


ALLOW DIRECT CONSUMER DELIVERY

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)

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

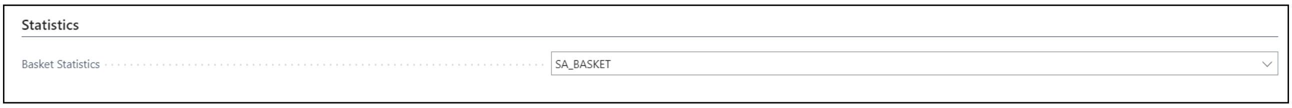
After the Order has been submitted to TRIMIT, this Address will be shown as **Ship-to Address** in the Sales Order.



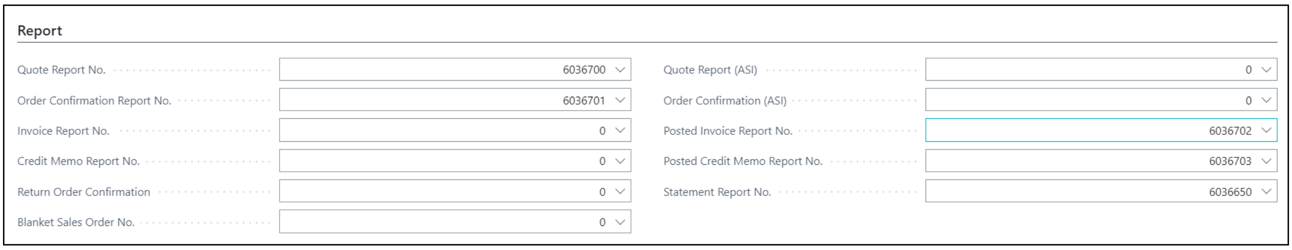
FASTTAB ACTIONS

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.

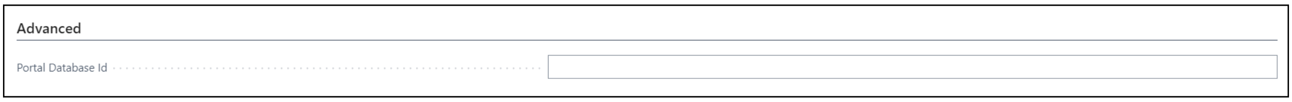
FASTTAB STATISTICS



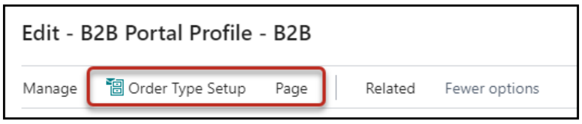
FASTTAB REPORT



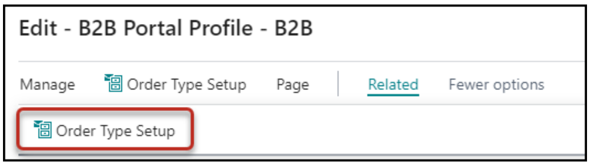
FASTTAB ADVANCED



ACTIONS IN B2B PORTAL PROFILE



RELATED IN B2B PORTAL PROFILE



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.*

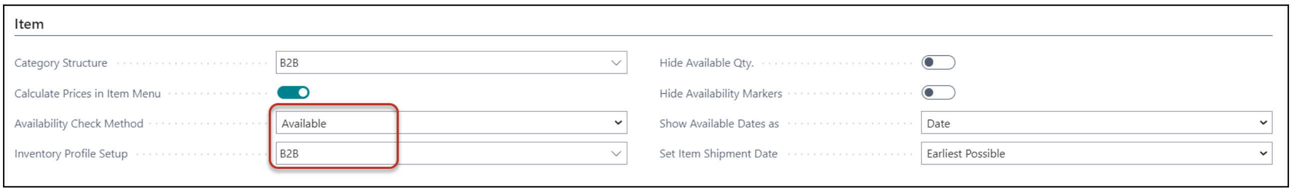
If Customer has one or more Delivery Addresses but none of them is set as default (field **Default Ship-to Code** is set to *TRUE* in TRIMIT) then, when entering **Delivery Address** page, it displays Customer address data by default.
Different Delivery Address can be selected from **Delivery no.** drop-down 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 filed 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.

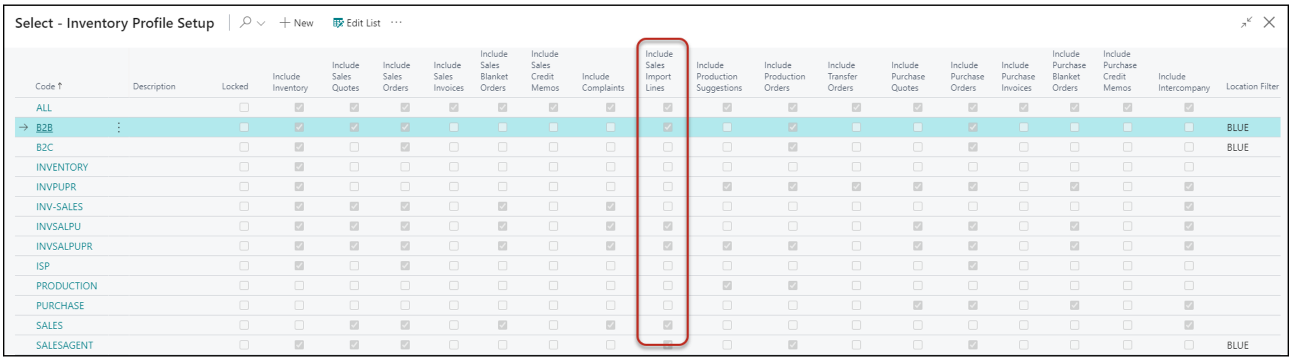
It is also possible to make changes to Delivery Address on the **Finalize Order** page, i.e., the final page of the Order creation process. Here it is also possible to set **Direct consumer delivery address**. The precondition is that both fields **Allow Alternate Ship-To Code** and **Allow Direct Consumer 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:***



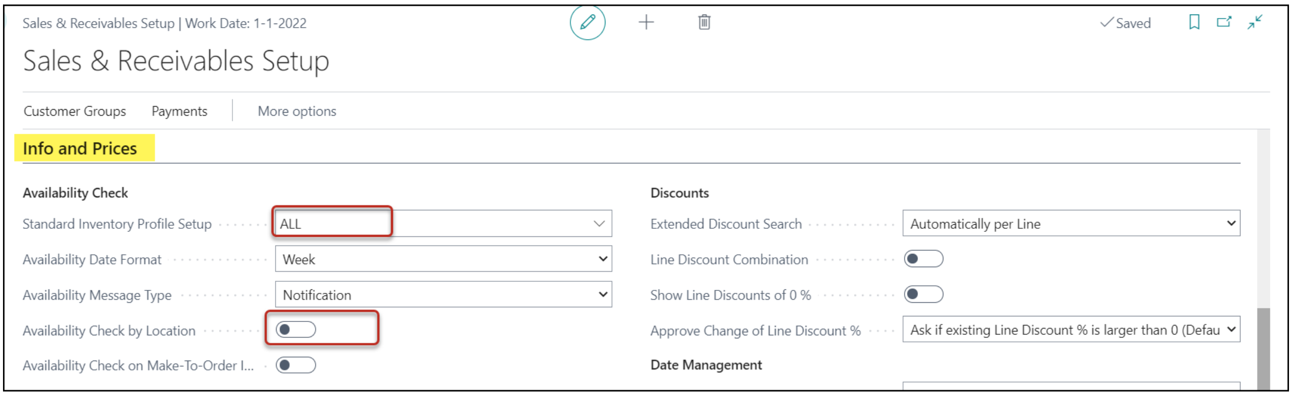
Inventory Profile Setup page:



NOTE

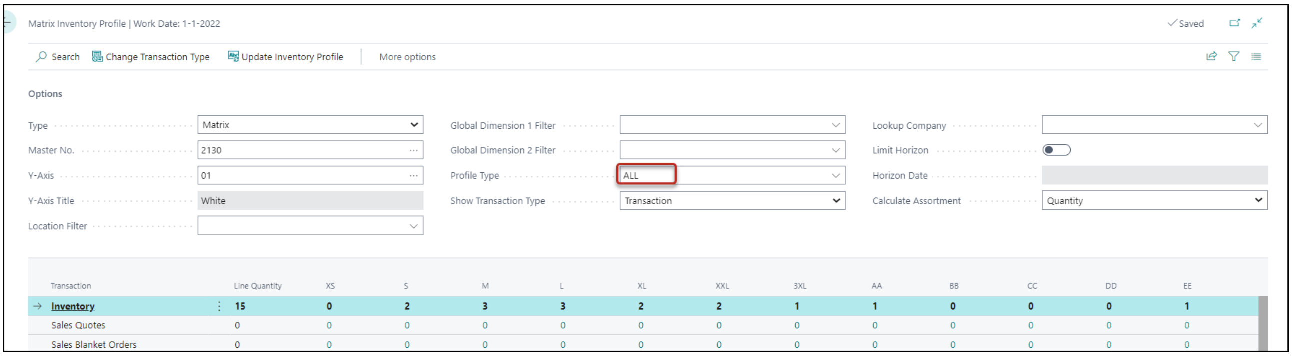
In order to compare the Availability shown on Matrices in B2B Webshop and the Availability in TRIMIT (via a Master or Order Line), following fields in TRIMIT need to have the same value, i.e., *ALL.*

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

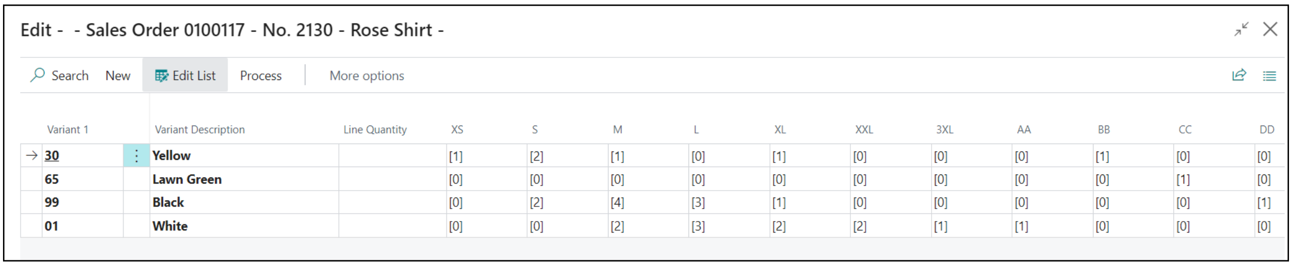


Field **Profile Type** in ***Matrix Inventory Profile***

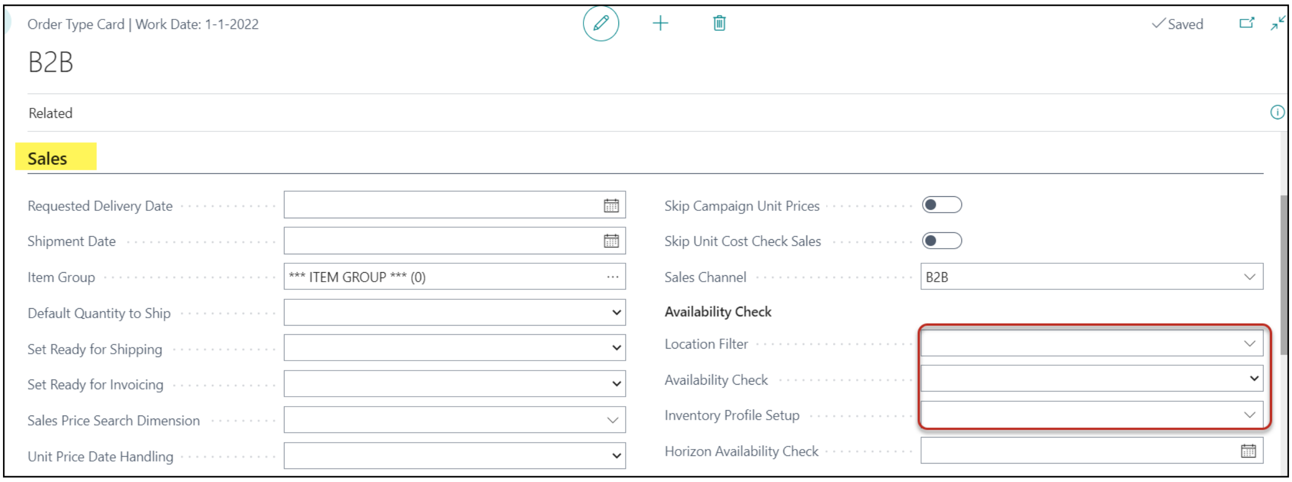
(I.e., via Master Card of *2130*, click ***Process, Inventory Profile***)



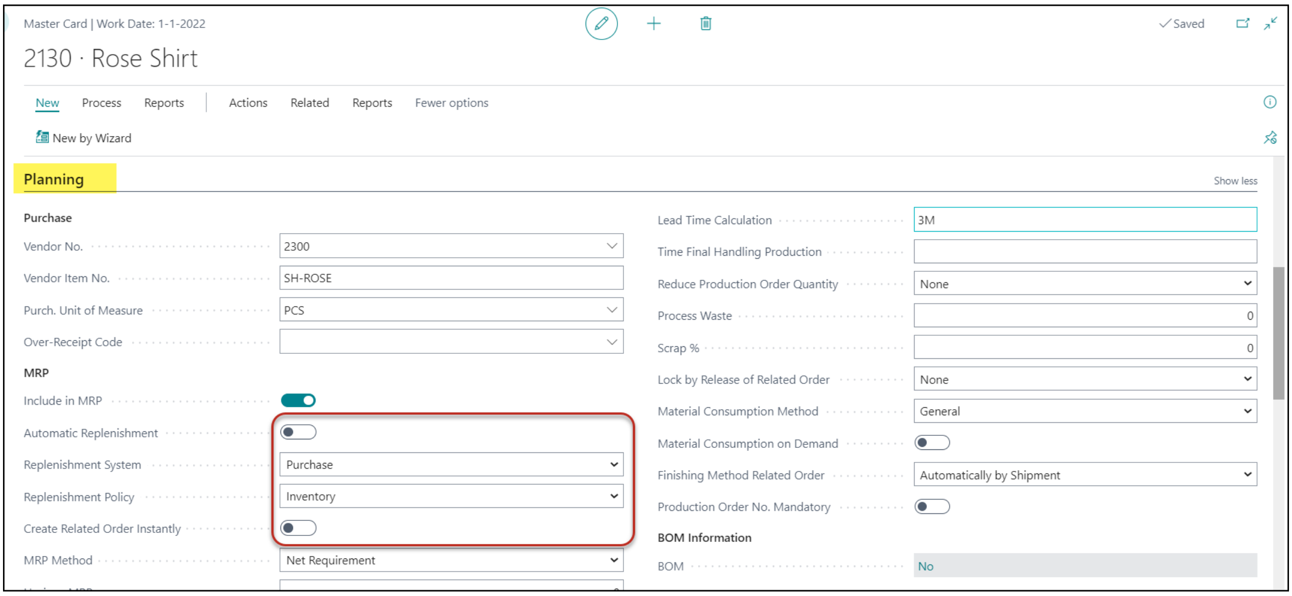
Then Item Availability corresponds (on page **Sales Order** while adding new Item to a Sales Line):



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



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



ITEM RESERVATION AND AVAILABILITY ON PORTALS

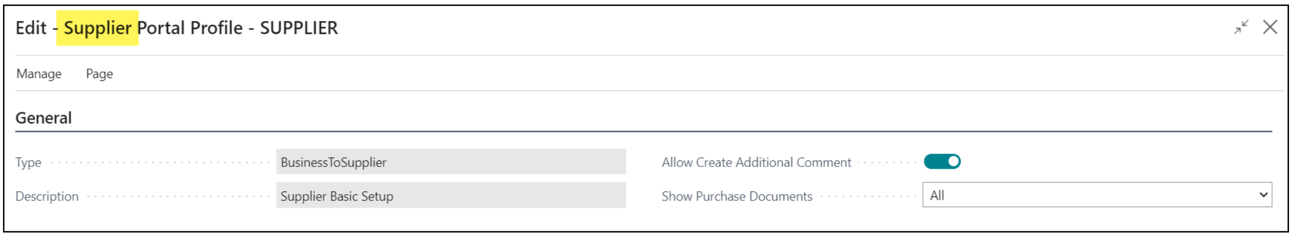
Product related data is synchronized between TRIMIT and SA Portal and B2B Webshop (read more about this in ***White Paper – TRIMIT Portals Schedules***).
It is also possible to 'reserve' Items on B2B Webshop and SA Portal. Item is included in Availability when placed into Basket, under condition that 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

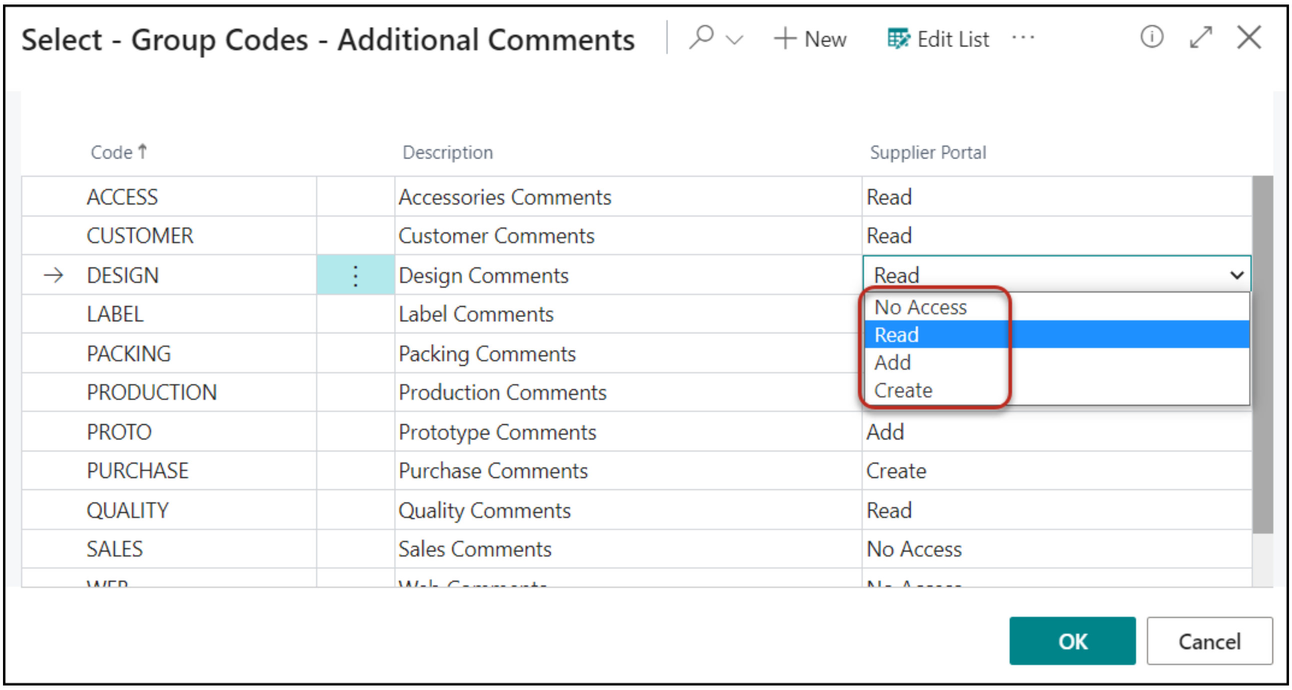
Select Portal Profile Type.
Available options are *BusinessToBusiness, BusinessToConsumer, SalesAgent, BusinessToSupplier, InstoreB2C, PIR, InSite.*

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.**



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:

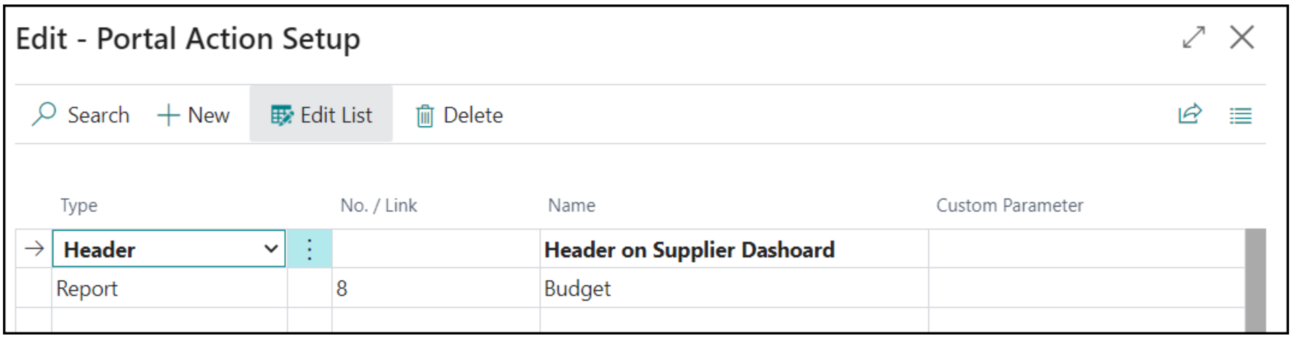
All	All Purchase Quotes and Purchase Orders will be shown.
Only Open	Only Purchase Quotes and Purchase Orders with **Status** = *Open* will be shown.
Only Released	Only Purchase Quotes and Purchase Orders with **Status** = *Released* will be shown.

FASTTAB ACTIONS

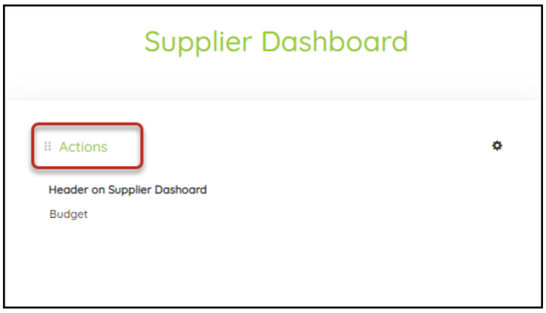
DASHBOARD

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.

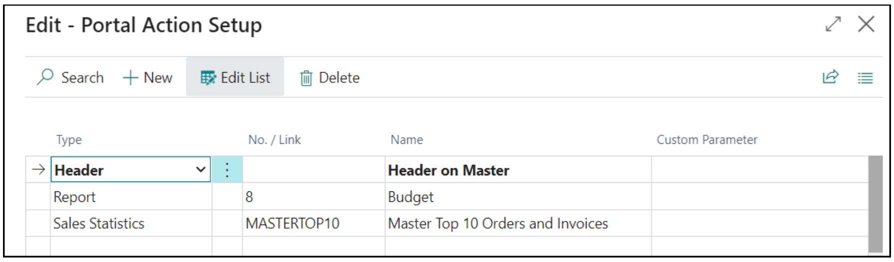


See FastTab Page Actions for more details.

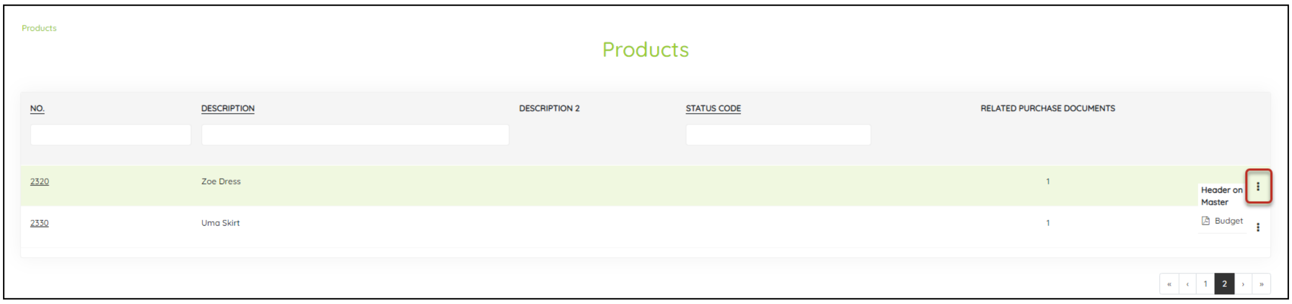


MASTER

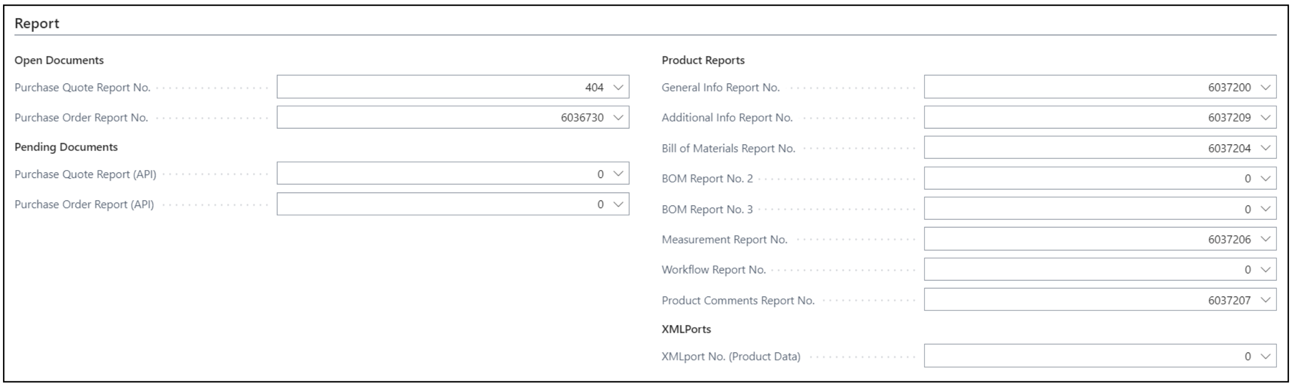
You can determine which **Actions** should be shown on the **Products** page of a Supplier.
Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.



See FastTab Page Actions for more details.

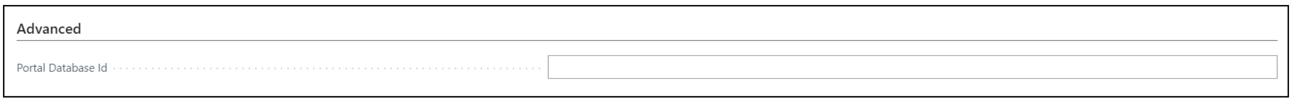


FASTTAB REPORT



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

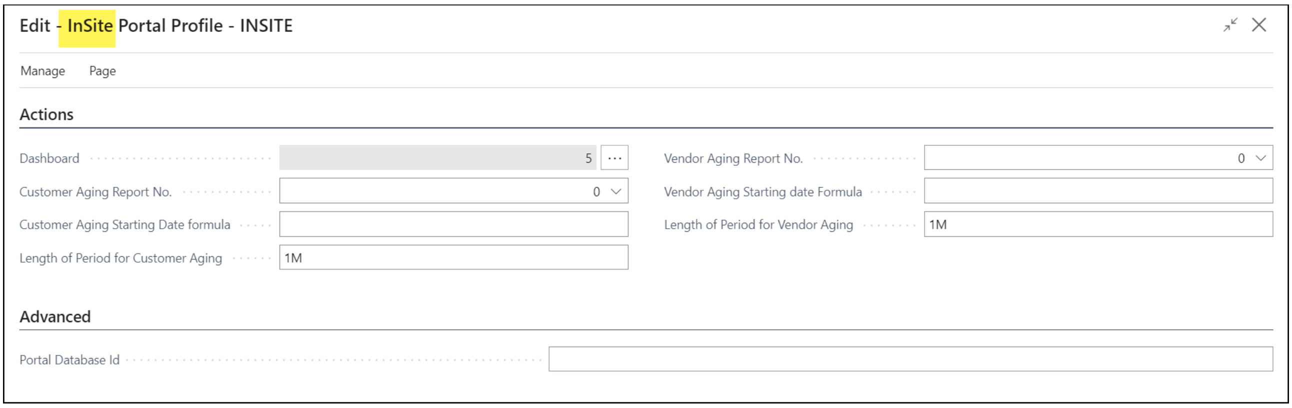


See FastTab Advanced for the details.

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.***

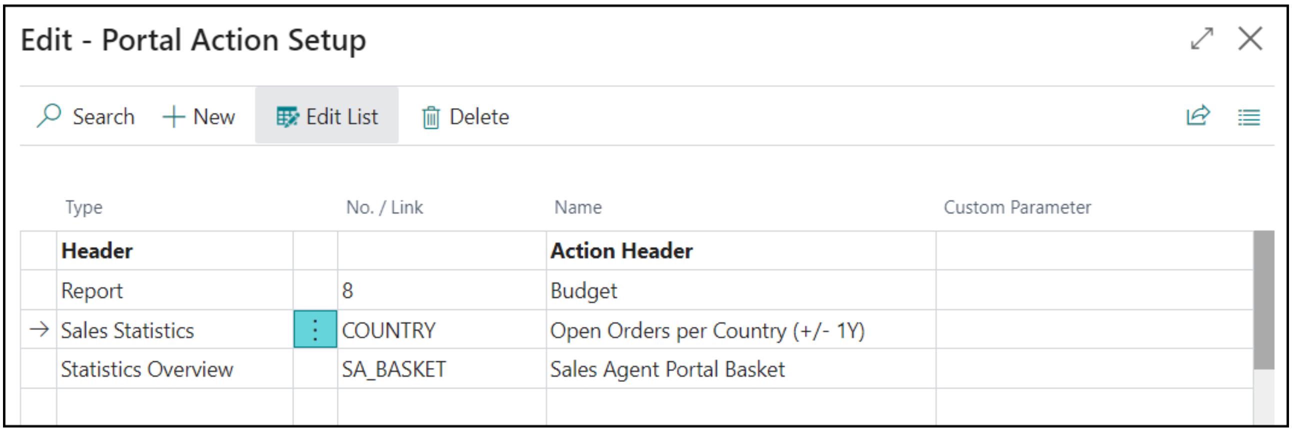
Based on the **Type** *InSite* the page ***InSite Portal Profile*** will open.



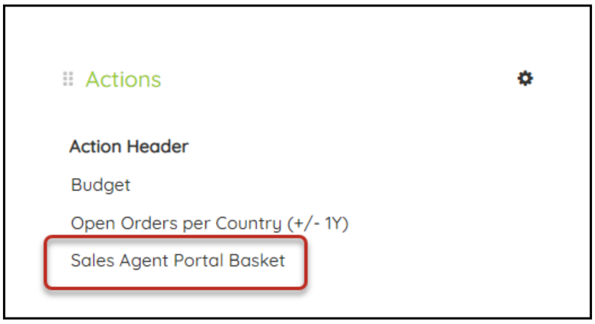
FASTTAB ACTIONS

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.



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***.***

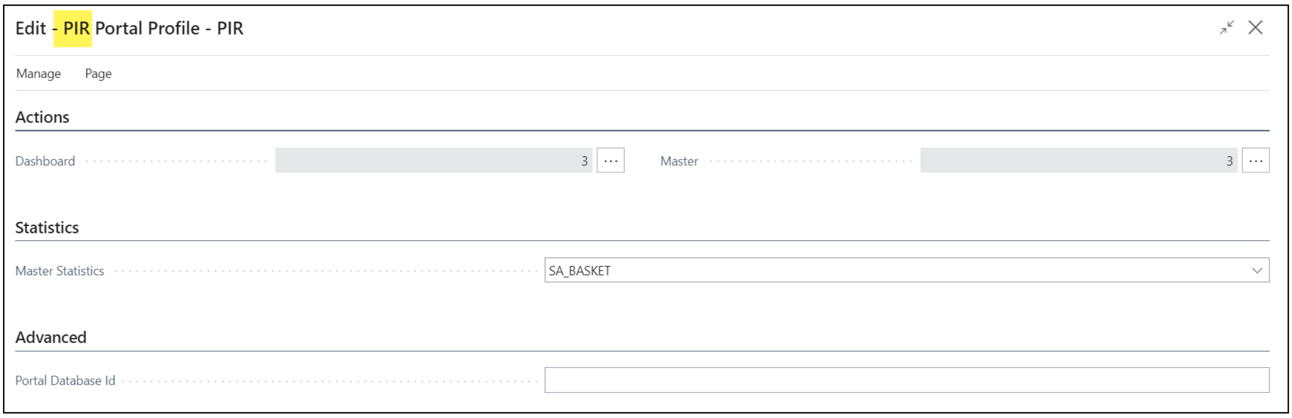
VENDOR AGING STARTING DATE FORMULA
If no **Date Formula** is entered the current Date will be used when showing the **Vendor Aging**

LENGTH OF PERIOD FOR VENDOR AGING
If no **Length of Period** is entered, it will be set to *1M*.

FASTTAB ADVANCED

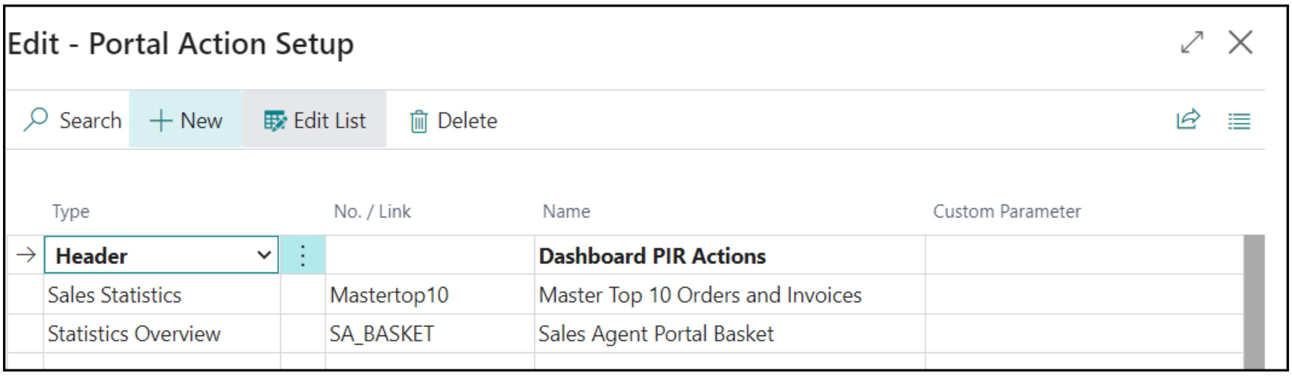
PORTAL DATABASE ID
See Portal Database Id for details.

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.

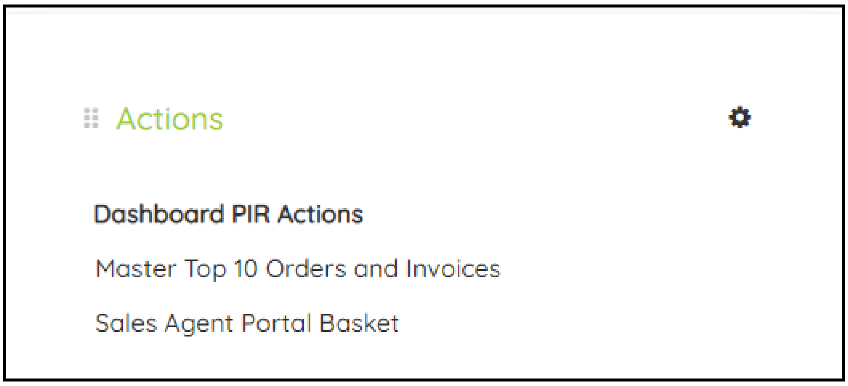


FASTTAB ACTIONS

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.

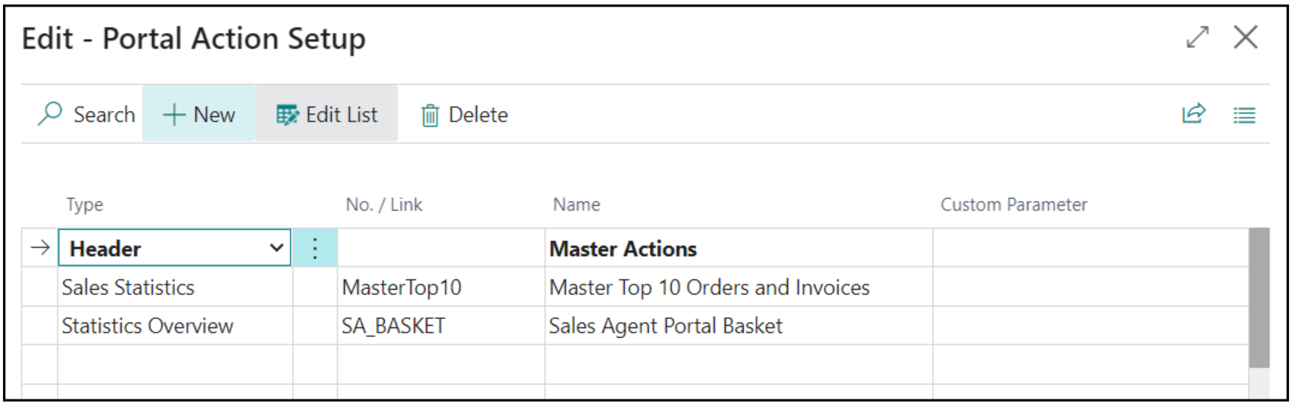


See FastTab Page Actions for more details.

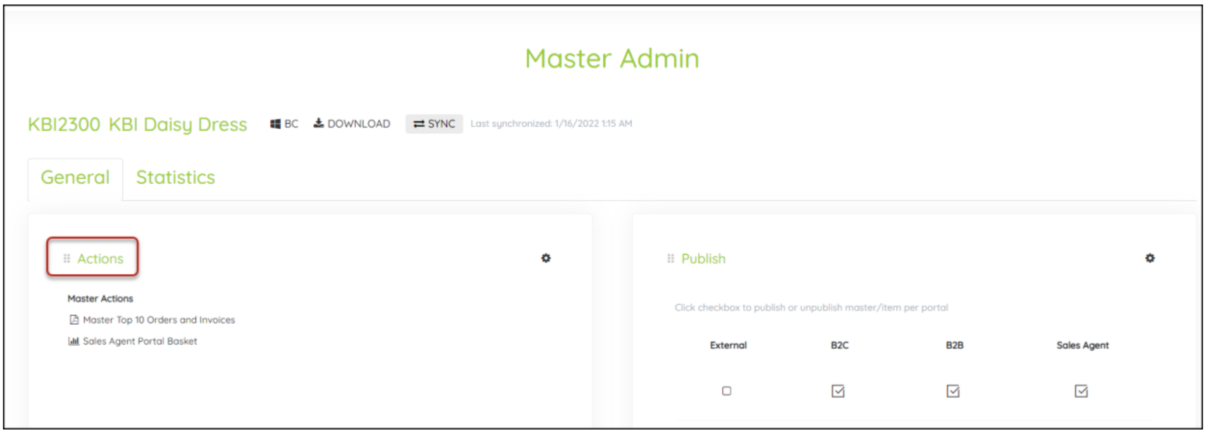


MASTER

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.



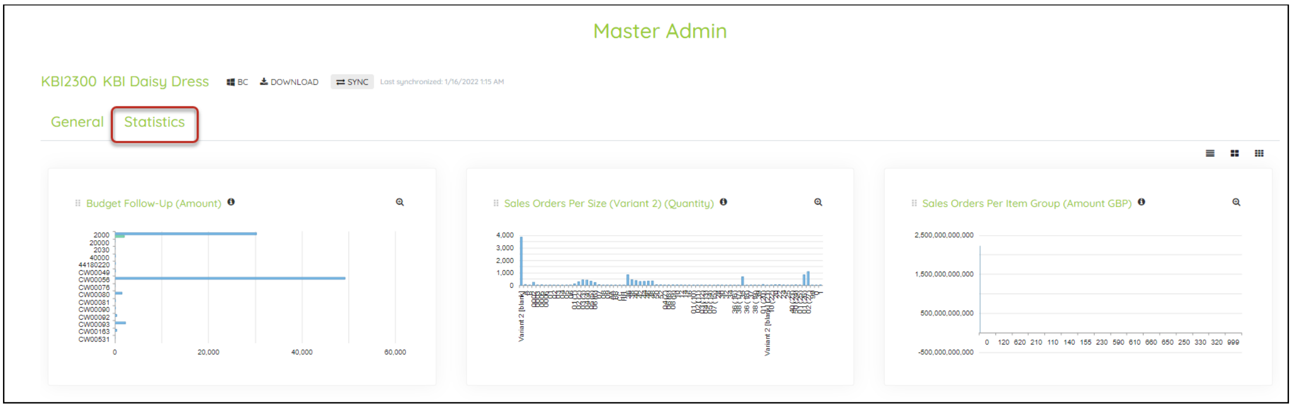
See FastTab Page Actions for more details.



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

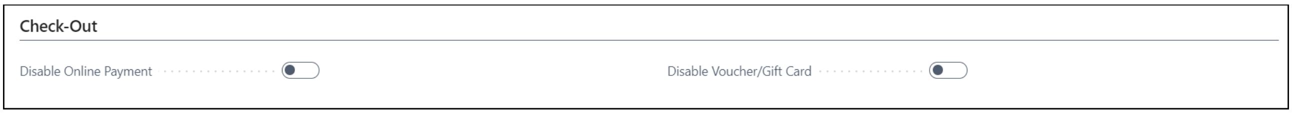
InStore B2C can be used by an employee in a Store that will enter a Sales Order for a Consumer for products that might not be available in the physical Store.

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.

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



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***.

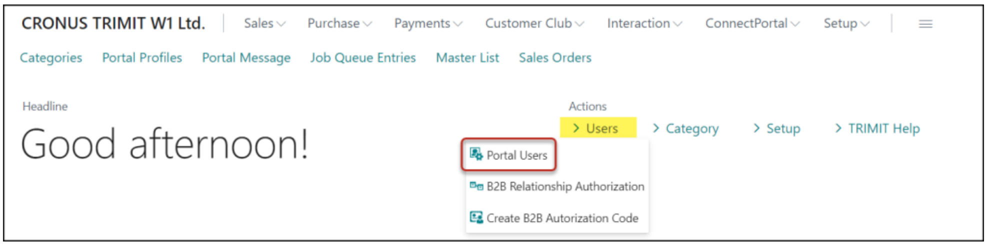
USER RELATIONSHIP MANAGEMENT

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

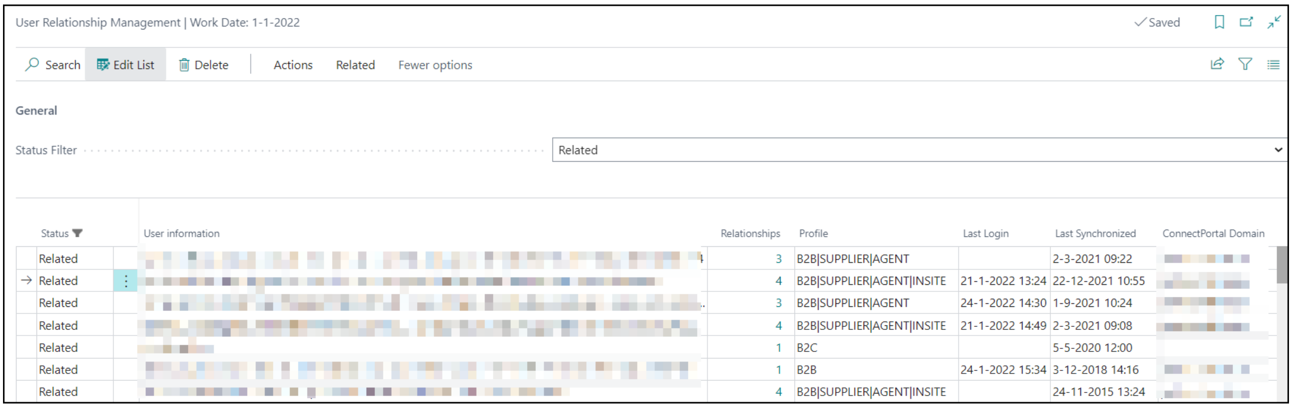
Example:
Andy Teal is a person working for *The Cannon Group PLC* and he is the person going to do the purchase through the B2B Webshop. Then you must go through 3 steps:

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.

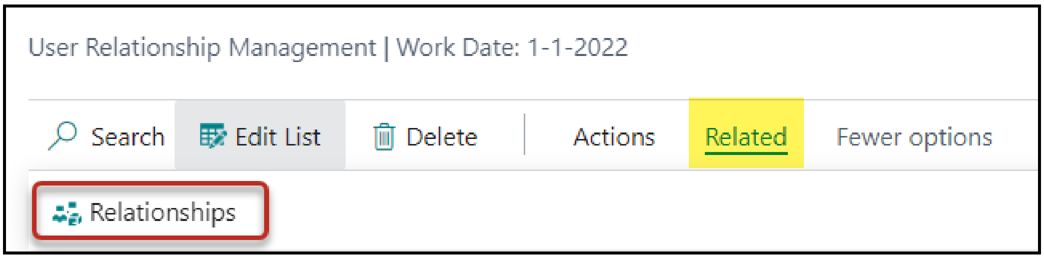


Change the **Status Filter** to see different filters on the synchronized Users.
You can choose between the following four options for the **Status Filter:**

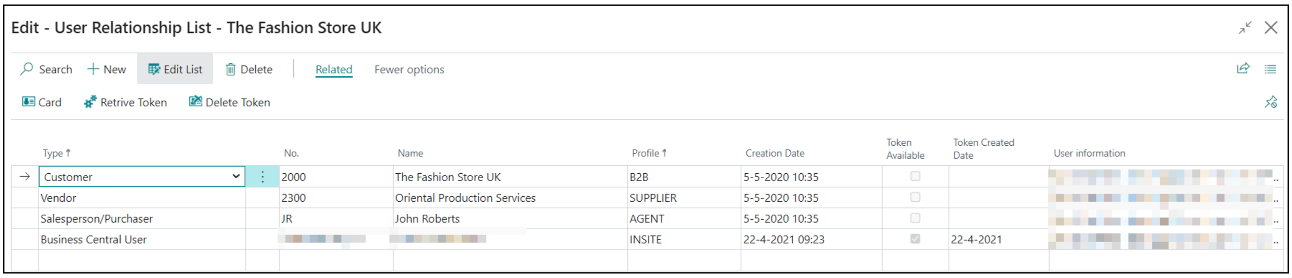
New	The synchronization sets this as the default value, when creating new users for the Portals
No Relation	Shows all users that are not related to a table in TRIMIT
Related	Shows all users who are already related to a table in TRIMIT
All	Shows all users of the above three options

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:



DESCRIPTION OF THE FIELDS

TYPE

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

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

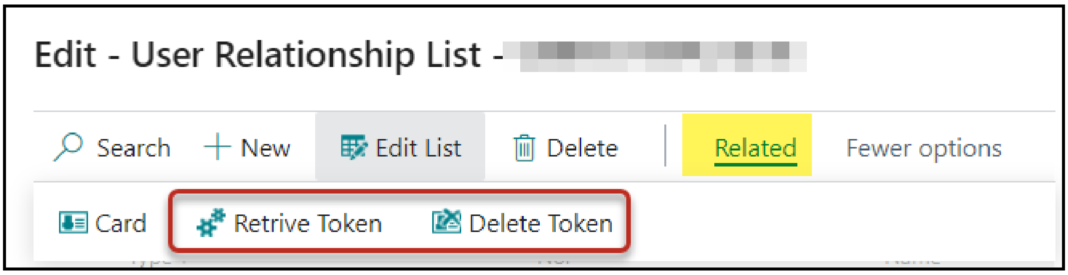
Lookup in this field will open the **Portal Profile List**. This field defines if the User will have access to the Portal related to the **Portal Profile** and as which User (Customer, Vendor, Salesperson).

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

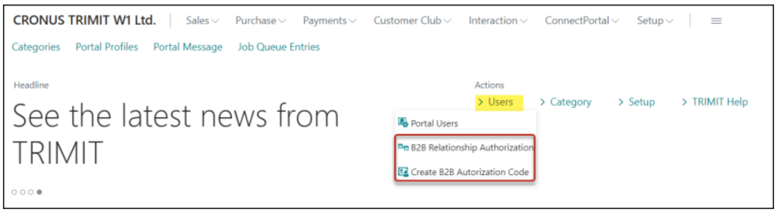
After clicking ***Retrieve Token***, if succeeded, field ***Token Created Date*** will contain the current date.
After clicking ***Delete Token*** this field will be set to blank.
Read more about this functionality in chapter *User Mapping and Token Authentication*.

USER INFORMATION

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

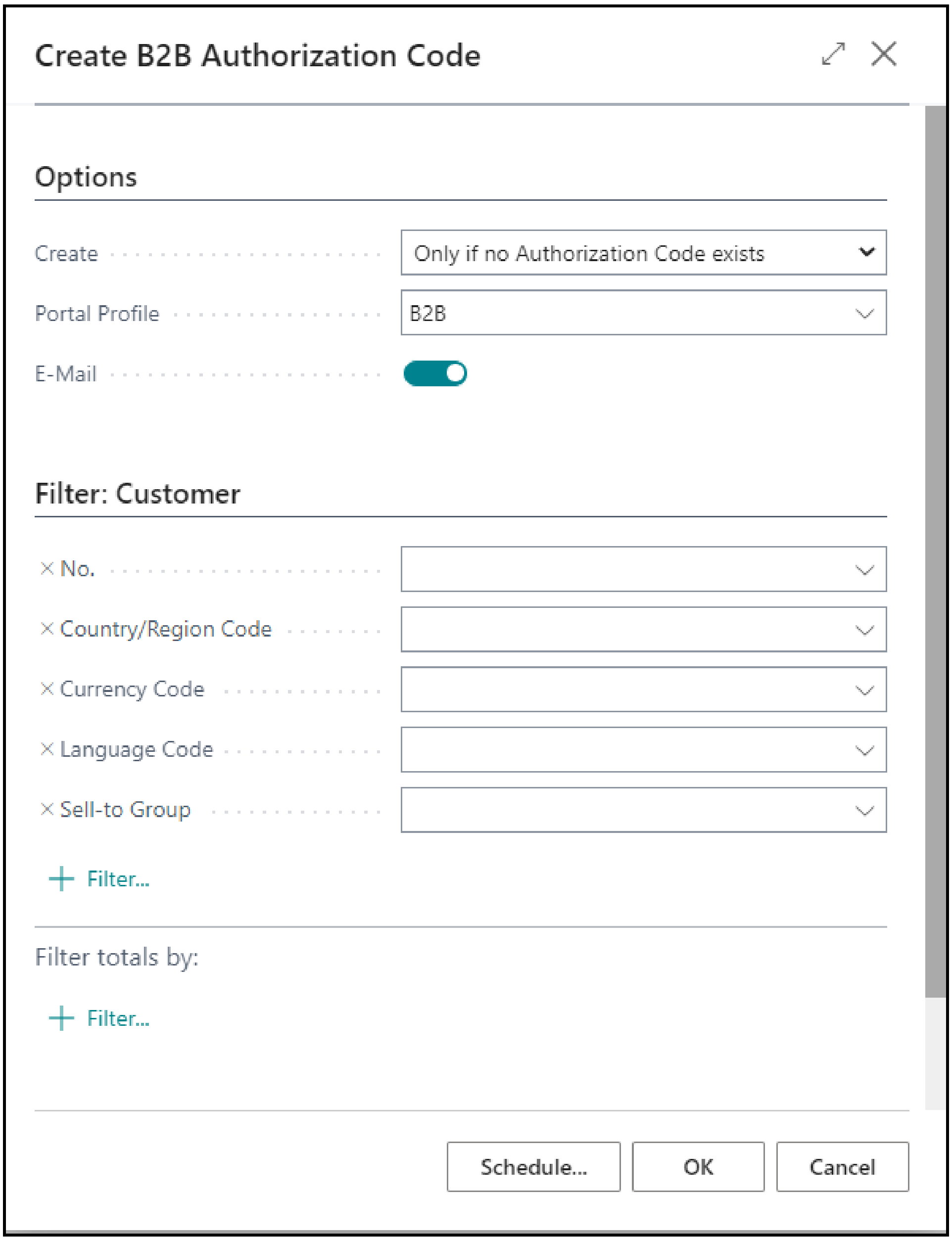
CREATE NEW CUSTOMER ON B2B

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

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.

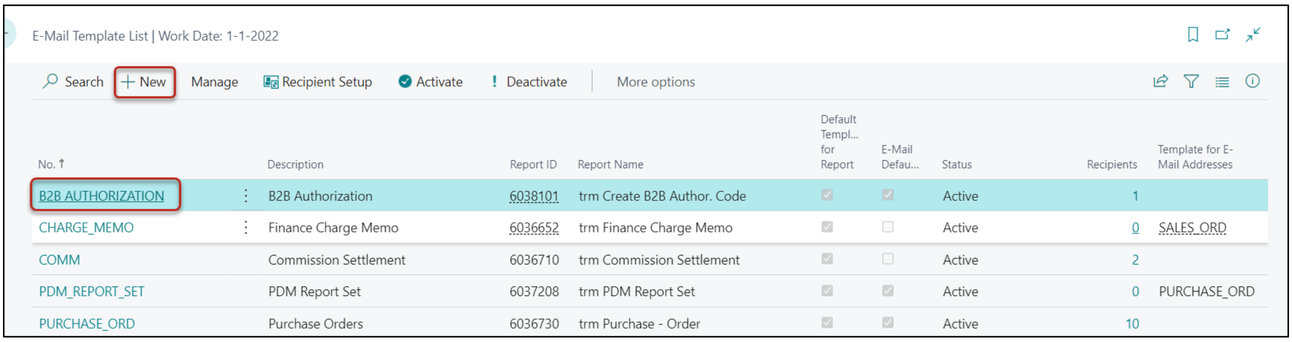
PORTAL PROFILE

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*.



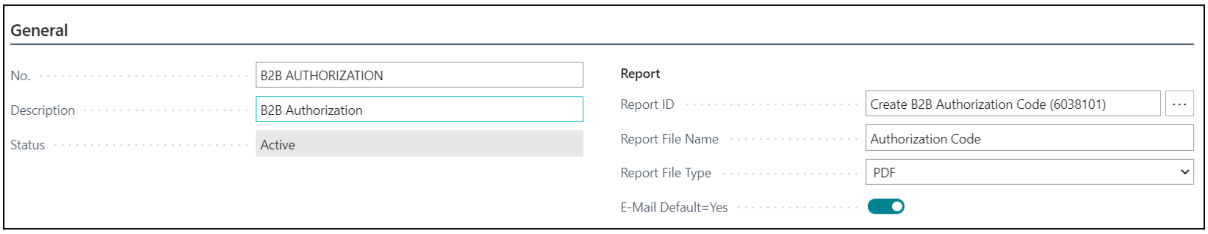
E-Mail Template List | Work Date: 1-1-2022

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	

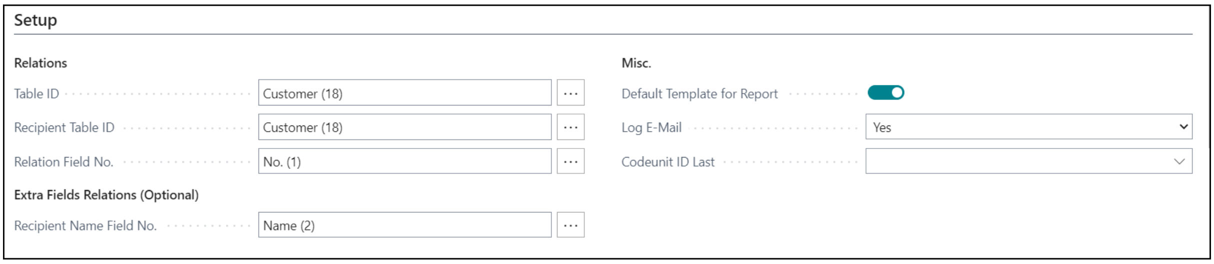
To see the E-Mail Template Card, click **No.** *B2B Authorization*, to create new E-Mail Template, click ***+ New.*** Here set a **No.** and **Description** to your template. Click **Activate** in ribbon *Manage* to make Template active.

FASTTAB GENERAL



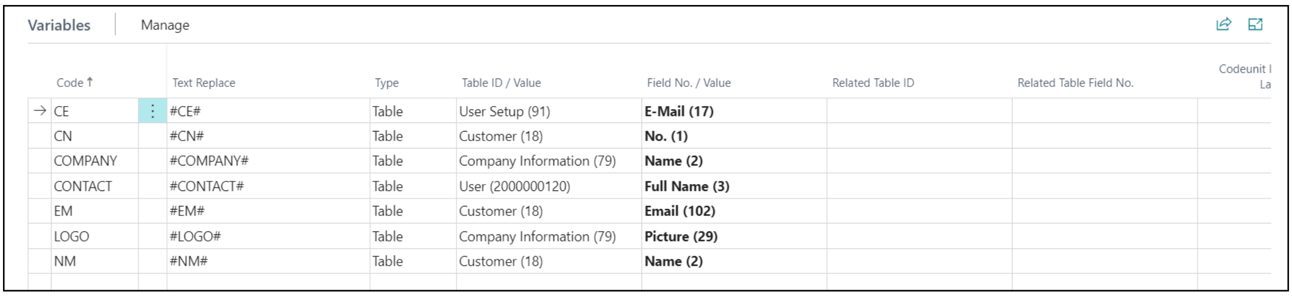
In FastTab ***General*** specify the **Report ID**, in this case *6038101*. This report will be used to generate Authorization Codes and sending E-Mails to Recipients if required.
Set **Report File Name** and select **Report File Type** if required.

FASTTAB SETUP



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

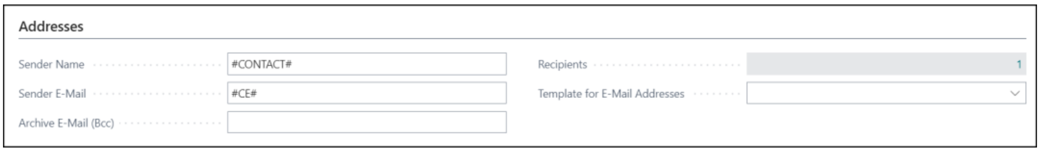


Variables | Manage

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)			

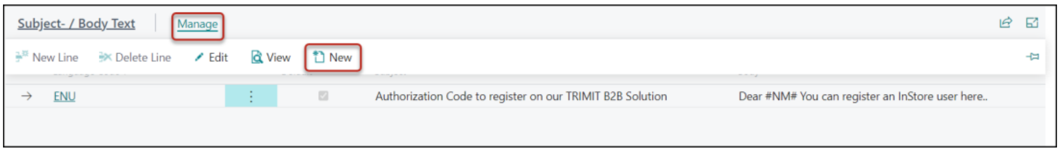
In FastTab ***Variable,*** create required variables. Variables are used the Body Text of the E-Mail.
In this case Variables are used for Customer No., Customer Name, Customer E-Mail, Company Name, Company Logo, Sender E-Mail and Sender Name. Variable *AUTHCODE* is predefined in the AL Code of the Report 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

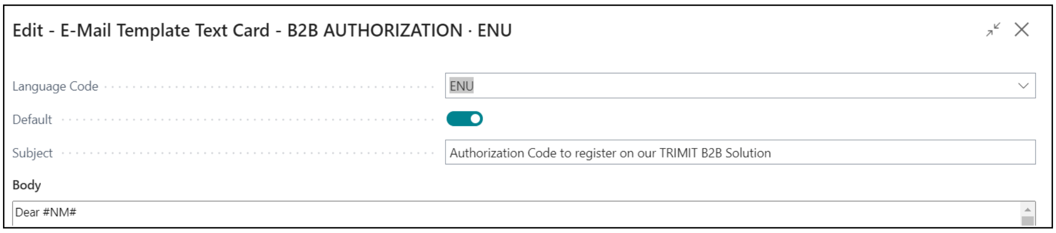


In FastTab ***Address,*** specify **Sender Name** and **Sender E-Mail.**
In this example it will be the Name of the **User** and the E-Mail of the **User Setup** of the user that creates the E-Mail to the Customer, but you also use an actual Name/E-Mail from which you want to send the E-Mail, i.e., portaladministrator@companyname.com

FASTTAB SUBJECT- / BODY TEXT



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



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

Dear #NM#

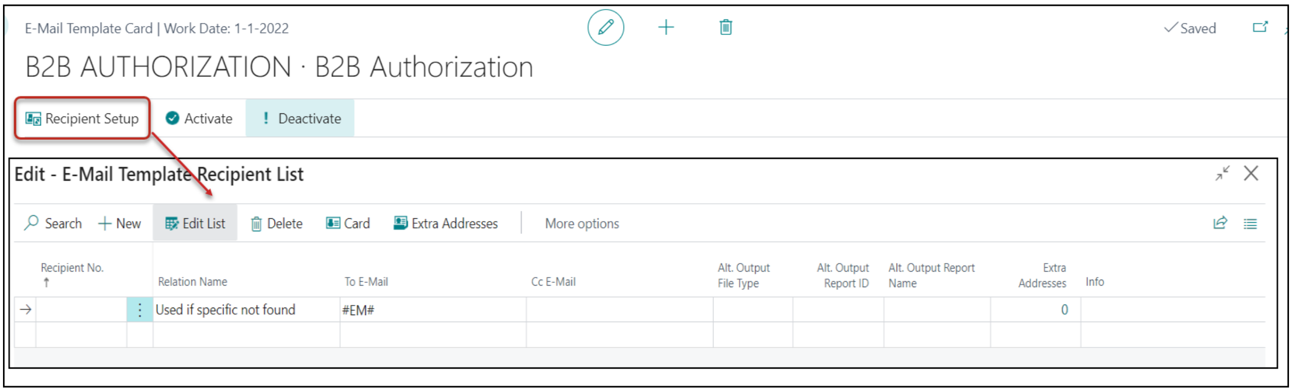
You can register an InStore user here:
InStore Portal User Registration

You can register a B2B user here:
B2B Portal User Registration

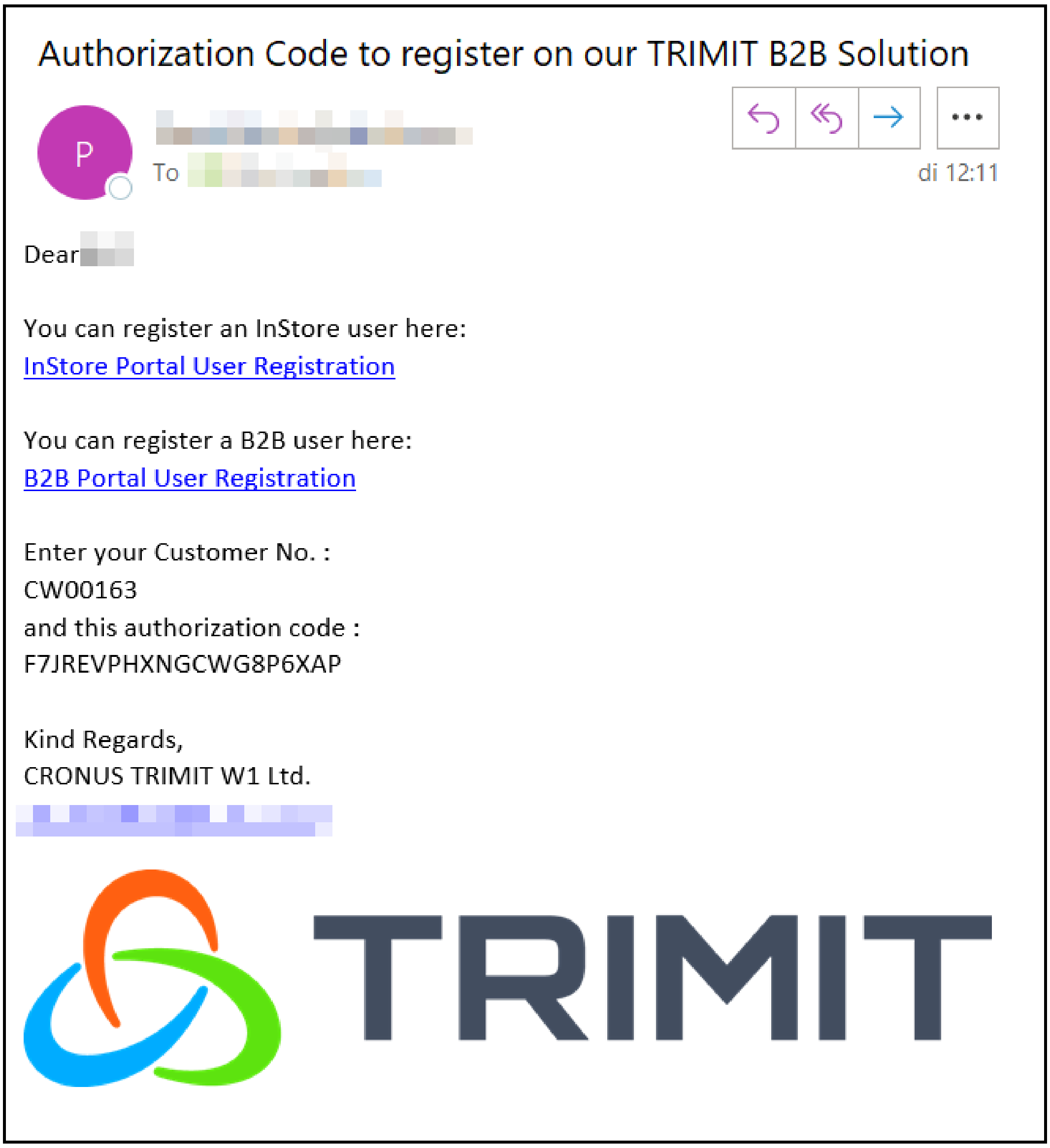
Enter your Customer No. :
#CN#
and this authorization code :
#AUTHCODE#

Kind Regards,
#COMPANY#
#CONTACT#
<img src=cid:#LOGO#>

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

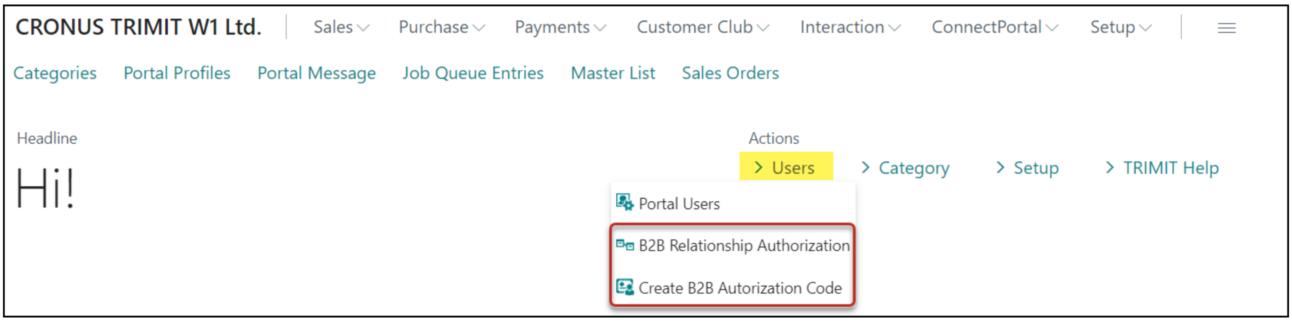


After the setup is done it is possible to create Authorization Codes and send them by E-Mail to Customers
The E-Mail received by the Customer (based on the above Template) will then look as follows:

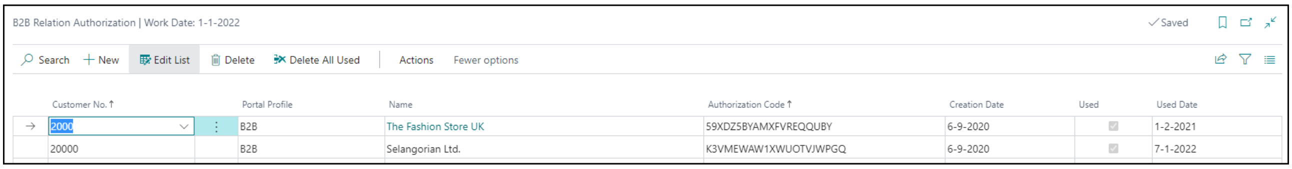


For more information regarding E-Mail Templates refer to ***White Paper – TRIMIT E-Mail***.

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



B2B RELATION AUTHORIZATION



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.

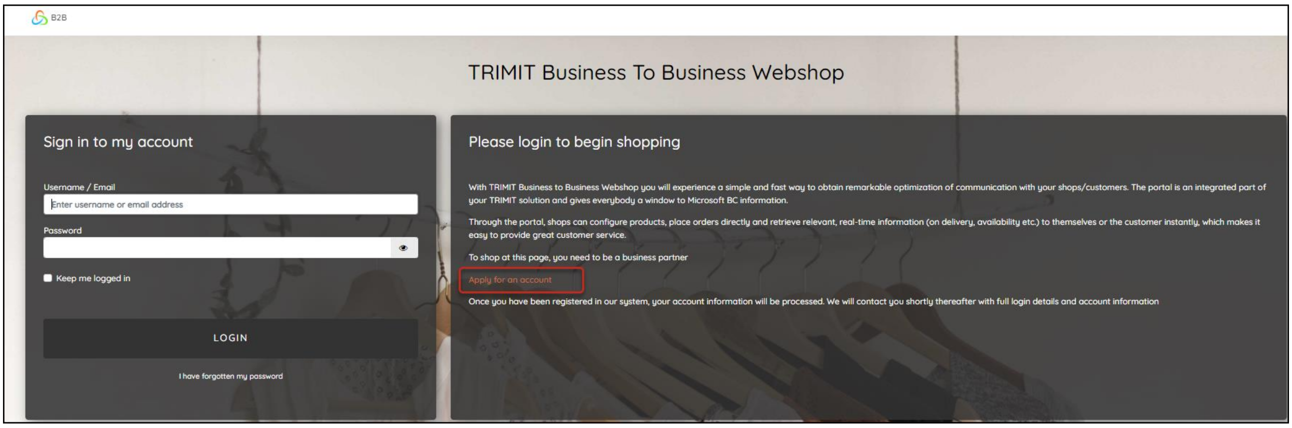
USED DATE

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.

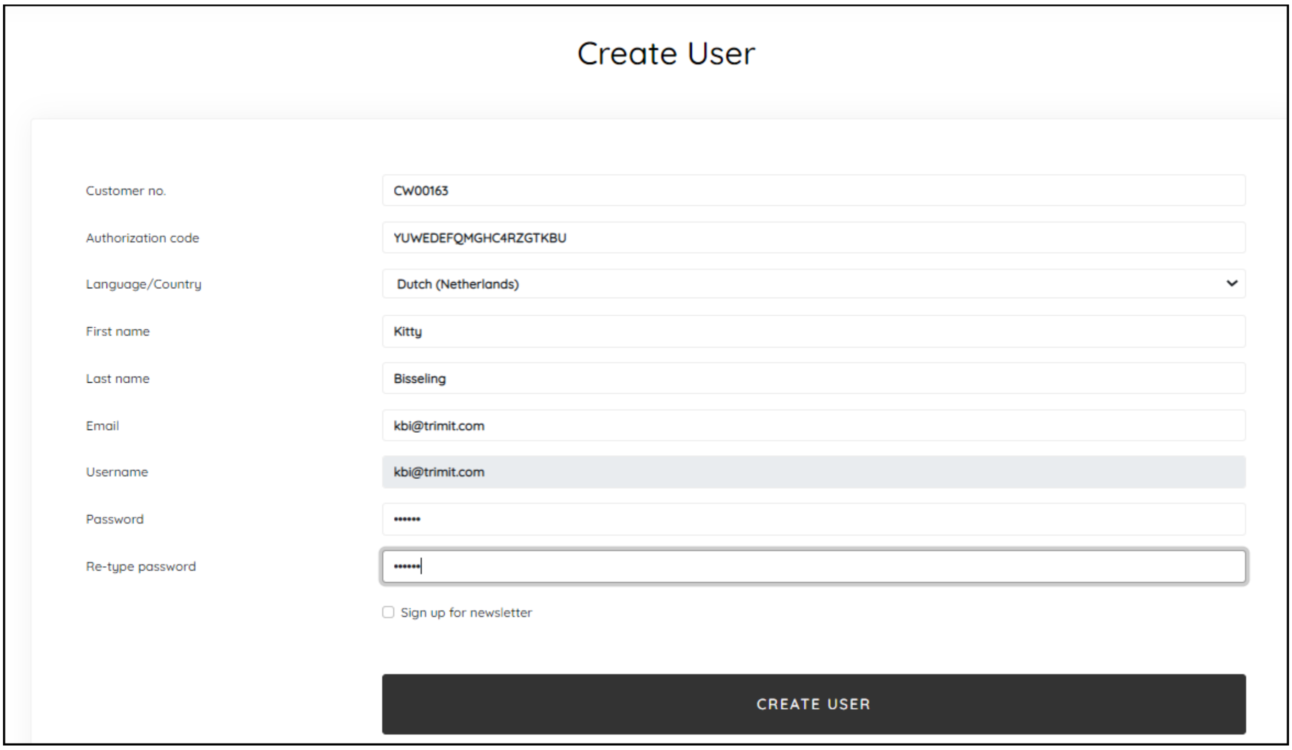
REGISTRATION ON THE B2B WEBSHOP

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.

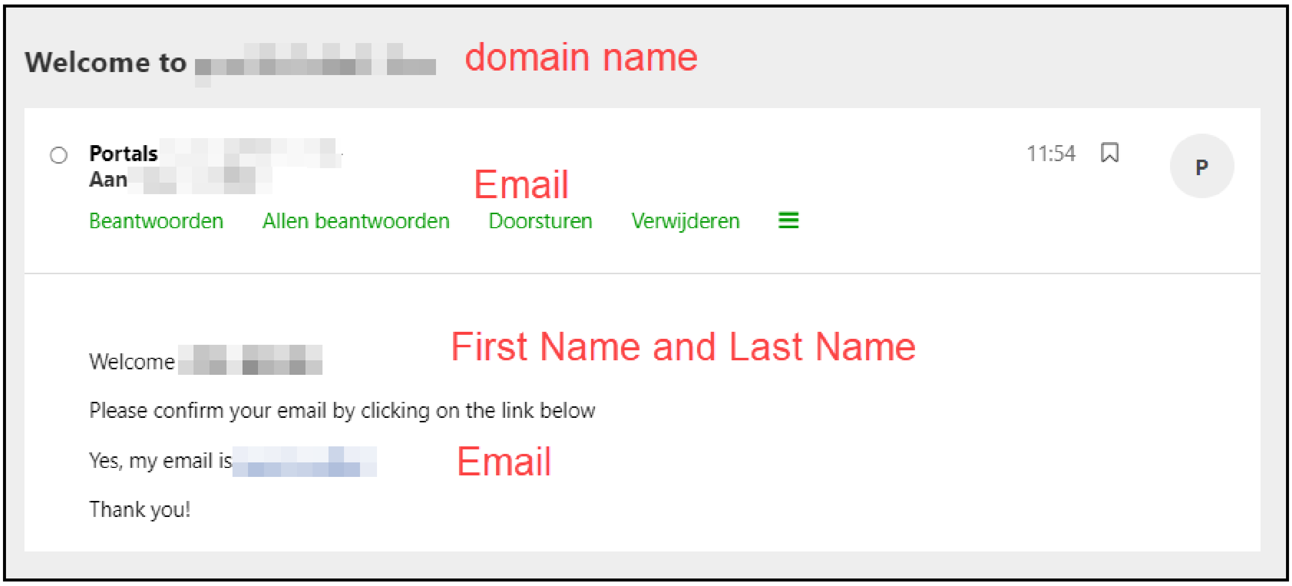
PASSWORD

User's Password

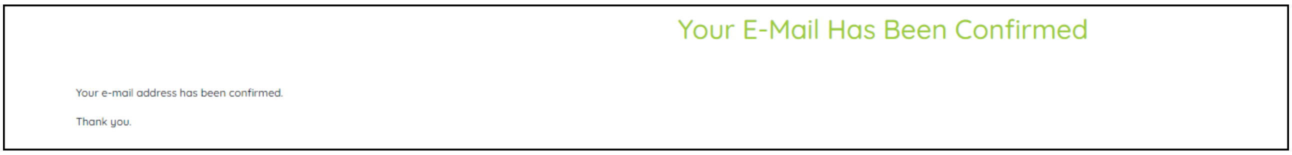
RE-TYPE PASSWORD

User's Password retyped

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



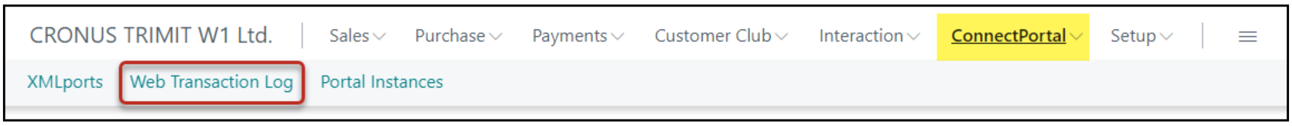
The user needs to confirm his email after which he will see:



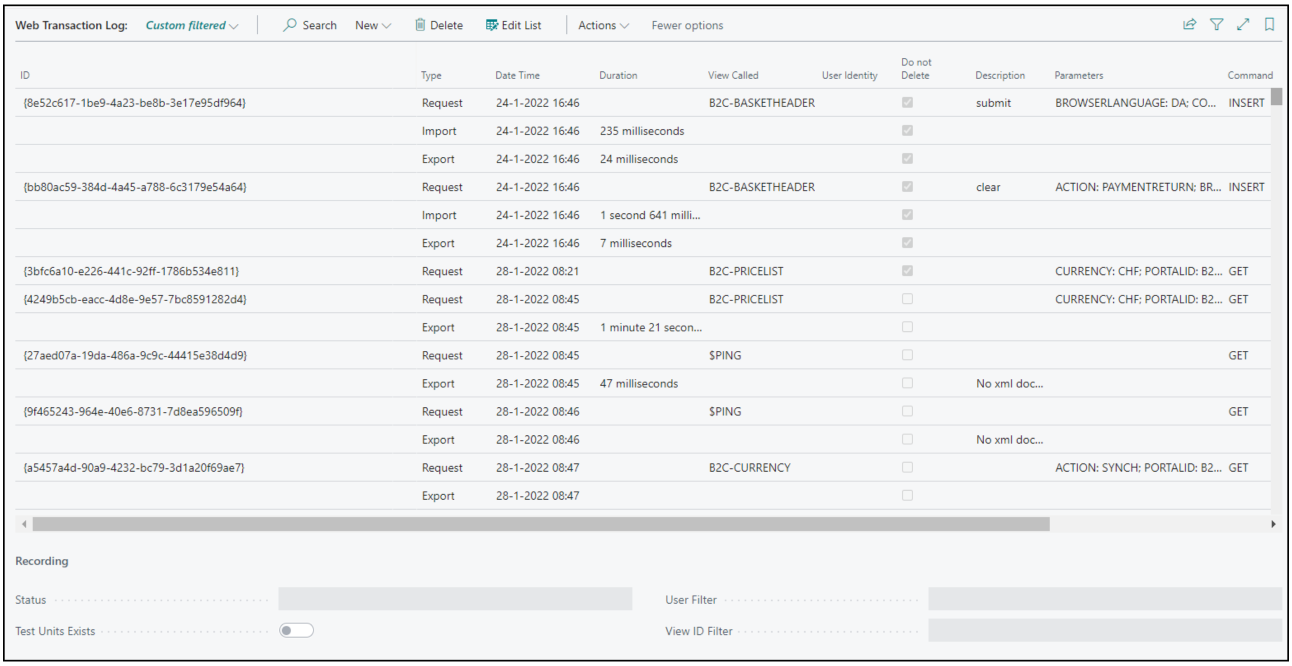
WEB TRANSACTION LOG

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-3e17e95df964}	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				☐			

Recording

Status

Test Units Exists

User Filter

View ID Filter

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.

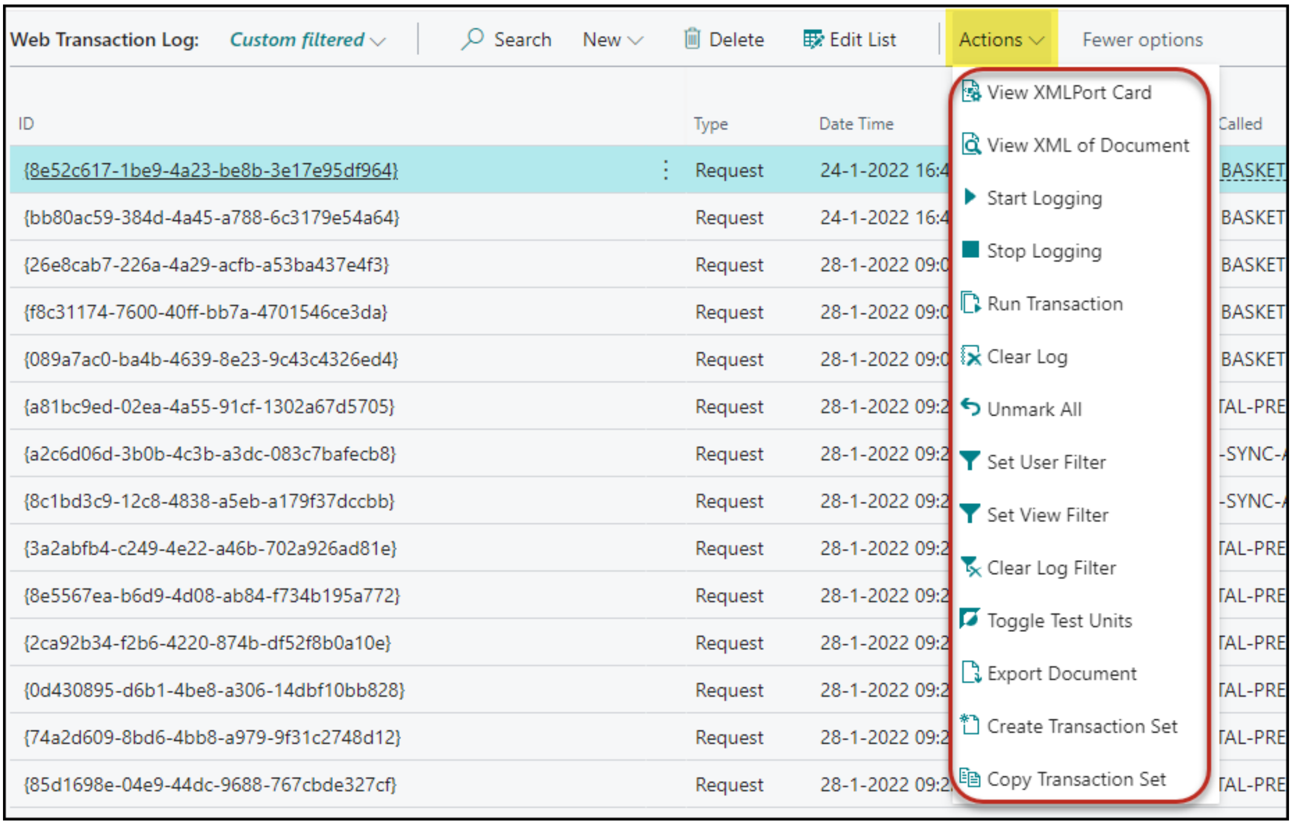
USER FILTER

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



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
{8e52c617-1be9-4a23-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.


```xml
<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="5086d9e6d5414a419fffa137ee516867">
    <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.

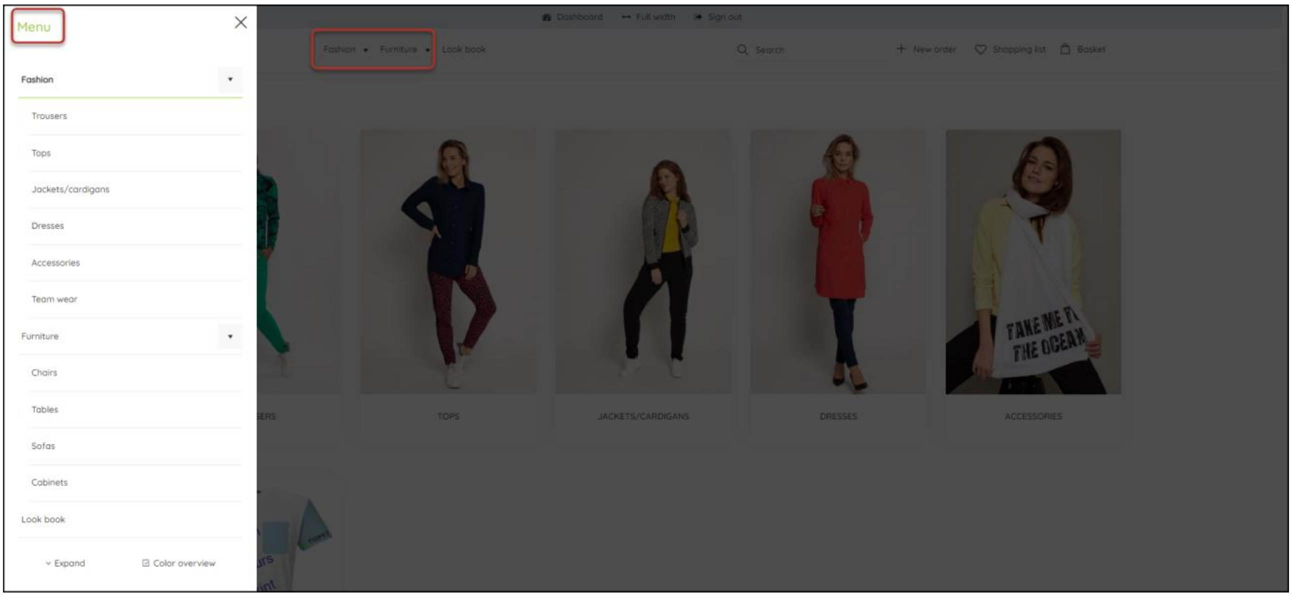
You can export the content of a document to disk by clicking ***Actions, Export Document***. This comes in handy if you want to send the XML data to another person for inspection.
But remember that if you import content, the content still needs to match the Business Central View definition. If the content 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.

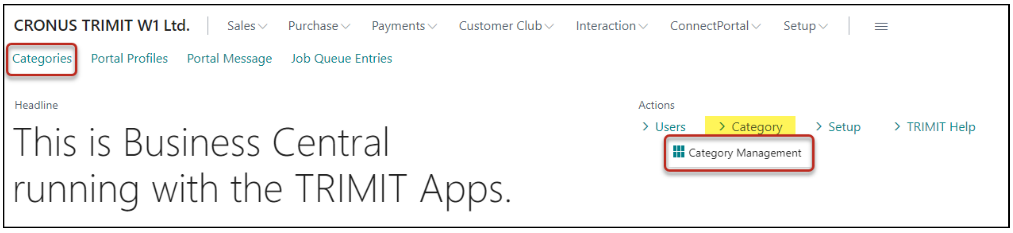
Copy a Transaction Set by selecting an existing Request set by clicking ***Actions, Copy Transaction Set***. This can be used if you want to keep the original set and want to create a new one in which you alter data.

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:

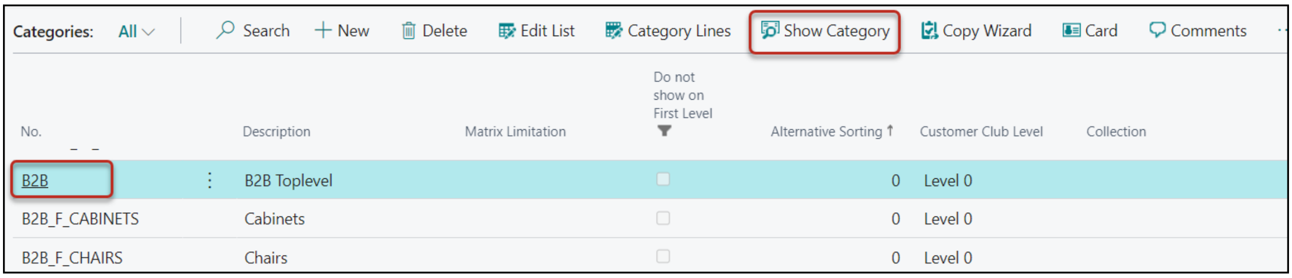


Via the Role Center ***TRIMIT Portal Administrator*** you can create and maintain the Categories via ***Categories*** and you can attach many Items to a Category in a simply step via ***Category, Category Management.***

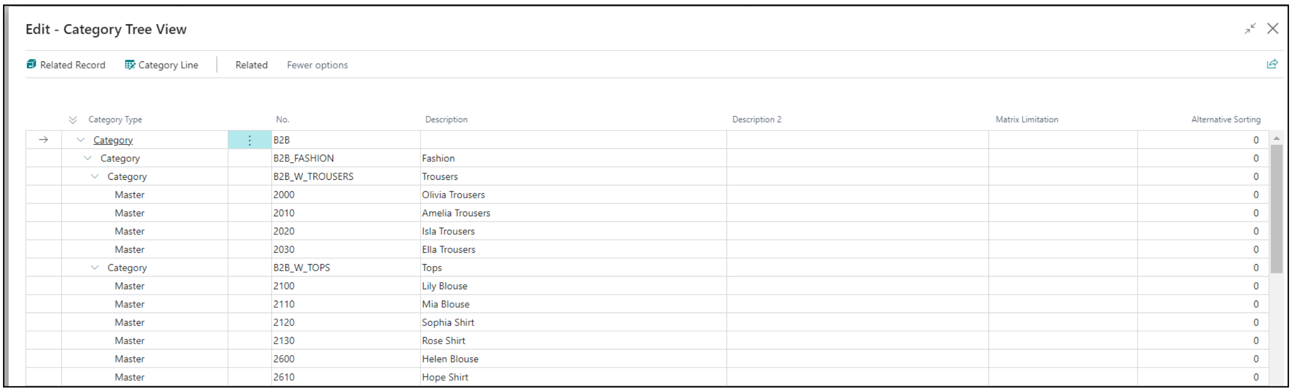


Creating the Category tree-view is like creating BOM's in TRIMIT. First, create the Categories, and then attach them to each other to build a structure.

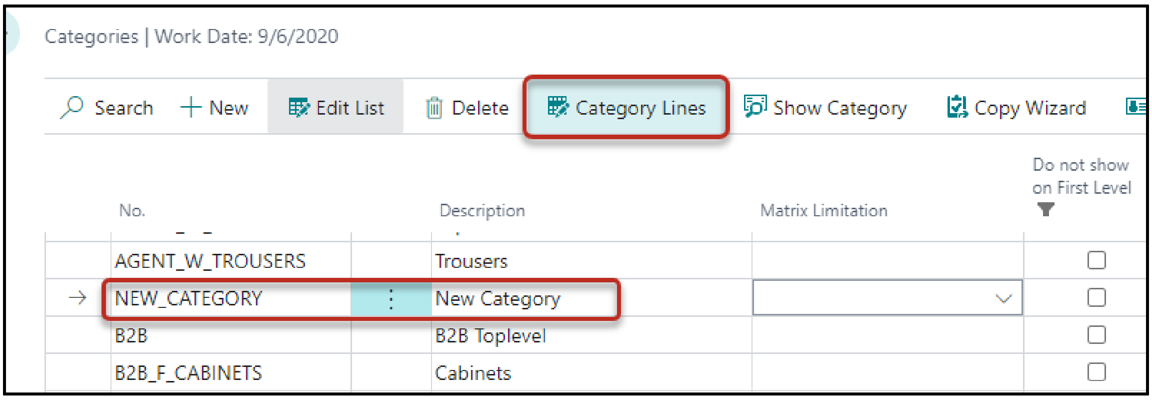
To see the whole Category Structure of a Portal you need to select a Top-Level Category (i.e., *B2B*) in the ***Categories*** and click ***Show Category***.



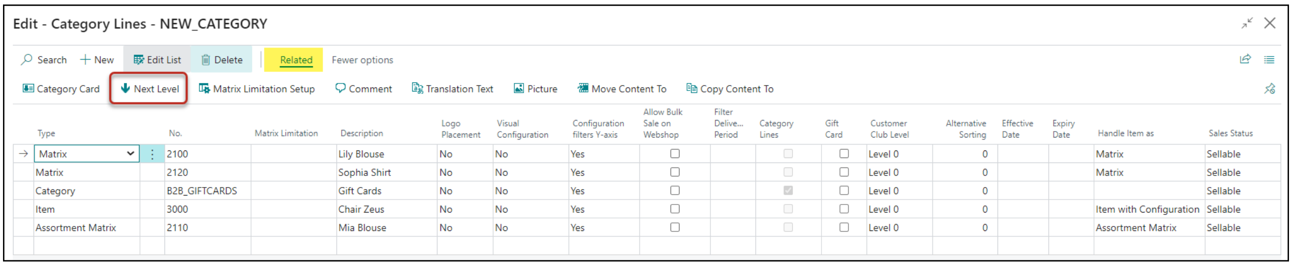
Now you can see the whole Category Structure. I.e.:



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***:

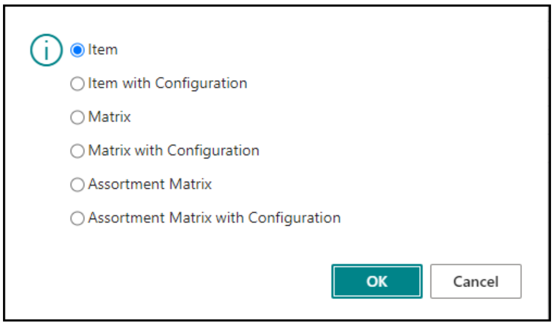
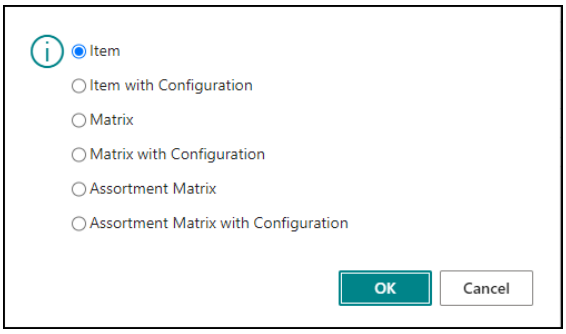


This will open the ***Category Lines*** page as shown below:



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 Lily Blouse* in the demo company
Assortment Matrix	The selected Item (**No.**) is a Master Item setup as an Assortment Matrix. Example: Master *2110 Mia Blouse* 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

<table>
<tr><td>Collection</td><td>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.

</td></tr>
<tr><td>Global Dimension 1 -2</td><td>The selected Global Dimension 1 – 2 (No.) becomes a Category</td></tr>
<tr><td>Statistics Group 1 - 5</td><td>The selected Item Statistic Group 1 – 5 (No.) becomes a Category</td></tr>
<tr><td>Period Code</td><td>The selected Shipment Group (No.) becomes a Category</td></tr>
<tr><td>Collection from Category</td><td>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.

</td></tr>
</table>

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***.

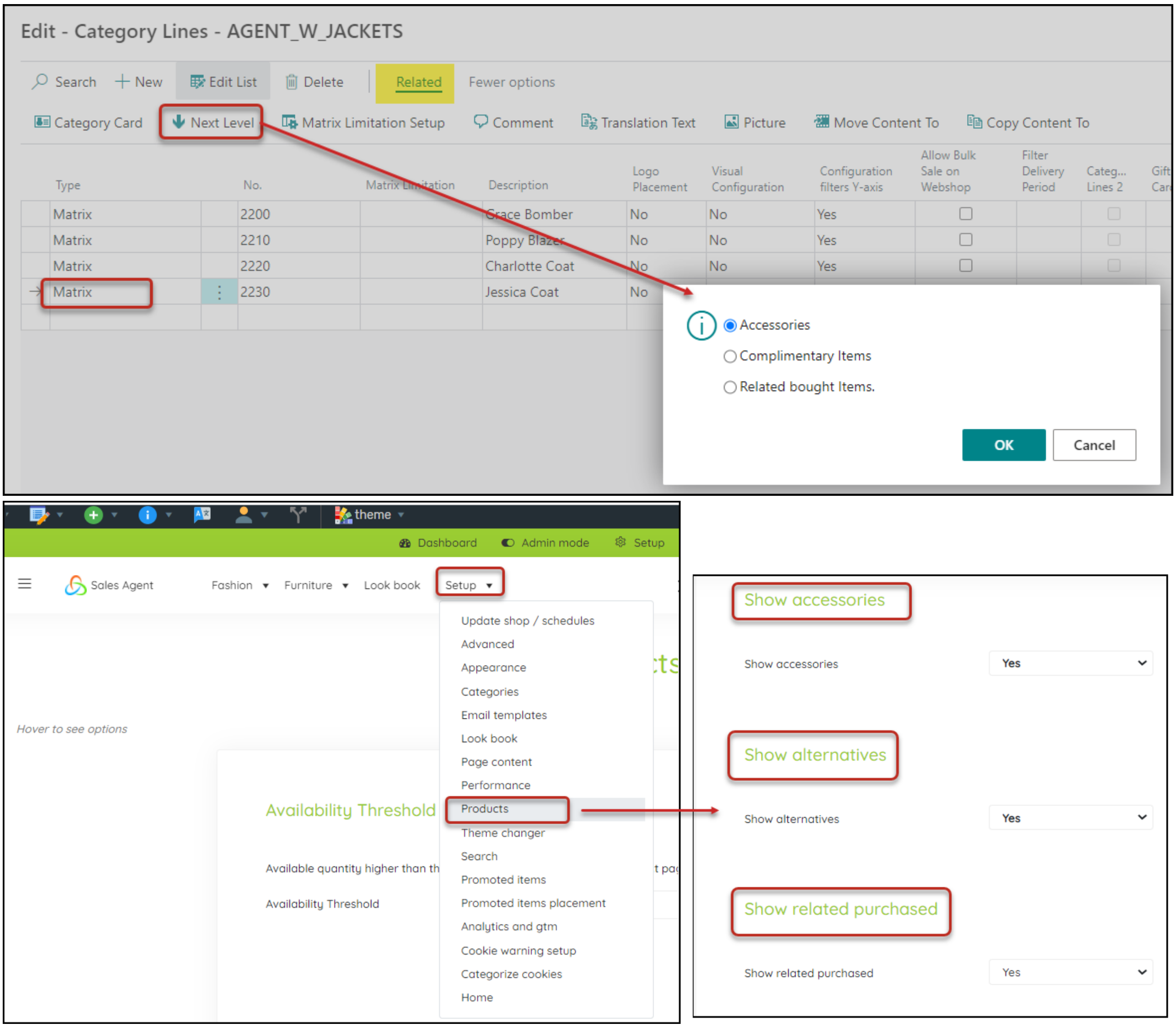
NOTE 1
Be aware that the Portals do not support Items without related Masters.
That means, that a flat Item should always have a Master.

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*.

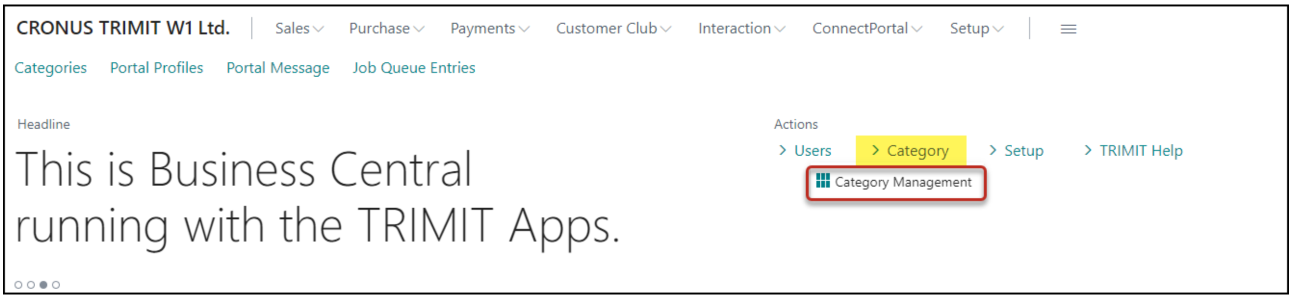
If those are chosen then in order to make them visible on the Portals it is needed to set the following fields on Soft Admin's **Product details** page to *TRUE*: **Show accessories, Show alternatives, Show related purchased.**



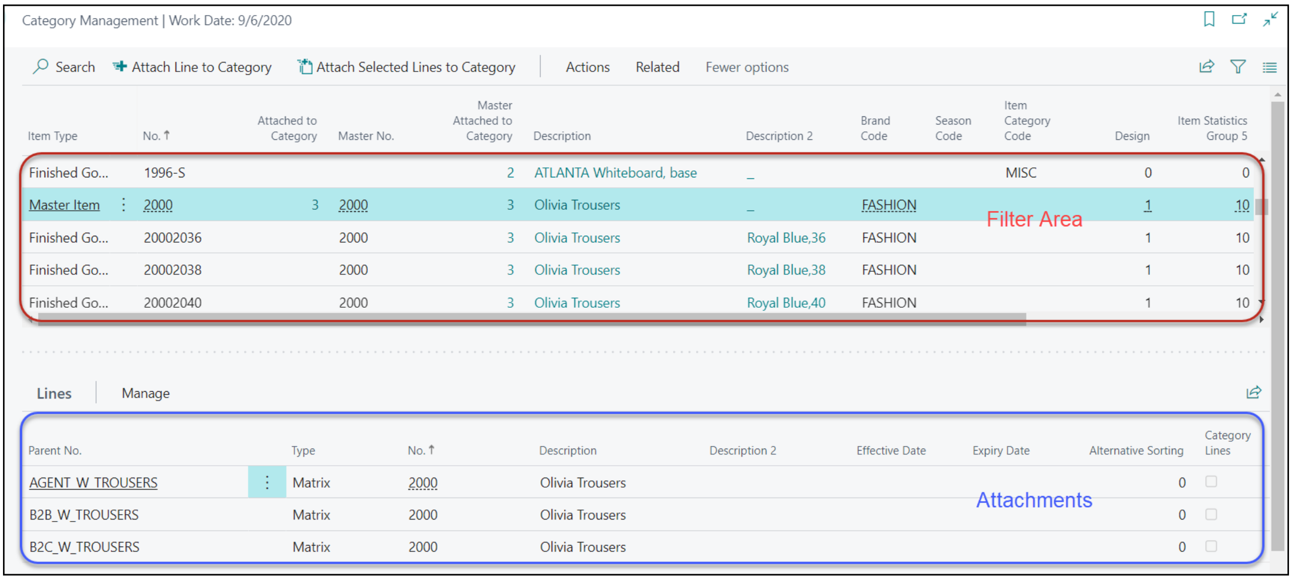
For more details regarding Categories, see ***White Paper – TRIMIT Category Management.***

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:



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

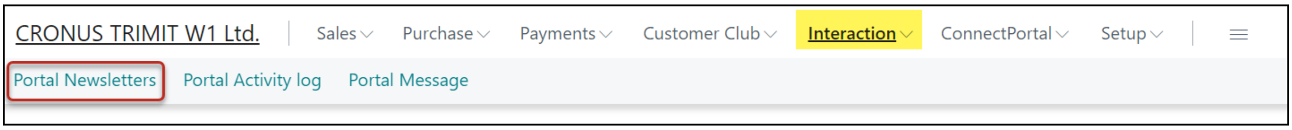
When the Salesperson creates a new Customer on the SA Portal, it is possible to set a checkmark in the field **Newsletter**. When doing so, the Customer is created as **Recipient** in the **Portal Newsletter Code** in TRIMIT based on the field **Customer Newsletter** in the SA Portal Profile.

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.

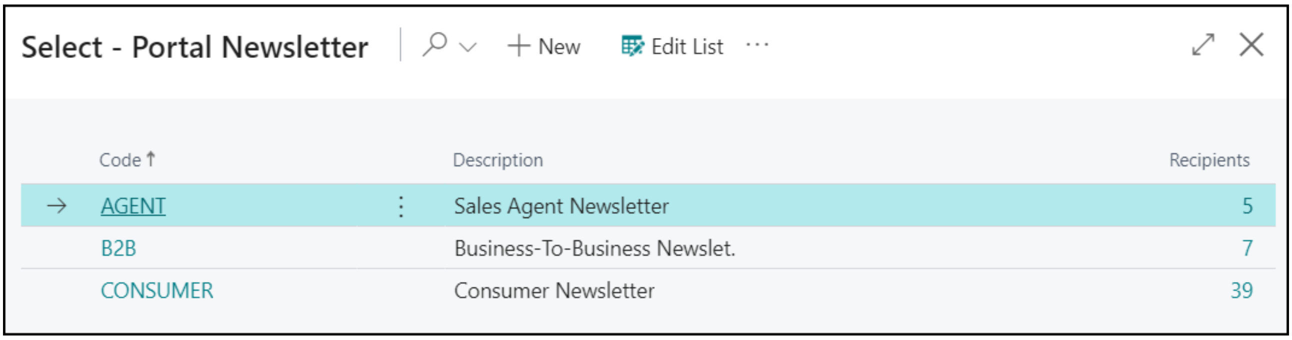
The same approach is used on B2C Webshop – when a Consumer registers on the web site it is possible to set a checkmark in field, **I wish to receive newsletters** in the ***Join*** or ***My Account/Checkout*** page on B2C Webshop. When done, the corresponding Customer will be added to the **Recipients** 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.

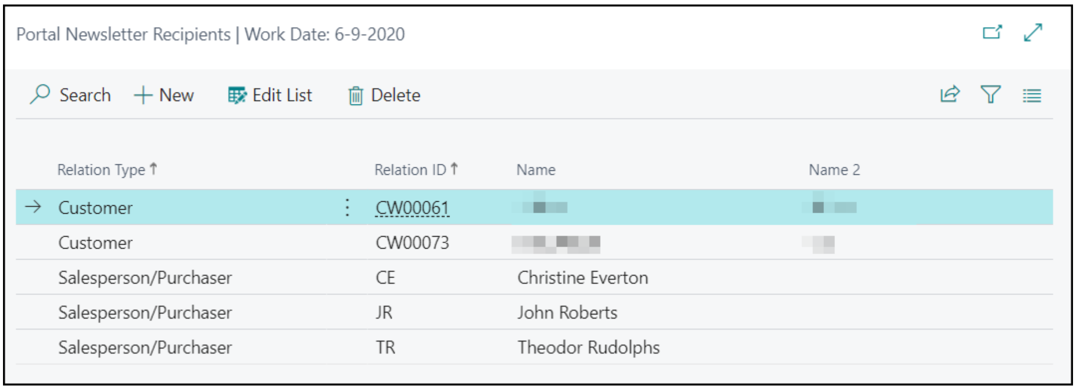
To create a **Portal Newsletter Code**, in the Role Center ***TRIMIT Portal Administrator*** you can go to ***Interaction, Portal Newsletters.*** Otherwise, use **Tell me** *Portal Newsletters*



go to ***Departments/Portals/Setup/Portals/Newsletters***.
This will open the list of Portal Newsletters:



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

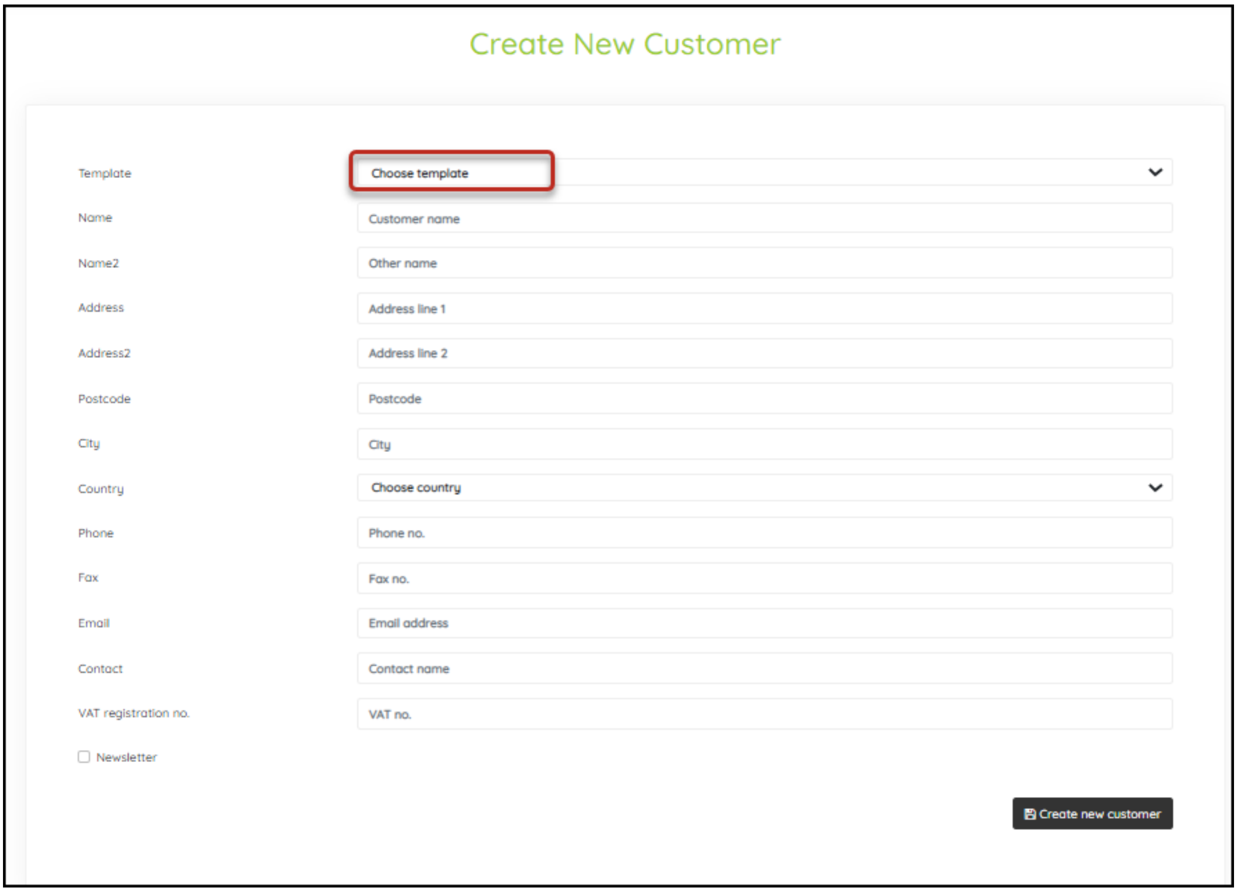


You are also able to enter the **Portals Newsletter Recipients** manually in this page.
The **Relations Type** can be *Employee, Contact Company, Contact Person, Customer, Vendor, Resource* or *Salesperson/Purchaser.* The **Relation ID** will then be related to the **Relation Type.**

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.

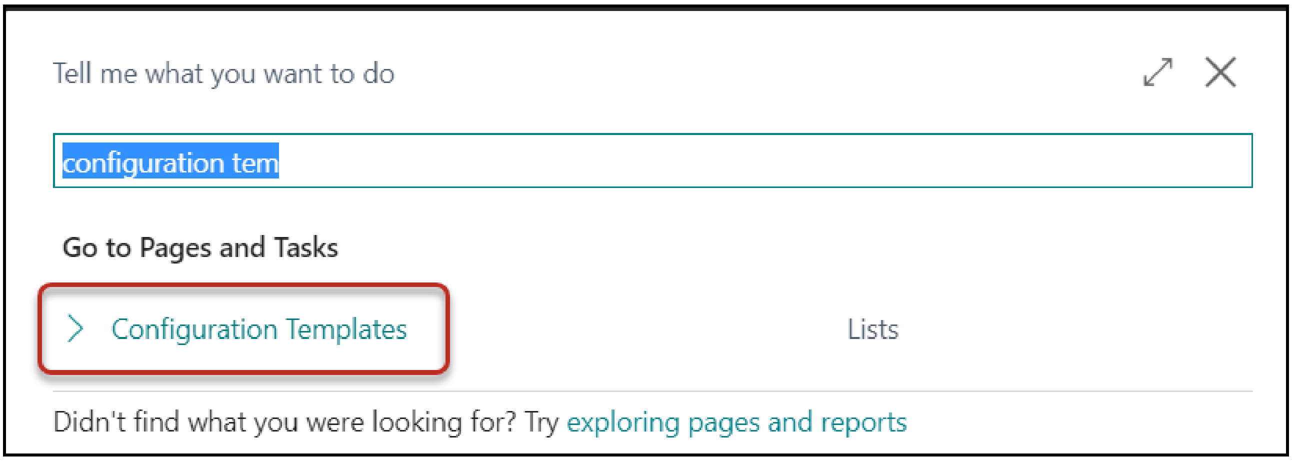
CUSTOMER TEMPLATES

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

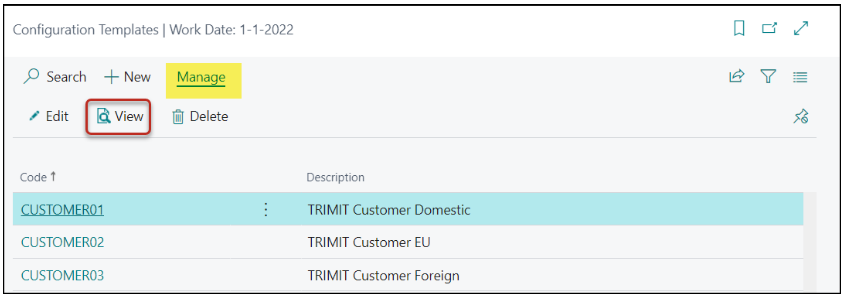


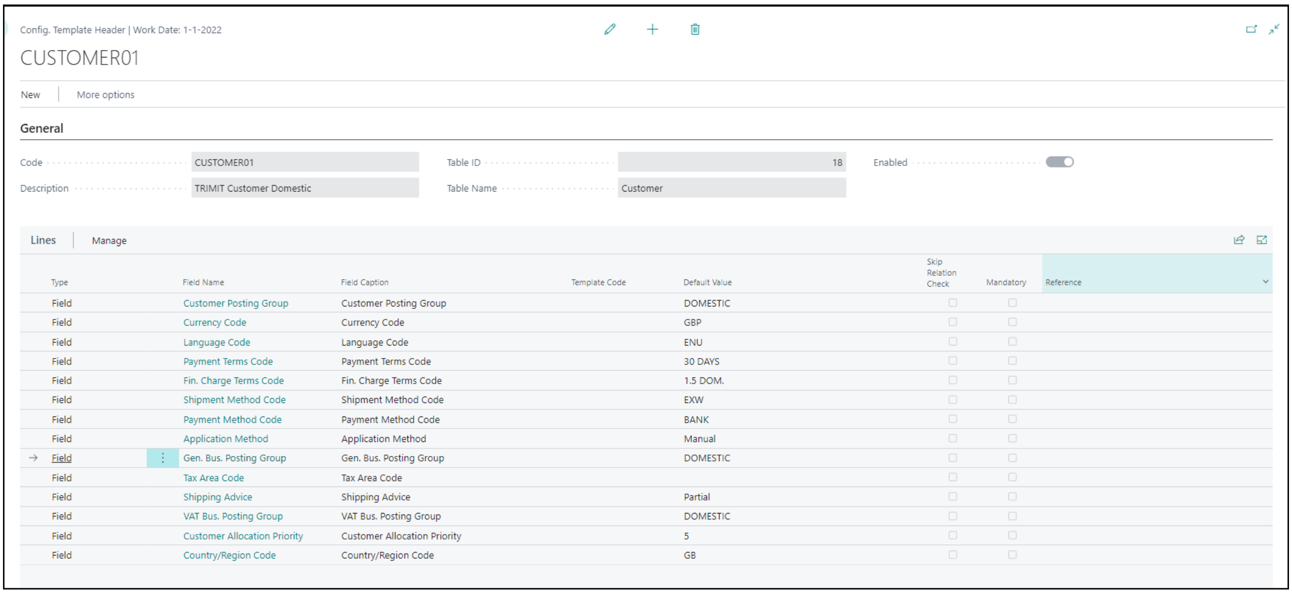
Before the Customer in TRIMIT can be used for creating Sales Orders, information regarding Posting Groups, Currency Code, Payment Terms, etc. also must be filled.
It is not expected that the Salesperson is able to decide on that type of information.
Hence, TRIMIT Salesperson makes use of the Configuration 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*

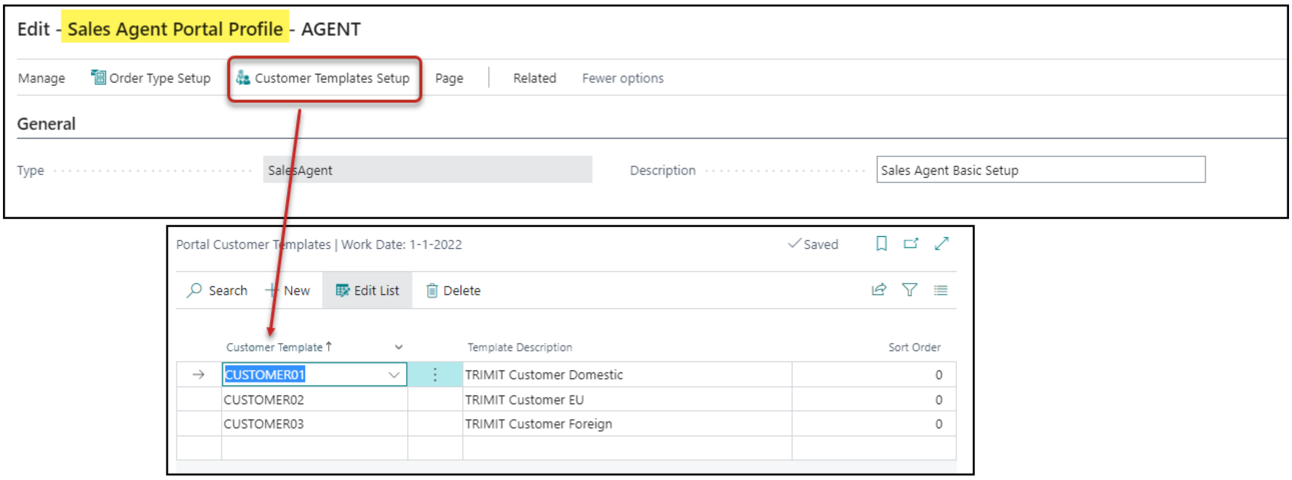


The CRONUS TRIMIT W1 Ltd. Demo company includes some examples of how the Template can be made. It is important to define just enough Templates, to make it easy for the Salesperson to quickly create new Customers. I.e.:

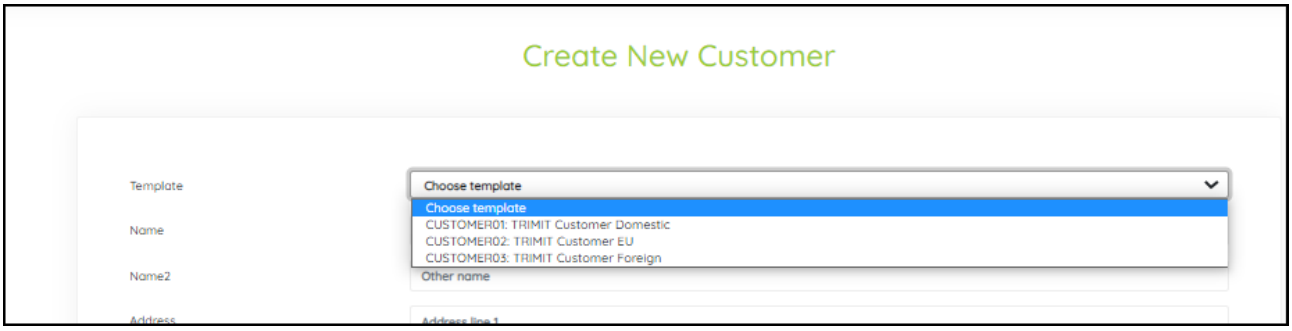




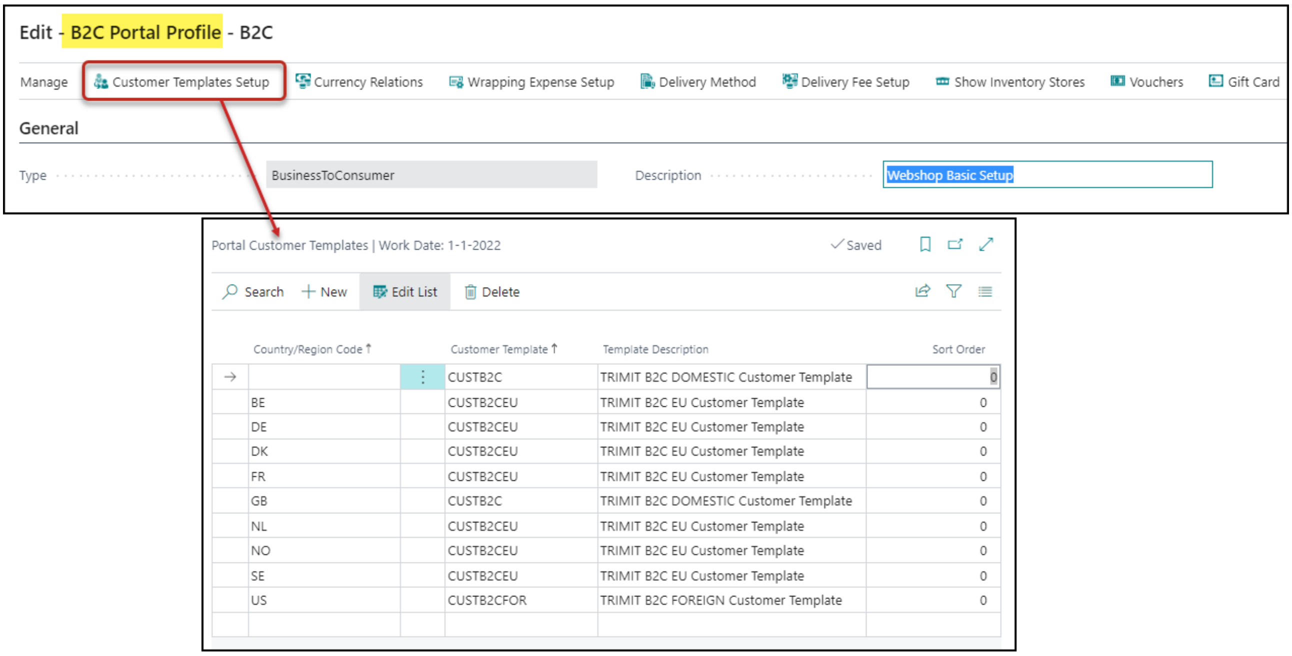
Customer Templates Setup for the SA Portal can be done in the **Portal Profile** Card of the SA Portal by clicking ***Customer Templates Setup.*** I.e.:



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:



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.:

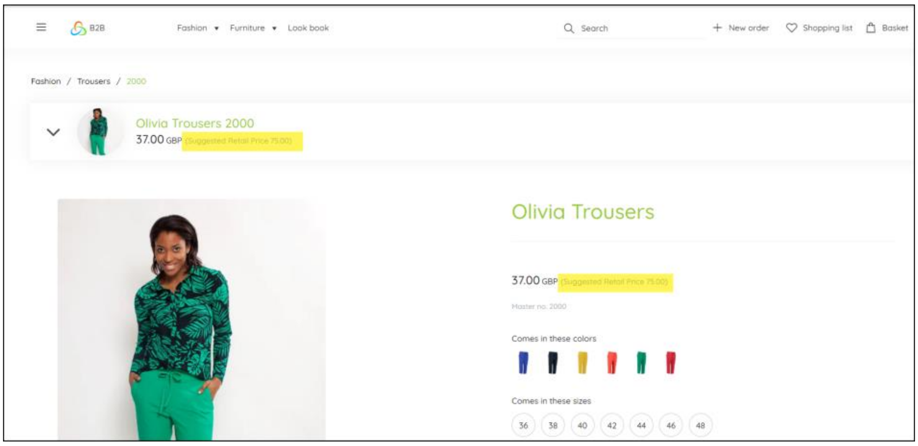


Here it is possible to define a set of Customer Templates related to the **Country Code** of the Consumer.
If no **Customer Template** has been chosen for a specific **Country Code,** the content of the field **Customer Template for Registry** in the Profile Card will be applicable.

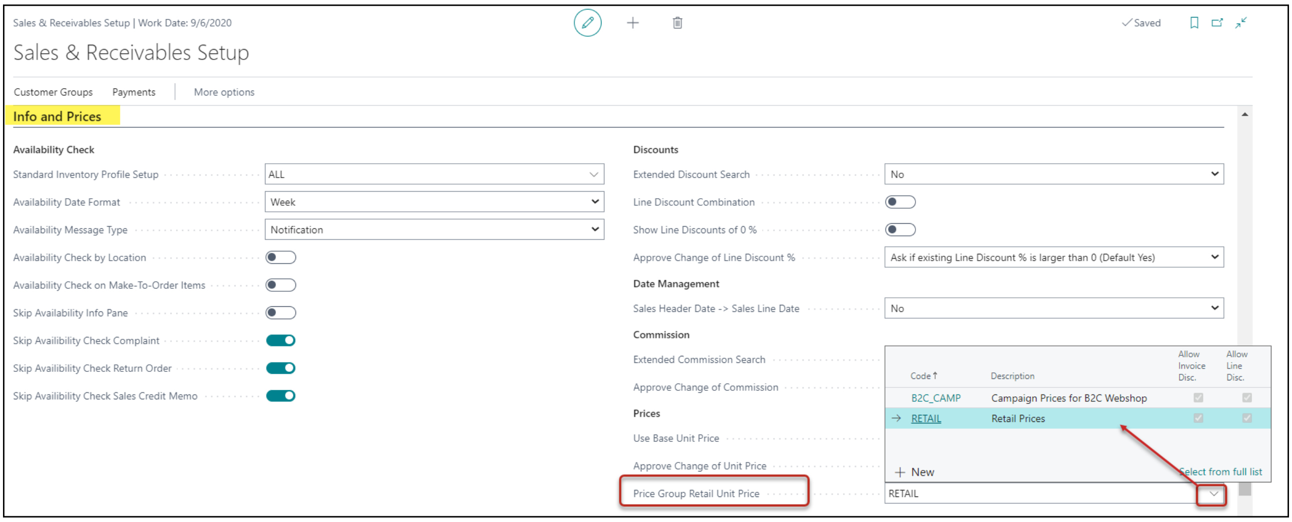
> **NOTE**
> Templates are functionality also used for Configuration Packages. If you insert a field requiring a Boolean content, the **Default Value** MUST be stated in the Language of the Web service connection. Boolean in the Template are translated from False to Yes. AL Code will only accept the 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

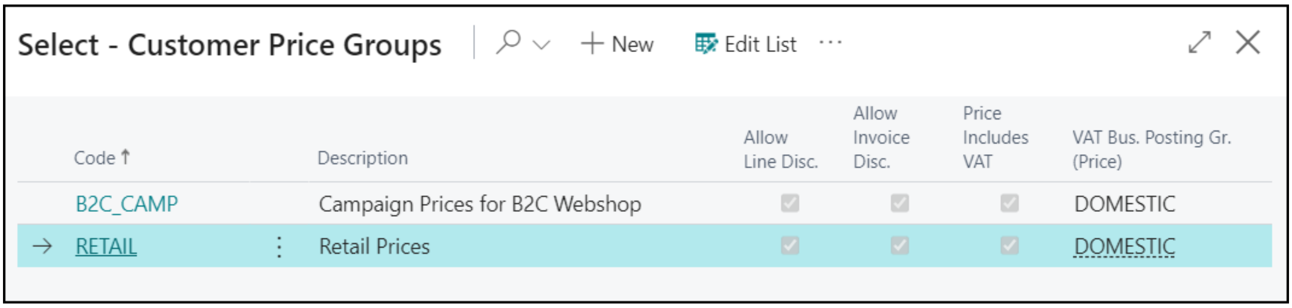
The Fashion industry works with the term *Suggested Retail Price*, being the Sales Price that the end-user must pay when buying the Item in a shop.
In the TRIMIT B2B and SA Portals the **Suggested Retail Price** is shown as follows:



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

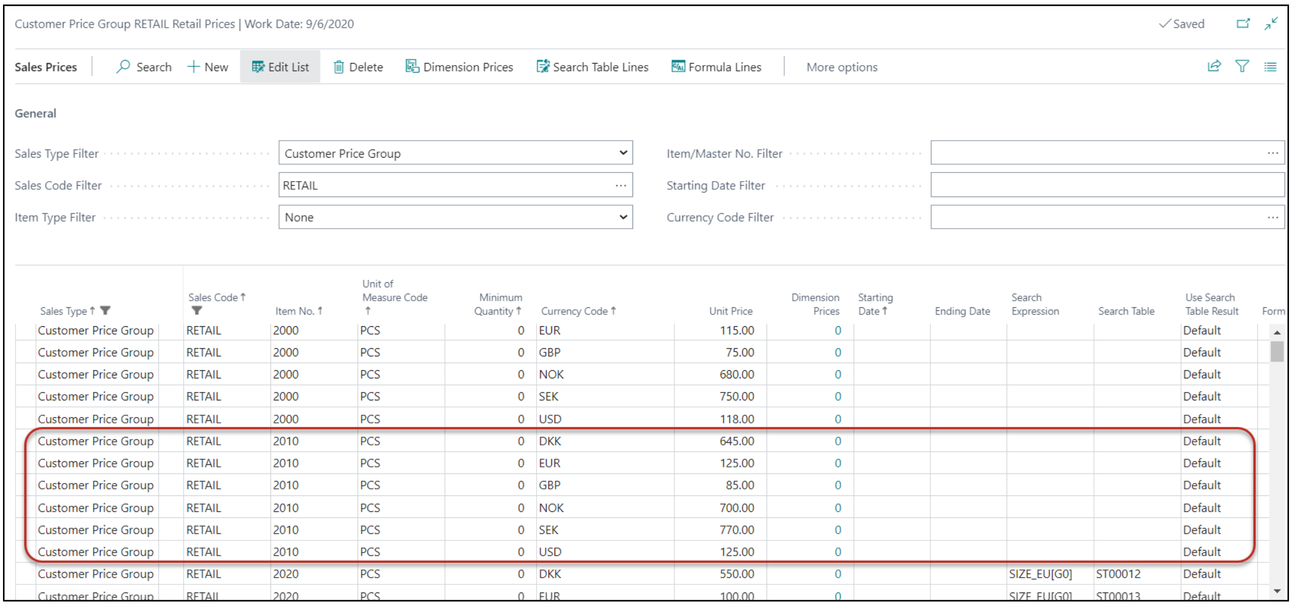
Code	Description	Allow Line Disc.	Allow Invoice Disc.	Price Includes VAT	VAT Bus. Posting Gr. (Price)
B2C_CAMP	Campaign Prices for B2C Webshop	✓	✓	✓	DOMESTIC
RETAIL	Retail Prices	✓	✓	✓	DOMESTIC

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

General

Sales Type Filter: Customer Price Group
Sales Code Filter: RETAIL
Item Type Filter: None
Item/Master No. Filter:
Starting Date Filter:
Currency Code Filter:

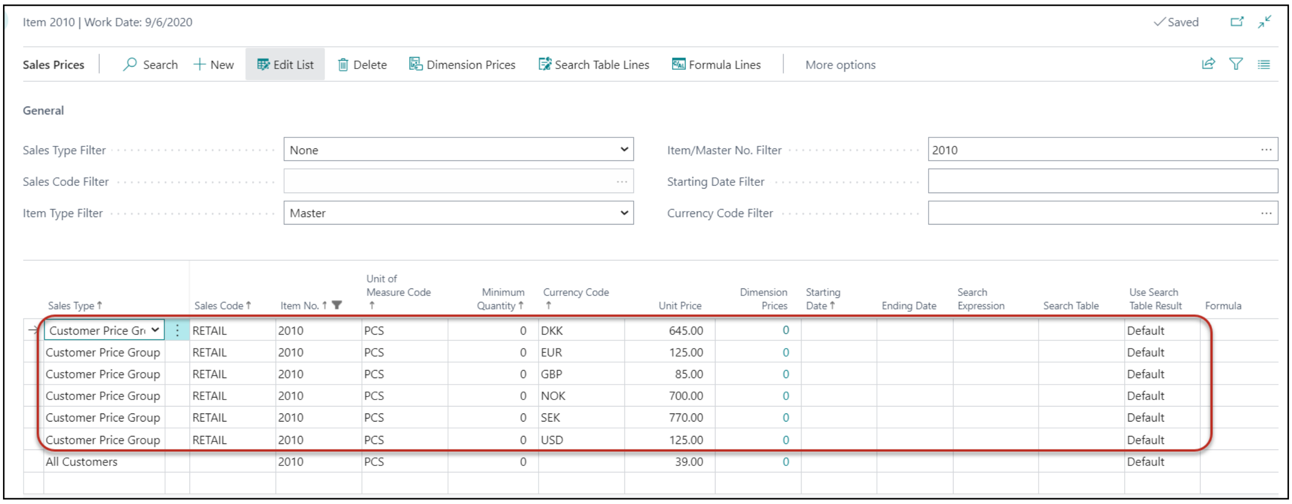
Sales Type	Sales Code	Item No.	Unit of Measure Code	Minimum Quantity	Currency Code	Unit Price	Dimension Prices	Starting Date	Ending Date	Search Expression	Search Table	Use Search Table Result
Customer Price Group	RETAIL	2000	PCS	0	EUR	115.00	0					Default
Customer Price Group	RETAIL	2000	PCS	0	GBP	75.00	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:



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.

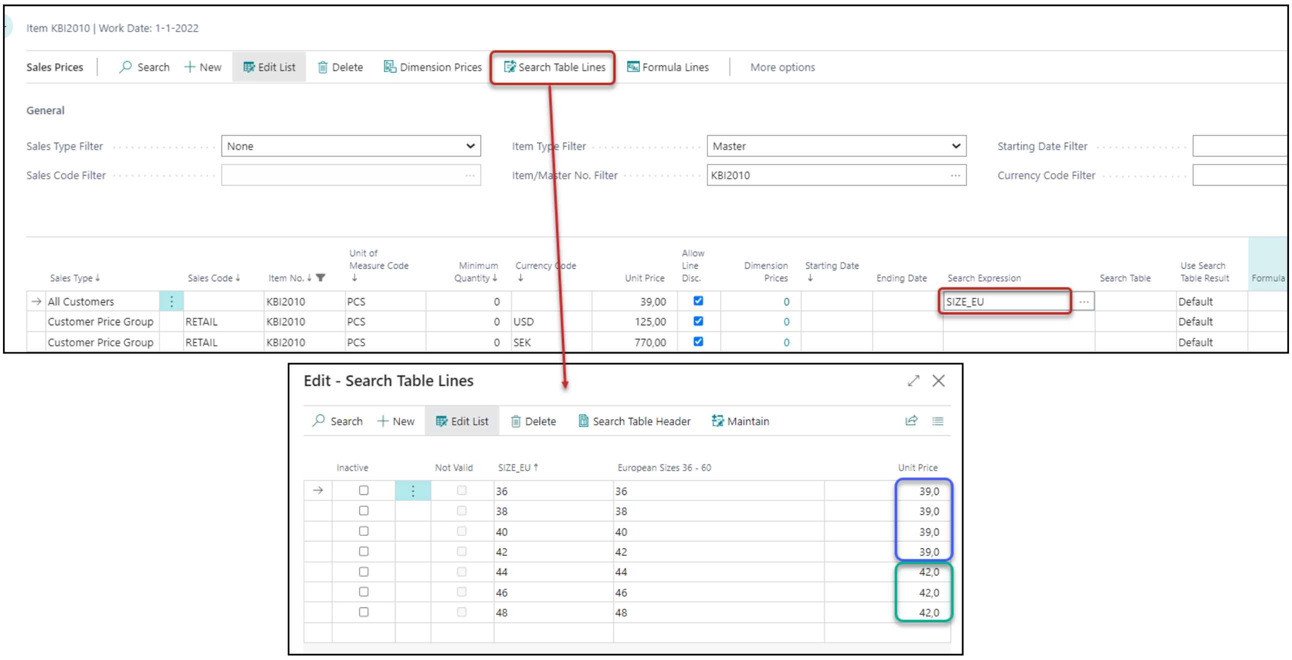
> **NOTE**
> Portals do not support multiline discounts because of the performance reasons. Therefore, Combination Discounts are not supported.

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.



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*

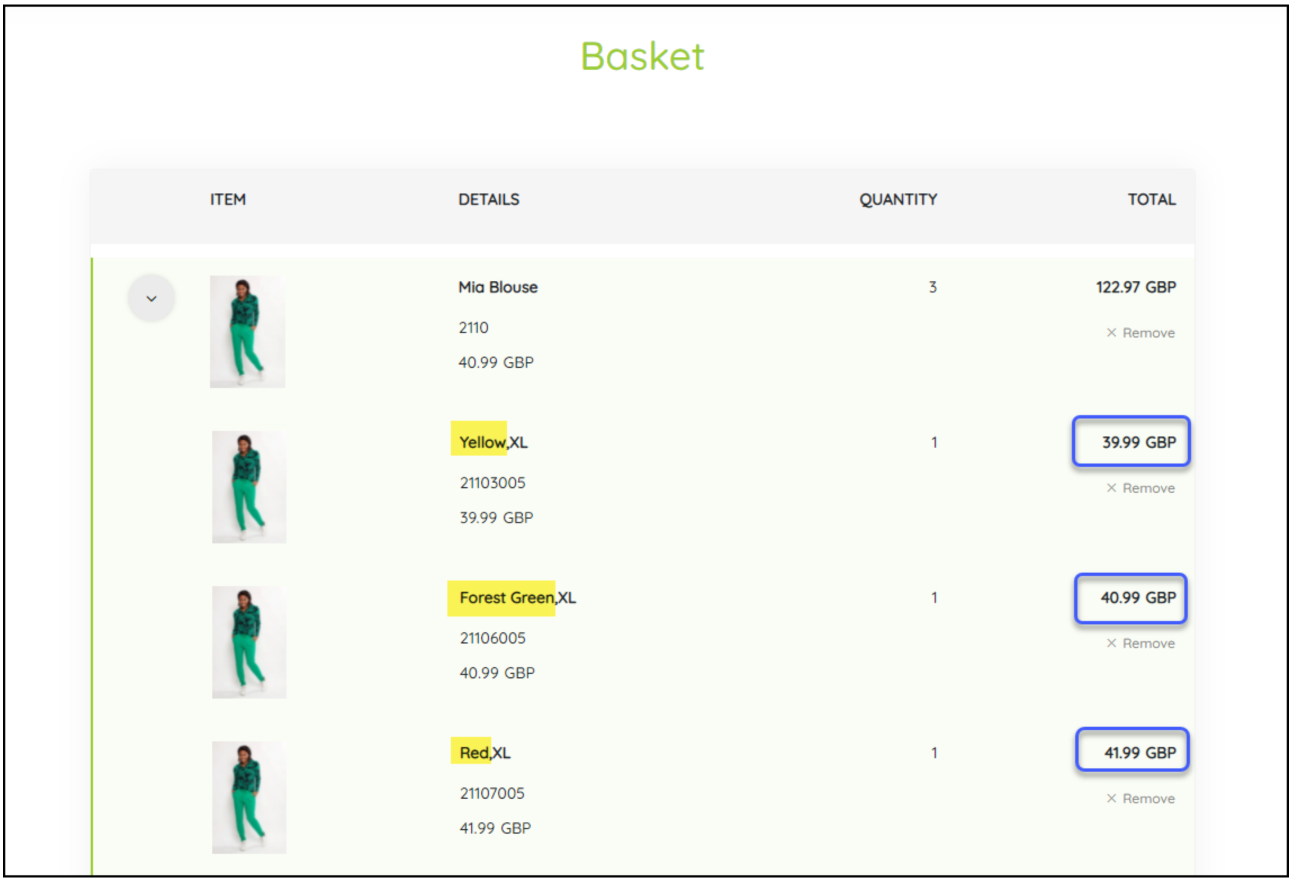
Output on **Product** page: White/XS *505,00 GBP*, Blue/M *510,00 GBP*, Red/L *515,00 GBP*
Output in **Basket**: White/XS *280,00 GBP*, Blue/M *285,00 GBP*, Red/L *250,00 GBP*

SCENARIO 4

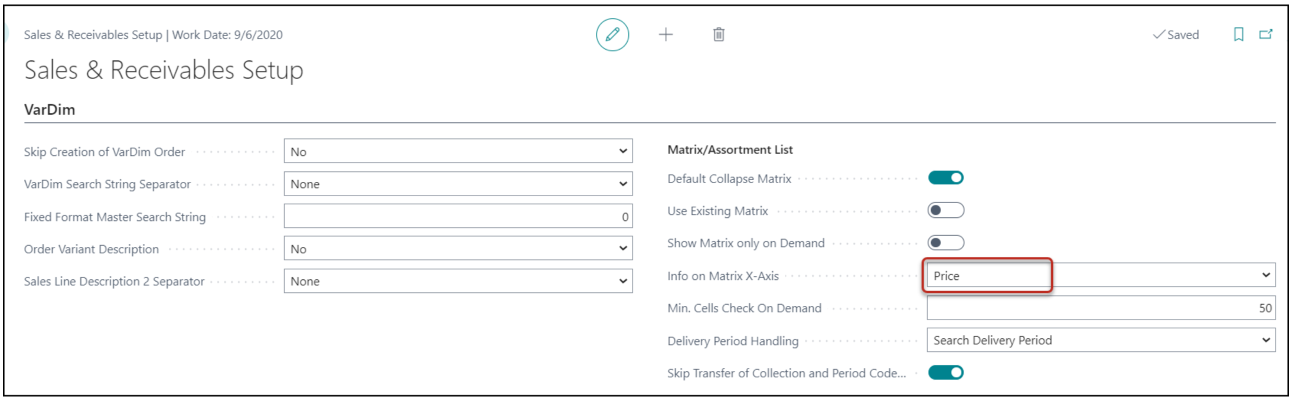
Master has a default Unit Price without different variant Unit Prices. Also, Master has default Campaign Unit Prices with different color prices.
Default Sales Price: *500,00 GBP*
Default Campaign Price: *250,00 GBP*
Campaign Price per Color: White *255,00 GBP*, Blue *260,00 GBP*, Red *265,00 GBP*

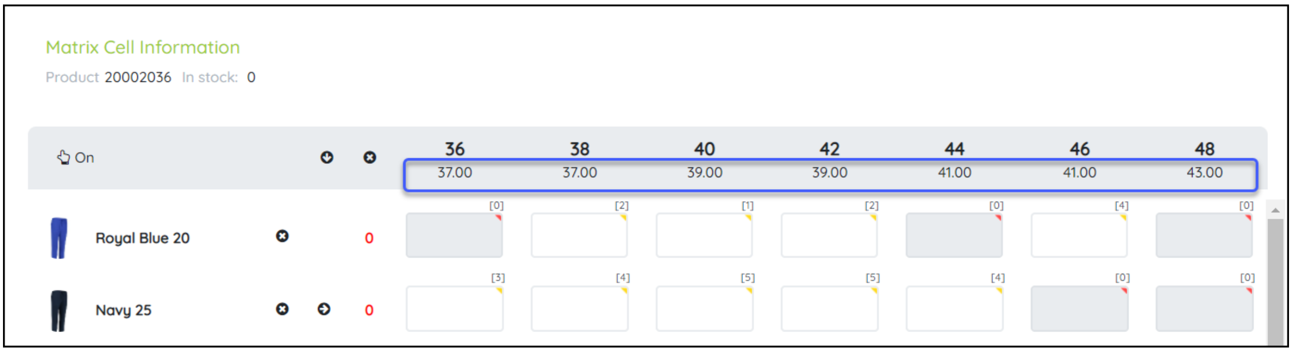
Output on **product details** page:
White *~~500,00~~ 255,00 GBP*, Blue *~~500,00~~ 260,00 GBP*, Red *~~500,00~~ 265,00* GBP.

It is possible to set different Unit Prices per Sze 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:



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*.





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.

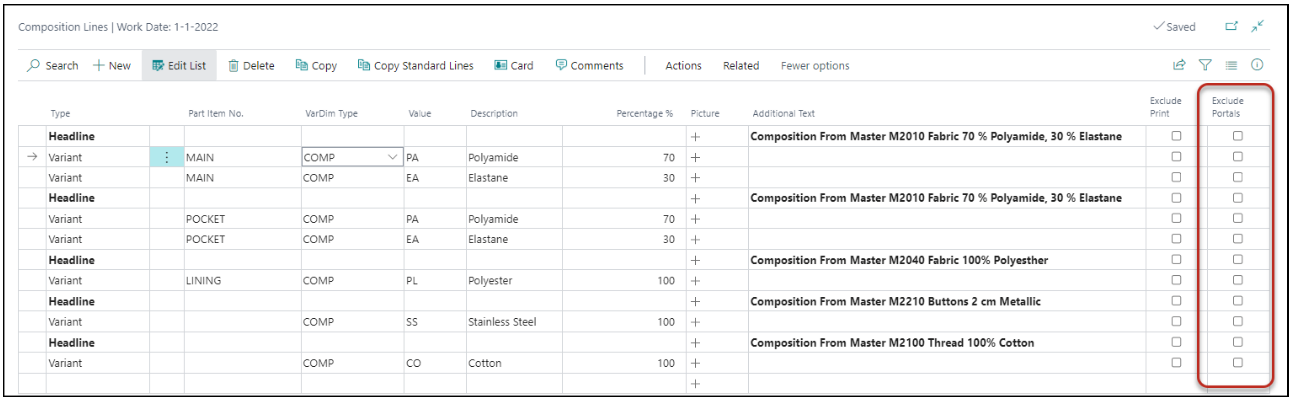
NOTE
Line Discounts based on Combinations of Discount Lines are not supported by TRIMIT portals. If you buy 10 pieces in total of a Master, you will get 5 % Discount.
However, Line Discounts based on single Items are supported.

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

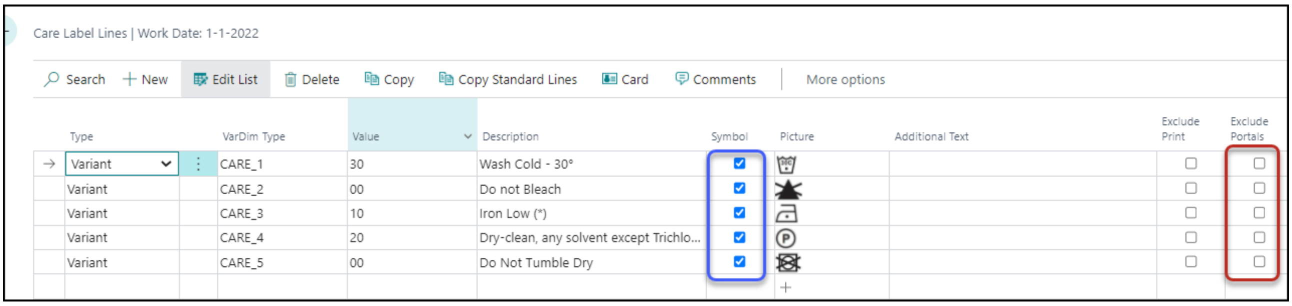
Type	Part Item No.	VarDim Type	Value	Description	Percentage %	Picture	Additional Text	Exclude Print	Exclude Portals
Headline						+	**Composition From Master M2010 Fabric 70 % Polyamide, 30 % Elastane**	☐	☐
Variant	MAIN	COMP	PA	Polyamide	70	+		☐	☐
Variant	MAIN	COMP	EA	Elastane	30	+		☐	☐
Headline						+	**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% Polyesther**	☐	☐
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.

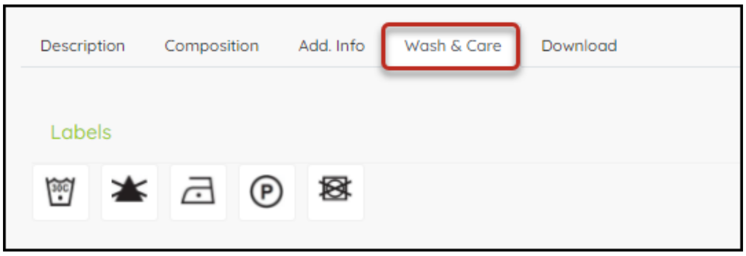
CARE LABEL

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 (*)*.

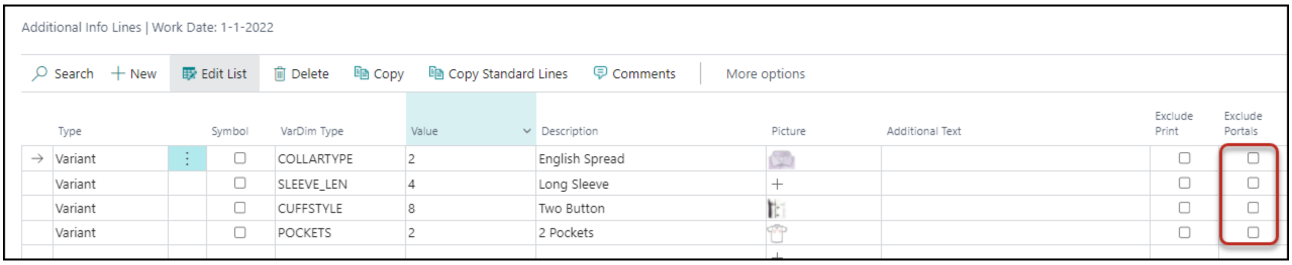


With a checkmark in **Exclude Portals** a **Care Label Line** will not be shown on the Shops/Portals.



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.

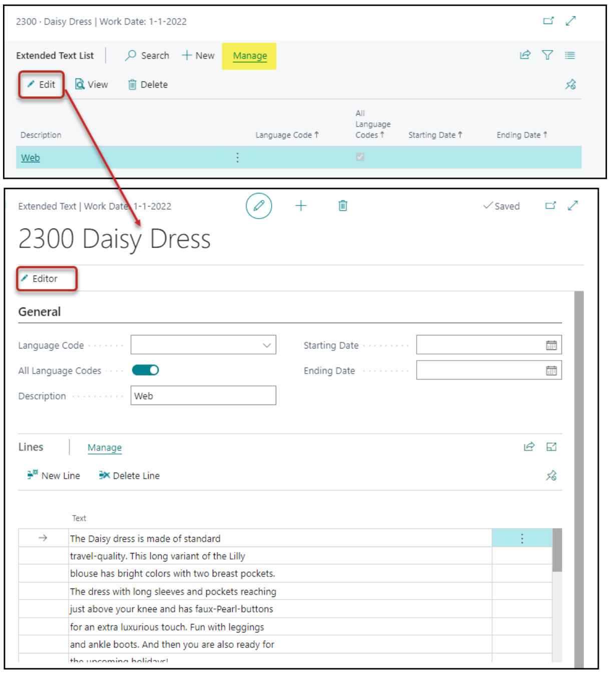


With a checkmark in **Exclude Portals** an **Additional Info Line** will not be shown on the Shops/Portals.

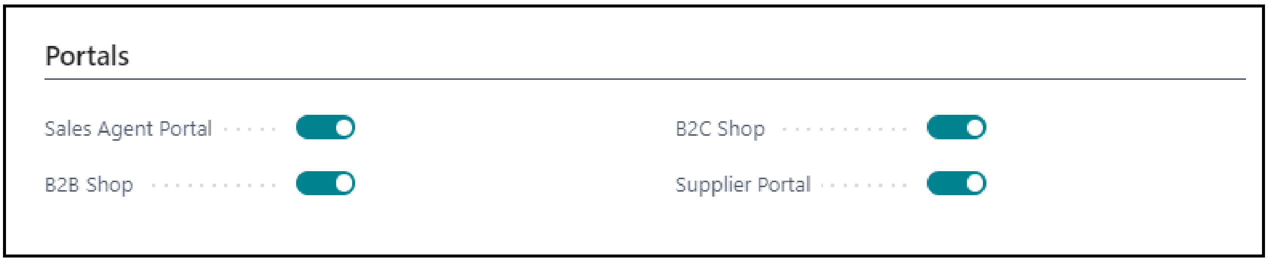
For more information about Composition, Care label and Additional info functionality refer to ***White Paper – TRIMIT Master Additional information***.

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:

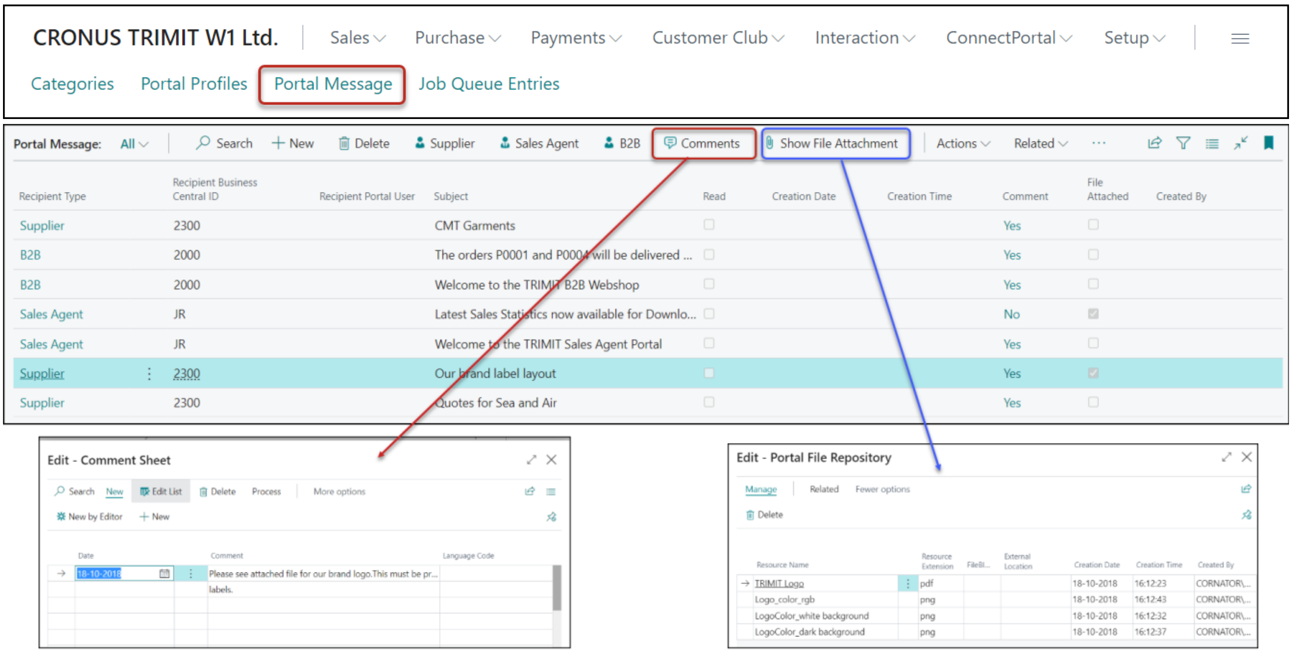
NOTE
Although ***Edit – Extended Text*** page has Boolean field **Supplier** – this functionality is not available on Suppler Portal and setting this field to *TRUE* will not have any affect.

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.*



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

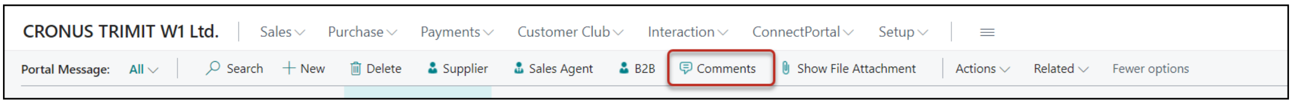
Displays the Creation Date of the Message.

CREATION TIME

Displays the Creation Time of the Message

COMMENT

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



FILE ATTACHED

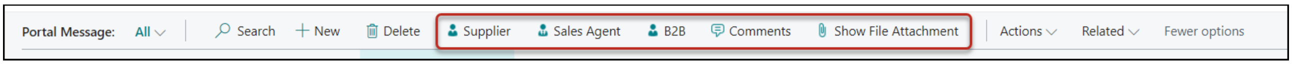
This field will get a checkmark automatically if **Attachments** have been imported.

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

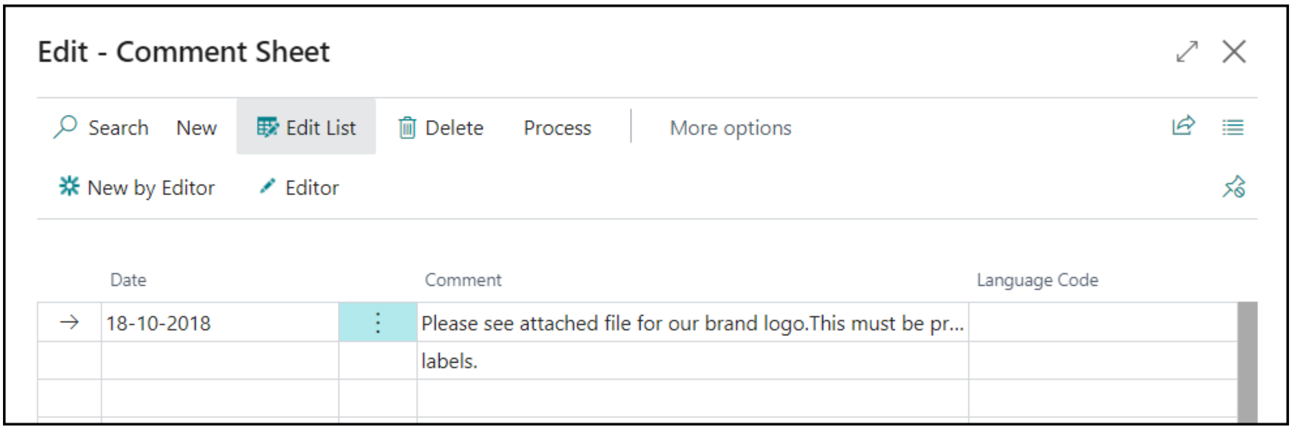
This will filter the **Portal Messages** base on **Recipient Type** = *Sales Agent.*

B2B

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

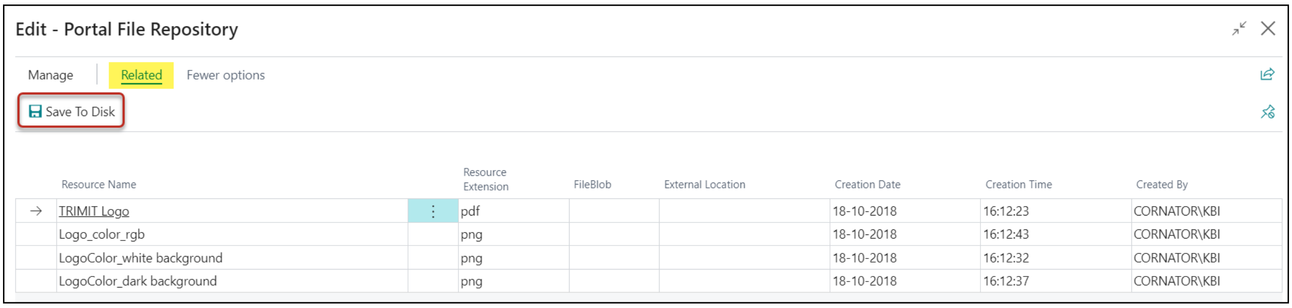
COMMENTS

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.

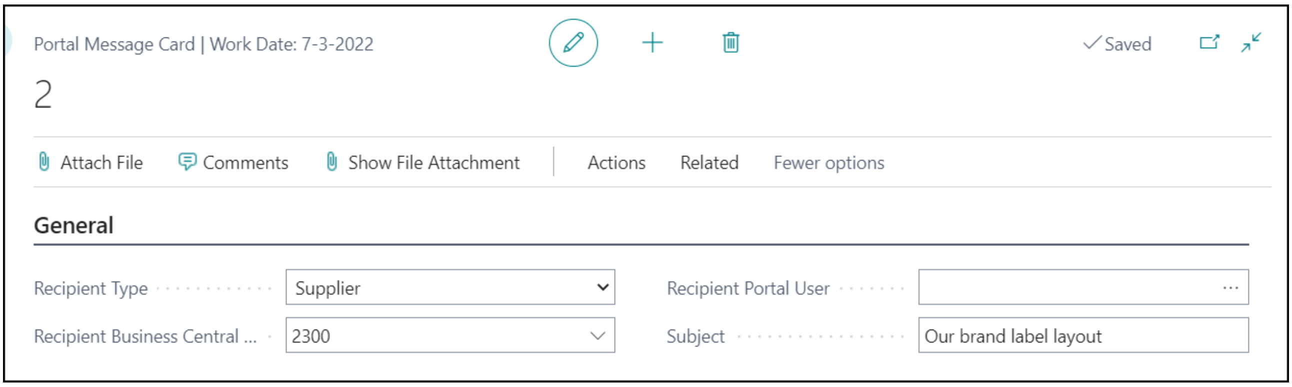


Resource Name	Resource Extension	FileBlob	External Location	Creation Date	Creation Time	Created By
TRIMIT Logo	pdf			18-10-2018	16:12:23	CORNATOR\KBI
Logo_color_rgb	png			18-10-2018	16:12:43	CORNATOR\KBI
LogoColor_white background	png			18-10-2018	16:12:32	CORNATOR\KBI
LogoColor_dark background	png	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

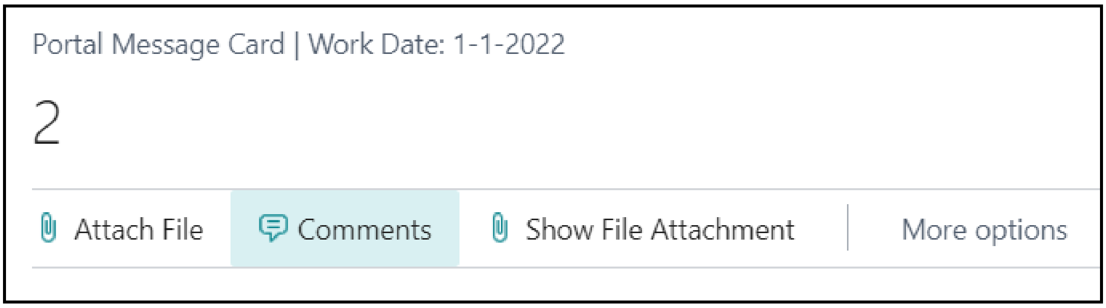
Recipient Type, Recipient Business Central ID, Recipient Portal User and **Subject.**



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

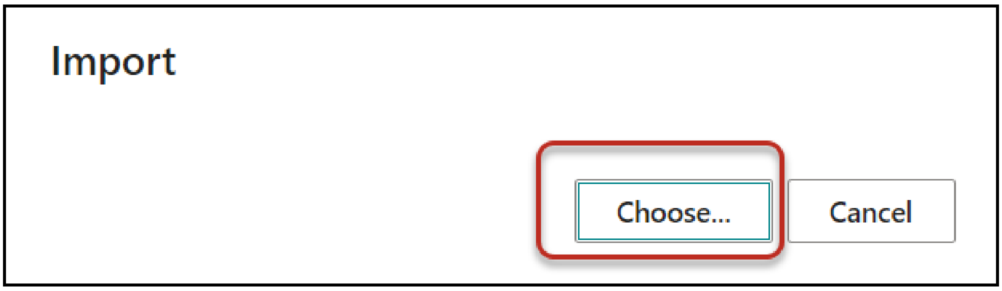
ACTIONS

Portal Message Card page has the following Actions:

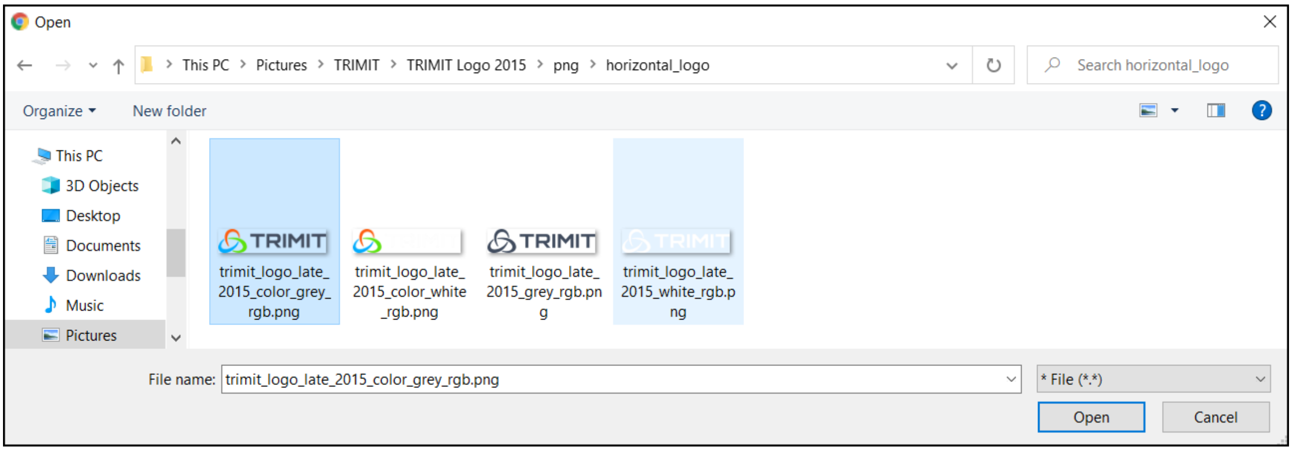


ATTACH FILE

With this Action, you can attach Files.



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



COMMENTS

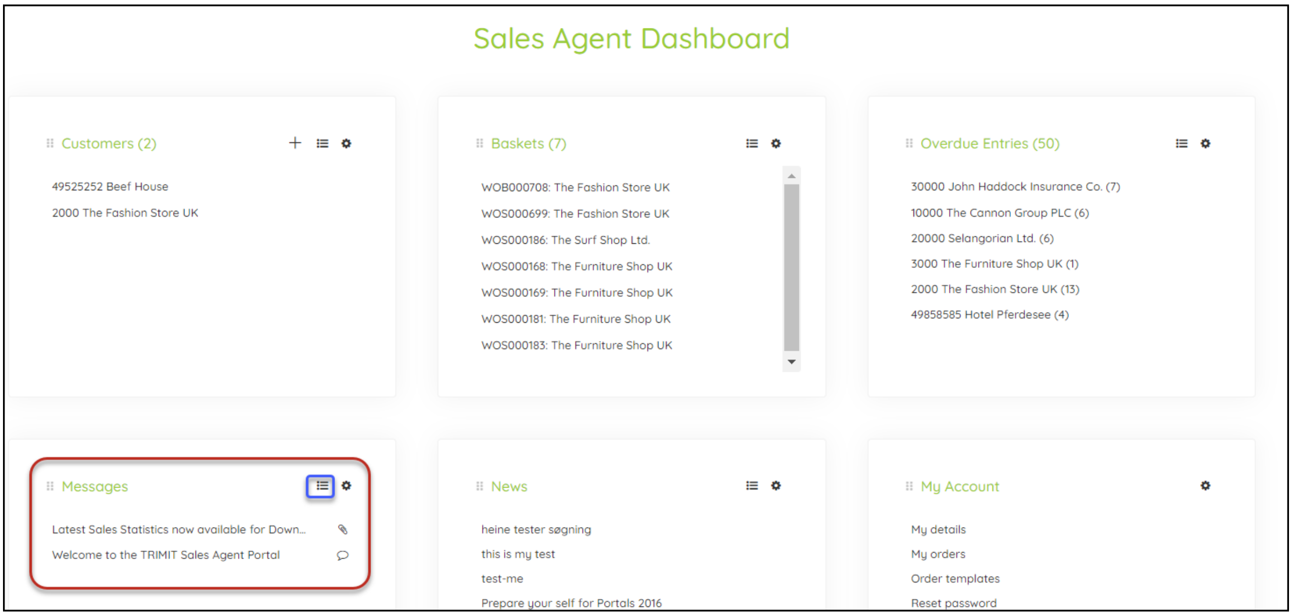
Same Action as in the **Poral Message List.**

SHOW FILE ATTACHMENT

Same Action as in the **Poral 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.

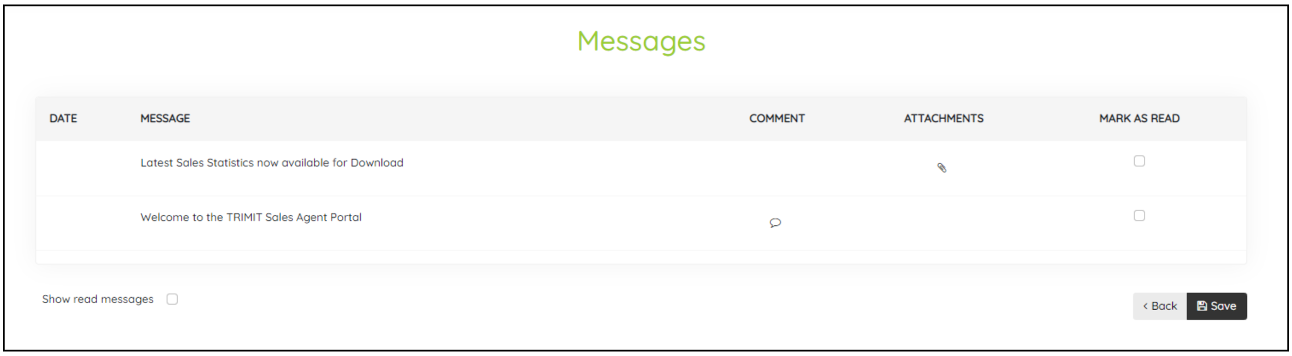
Here is a description of Message functionality on Portals:

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:



DATE

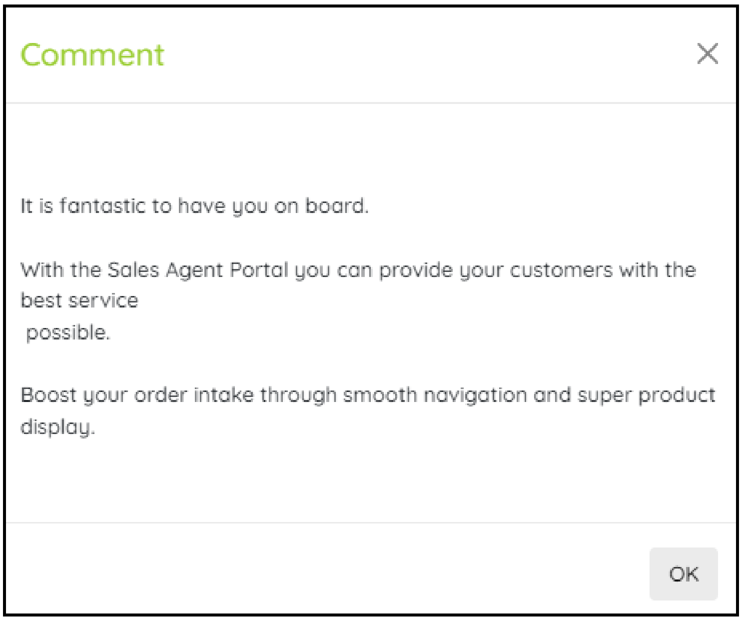
Message Creation date

MESSAGE

Subject of a Message

COMMENT

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



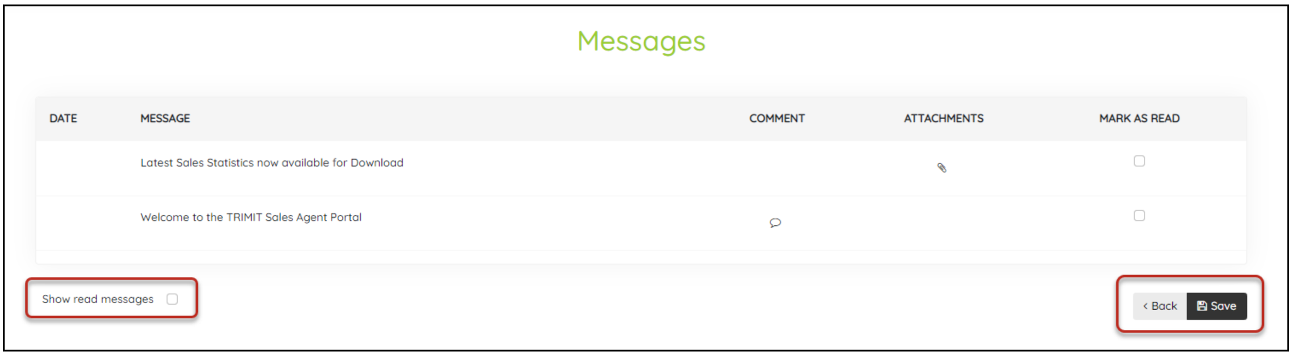
ATTACHMENTS

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

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

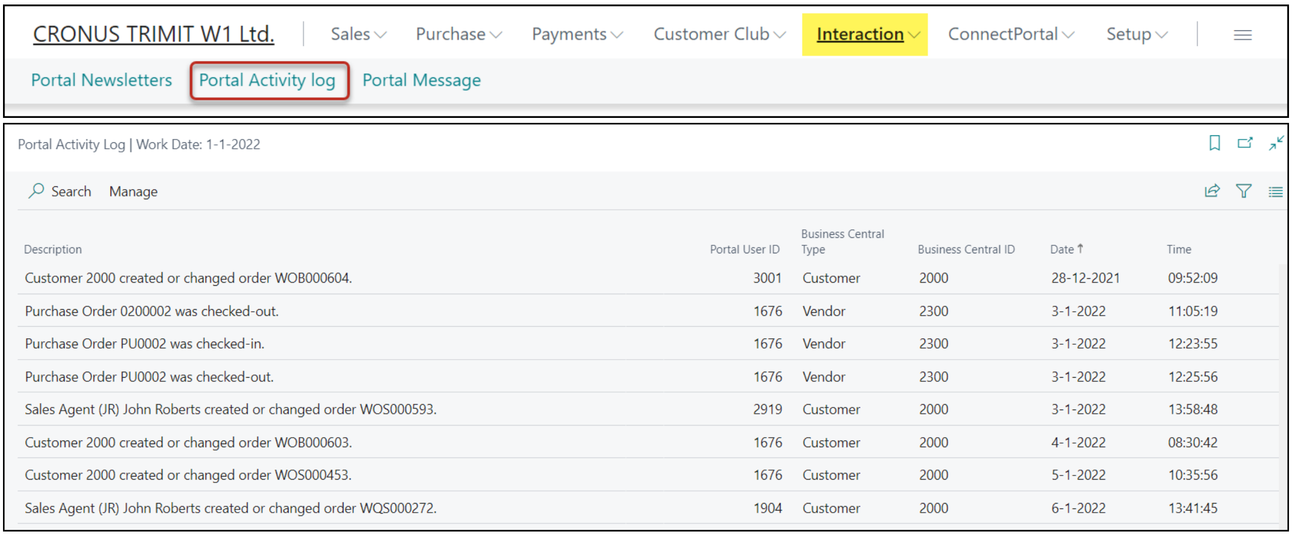
Navigate to dashboard

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*.



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.**

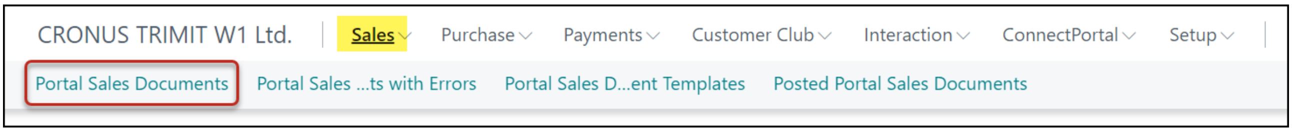
DATE
Date the activity was initiated.

TIME
Time the activity was initiated.

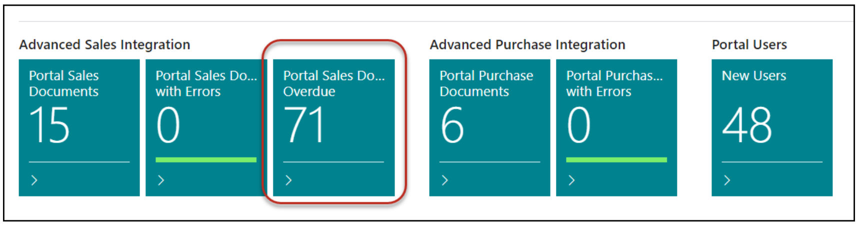
PORTAL OVERDUE DOCUMENTS

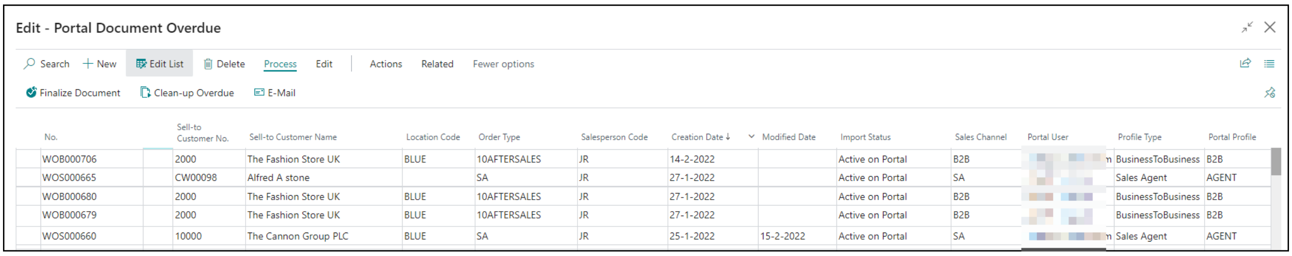
Since SA Portal and B2B Webshop got Availability Functionality - this arises a problem with created and not finalized Sales Documents on the portals.

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***).





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	[illegible]	BusinessToBusiness	B2B
WOS000665	CW00098	Alfred A stone		SA	JR	27-1-2022		Active on Portal	SA	[illegible]	Sales Agent	AGENT
WOB000680	2000	The Fashion Store UK	BLUE	10AFTERSALES	JR	27-1-2022		Active on Portal	B2B	[illegible]	BusinessToBusiness	B2B
WOB000679	2000	The Fashion Store UK	BLUE	10AFTERSALES	JR	27-1-2022		Active on Portal	B2B	[illegible]	BusinessToBusiness	B2B
WOS000660	10000	The Cannon Group PLC	BLUE	SA	JR	25-1-2022	15-2-2022	Active on Portal	SA	[illegible]	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.

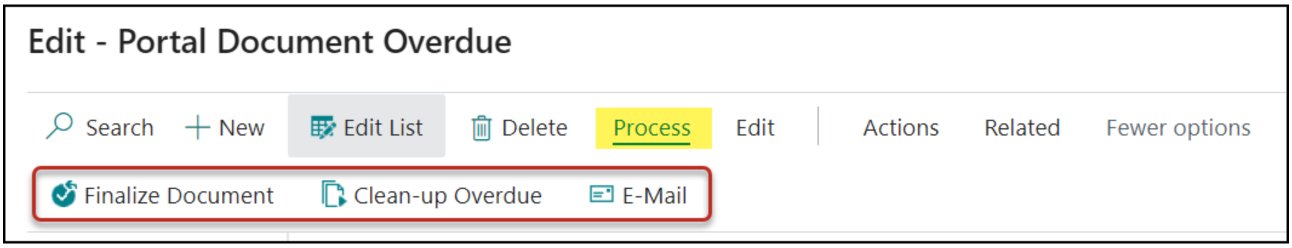
PROFILE TYPE

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



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

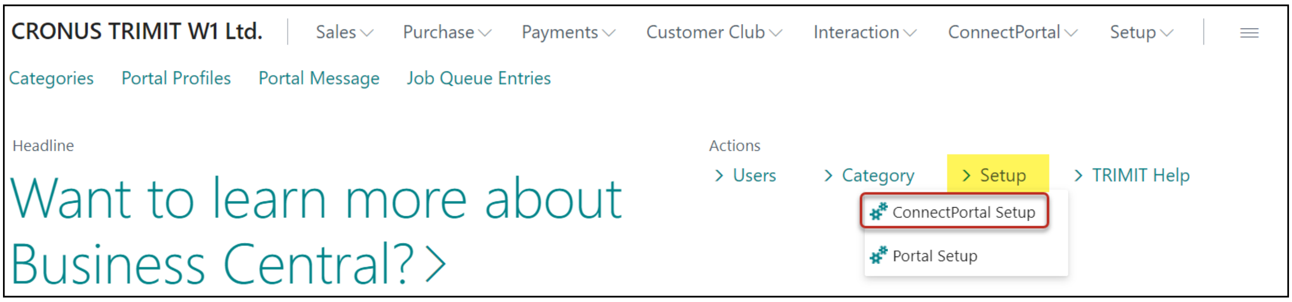
Clicking this Action deletes all the Overdue Documents.

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**



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

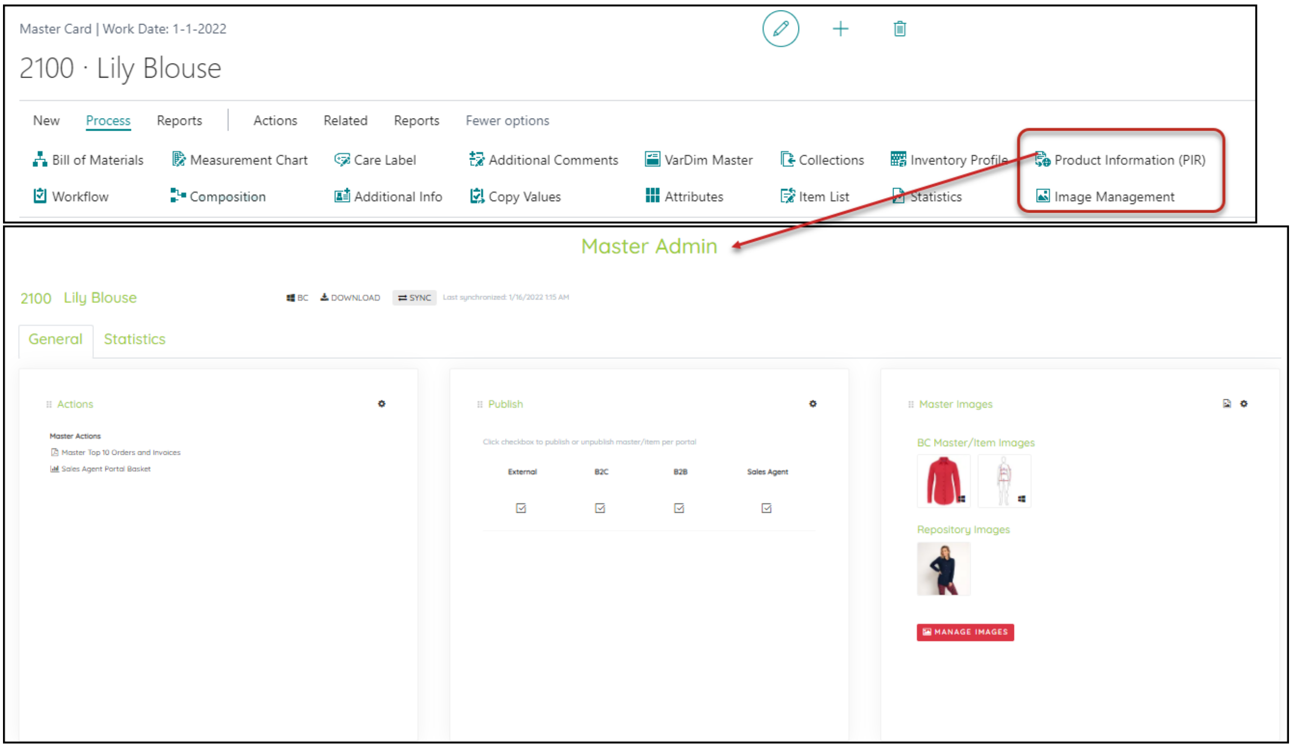
The **Overdue entries** in the dashboard of the B2B Webshop and SA Portal, show Posted Sales Invoices that are due based on the **Due Date** of the Posted Sales Invoice; they are in no way related to the Portal Overdue Documents – which are open Portal Sales Documents.

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.

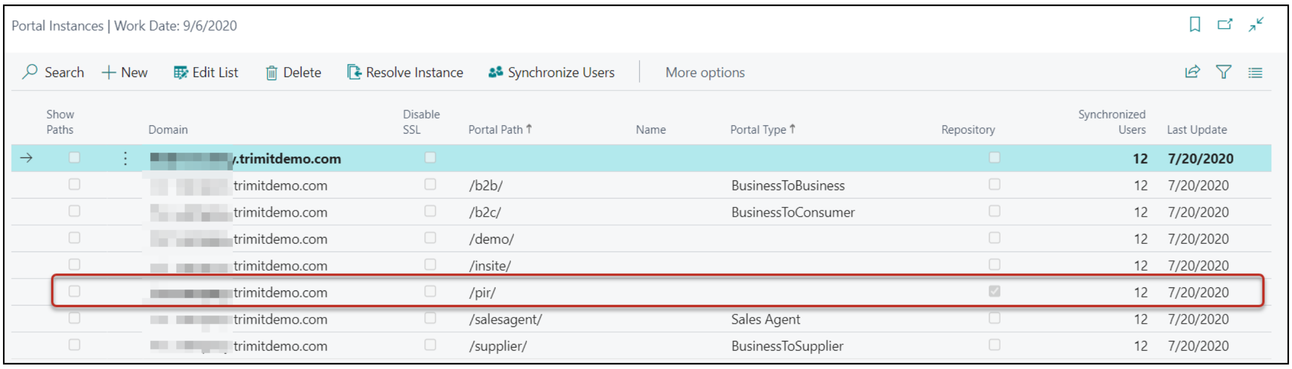
If you want others to be able to interact with a Portal from within TRIMIT you can call a Portal page.



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**.



The URL also contains parameters.

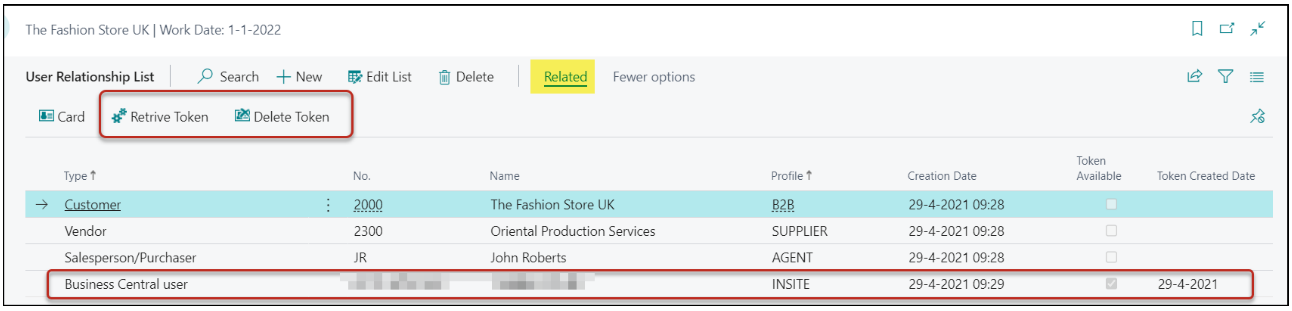
The page that is being called on the portal side resides behind the login. Therefore, there is a need to let system login automatically which is more user friendly. But that means sending Username and Password in the URLs and behind the scenes as clear text. This is of course a major security risk as 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.*



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.

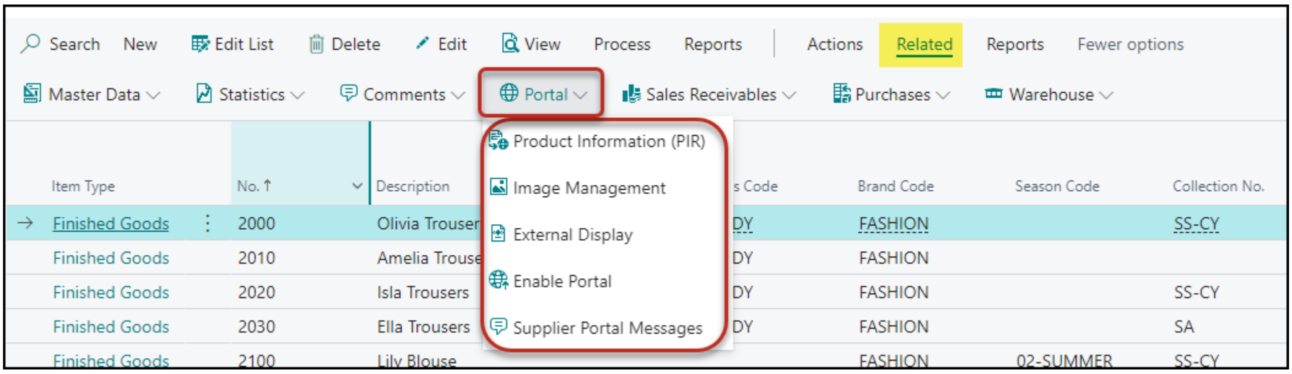
This token is used behind the scenes and applied to any request that needs authentication.

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)***.

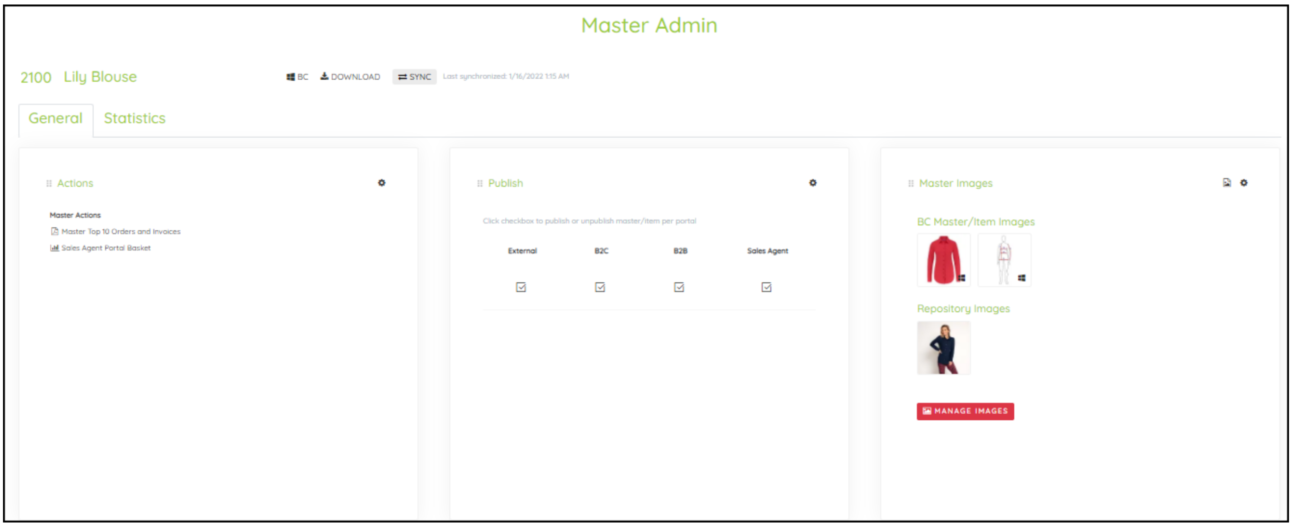
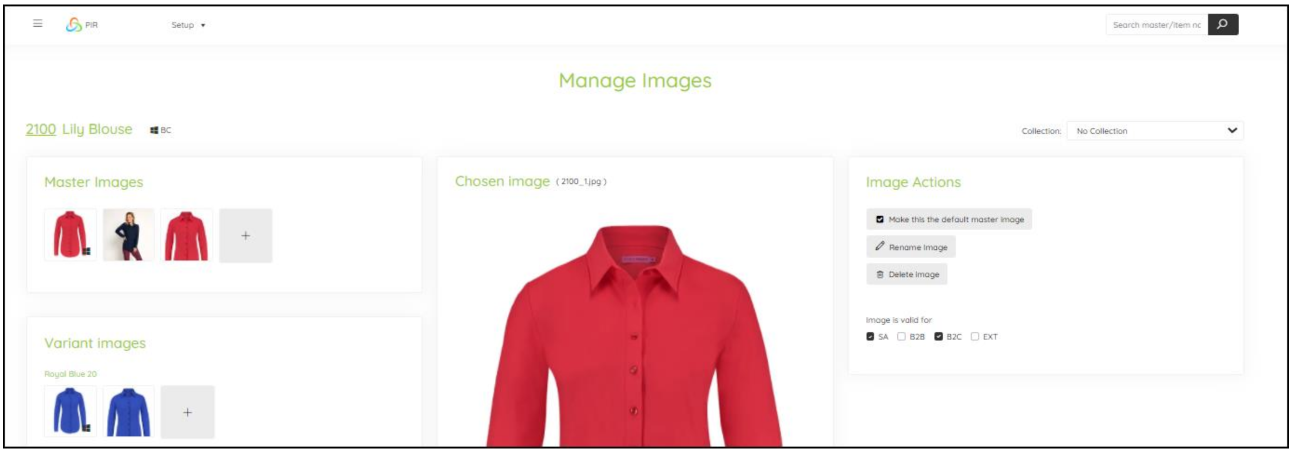


IMAGE MANAGEMENT

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.

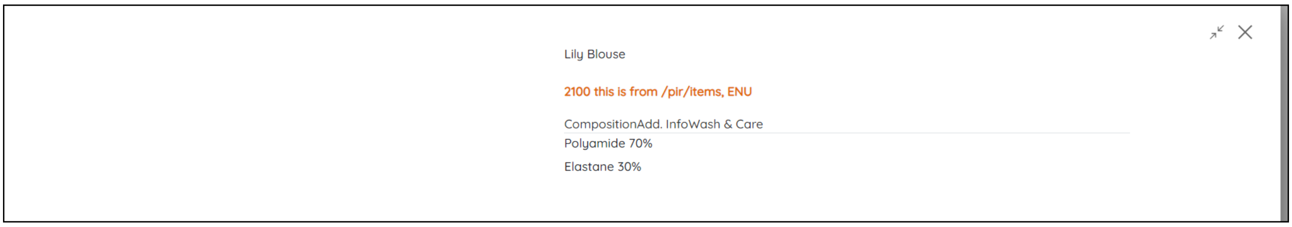
Read more details in ***White Paper – Portals Product Information Repository (PIR)***.



EXTERNAL DISPLAY

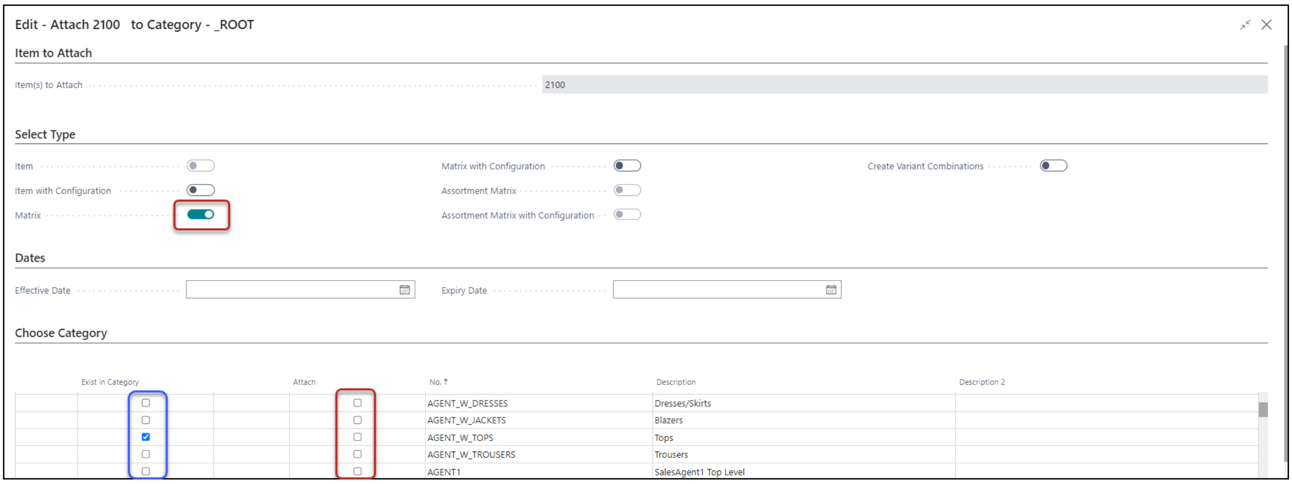
Clicking this Action will open a Product view for the external systems. The view includes data available for this product.

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



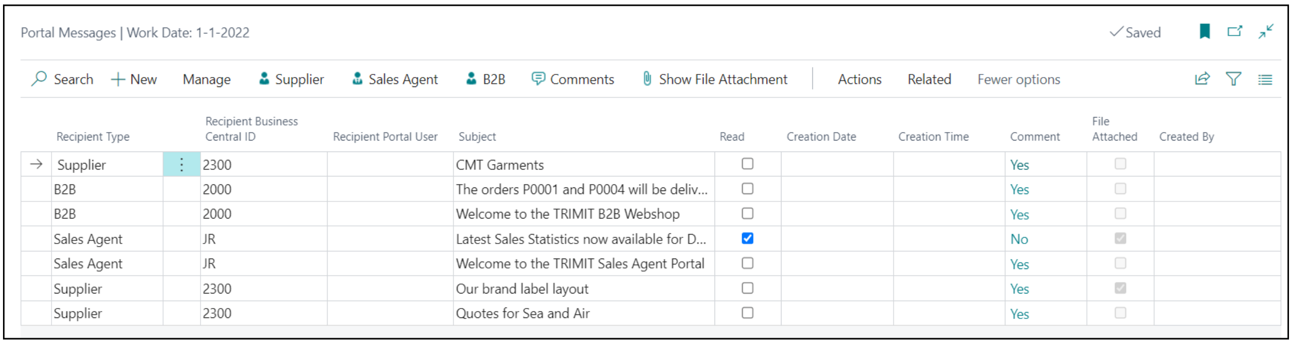
ENABLE PORTAL

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.



SUPPLIER PORTAL MESSAGES

Clicking this Action opens [Portal Message List]

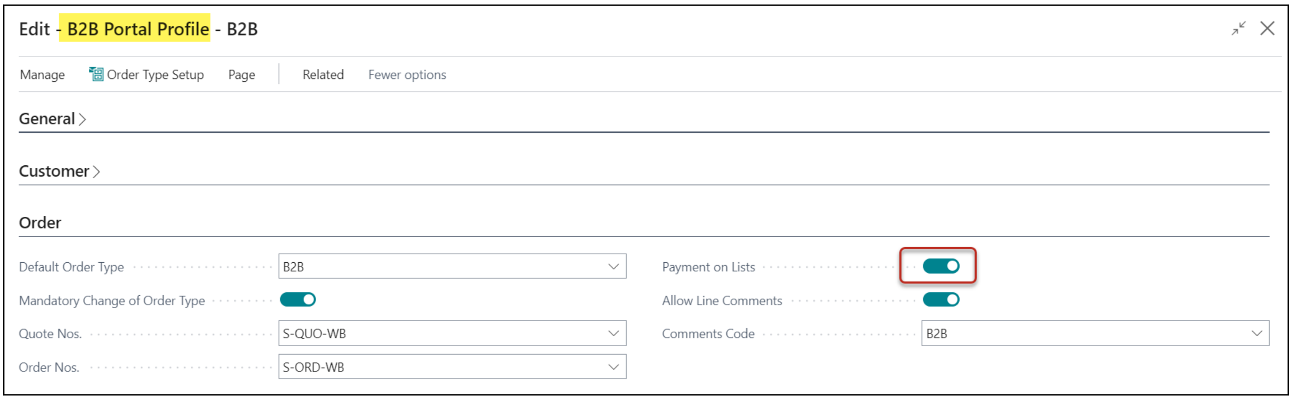


Recipient Type	Recipient Business Central ID	Recipient Portal User	Subject	Read	Creation Date	Creation Time	Comment	File Attached	Created By
Supplier	2300		CMT Garments	☐			Yes	☐	
B2B	2000		The orders P0001 and P0004 will be deliv...	☐			Yes	☐	
B2B	2000		Welcome to the TRIMIT B2B Webshop	☐			Yes	☐	
Sales 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	☐	

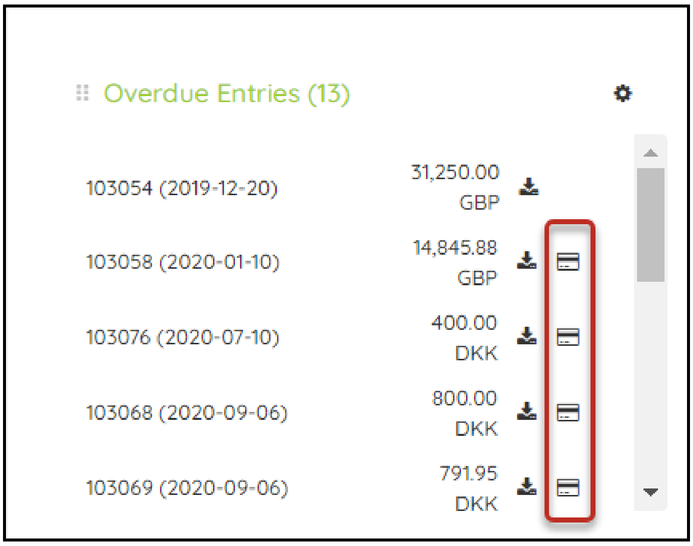
B2B WEBSHOP PAYMENT

Here is described B2B Payment setup in TRIMIT.

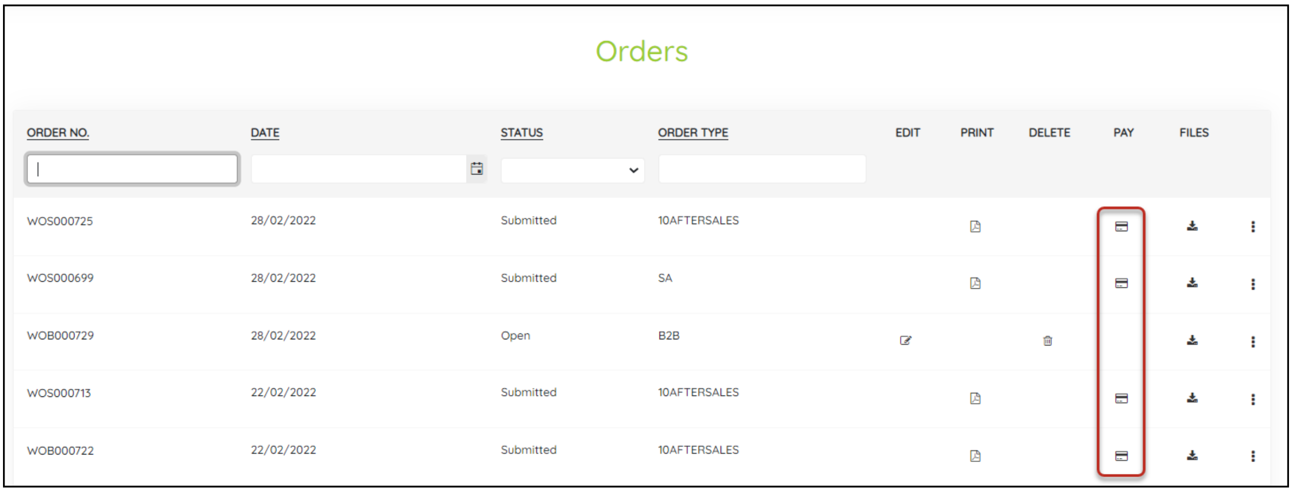
B2B Portal Profile card has a Boolean field which, when set to *TRUE*, enables Payment icons to appear on Order list pages on B2B. Only relevant Orders will have this Payment icon, i.e., Orders which must be paid, but not yet have been paid.



Payment icons in **Overdue Entries** dock:



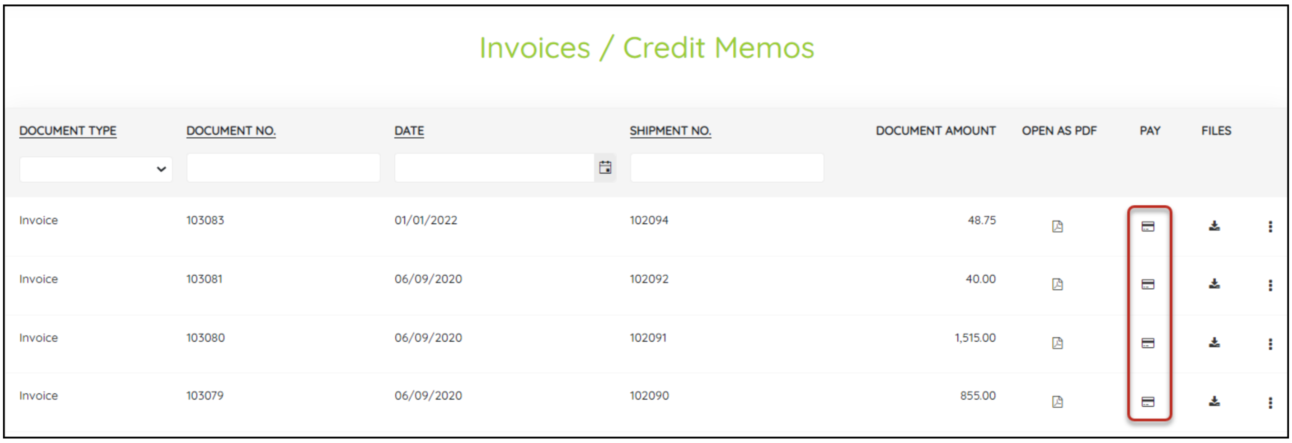
Payment icons on **Orders** page:



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					

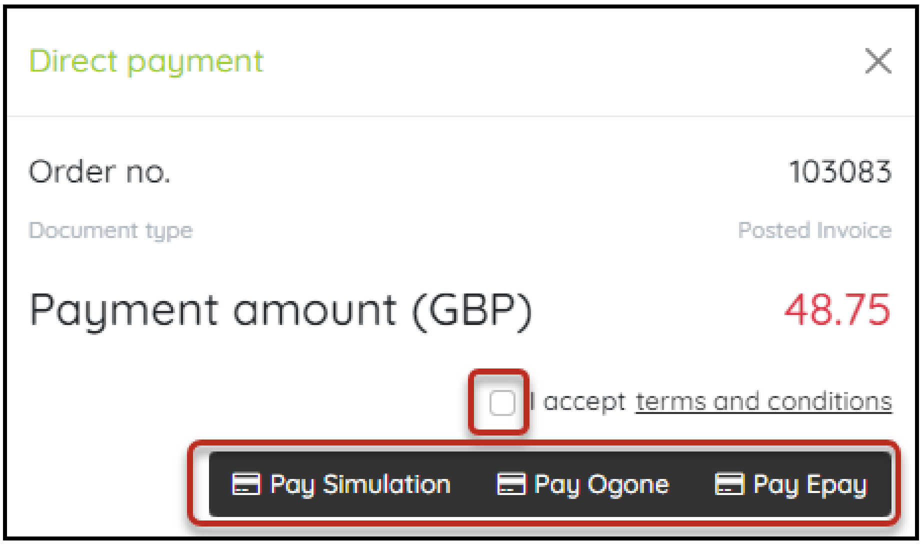
Payment icons on **Invoices/Credit Memos** page



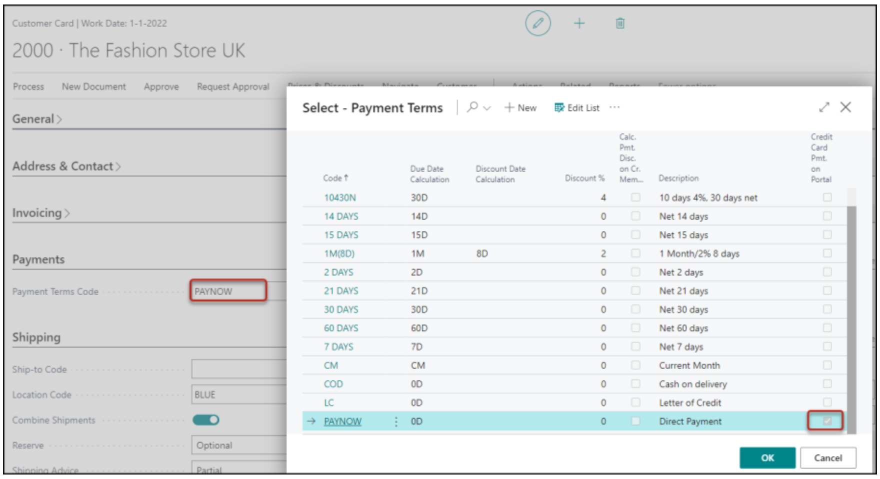
Invoices / Credit Memos

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			

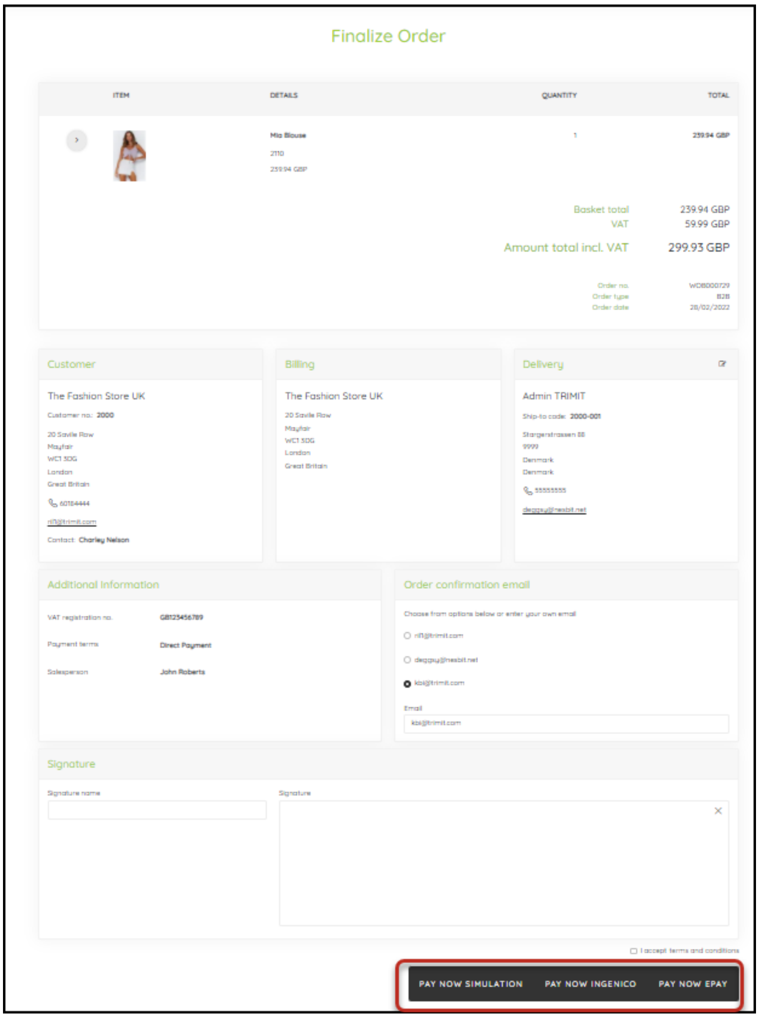
After clicking this Payment icon, a new pop-up window will appear which shows Order number, Order Amount and Currency and available Payment Methods.
Make sure you put a checkmark in *I accept terms and conditions*.
Clicking on Payment Methods will create a payment (this requires Credit Card information).



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



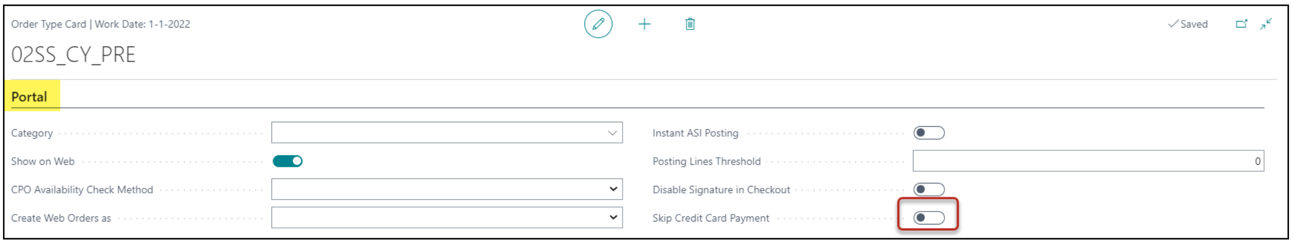
If **Credit Card Pmt. On Portal** is set to *TRUE,* payment provider buttons appear on B2B **Finalize Order** page:



NOTE

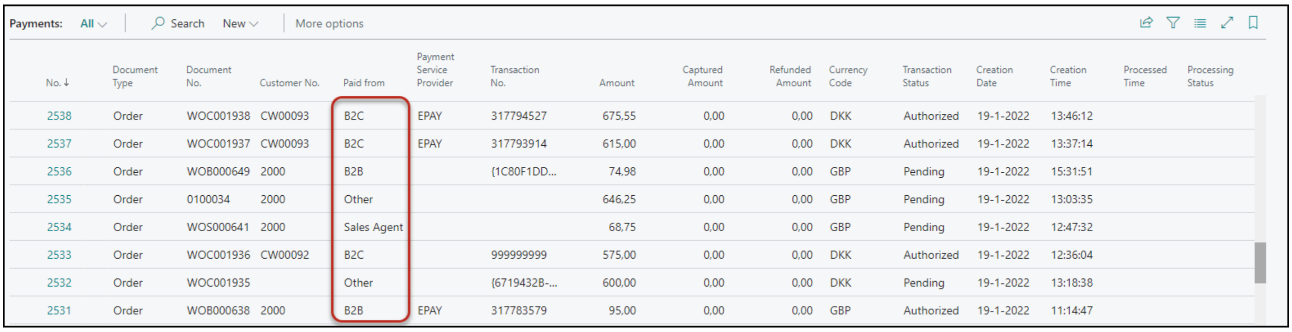
Entering **Finalize Order** page on B2B Webshop initiates creation of temporary order in TRIMIT. This triggers all needed calculations, defining that this is a payment mode (if payment is activated) and at this stage it is possible to retrieve all the extra information using e.g., credit card fees, shipment cost etc.

The Credit Card payment can be disabled on **Order Type** card:



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*.

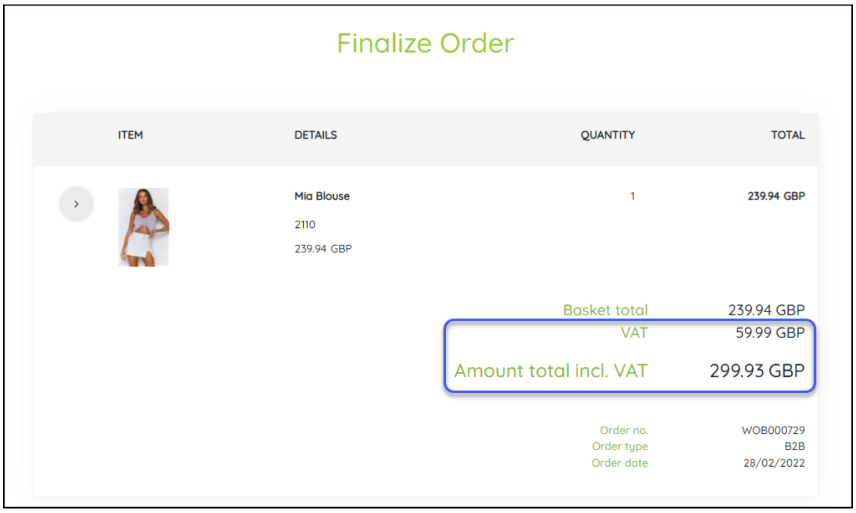


Payments: All | Search | New | More options

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.

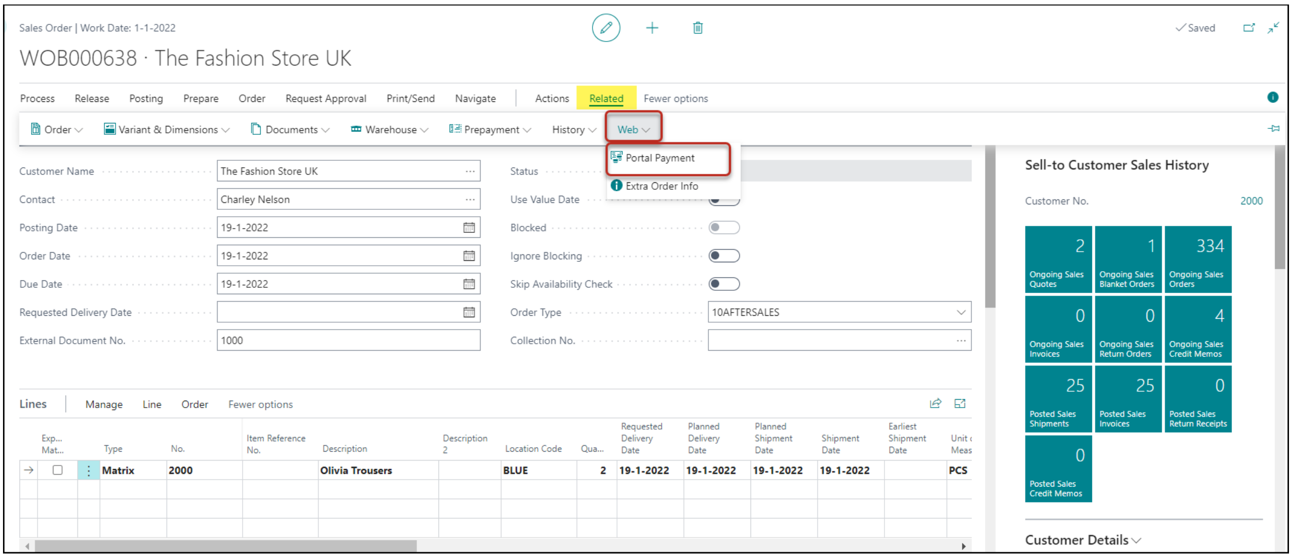


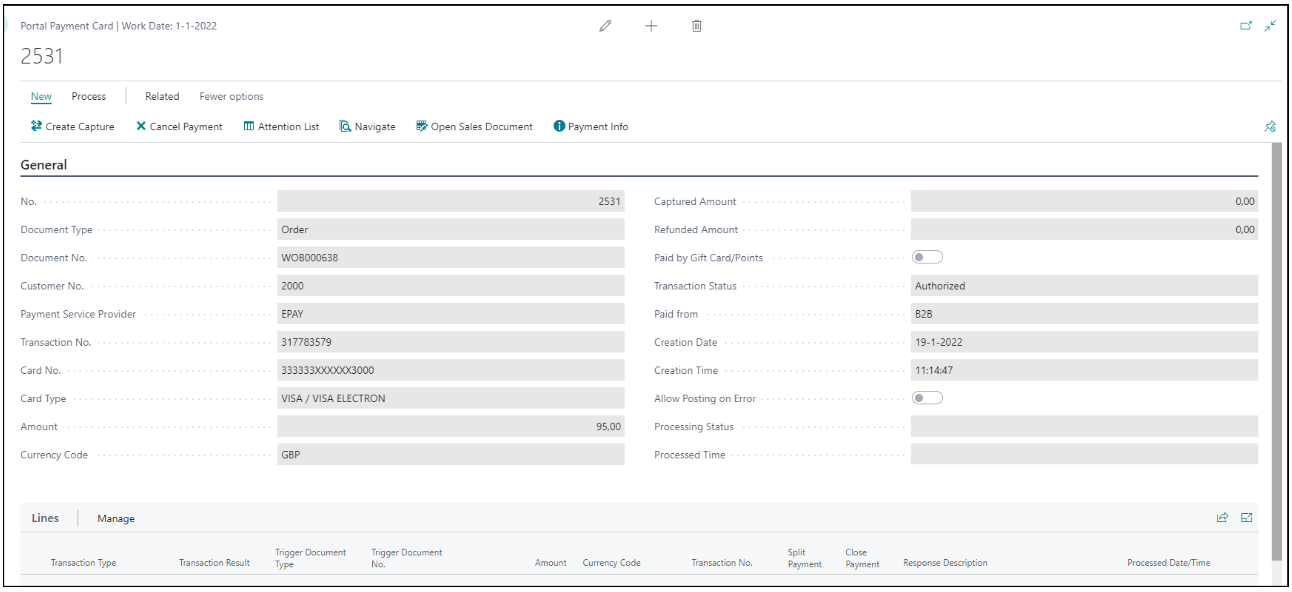
If an Order has been paid, then it will not be possible to reopen it for editing anymore on B2B Webshop.

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***.

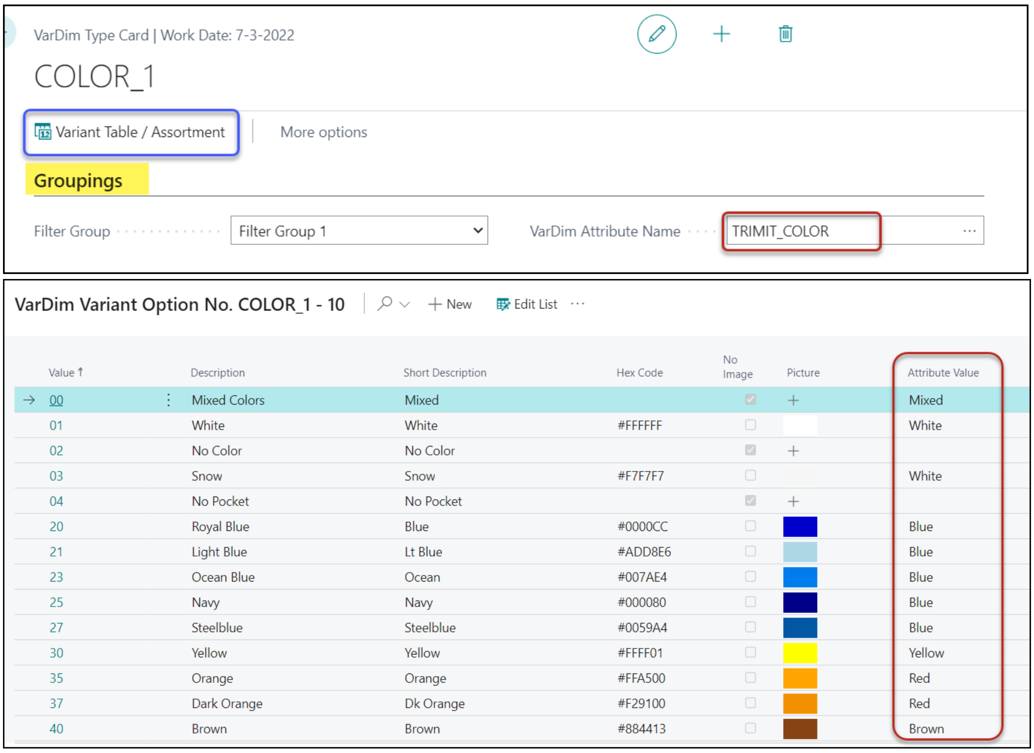




FILTER GROUPS/ITEM ATTRIBUTES IN VARDIM TYPES

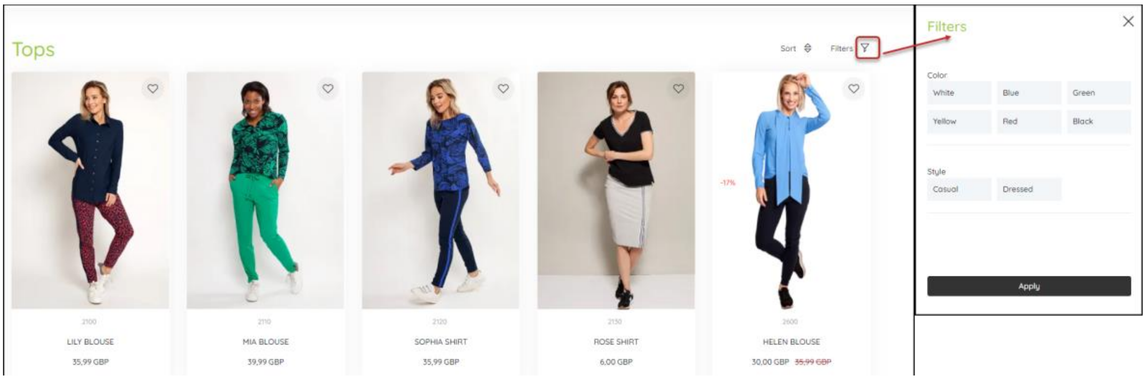
In comparison to older versions of the Portals, the field **Filter Group** in the VarDim Types (**Tell me** *VarDim Type*) has almost lost his influence on the Filters on the Portals.

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:



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	#884413			Brown

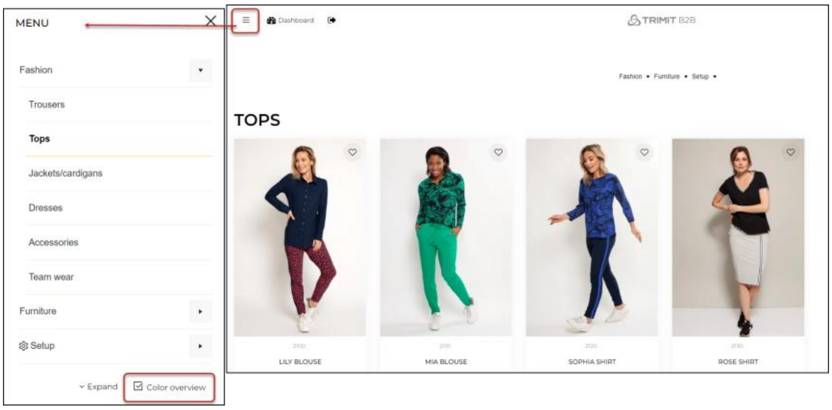
In the Product Overview, you can click the **Filter** icon, and see the possible Filters:



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: