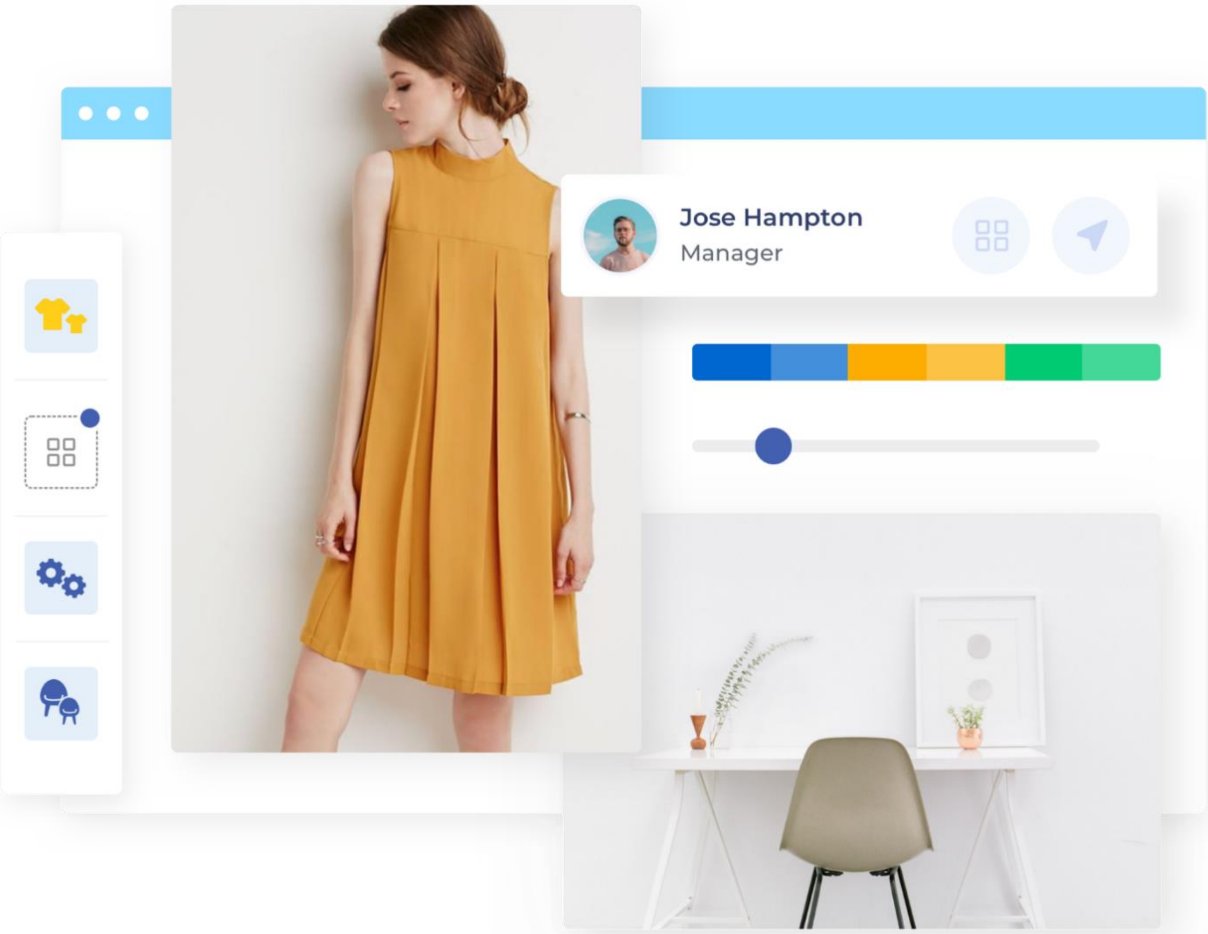


WHITE PAPER

TRIMIT Role Center Features 21.2

This document contains information regarding the additional functionality regarding Role Centers and Pages in TRIMIT 21.2 for Business Central 2021 Release Wave 2 W1 (BC19).

Version: 21.2
Date: 07-01-2022

CONTENTS

INTRODUCTION

TRIMIT has used the opportunity to add many features concerning improvements of working with the RTC client from its version TRIMIT 2013 based on Business Central 2013.
In the TRIMIT 2017 release we again added some new features to enhance the RTC user experience.
All the features are described in this document.

The Page Actions, the Charting Feature, personalization of Role Centers according to the TRIMIT Zero-Cost-Upgrade philosophy deserve specific attention.

The functionality described is the functionality in **TRIMIT 21.2 for Business Central W1 BC19.X**.
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).

COMPONENTS

TRIMIT Role Center Features contains the following objects:

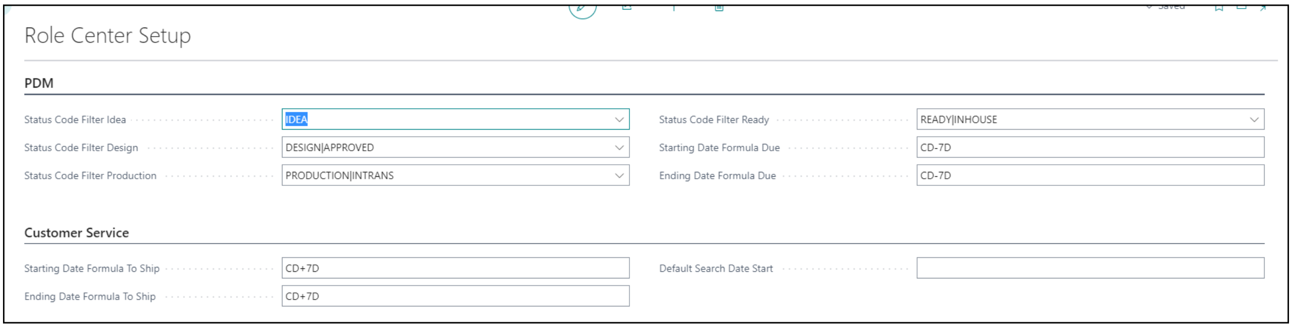
The tables	***6036514 trm Page Actions***
	6036730 trm Production Cue
	6036800 trm Role Center Setup
	6036801 trm PDM Cue
	6036802 trm Customer Service Cue
	6036803 trm Small Business Cue
	6036804 trm CRM Cue
	6038161 trm ConnectPortal Cue
The pages	***6036301 trm PDM Processor Role Center / 6036330 trm PDM Processor Activities***
	6036302 trm Cust Service Role Center / 6036331 trm Cust. Service Activities
	6036303 trm Small Bus. Role Center / 6036332 trm Small Business Activities
	6036304 trm Shop Floor Role Center
	6036305 trm CRM Role Center / 6036333 CRM Processor Activities
	6036306 trm Production Role Center / 6036335 trm Prod. Processor Activities
	6036341 trm My Masters
	6036342 trm Search Page
	6036343 trm My Workflow Activities
	6036344 trm Search Sales
	6036345 trm My Actions
	6036346 trm My Activities
	6036507 trm Role Center Setup
	6036520 trm Headline Role Center
	6038160 trm ConnectPortal Role Center / 6038161 trm Portal Activities

The codeunits ***6036523 trm Open Help in TRIMIT***
6038102 trm Portal Service Handler

To show the information in the Role Centers, there are much more tables, pages, etc. involved.

ROLE CENTER SETUP

Via **Tell me** *Role Center Setup***,** you can open the Card for the Role Center Setup.
These Parameters influence the content of the special TRIMIT Profiles.


Role Center Setup

PDM

Status Code Filter Idea	IDEA	Status Code Filter Ready	READY|INHOUSE
Status Code Filter Design	DESIGN|APPROVED	Starting Date Formula Due	CD-7D
Status Code Filter Production	PRODUCTION|INTRANS	Ending Date Formula Due	CD-7D

Customer Service

Starting Date Formula To Ship	CD+7D	Default Search Date Start	
Ending Date Formula To Ship	CD+7D		

DESCRIPTION OF THE PARAMETERS:

FASTTAB PDM

These Parameters influence the cues on the Role Center of profile *TRM_PDM – TRIMIT PDM/Design*.

STATUS CODE FILTER IDEA

In this Parameter, you can enter a Filter for the first Master Cue in the Profile *TRM_PDM* called *Idea.*
I.e.: If you want to show all the Masters with **Status Code** *Idea,* you simply enter *IDEA* in this Parameter.

STATUS CODE FILTER DESIGN

In this Parameter, you can enter a Filter for the second Master Cue in the Profile *TRM_PDM* called *Design.*
I.e.: If you want to show all the Masters with **Status Code** *Approved* or *In Design,* you simply enter *APPROVED|IN DESIGN* in this Parameter.

STATUS CODE FILTER PRODUCTION

In this Parameter, you can enter a Filter for the third Master Cue in the Profile *TRM_PDM* called *Production.*
I.e.: If you want to show all the Masters with **Status Code** *In Production,* you simply enter *PROD* in this Parameter.

STATUS CODE FILTER READY

In this Parameter, you can enter a Filter for the fourth Master Cue in the Profile *TRM_PDM* called *Ready.*
I.e., If you want to show all the Masters with **Status Code** *Ready or* without a **Status Code** you simply enter *READY|''* in this Parameter.

The **Status Code** that can be connected can be setup via **Tell me** *Status Codes*:

Status Code List

Search + New Edit List Delete More options

Status Code	Description	Status Sorting ↑	Purchase Requisition, Available	Purchase Order, Available	Purchase Blanket Order, Available	Purchase Invoice, Available	Purchase Credit Memo, Available	Sales Quote, Available	Sales Order, Available	Sales Blanket Order, Available	Sales Invoice, Available	Sales Credit Memo, Available	Sales, Error when No Available Quantity
IDEA	Idea/Design	10	☑	☑	☑	☑	☐	☐	☐	☐	☐	☐	☐
DESIGN	Design	20	☑	☑	☑	☑	☐	☑	☑	☑	☐	☐	☐
APPROVED	Approved	30	☑	☑	☑	☑	☐	☑	☑	☑	☐	☐	☐
READY	Ready	40	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☐
PRODUCTION	In Production	50	☑	☑	☑	☐	☐	☑	☑	☑	☐	☐	☐
INTRANS	In Transit	60	☐	☐	☐	☑	☑	☑	☑	☑	☐	☐	☐
INHOUSE	In House	70	☐	☑	☑	☑	☑	☑	☑	☑	☑	☑	☐
NO-SALES	Sales Only Available Until Jan. 31	80	☑	☑	☑	☑	☑	☐	☑	☐	☑	☑	☐
NO-PURCHASE	Purchase Only Available Until Jan. 31	90	☐	☑	☐	☑	☑	☑	☑	☑	☑	☑	☐
AVAILABLE	Sales Only If Available Quantities	100	☐	☐	☐	☐	☐	☐	☑	☐	☑	☐	☑
BLOCKED	Blocked	110	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

The concept behind this setup is that the Masters are first in the development phase (Status Code *IDEA*).
At a certain moment, the Masters are in the Approval phase until they get Status Code *APPROVED*.
After approval, the Salesmen Samples are in production (Status Code *PRODUCTION* and *INTRANS*).
As soon as these Samples have been received, the actual Sales process can start (Status Code *READY* and *INHOUSE*). From that moment the Design process is done.

NOTE

Of course, a customer can give his own interpretations to design phases and he can make his own Statuses accordingly. He can also decide that some phases are not specifically design phases but used further down the life cycle of a product. By customization of the Role Center, a user can also delete phases, if desired.
This is discussed in chapter Personalization of Activity Groups.
For adding extra phases, customization is required, for instance a Cue *Rejected* in which Masters end up, if they are not approved.

STARTING DATE FORMULA DUE / ENDING DATE FORMULA DUE

For the cue of **My Due Workflow** and **My Overdue Workflow** of the profile TRM_PDM, you can enter a Date Formula to determine which Workflow Activities for which the specific User is the **Responsible ID** must be shown in this Cue.
I.e., If for you want to see all the Activities that should have been approved in the last week, or in the coming week you could enter *CD-7D and CD+7D.*
If the Work Date is 23-01-20, you will see the Activities that should be approved between 16-01-20 and 30-02-20.

FASTTAB CUSTOMER SERVICE

These Parameters influence the cues on the Role Center of profile *TRM_CS – TRIMIT Customer Service.*

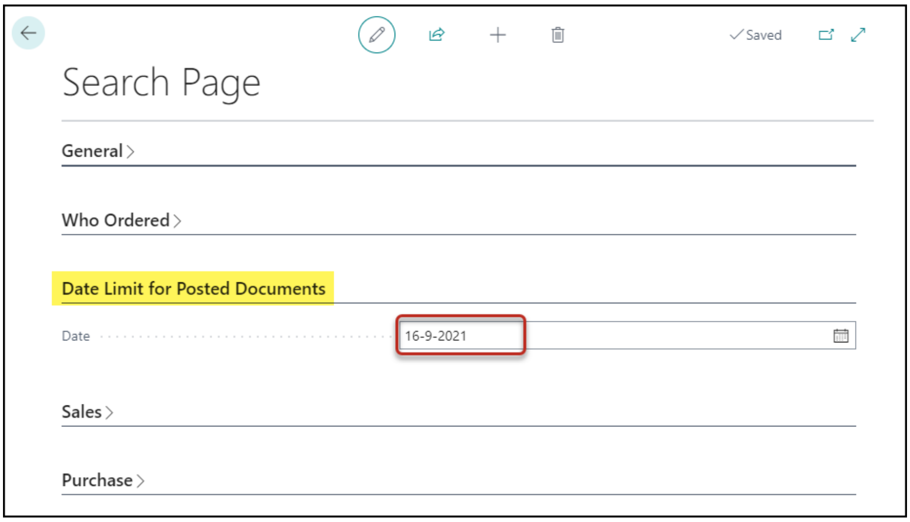
STARTING DATE FORMULA TO SHIP / ENDING DATE FORMULA TO SHIP

For the cue of **To Ship** that shows the number of Sales Orders for which lines can be shipped of the profile TRM_CS you can enter a Date Formula to determine between which Dates the Shipment Date should be to be shown in **To Ship**.
I.e., If for you want to see all the Sales Orders for which lines should be shipped last week or should be shipped next week you can enter *CD-7D and CD+7D.*
If the Work Date is 23-01-20, you will see the Orders for which the lines have Shipment Dates between 16-01-20 and 30-02-20.

NOTE
Standard Microsoft Dynamics 365 Business Central does not look at the Shipment Date of the Sales Lines but only at the Shipment Date on the Sales Header! TRIMIT looks at the Shipment Date on the Lines.

DEFAULT SEARCH START DATE

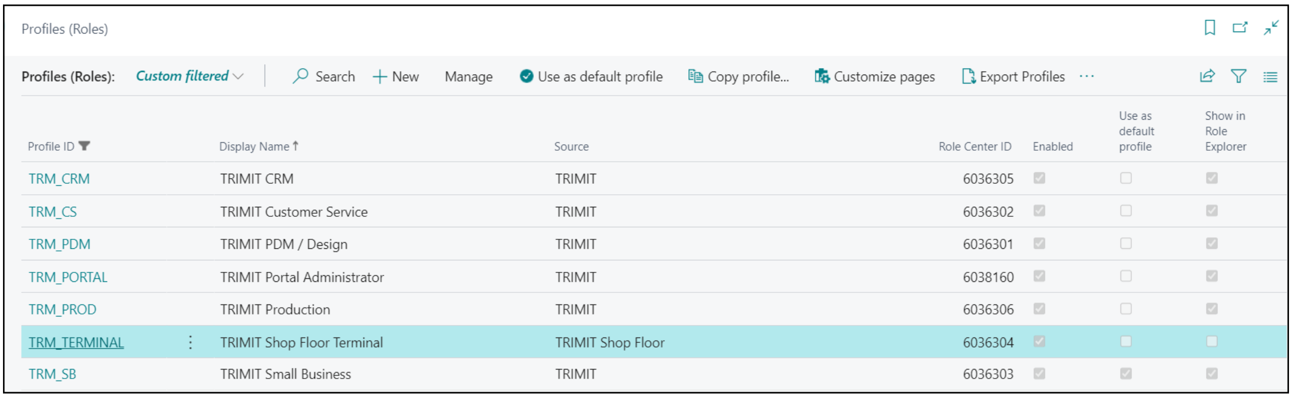
If you enter a Date Formula in this Field, it will become the default **Date Limit for Posting Documents** when searching Documents via the TRIMIT Search function that can be used in all the TRIMIT Profiles.
If this field is not filled, the default will be set to *Work Date – 90 Days*.



TRIMIT PROFILES (ROLES)

INTRODUCTION OF TRIMIT PROFILES

Currently TRIMIT has added 7 different profiles.
You can find them in the profile list by using **Tell me** *Profiles*
The TRIMIT profiles start with *TRM_* (See Fig. 1)



Profile ID	Display Name	Source	Role Center ID	Enabled	Use as default profile	Show in Role Explorer
TRM_CRM	TRIMIT CRM	TRIMIT	6036305	☑	☐	☑
TRM_CS	TRIMIT Customer Service	TRIMIT	6036302	☑	☐	☑
TRM_PDM	TRIMIT PDM / Design	TRIMIT	6036301	☑	☐	☑
TRM_PORTAL	TRIMIT Portal Administrator	TRIMIT	6038160	☑	☐	☑
TRM_PROD	TRIMIT Production	TRIMIT	6036306	☑	☐	☑
TRM_TERMINAL	TRIMIT Shop Floor Terminal	TRIMIT Shop Floor	6036304	☑	☐	☐
TRM_SB	TRIMIT Small Business	TRIMIT	6036303	☑	☑	☑

Fig. 1: TRIMIT Profiles

> **NOTE**
> *TRM_TERMINAL* will only be present if you also installed the TRIMIT Shop Floor App.

The TRIMIT profiles are created automatically when you install the TRIMIT App.
The *TRM_TERMINAL* will however only be created automatically when you also install the TRIMIT Shop Floor App.

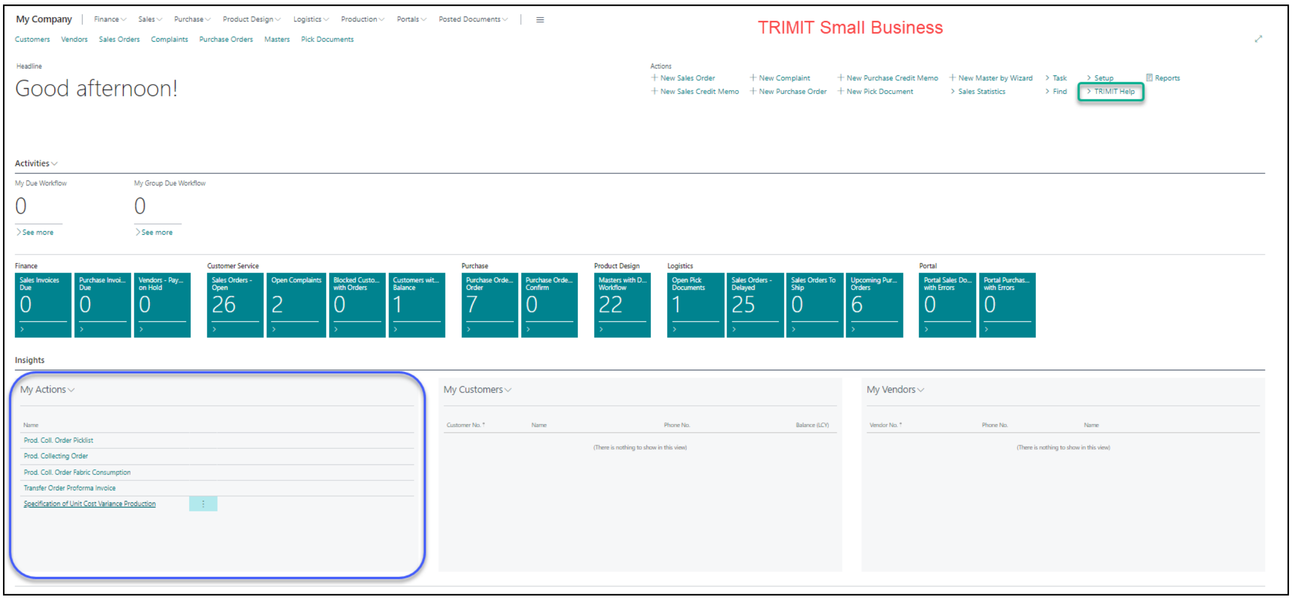
Every profile has its specific function. These will be described in paragraphs later in this chapter.

DIFFERENCES BETWEEN TRIMIT AND BUSINESS CENTRAL PROFILES

In this chapter, generic differences between TRIMIT Profiles and standard Business Central Profiles are discussed. These differences can be shown in the standard Role Center made for the *TRIMIT Small Business* profile compared to the Role Center deducted from the standard Business Central profile *Sales Order Processor*. (See Fig. 2.)

In this paragraph, you will only focus on generic differences that are valid for all TRIMIT and Business Central Role Centers. A more detailed description on the individual profiles is discussed in the next paragraphs when specific profiles are discussed.

a. TRIMIT Small Business Profile



b. Sales Order Processor Profile

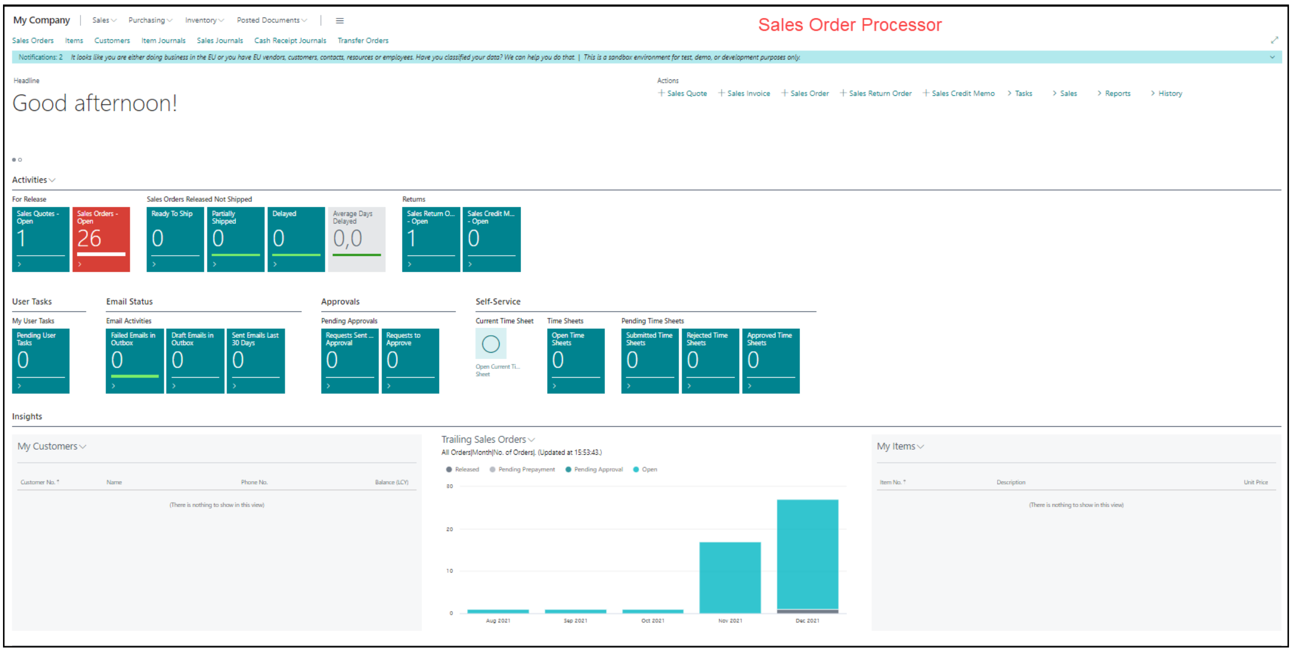


Fig. 2: Comparison TRIMIT profile (a) with standard Business Central profile (b).

SEARCH

TRIMIT has added a Search function in the TRIMIT Profiles (via ***> Find, Search***). The Search function will be explained later in TRIMIT Search Function.

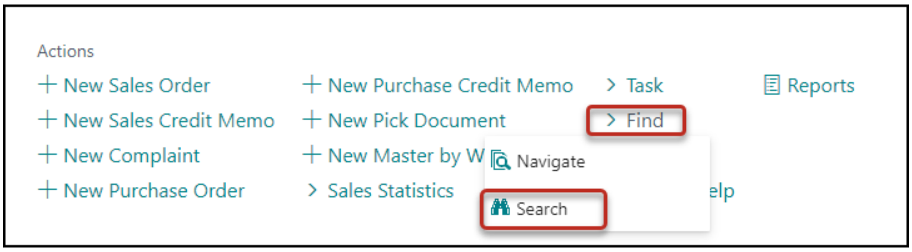


Fig. 3: Actions, Find options

MY ACTIONS

Furthermore, you see in the TRIMIT Role Center a FactBox called ***My Actions*** (shown in **blue** frame in Fig. 2a). This TRIMIT specific FactBox enables the user to execute activities that are specifically dedicated to the user itself or to all users. **My Actions** is described in [FactBox My/Page Actions](#).

MY MASTERS

In the TRIMIT Profiles you can include the FactBox ***My Masters.*** You can add it yourself via *Personalize*, although you can also use the standard Business Central FactBox ***My Items***, but it is not common to manage products on Item level in TRIMIT.

TRIMIT HELP

Clicking on ***TRIMIT Help*** (shown in the green frame in Fig. 2a), will open a specific website: https://help-bc.trimit.com/main.aspx?lang=en-US&content=index.html

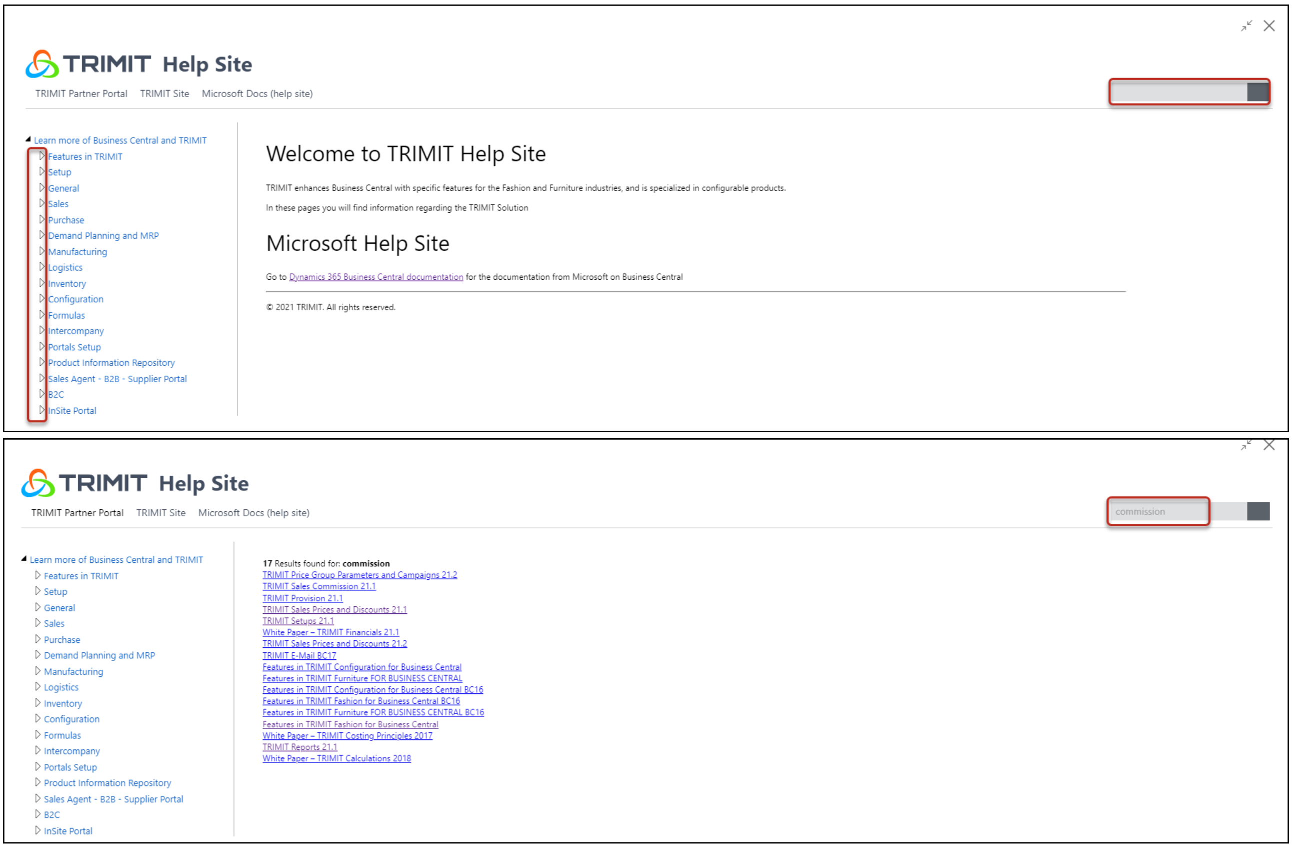


Fig. 4: TRIMIT Help.

Under each of the Topics, you can find TRIMIT White Papers (only in English), to describe the specific functionality of TRIMIT. These White Papers have been written for our Partners and will not describe standard Business Central fields/functionality. Only the newest versions of the White Papers will be visible via this page. Older versions of the White Papers can only be found via our Partner Portal.
Using the **Search** in the top right corner, you can find all the White Papers in which your Search-text is available.

CUE FILTERS ON ORDER LINE LEVEL

Another difference is not visible, but not less important. This has to do with Cues (Cues). In TRIMIT as in Business Central filters divide documents in different Cues. However, when a Shipment Date or a Receipt Date is involved the Business Central Cues look at the date in the Order Header while the TRIMIT Cues look at the date in the Order Line. And Business Central only takes the *Released* Orders into account.
This is schematically shown in Fig. 5

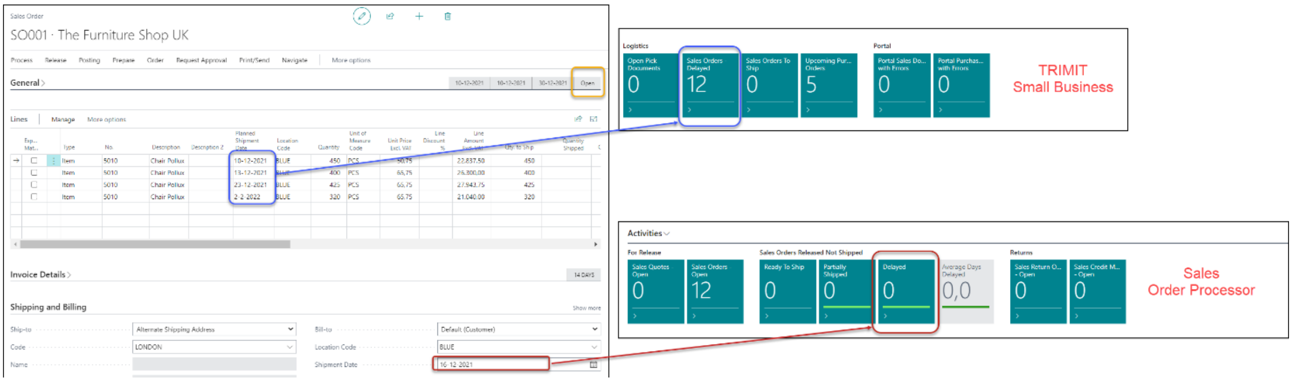


Fig.5: Difference between Business Central and TRIMIT Cues.

Let us assume that the **Work Date** in the example above is *December 15th, 2021*. The **Shipment Date** on the Sales Order Header is *December 16th, 2021* and the **Status** is *Open*. This implies that this order would not be in the **Delayed** Cue of standard Business Central.
It completely ignores the fact that there are Sales Order Lines that already been delayed: **Shipment Date** = *December 10th, 2021 December 13th, 2021* – even though this Sales Order has not been released yet.

For this reason, the TRIMIT Cue criteria look at the Order Line – even if the **Status** is *Open*. This means also that Sales Orders could be in several Cues: in **Sales Orders - Delayed** because of some Lines and in **Sales Orders To Ship** because of some Lines.

NOTE It is very important to realize that due to different filter criteria the standard Business Central Cues and the TRIMIT Cues may not have the same height even when they look to represent the same.

TRIMIT has provided also some specific Cues depending on TRIMIT features.
They will be described in the next paragraphs.

PROFILE TRIMIT CRM

Let us have a closer look at the Profile for **TRIMIT CRM** (TRM_CRM). This profile can be used as Role Center for Salespersons that are in contact with Customers and their Quotes, Orders, Complaints and Payments, and keep track of Opportunities. There is no equivalent profile in standard Business Central. Some parts of this profile are generic for all TRIMIT Role Centers and are described in paragraph Differences between TRIMIT and Business Central Profiles.

TRIMIT CRM profile has different Activity Groups, Cues and Actions as shown in Fig. 6.

The basic filter for all the Cues is the user as a Salesperson.

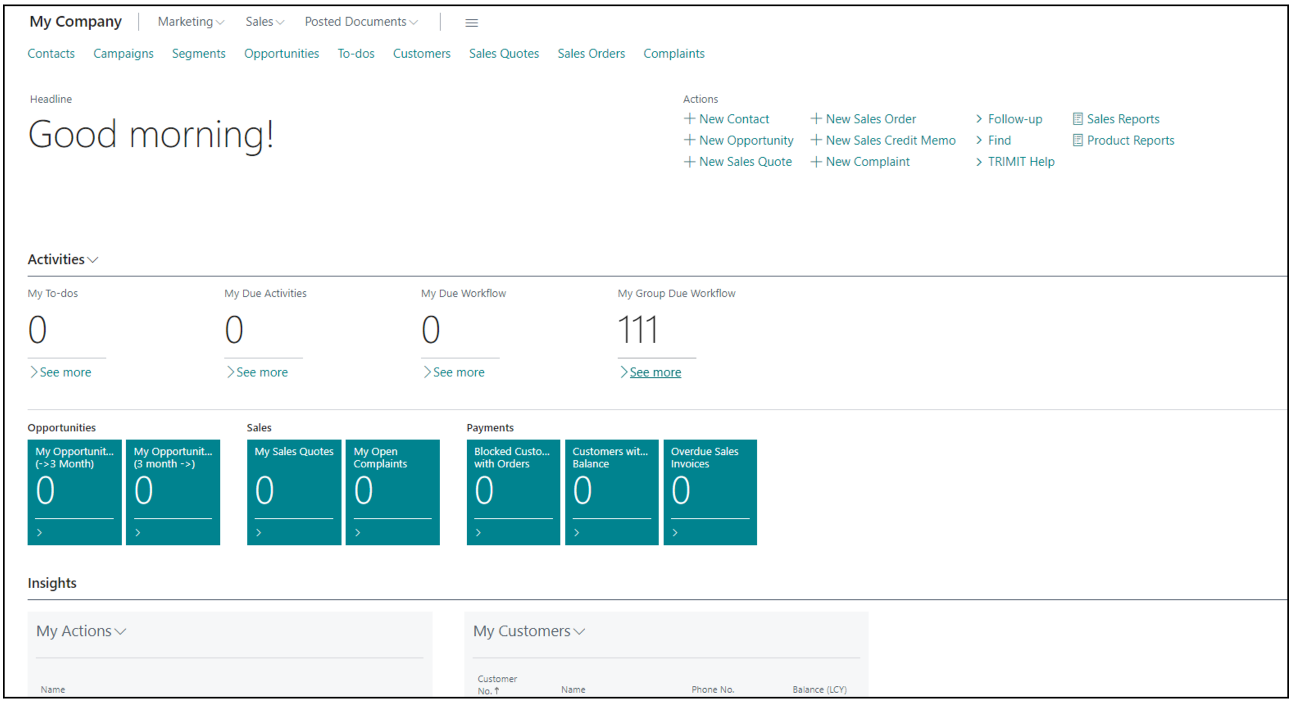


Fig.6: TRIMIT CRM Role Center.

ACTIVITIES

TASKS

TRIMIT has an Activity Group for Tasks which contains the following Cues:

- **MY TO-DOS**
  In this Cue you see a list of all To-Dos that are not closed yet and that are to be followed up by the user. The To-Do is a standard Business Central functionality that can be related to *Contacts, Salespersons, Teams, Opportunities* and *Segments*.
- **MY DUE ACTIVITIES**
  In this Cue you see a list of all TRIMIT Activities that are not closed yet until the current work date and that are to be followed up by the user.
  However, the due period can be manipulated with the date formula in the field **Default Activity Due Date** of the **Marketing Setup**.
- **MY DUE WORKFLOW**
  In this Cue you see a list of TRIMIT Workflow Lines that are to be followed up by the User before or on the Work Date. The TRIMIT Workflow Lines can be related to *Customer, Vendor, Collection, Shipment Group, Master, Sales Order, Purchase Order, Production Order, Production Collection Order, Complaint, Replacement, Container* and *Category*.

- **MY GROUP DUE WORKFLOW**
  In this Cue you see a list of TRIMIT Workflow Lines that are to be followed up by the **Workflow User Groups** in the User Setup of the User before the Work Date.

OPPORTUNITIES

TRIMIT has an Activity Group for **Opportunities** which contains the following Cues:

- **MY OPPORTUNITIES (-> 3 MONTHS)**
  In this Cue you see a list of all open Opportunities that are related to you as a Salesperson that has and **Estimated Closing Date** of Work Date + 3 Months or earlier.
- **MY OPPORTUNITIES (3 MONTHS ->)**
  In this Cue you see a list of all open Opportunities that are related to you as a Salesperson that has and **Estimated Closing Date** of Work Date + 3 Months or later.

SALES

TRIMIT has an Activity Group for **Sales** which contains the following Cues:

- **MY SALES QUOTES**
  In this Cue you see a list of all open Sales Quotes that are related to you as a Salesperson.
- **MY OPEN COMPLAINTS**
  In this Cue you see a list of all open Complaints that are related to you as a Salesperson.

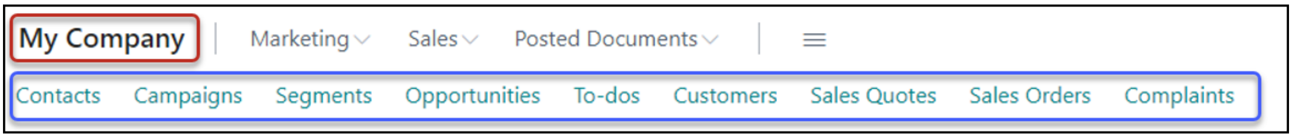
PAYMENTS

TRIMIT has an Activity Group for **Payments** which contains the following Cues:

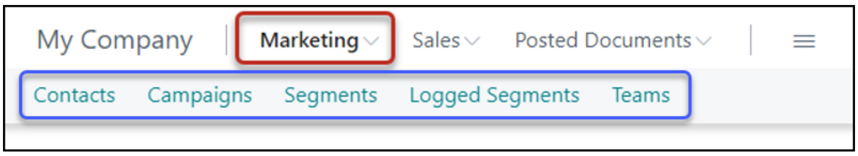
- **BLOCKED CUSTOMERS W/ORDERS**
  In this Cue you see a list of Customers with **Blocked** is *Ship*, *Invoice* or *All* and open Sales Orders related to you as a Salesperson.
- **CUSTOMER W/DUE BALANCE**
- In this Cue you will see a list of Customers that have Due Amounts as of the Work Date. Note that also Customers with an Overdue Credit Memo will be in the list. Only Customers for which you are the Salesperson will be shown at first.
- **OVERDUE SALES INVOICES**
  In this Cue you see a list of all open Sales Invoice and Credit Memos (not posted yet!) with and overdue amount and for which you the Salesperson.

MENUS

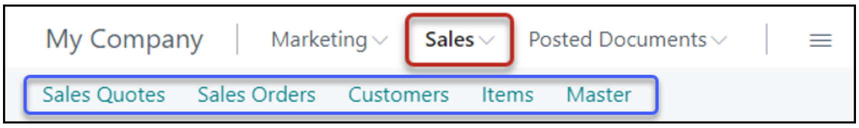
HOME



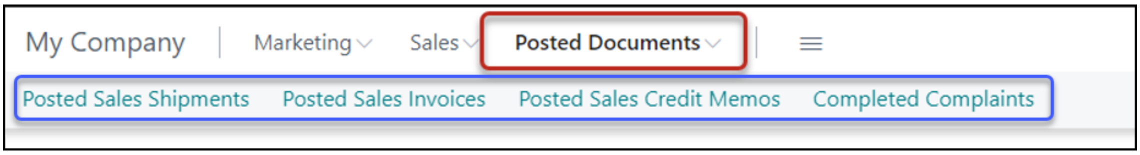
MARKETING



SALES



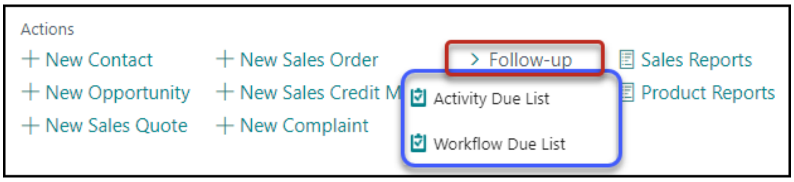
POSTED DOCUMENTS



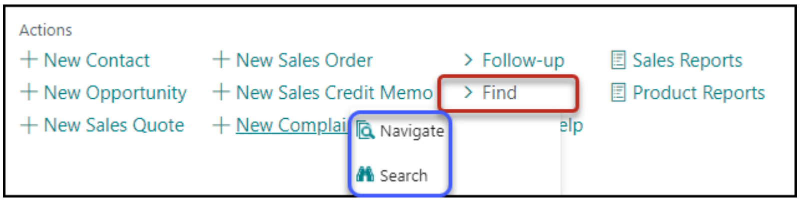
ACTIONS

There are also special *Actions*.

ACTIONS, FOLLOW UP

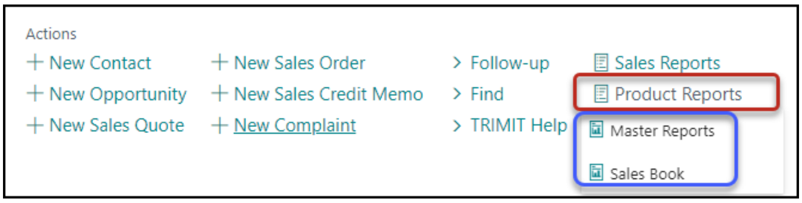


ACTIONS, FIND



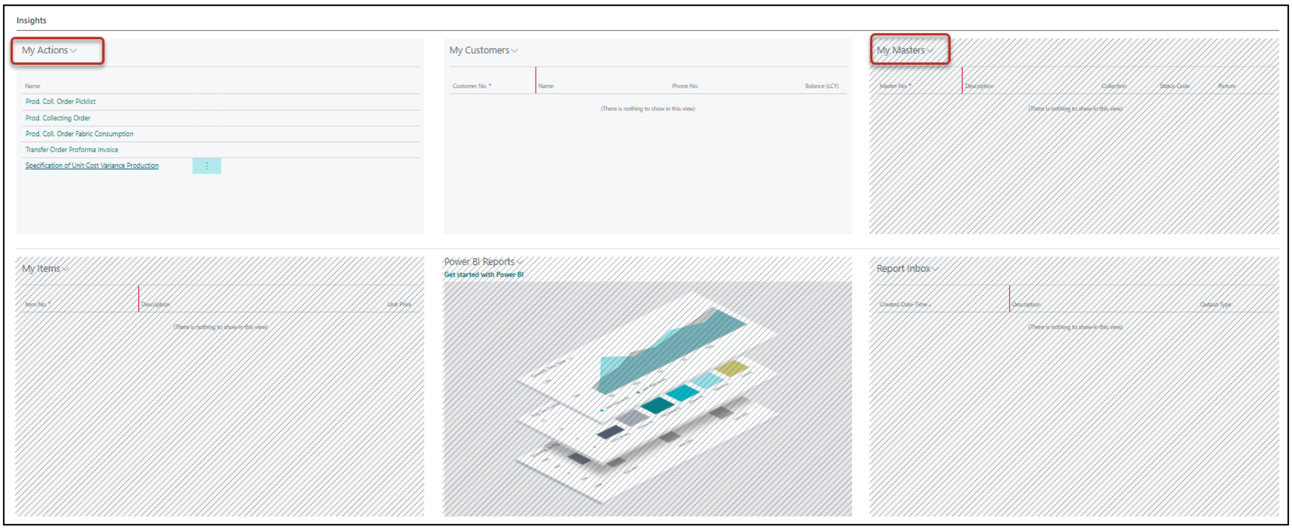
ACTIONS, SALES REPORTS

ACTIONS, PRODUCT REPORTS



POSSIBLE INSIGHTS (FACTBOXES)

The **FactBoxes** that can be chosen have many similarities with standard Business Central **FactBoxes**, besides the ***My Actions*** and ***My Masters***. They are TRIMIT specific.



PROFILE TRIMIT CUSTOMER SERVICE

Let us have a closer look at the Profile for **TRIMIT Customer Service** (TRM_CS). This profile can be used as Role Center for users that are in contact with Customers and their Orders. This Role Center is the equivalent of the standard Business Central Role Center *Sales Order Processor*, but apart from the differences described in paragraph Differences between TRIMIT and Business Central Profiles .
The *TRIMIT Customer Service* profile has different Activity Groups, Cues and Actions as shown in Fig. 7.

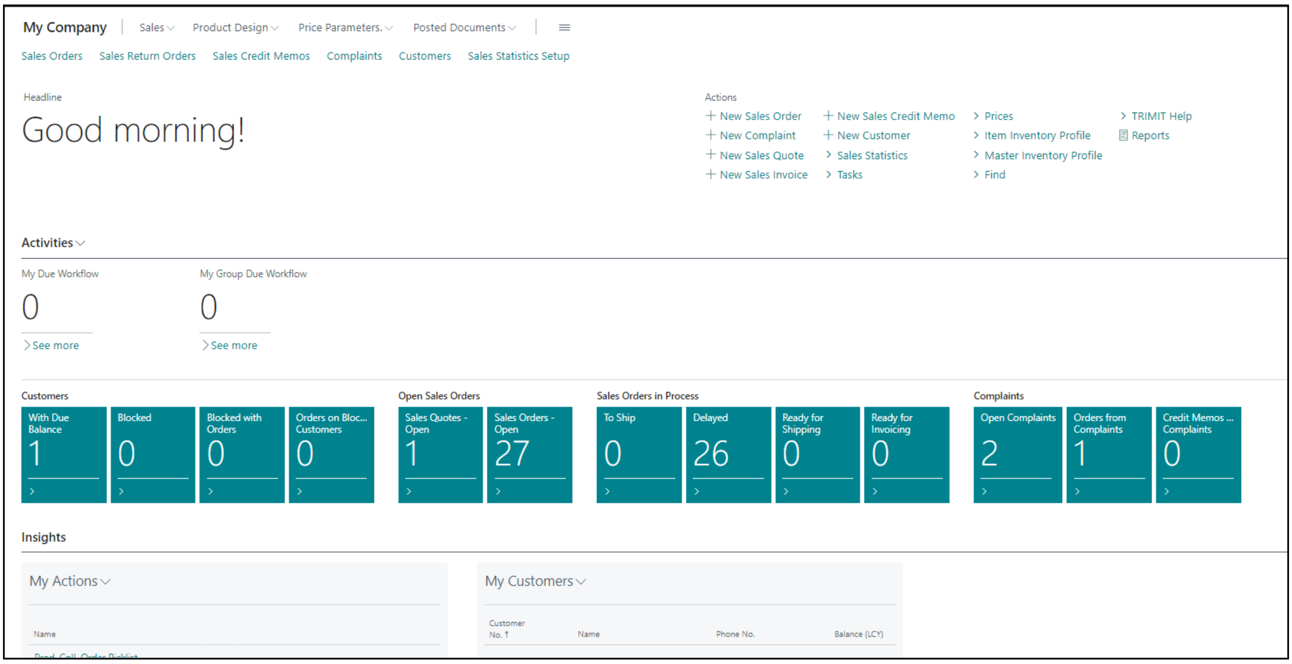


Fig. 7: TRIMIT Customer Service Role Center.

ACTIVITIES

TASKS

TRIMIT has an Activity Group for Tasks which contains the following Cues:

- **MY DUE WORKFLOW**
  In this Cue you see a list of TRIMIT Workflow Lines that are to be followed up by the User between the **Starting Date Formula Due** and **Ending Date Formula Due** from the **Role Center Setup**.
- The TRIMIT Workflow Lines can be related to *Customer, Vendor, Collection, Shipment Group, Master, Sales Order, Purchase Order, Production Order, Production Collection Order, Complaint, Replacement, Container* and *Category*.
- **MY GROUP DUE WORKFLOW**
  In this Cue you see a list of TRIMIT Workflow Lines that are to be followed up by the **Workflow User Groups** in the User Setup of the User between the **Starting Date Formula Due** and **Ending Date Formula Due** from the **Role Center Setup**.

CUSTOMERS

TRIMIT has added an Activity Group for **Customers** which contains the following Cues:

- **WITH DUE BALANCE**
  In this Cue you will see a list of Customers that have a **Balance Due (LCY)** <> *0* until the Work Date. Note that also Customers with an Overdue Credit Memo will be in the list.

- **BLOCKED**
  In this Cue you will see a list of Customers if **Blocked** is *Ship*, *Invoice* or *All*.
- **BLOCKED WITH ORDERS**
  In this Cue you will see a list of Customers that you can also find in the previous Cue, but in this list only the blocked Customers are visible that have Orders in the Sales Orders List (**No. of Orders** <> *0*).
- **ORDERS ON BLOCKED CUSTOMERS**
  In this Cue you will see a list of Sales Orders belonging to the Customers in the Cue **Blocked with Orders**. You will not be able to post these orders.

OPEN SALES ORDERS

TRIMIT has also added an Activity Group for **Open Sales Orders** which contains the following Cues:

- **SALES QUOTES – OPEN**
  In this Cue you see a list of Sales Quotes with **Status** *Open*. The moment the Quote gets **Status** *Released* it will vanish from this list until it is reopened again.
- **SALES ORDERS – OPEN**
  Same as above, but then for Sales Orders instead of Sales Quotes.

SALES ORDERS IN PROCESS

TRIMIT has also added an Activity Group for **Sales Orders in Process** which contains the following Cues:

- **TO SHIP**
  In this Cue you see a list of Sales Orders with Sales Order Lines with an Outstanding Quantity to be shipped on or before the Work Date. However, the due period can be manipulated with the date formulas in the **Role Center Setup**.
- **DELAYED**
  In this Cue you see a list of Sales Orders with Sales Order Lines with an Outstanding Quantity that had to be shipped earlier than the day before the Work Date. However, the overdue date can be manipulated with the date formulas in the **Role Center Setup**.
- **READY FOR SHIPPING**
  In this Cue you see a list of Sales Orders in which the TRIMIT Boolean **Ready for Shipping** is activated. You can find this Boolean on the FastTab ***Shipping*** on the Sales Order.
- **READY FOR INVOICING**
  In this Cue you see a list of Sales Orders in which the TRIMIT Boolean **Ready for Invoicing** is activated. You can find this Boolean on the FastTab ***Invoicing*** on the Sales Order.

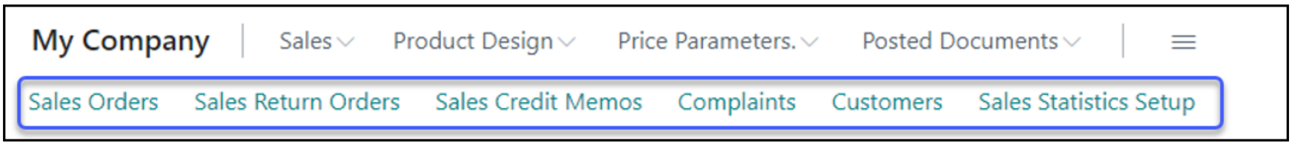
COMPLAINTS

TRIMIT has also added an Activity Group for **Complaints** which contains the following Cues:

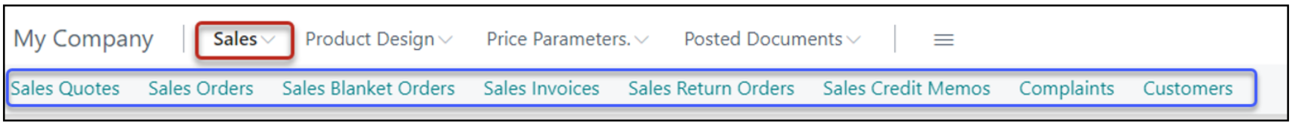
- **OPEN COMPLAINTS**
  In this Cue you see a list of all TRIMIT Complaints that have not been completed.
- **ORDERS FROM COMPLAINTS**
  In this Cue you see a list of all Sales Orders that are a follow-up from TRIMIT Complaints. In that case, the TRIMIT Boolean **Complaint** contains a checkmark. This Boolean can be found on the Sales Order FastTab ***Misc. Param.***
- **CREDIT MEMOS FROM COMPLAINTS**
  In this Cue you see a list of all Sales Credit Memos that are a follow-up from TRIMIT Complaints. In that case, the TRIMIT Boolean **Complaint** contains a checkmark. This Boolean can be found on the Sales Credit Memo FastTab ***Misc. Param.***

MENUS

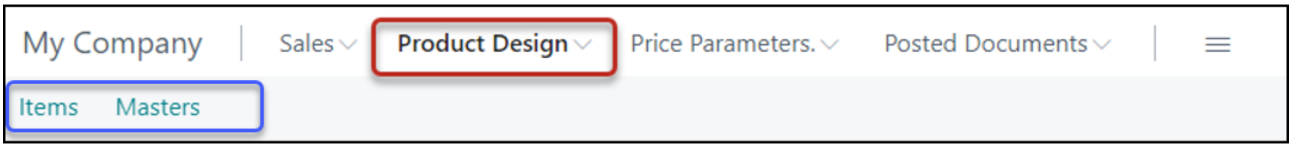
HOME



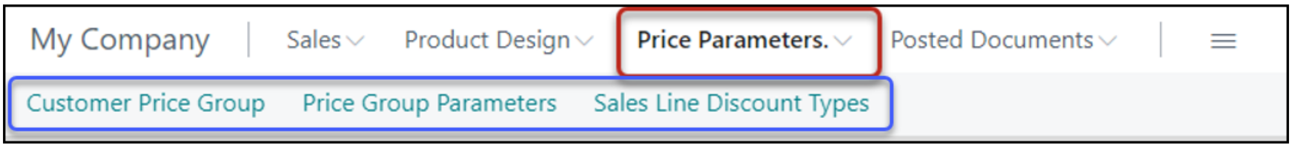
SALES



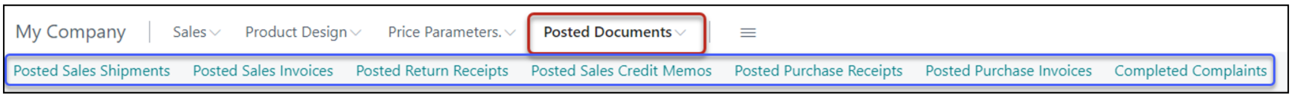
PRODUCT DESIGN



PRICE PARAMETERS



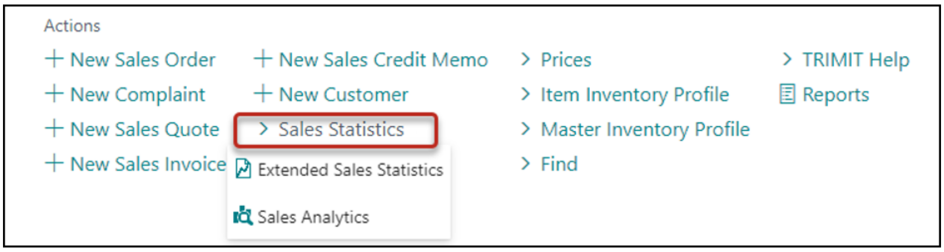
POSTED DOCUMENTS



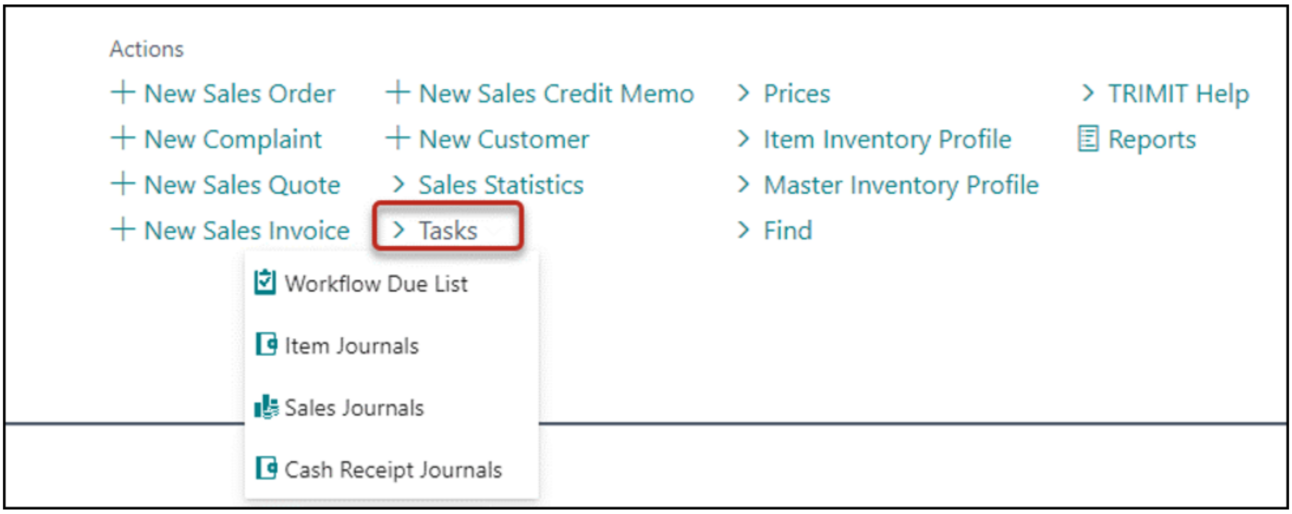
ACTIONS

There are also special *Actions.*

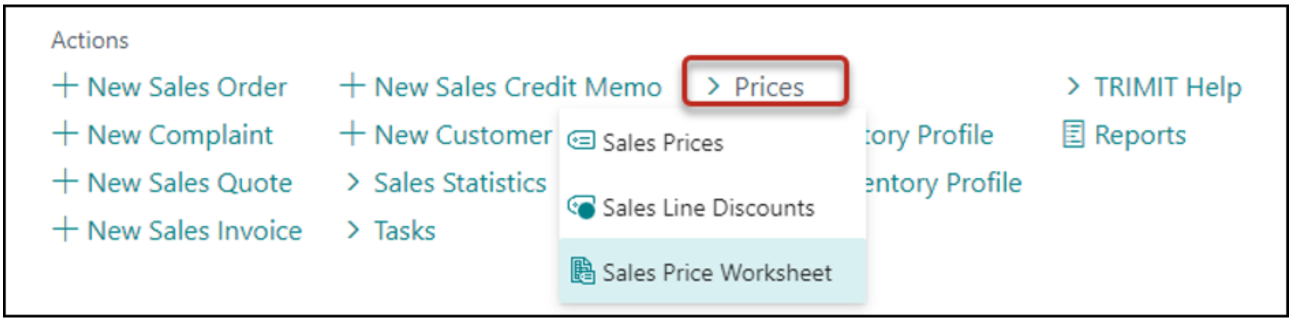
ACTIONS, SALES STATISTICS



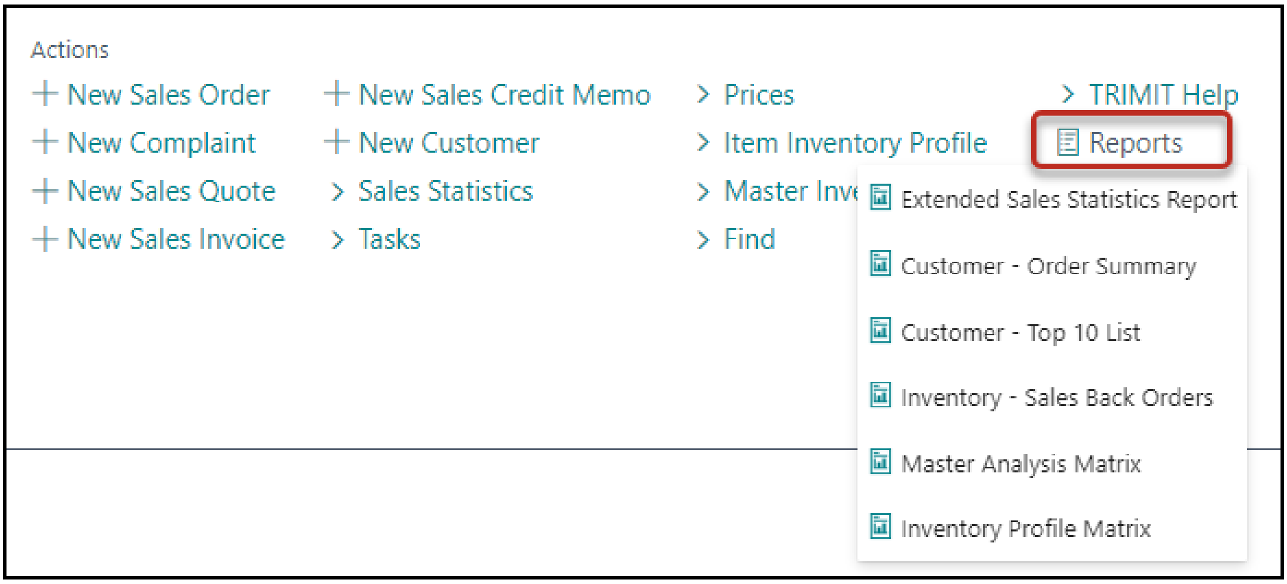
ACTIONS, TASKS



ACTIONS, PRICES

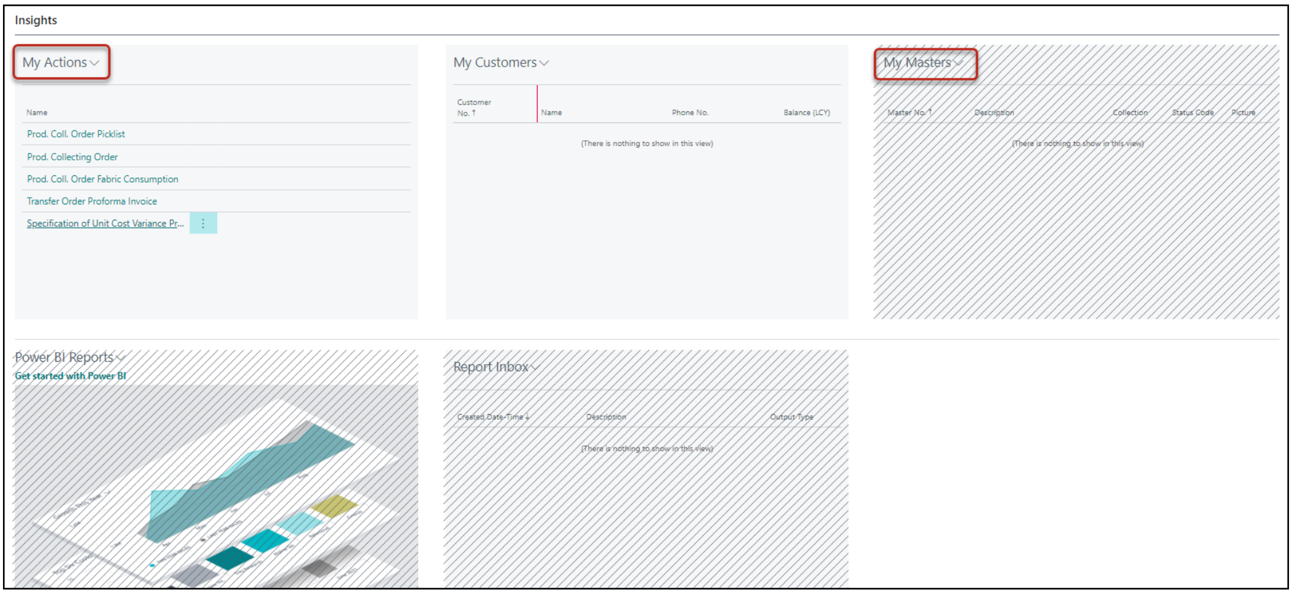


ACTION, REPORTS



POSSIBLE INSIGHTS (FACTBOXES)

The **FactBoxes** that can be chosen have many similarities with standard Business Central **FactBoxes**, besides the ***My Actions*** and ***My Masters***. They are TRIMIT specific.



PROFILE TRIMIT PDM/ DESIGN

Let us have a closer look at the Profile for **TRIMIT PDM/ Design** (TRM_PDM). This profile can be used as Role Center for users involved in the Design and Product Management. There is no equivalent profile in standard Business Central. Some parts of this profile are generic for all TRIMIT Role Centers and are described in paragraph Differences between TRIMIT and Business Central Profiles .

The *TRIMIT PDM/Design* profile has different Activity Groups, Cues and Actions as shown in Fig. 8.

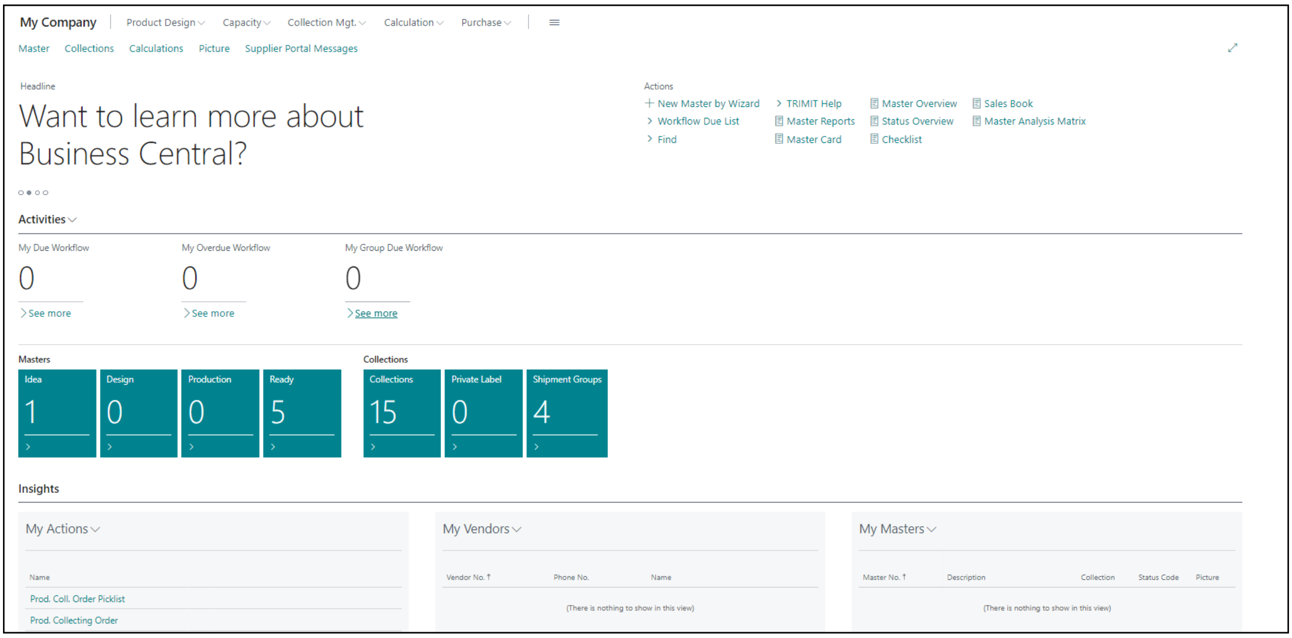


Fig. 8: TRIMIT PDM/ Design Role Center.

ACTIVITIES

TASKS

TRIMIT has an Activity Group for Tasks which contains the following Cues:

- **MY DUE WORKFLOW**
  In this Cue you see a list of TRIMIT Workflow Lines that are to be followed up by the User between the **Starting Date Formula Due** and **Ending Date Formula Due** from the **Role Center Setup**.
- **MY OVERDUE WORKFLOW**
  In this Cue you see a list of Workflow Lines that are to be followed up by the user that have been delayed, which means that they should have been approved ultimately 1 day before the **Starting Date Formula Due** from the **Role Center Setup**.
- **MY GROUP DUE WORKFLOW**
  In this Cue you see a list of TRIMIT Workflow Lines that are to be followed up by the **Workflow User Groups** in the User Setup of the User between the **Starting Date Formula Due** and **Ending Date Formula Due** from the **Role Center Setup**.

MASTERS

TRIMIT has added an Activity Group for **Masters** which contains the following Cues:

- **IDEA**
- **DESIGN**
- **PRODUCTION**
- **READY**

The purpose of these Cues is to define different stages within the design process. The customer has the possibility to define his own stages by connecting a **Status Code** to one of these stages.
This can be setup as described in the [Role Center Setup]

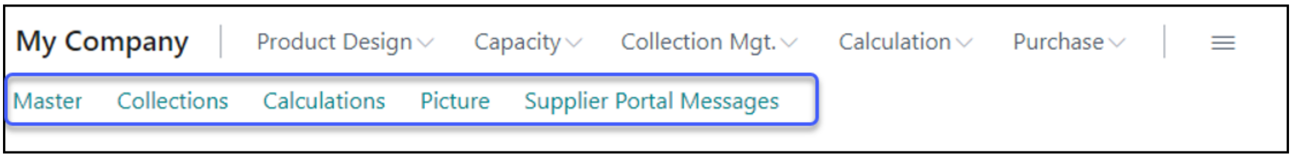
COLLECTIONS

TRIMIT has also added an Activity Group for **Collections** which contains the following Cues:

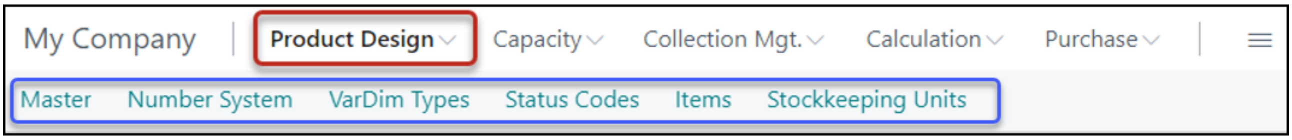
- **COLLECTIONS**
  In this Cue you see a list of Collections that are not dedicated to a specific Customer or Country. Collections are described in detail in the ***White Paper – TRIMIT Collection Management***.
- **PRIVATE LABEL**
  In this Cue you see a list of Collections that are dedicated to a specific Customer or Country. These are called Private Label Collections. This feature is in more detail described in the ***White Paper – TRIMIT Collection Management***.
- **SHIPMENT GROUPS**
  In this Cue you see a list of Shipment Groups (that are not connected as Periods to the Collections). Masters can be attached to a particular Shipment Group. This feature is described in detail in the ***White Paper – TRIMIT Collection Management***.

MENUS

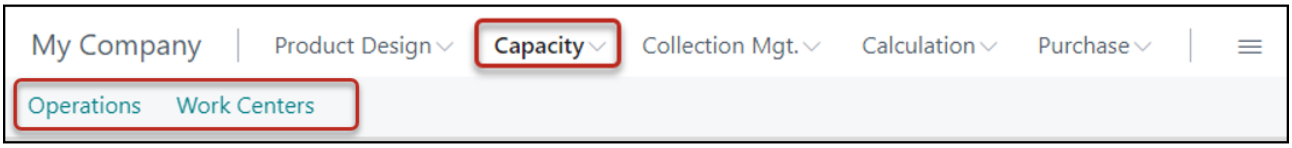
HOME



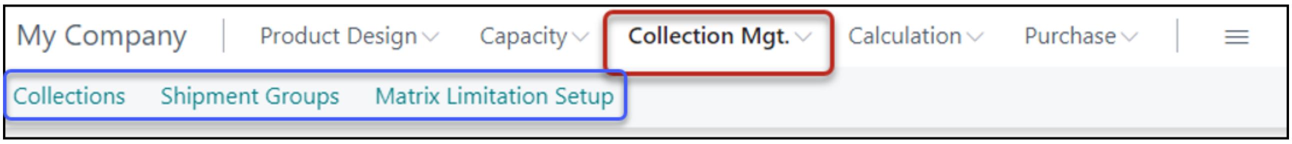
PRODUCT DESIGN



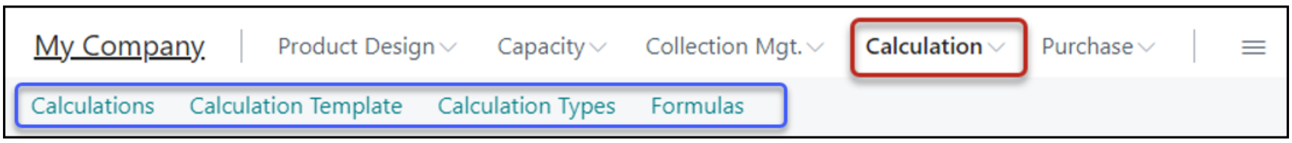
CAPACITY



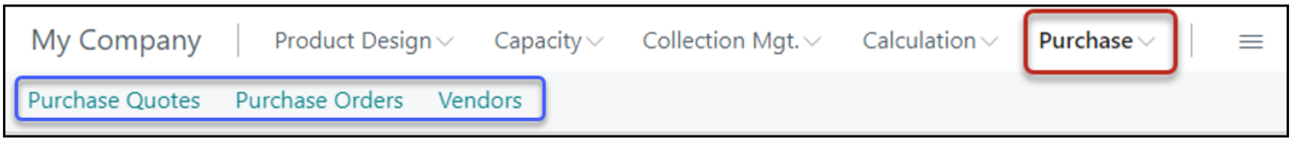
COLLECTION MGT.



CALCULATION

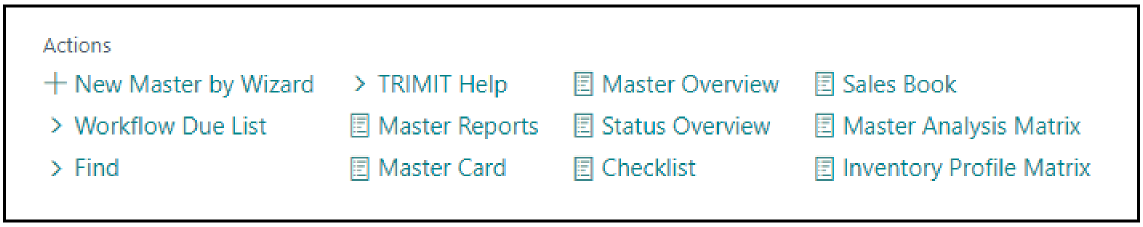


PURCHASE



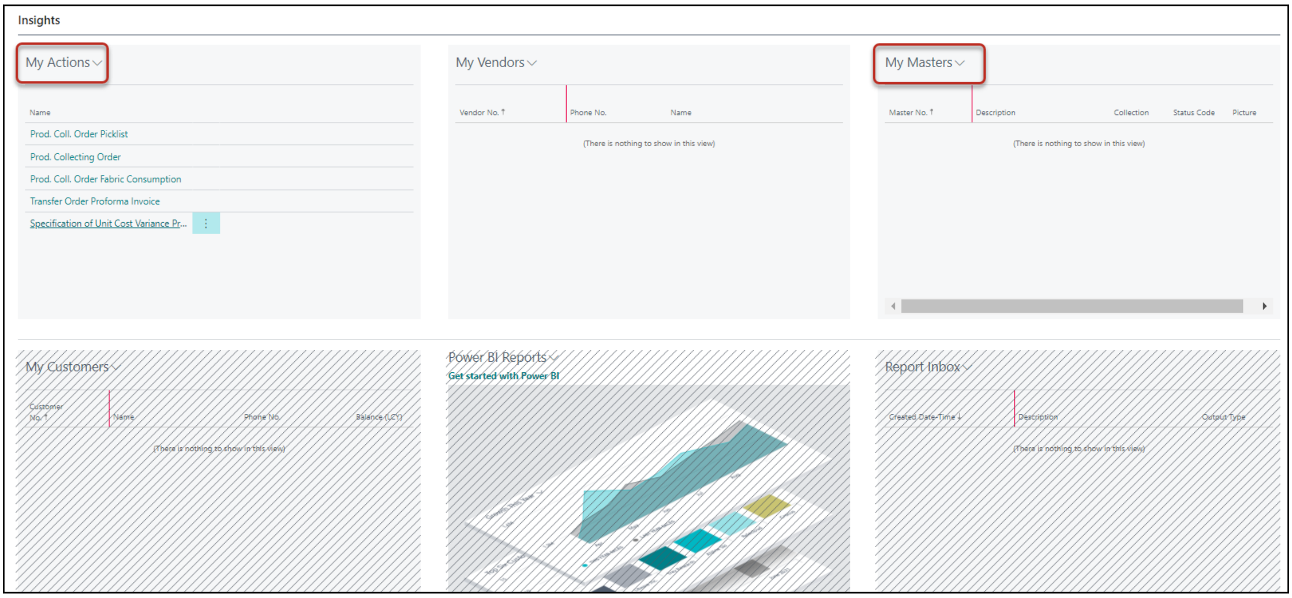
ACTIONS

There are also special *Actions.*



POSSIBLE INSIGHTS (FACTBOXES)

The **FactBoxes** that can be chosen have many similarities with standard Business Central **FactBoxes**, besides the ***My Actions*** and ***My Masters***. They are TRIMIT specific.



PROFILE TRIMIT PORTAL ADMINISTRATOR

Let us have a closer look at the Profile for **TRIMIT Portal Administrator** (TRM_PORTAL). This profile can be used as Role Center for the administrators of the Portals and Webshops of TRIMIT i.e., to check if all orders from the Portals and Webshops have been submitted correctly, but also for all the setups needed for the portals.

There is no equivalent profile in standard Business Central.

Apart from the differences described in paragraph Differences between TRIMIT and Business Central Profiles.

The *TRIMIT Portal Administrator* profile has different Activity Groups, Cues and Actions as shown in Fig. 9.:

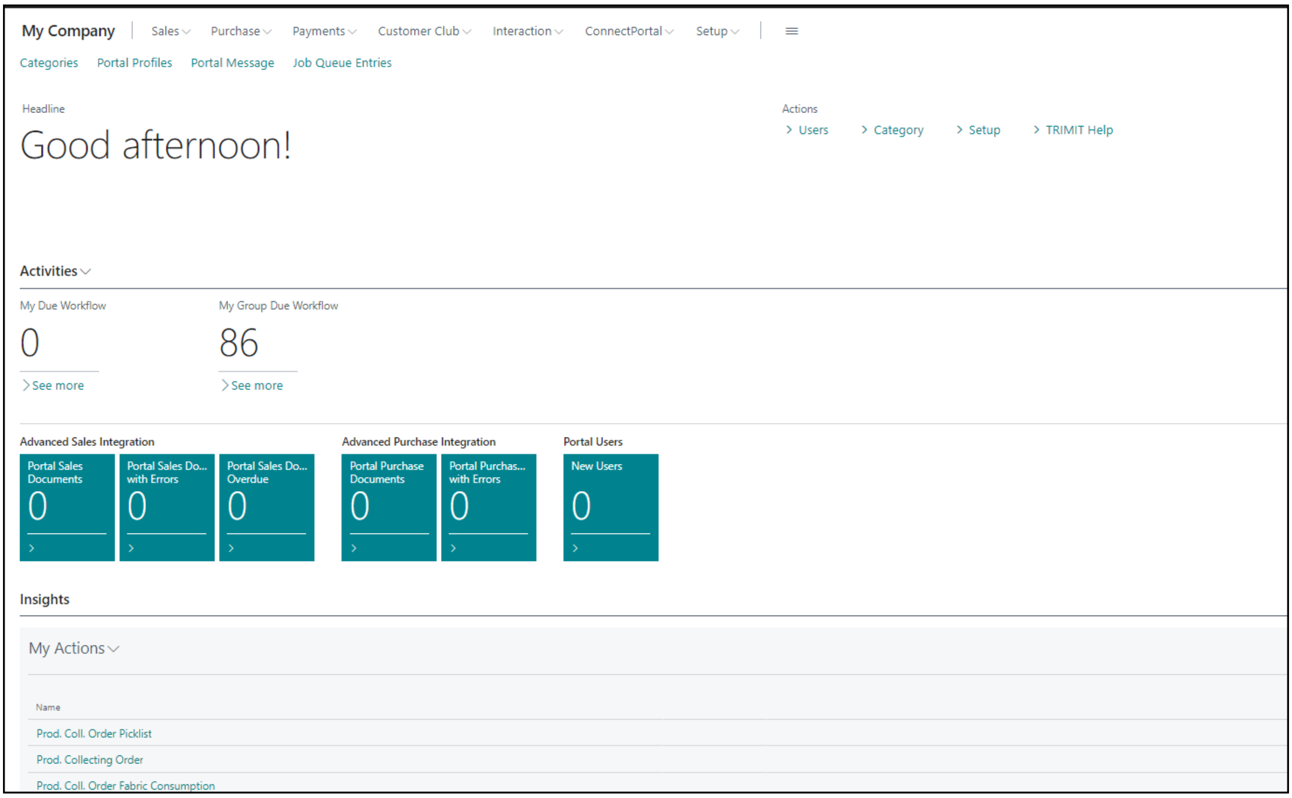


Fig.9: TRIMIT Portal Administrator Role Center.

ACTIVITIES

TASKS

TRIMIT has an Activity Group for Tasks which contains the following Cues:

- **MY DUE WORKFLOW**
  In this Cue you see a list of TRIMIT Workflow Lines that are to be followed up by the User before the Work Date.
- **MY GROUP DUE WORKFLOW**
  In this Cue you see a list of TRIMIT Workflow Lines that are to be followed up by the **Workflow User Groups** in the User Setup of the User before the Work Date.

ADVANCED SALES INTEGRATION

TRIMIT has added an Activity Group for **Advanced Sales Integration** which contains the following Cues:

- **PORTAL SALES DOCUMENTS**
  In this Cue, a list of all the open **Portal Sales Documents** is shown. They represent the web orders received (from B2B or SA) and not 'posted' yet to become 'normal' Sales Quotes/Orders. You cannot change the Portal Sales Document, only perform various actions before it ends up being 'posted'. Altering the document during the process could cause data inconsistency.
- **PORTAL SALES DOCUMENTS WITH ERRORS**
  In this Cue, a list of all the open **Portal Sales Documents with Errors** is shown. They represent the web orders received (from B2B or SA) and not 'posted' yet to become 'normal' Sales Quotes/Orders that contain errors like i.e., Item not part of Collection anymore or Item does not exist anymore. You cannot change the Portal Sales Document, only perform various actions before it ends up being 'posted'. Altering the document during the process could cause data inconsistency.
- **PORTAL SALES DOC, OVERDUE**
  In this Cue, a list of all the open **Portal Sales Documents** is shown that are **Overdue**. It is possible to set a Date Formula, which determines the Sales Documents (from B2B or SA) to be overdue.
  The Date Formula can be set on ***ConnectPortal Setup*** page (to be found via *Actions, Setup, ConnectPortal Setup)* 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.

> **NOTE**
> Sales Quotes/Orders from the TRIMIT B2B Webshop and TRIMIT Sales Agent Portal, will only show up in the Portal Sales Documents if **Instant Posting ASI** in the appropriate **Portal Profile** is set to *No.*
> Sales Orders from the TRIMIT B2C Webshop will never be shown in the Portal Sales Documents; they will always become 'normal' Sales Orders.

ADVANCED PURCHASE INTEGRATION

TRIMIT has added an Activity Group for **Advanced Purchase Integration** which contains the following Cues:

- **PORTAL PURCHASE DOCUMENTS**
  In this Cue, a list of all the open **Portal Purchase Documents** is shown. They represent the changed Purchase Quotes/Orders on the Supplier Portal. You cannot change the Portal Purchase Document, only perform various actions before it ends up being 'posted' (taken into 'normal' Purchase Quotes/Orders). Altering the document during the process could cause data inconsistency.
- **PORTAL PURCHASE DOCUMENTS WITH ERRORS**
  In this Cue, a list of all the open **Portal Purchase Documents with Errors** is shown. They represent the changed Purchase Quotes/Orders on the Supplier Portal and not 'posted' yet to become 'normal' Purchase Quotes/Orders that contain errors like i.e., Item not part of Collection anymore or Item does not exist anymore. You cannot change the Portal Purchase Document, only perform various actions before it ends up being posted. Altering the document during the process could cause data inconsistency.

> **NOTE**
> Quotes/Orders from the TRIMIT Supplier Portal, will only show up in the Portal Purchase Documents if the Supplier has changed the **Promised Receipt Date** and/or **Quantity to Receive,** and has updated the Quote/Order.

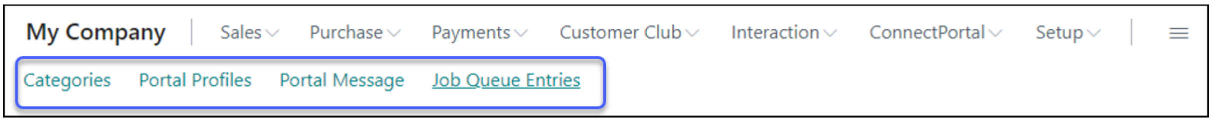
PORTAL USERS

TRIMIT has added an Activity Group for **Portal Users** which contains the following Cue:

- **NEW USERS**
  The Cue **New Users** gives you an overview of new Users that have been registered on one of the Portals and Webshops that needs to be assigned to the correct Customer, Vendor and/or Salesperson.

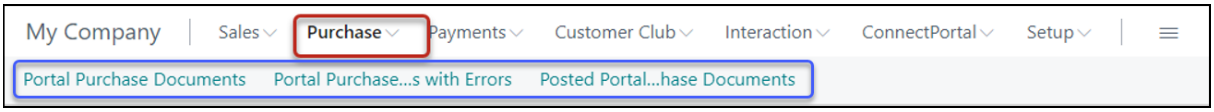
MENUS

HOME

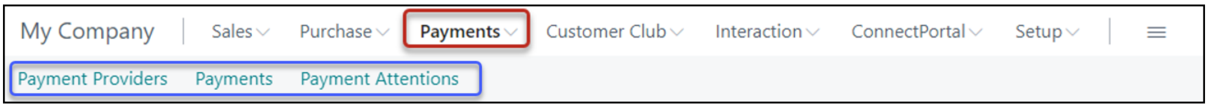


SALES

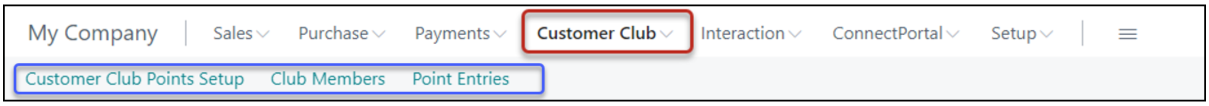
PURCHASE



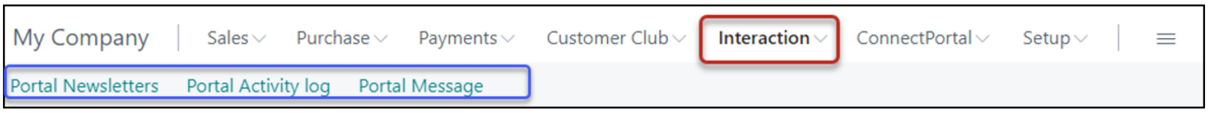
PAYMENTS



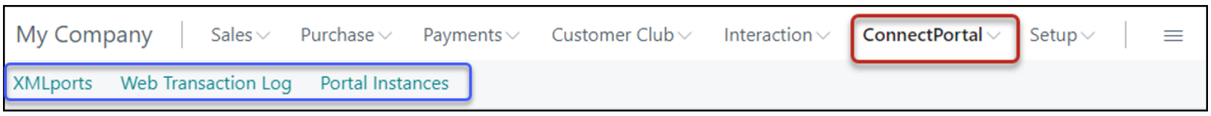
CUSTOMER CLUB



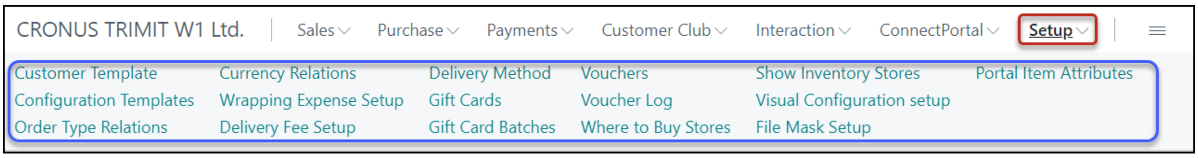
INTERACTION



CONNECTPORTAL



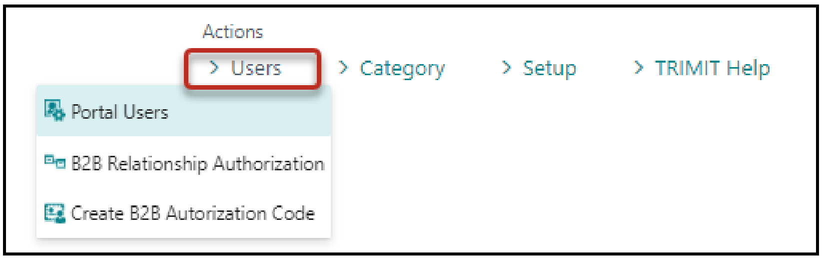
SETUP



ACTIONS

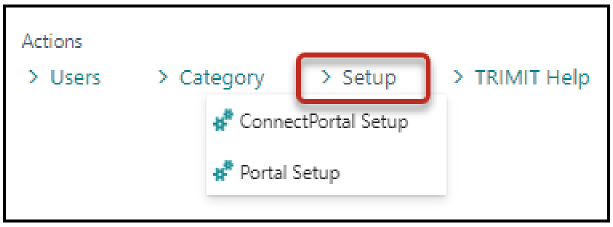
There are also special *Actions.*

ACTIONS, USERS



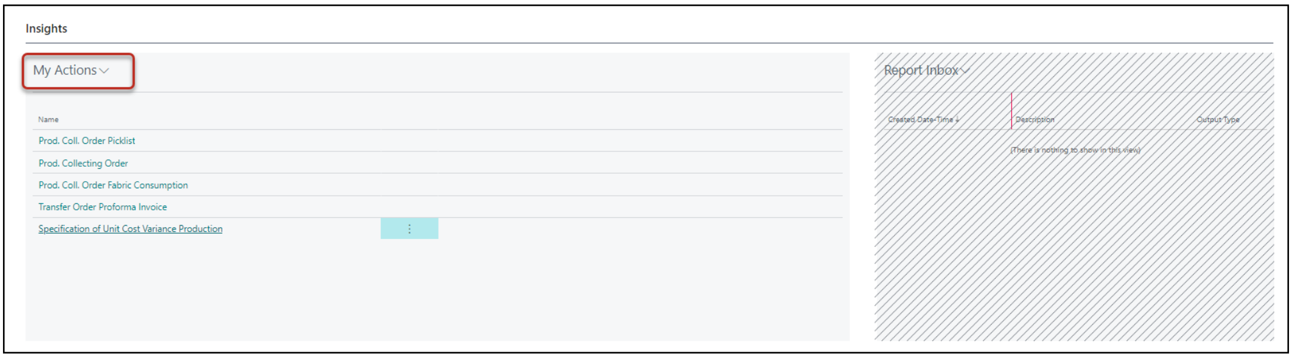
ACTIONS, CATEGORY

ACTIONS, SETUP



POSSIBLE INSIGHTS (FACTBOXES)

The **FactBoxes** that can be chosen have many similarities with standard Business Central **FactBoxes**, besides the ***My Actions***. That is TRIMIT specific.



PROFILE TRIMIT PRODUCTION

Let us have a closer look at the Profile for **TRIMIT Production** (TRM_PROD). This profile can be used as the Role Center for employees that are working with Production Orders / Production Process.

We however also included the setups/functionality of **TRIMIT Shop Floor** (yellow highlighted in the pictures in this paragraph). This will however only be visible if you also installed the **TRIMIT Shop Floor App.**
This Role Center might be compared with the standard Business Central Role Center *Manufacturing Manager,* but apart from the differences described in paragraph Differences between TRIMIT and Business Central Profiles the **TRIMIT Production** profile has different Activity Groups and Cues as shown in Fig. 10.

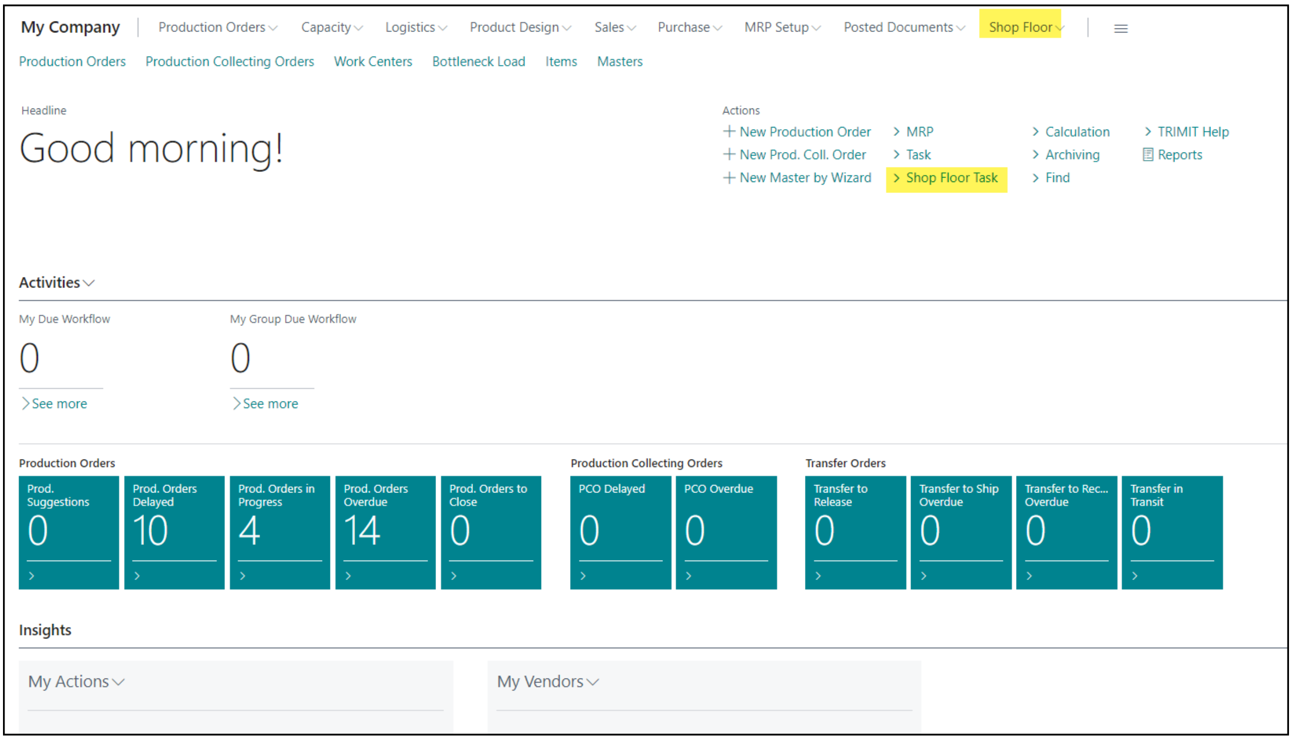


Fig. 10: TRIMIT Production Profile.

ACTIVITIES

TASKS

TRIMIT has an Activity Group for Tasks which contains the following Cues:

- **MY DUE WORKFLOW**
  In this Cue you see a list of TRIMIT Workflow Lines that are to be followed up by the User before or at the Work Date.
- **MY GROUP DUE WORKFLOW**
  In this Cue you see a list of TRIMIT Workflow Lines that are to be followed up by the **Workflow User Groups** in the User Setup of the User before or at the Work Date.

PRODUCTION ORDERS

TRIMIT has an Activity Group for **Production Orders** which contains the following Cues:

- **PROD. SUGGESTIONS**
  In this Cue you see a list of (TRIMIT) Production Orders with:
  Document Type *Suggestion*.
- **PROD. ORDERS DELAYED**
  In this Cue you see a list of (TRIMIT) Production Orders with:
  Document Type *Order,* **Status** *New* and **Start Date** before or at the Work Date.

- **PROD. ORDERS IN PROGRESS**
  In this Cue you see a list of (TRIMIT) Production Orders with:
  Status *Released* or *Partly Finished*.
- **PROD. ORDERS OVERDUE**
  In this Cue you see a list of (TRIMIT) Production Orders with:
  End Date before or at the Work Date

PRODUCTION COLLECTING ORDERS

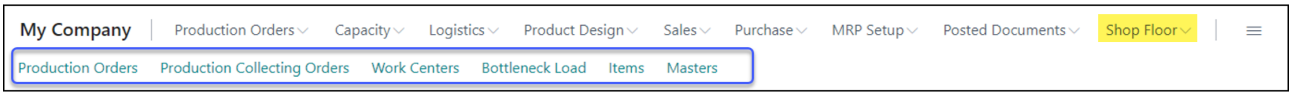
- **PCO DELAYED**
  In this Cue you see a list of Production Collecting Orders with:
  Status *New* or *Planned* and a **Start Production Date** before or at the Work Date.
- **PCO OVERDUE**
  In this Cue you see a list of Production Collecting Orders with:
  Status *New* or *Planned* and an **End Production Date** before or at the Work Date.

TRANSFER ORDERS

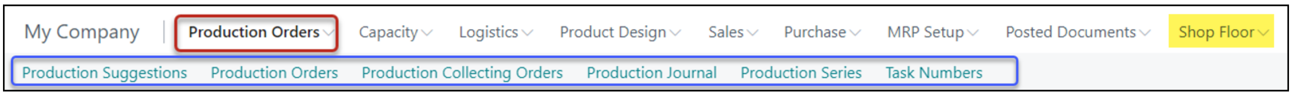
- **TRANSFER TO RELEASE**
  In this Cue you see a list of Transfer Orders with **Status** *Open.*
- **TRANSFER TO SHIP OVERDUE**
  In this Cue you see a list of Transfer Orders with **Quantity Shipped** is *0 (zero)* and **Shipment Date** before or at the Work Date.
- **TRANSFER TO RECEIVE OVERDUE**
  In this Cue you see a list of Transfer Orders with **Quantity Received** is *0 (zero)* and **Receipt Date** before or at the Work Date.
- **TRANSFER IN TRANSIT**
  In this Cue you see a list of Transfer Orders with **Quantity Shipped** <> *0 (zero)* and **Quantity Received** is *0 (zero)*

MENUS

HOME

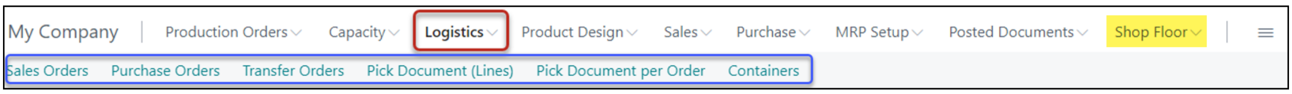


PRODUCTION ORDERS

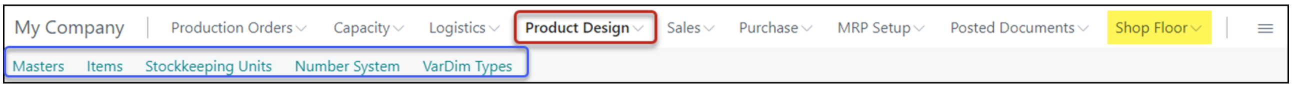


CAPACITY

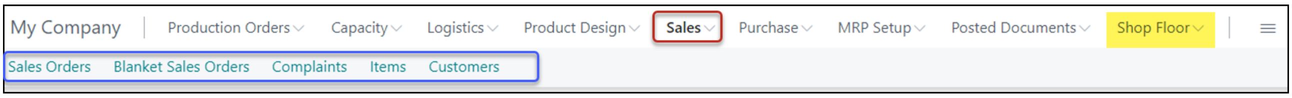
LOGISTICS



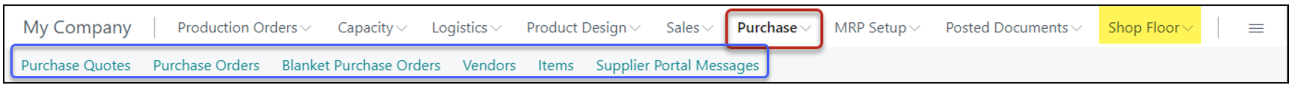
PRODUCT DESIGN



SALES



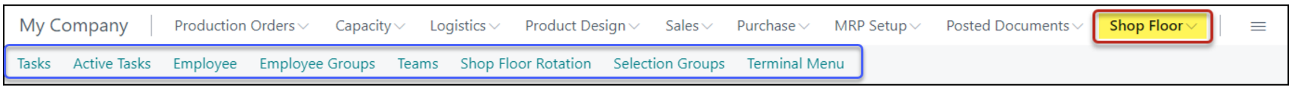
PURCHASE



MRP SETUP

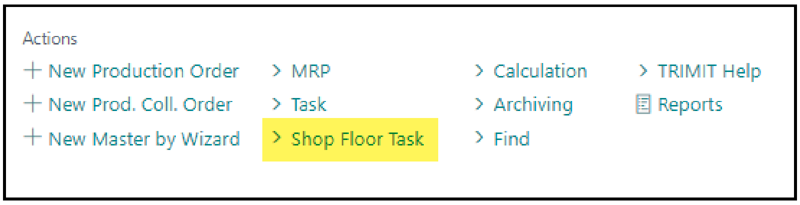
POSTED DOCUMENTS

SHOP FLOOR

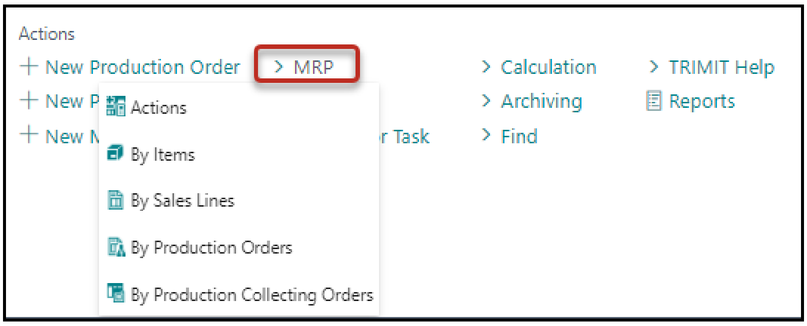


ACTIONS

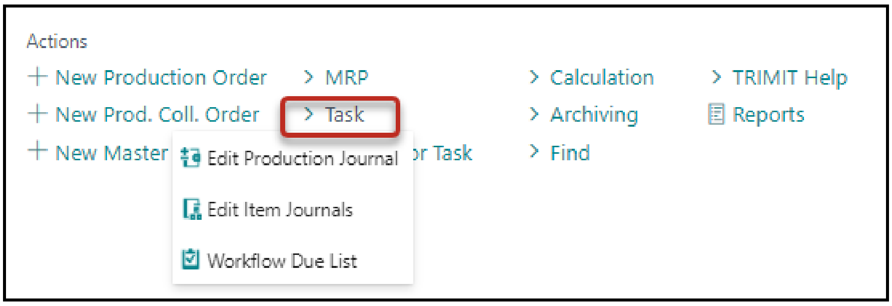
There are also special *Actions.*



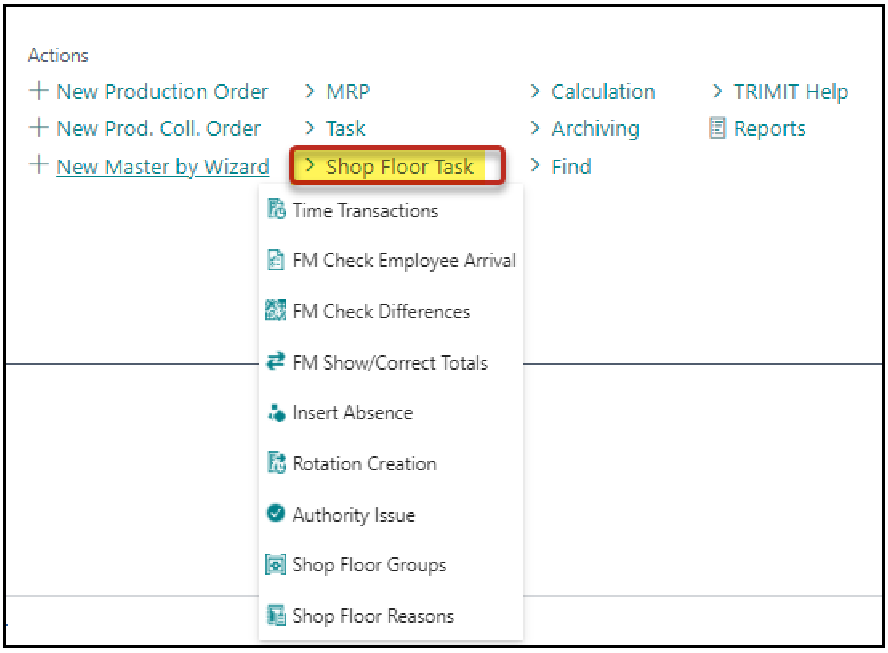
ACTIONS, MRP



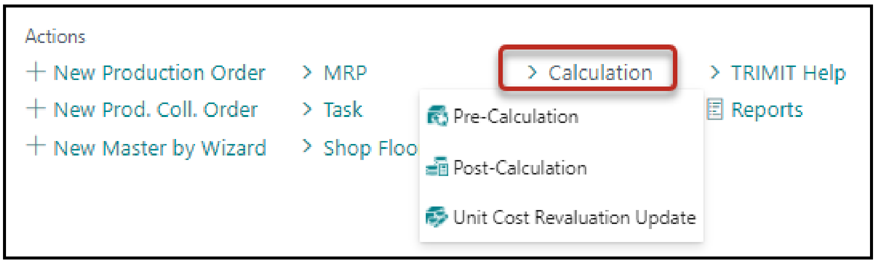
ACTIONS, TASK



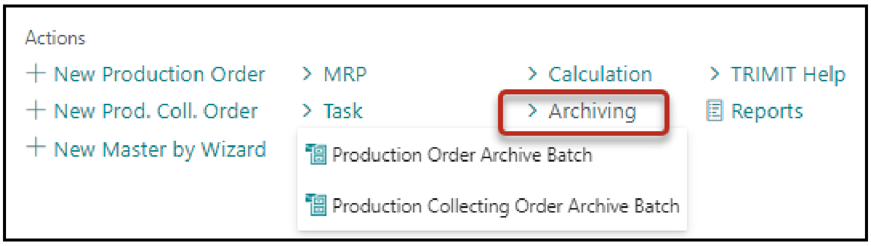
ACTIONS, SHOP FLOOR TASK



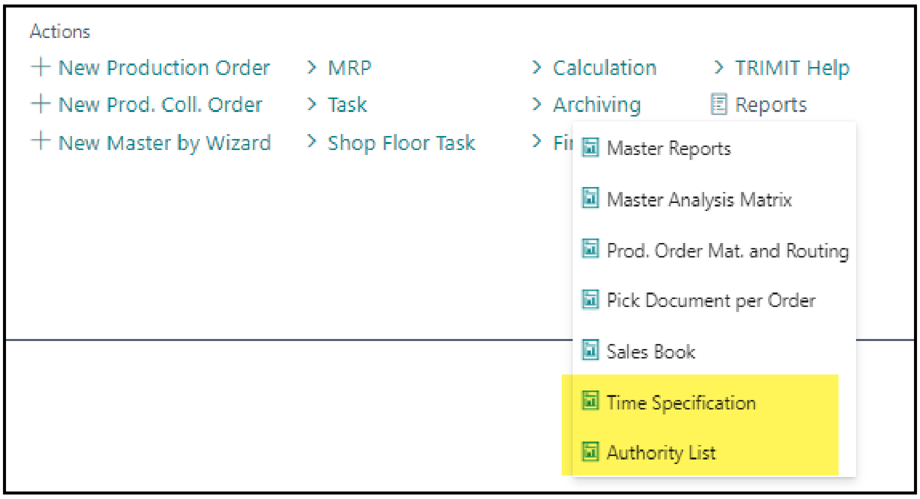
ACTIONS, CALCULATION



ACTIONS, ARCHIVING

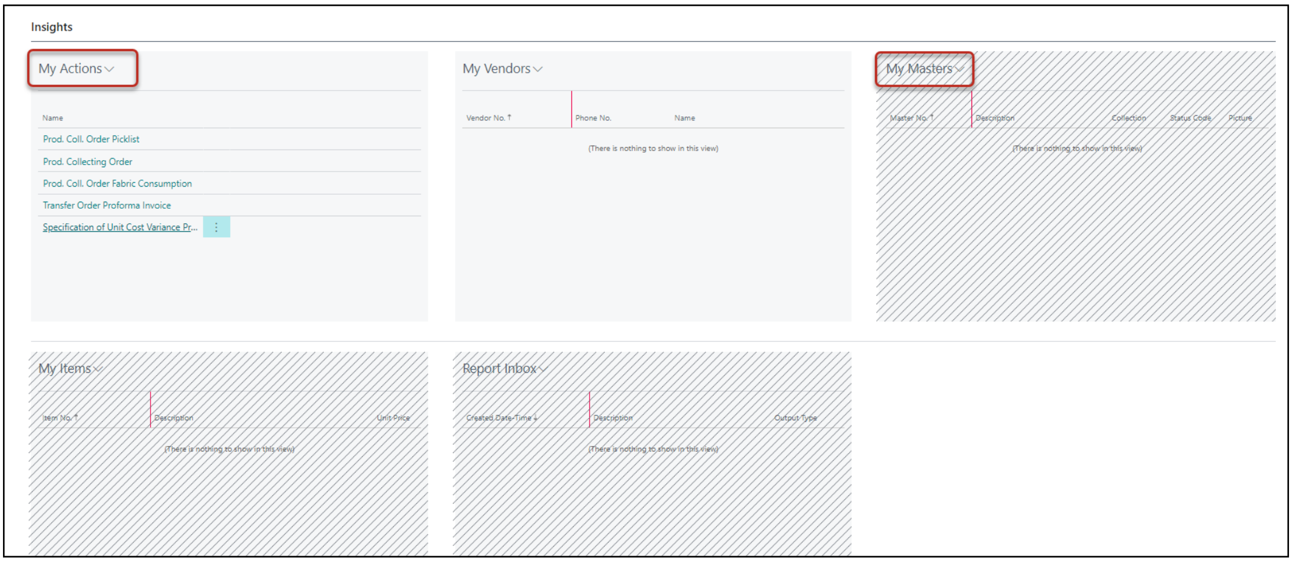


ACTIONS, REPORTS



POSSIBLE INSIGHTS (FACTBOXES)

The **FactBoxes** that can be chosen have many similarities with standard Business Central **FactBoxes**, besides the ***My Actions*** and ***My Masters***. They are TRIMIT specific.



PROFILE TRIMIT SMALL BUSINESS

Let us have a closer look at the Profile for **TRIMIT Small Business** (TRM_SB). This profile can be used as a basis for Role Centers for users that do activities for more than one department. This is primarily the case in small businesses but not exclusively. This Role Center is the equivalent of the standard Business Central Role Center *President – Small Business*, but apart from the differences described in paragraph Differences between TRIMIT and Business Central Profiles the **TRIMIT Small Business** profile has different Activity Groups and Cues as shown in Fig. 11.

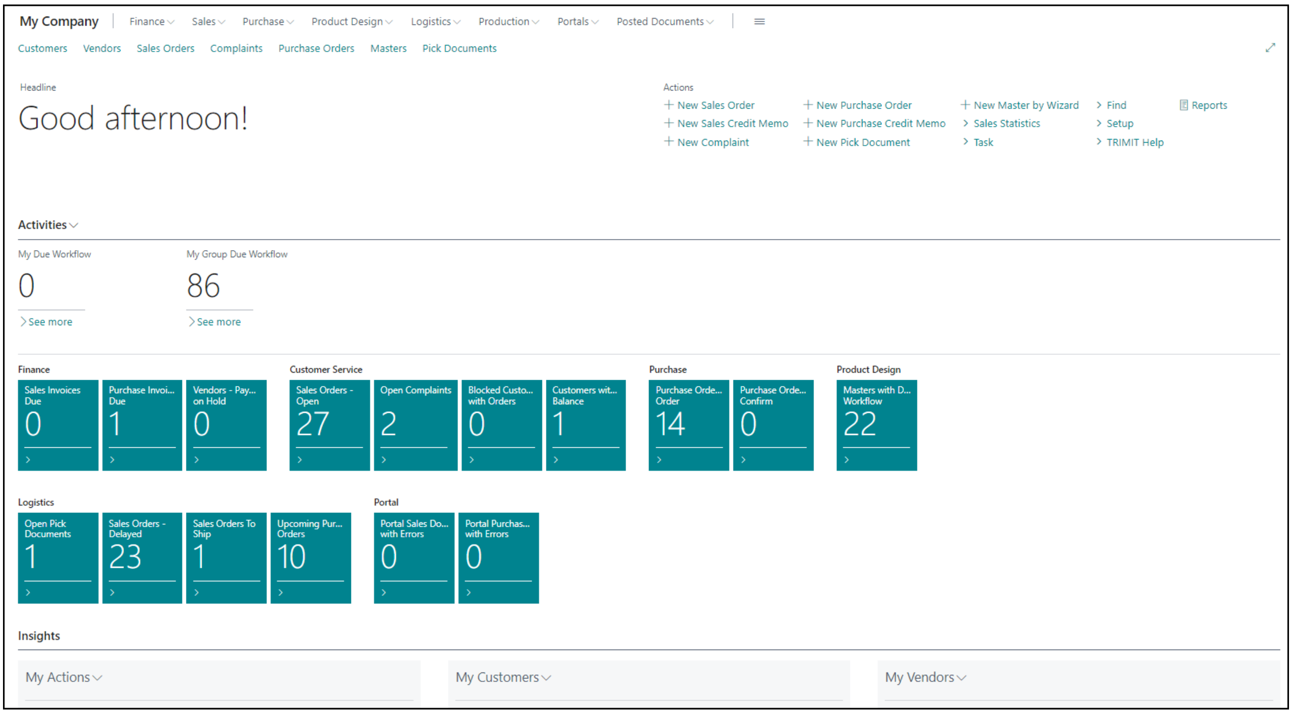


Fig. 11 TRIMIT Small Business Profile.

As you can see, there are more Activity Groups than usual, and they cover most activities within a company. The user can personalize this Role Center with only those Activity Groups that are of his interest. This personalization will be discussed in Personalizing the Role Center. Below the different Cues are discussed.

NOTE

For Demo purposes, this profile can be used best as Role Center, because for Wholesale companies all basic functionality is present.

ACTIVITIES

TASKS

TRIMIT has an Activity Group for Tasks which contains the following Cues:

- **MY DUE WORKFLOW**
  In this Cue you see a list of TRIMIT Workflow Lines that are to be followed up by the User before or at the Work Date.
- **MY GROUP DUE WORKFLOW**
  In this Cue you see a list of TRIMIT Workflow Lines that are to be followed up by the **Workflow User Groups** in the User Setup of the User before or at the Work Date.

FINANCE

The Activity Group **Finance** contains the following Cues:

- **SALES INVOICES DUE**
  In this Cue a list of open Customer Ledger Entries with:
  Document Type is *Invoice* or *Credit Memo,* **Open** is *Yes* and **Due Date** between the **Starting Date Formula to Ship** and the **End Date Formula to Ship** in the Role Center Setup.
- **PURCHASES INVOICES DUE**
  In this Cue a list of open Vendor Ledger Entries with:
  Document Type is *Invoice* or *Credit Memo,* **Open** is *Yes* and **Due Date** between the **Starting Date Formula to Ship** and the **End Date Formula to Ship** in the Role Center Setup.
- **VENDORS – PAYMENTS ON HOLD**
  In this Cue a list of Vendors is shown on which the field **Blocked** has the value *Payment*.

CUSTOMER SERVICE

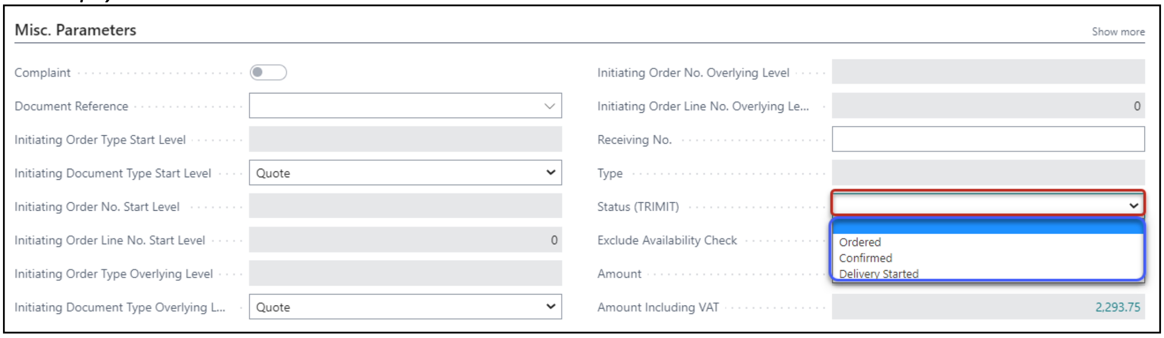
The Activity Group **Customer Service** contains the following Cues:

- **SALES ORDERS – OPEN**
  In this Cue a list of Sales Orders is shown with **Status** is *Open* and **All Shipped and Invoiced** is *No.*
- **OPEN COMPLAINTS**
  In this Cue you see a list of all TRIMIT Complaints that have not been completed.
- **BLOCKED CUSTOMERS WITH ORDERS**
  In this Cue you will see a list of Customers with **Blocked** is *Ship*, *Invoice* or *All* that have Orders in the Sales Orders List (**No. or Orders** <> *0*).
- **CUSTOMERS WITH DUE BALANCE**
  In this Cue you will see a list of Customers that have **Balance Due (LCY)** <> *0* as of the Work Date. Note that also Customers with a **Balance Due (LCY)** <> *0* on Credit Memos will be in the list.

PURCHASE

The Activity Group **Purchase** contains the following Cues:

- **PURCHASE ORDERS TO ORDER**
  In this Cue a list of Purchase Orders that have **All Received and Invoiced** is *No* and **Status (TRIMIT)** is *<empty>*. This field can be found in the FastTab ***Misc. Param***. of the Purchase Orders.



- **PURCHASE ORDERS TO CONFIRM**
  In this Cue a list of Purchase Orders that have **All Received and Invoiced** is *No* and **Status (TRIMIT)** is *Ordered.* As soon as the supplier has confirmed the Order, the user can change this **Status (TRIMIT)** into *Confirmed*. The Purchase Order will then not be shown anymore in this Cue.

PRODUCT DESIGN

The Activity Group **Product Design** contains the following Cues:

- MASTERS WITH DUE WORKFLOW
  In this Cue you will see a list of Masters that have Workflow Lines with a **Deadline** before the Work Date and have not been Approved so far.

LOGISTICS

The Activity Group **Logistics** contains the following Cues:

- OPEN PICK DOCUMENTS
  In this Cue a list of Open Pick Documents is shown on which the field **Status** is <empty>.
- SALES ORDERS – DELAYED
  In this Cue you see a list of Sales Orders with Sales Order Lines with an Outstanding Quantity that had to be shipped earlier than the day before the Work Date.
  However, the date comparison can be manipulated with the **Starting Date Formula to Ship** in the Role Center Setup.
- SALES ORDERS TO SHIP
  you see a list of Sales Orders with Sales Order Lines with an Outstanding Quantity that had to be shipped on the Work Date or the day before.
  However, the date comparison can be manipulated with the **Starting Date Formula to Ship** in the Role Center Setup.
- UPCOMING PURCHASE ORDERS
  In this Cue a list of Purchase Orders is presented, which have Outstanding Quantity on the Purchase Order lines and are supposed to be received on Work Date or before.

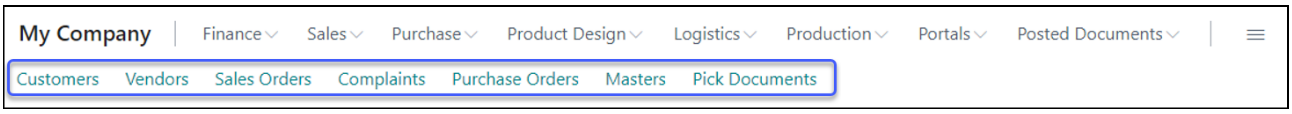
PORTAL

The Activity Group **Portal** contains the following Cues:

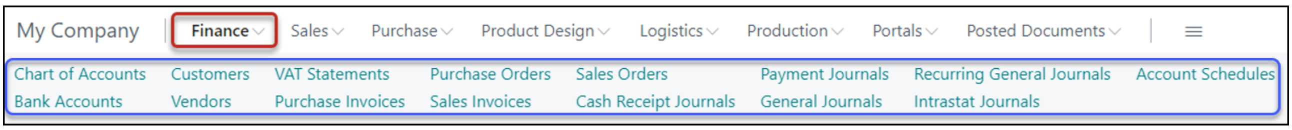
- PORTAL SALES DOC. ERROR
  See Advanced Sales Integration
- PORTAL PURCH. DOC ERROR
  See Advanced Purchase Integration

MENUS

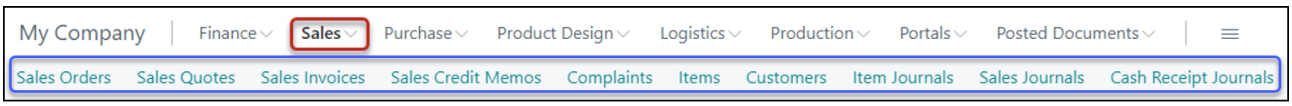
HOME



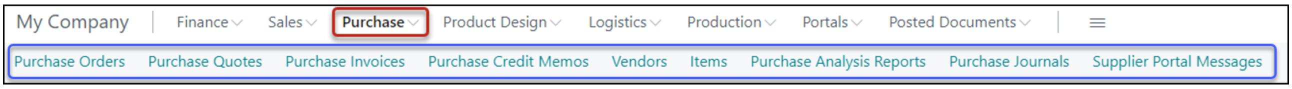
FINANCE



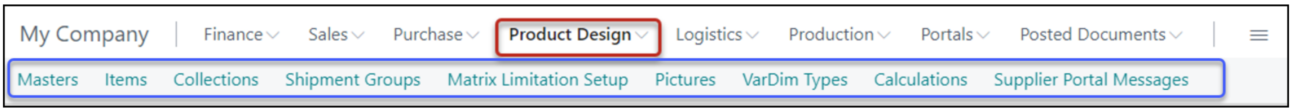
SALES



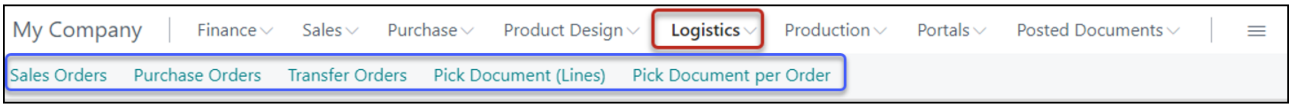
PURCHASE



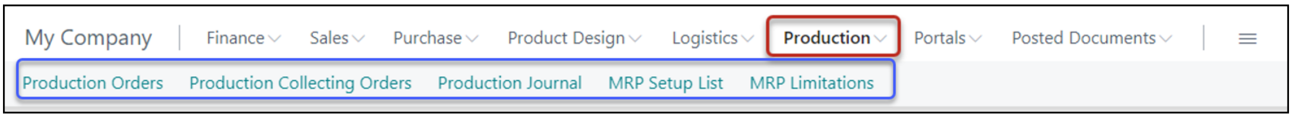
PRODUCT DESIGN



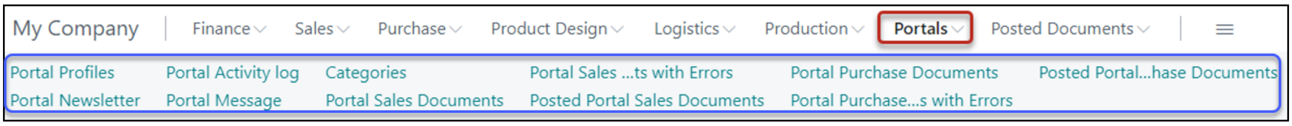
LOGISTICS



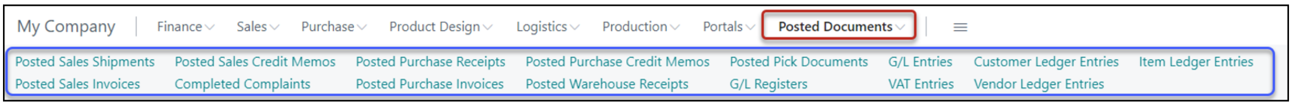
PRODUCTION



PORTALS

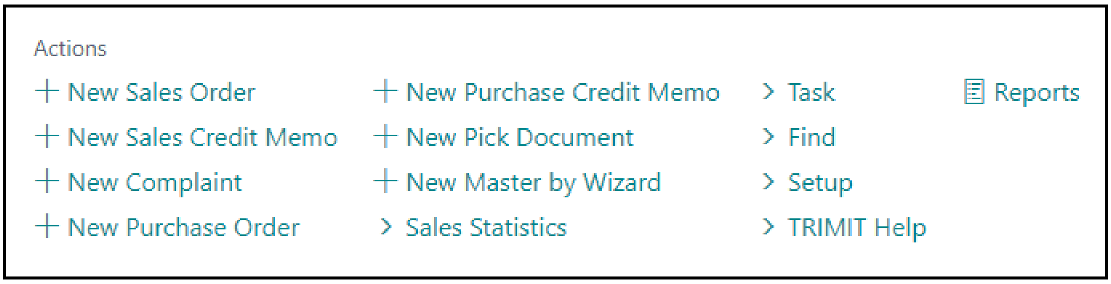


POSTED DOCUMENTS

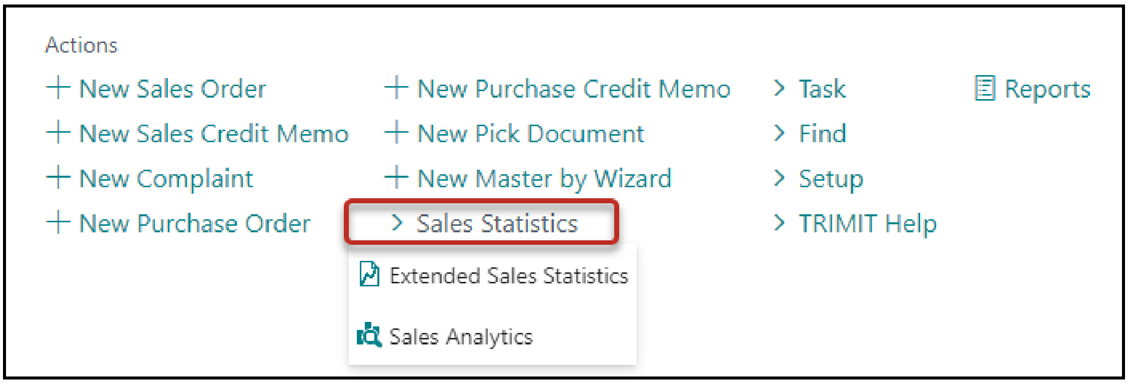


ACTIONS

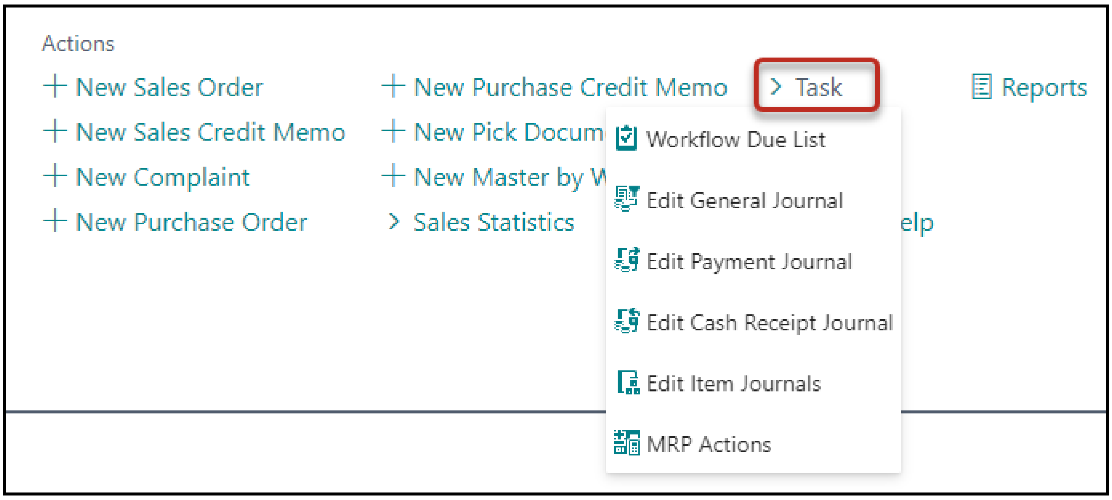
There are also special *Actions.*



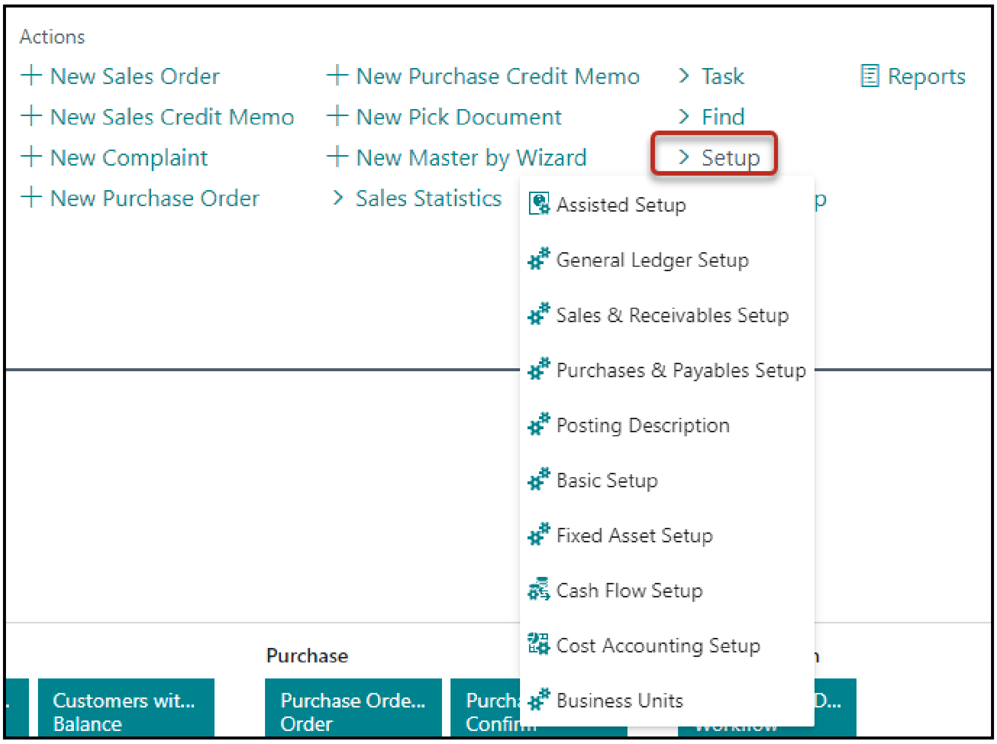
ACTIONS, SALES STATISTICS



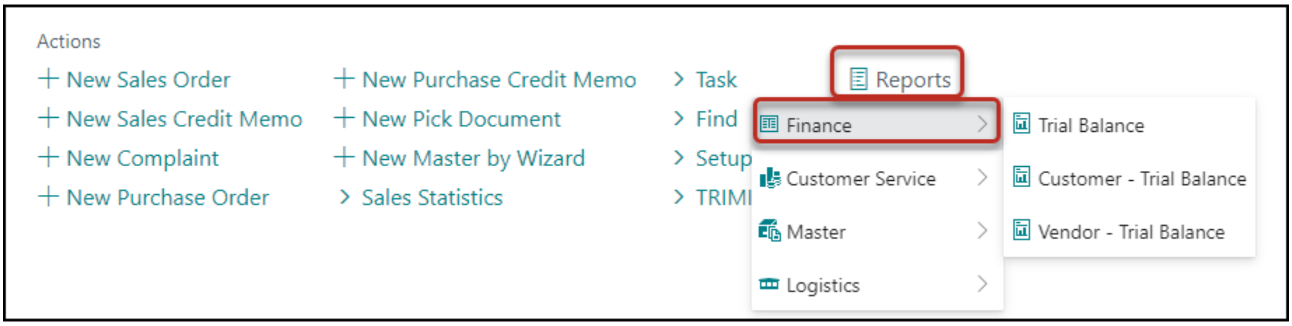
ACTIONS, TASK



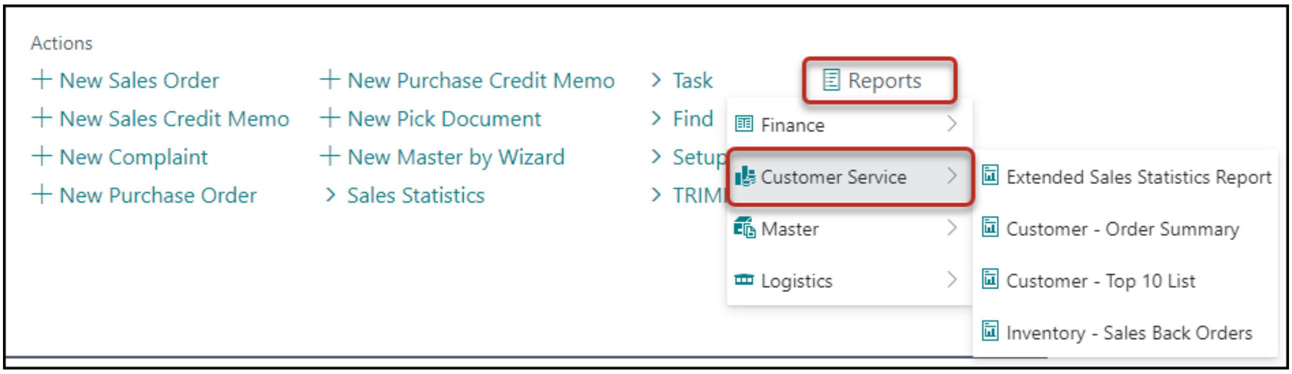
ACTIONS, SETUP



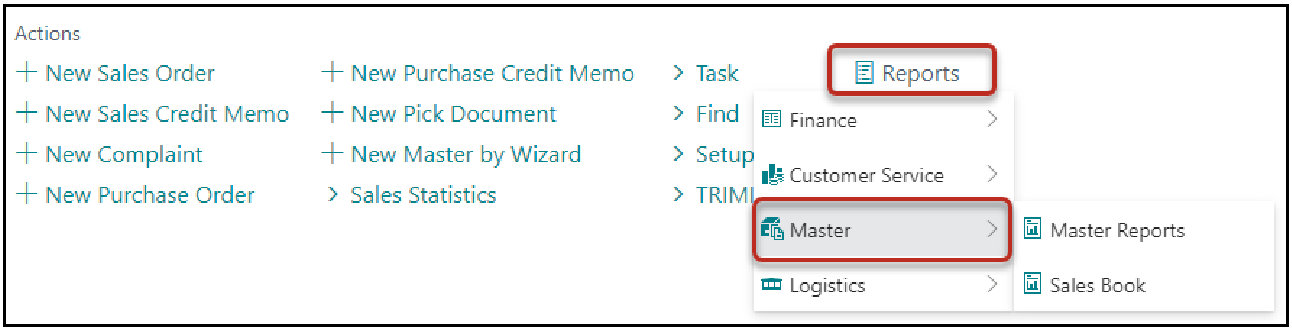
REPORTS, FINANCE



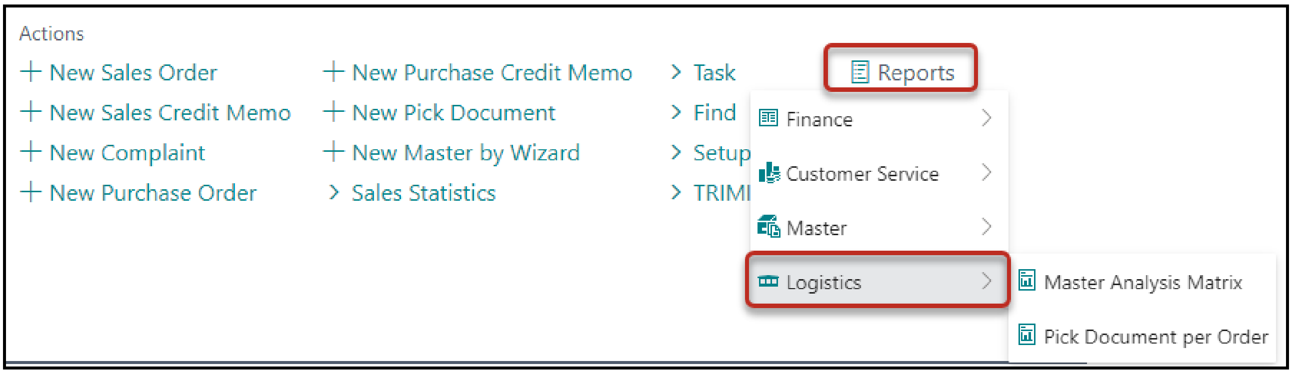
REPORTS, CUSTOMER SERVICE



REPORTS, MASTER

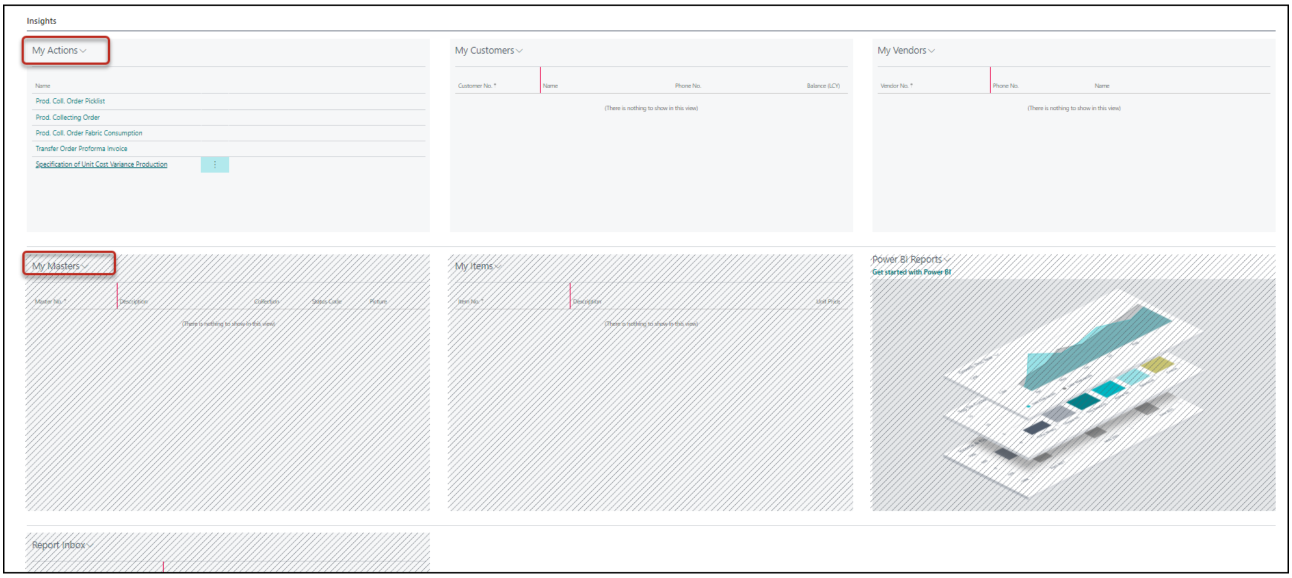


REPORTS, LOGISTICS



POSSIBLE INSIGHTS (FACTBOXES)

The **FactBoxes** that can be chosen have many similarities with standard Business Central **FactBoxes**, besides the ***My Actions*** and ***My Masters***. They are TRIMIT specific.



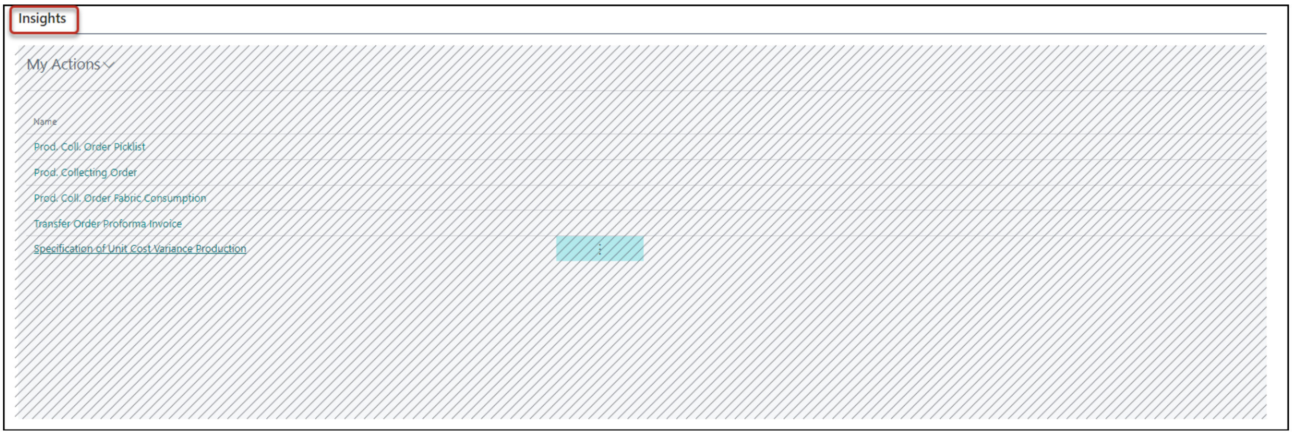
PROFILE TRIMIT SHOP FLOOR TERMINAL

Let us have a closer look at the Profile for **TRIMIT Shop Floor Terminal** (*TRM_TERMINAL*).
This profile will only be applicable if you did install the **TRIMIT Shop Floor App**.
This profile can be used as Role Center for users that register time spend on Operations of Production Orders by using TRIMIT Datacapture.
There is no equivalent profile in standard Business Central. There are not even Activity Groups and Cues within this profile as shown in Fig. 12. The user can only click **Login** (or press **F2**) to open the Terminal to register time.
For more details see ***White Paper – TRIMIT Shop Floor***

Fig.12: TRIMIT Shop Floor Terminal.

POSSIBLE INSIGHTS (FACTBOXES)

The only **FactBox** that can be chosen is the specific TRIMIT FactBox ***My Actions.***



FACTBOX MY/PAGE ACTIONS

INTRODUCTION

TRIMIT has introduced a new FactBox in which you can define specific **Actions**. On the Role Center, this FactBox is called ***My Actions***. On other pages, this FactBox is called ***Page Actions***.
In these FactBoxes, a user has the possibility to create a list of Actions of different types. An example of both FactBoxes is shown in Fig. 13. In the example below some Actions are added.

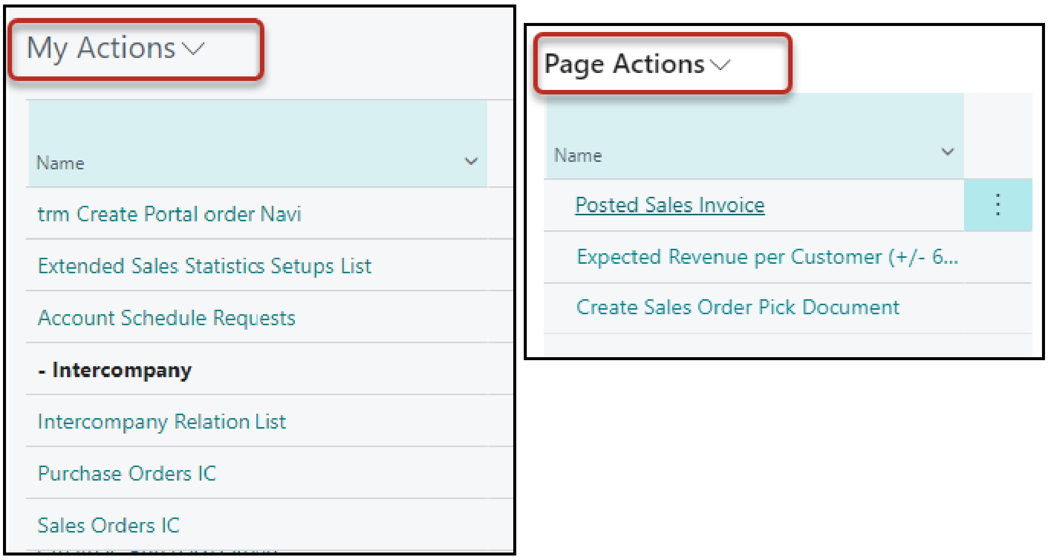


Fig. 13: My Actions and Page Actions.

The purpose of these FactBoxes is to avoid customizing the pages.
The Actions can be run by double-clicking on the chosen Action.
For instance: when you double-click on *Intercompany Relation List* the TRIMIT Page opens with the Intercompany Relations of TRIMIT.
By creating an Action List, a user can choose the Actions that he needs the most without adding them to the Role Center/Pages. This keeps the solution upgradeable, and a user can do himself what normally should be done by development.
This will be elaborated in the paragraphs below.

MANAGE ACTIONS

MY ACTIONS – VIA A ROLE CENTER

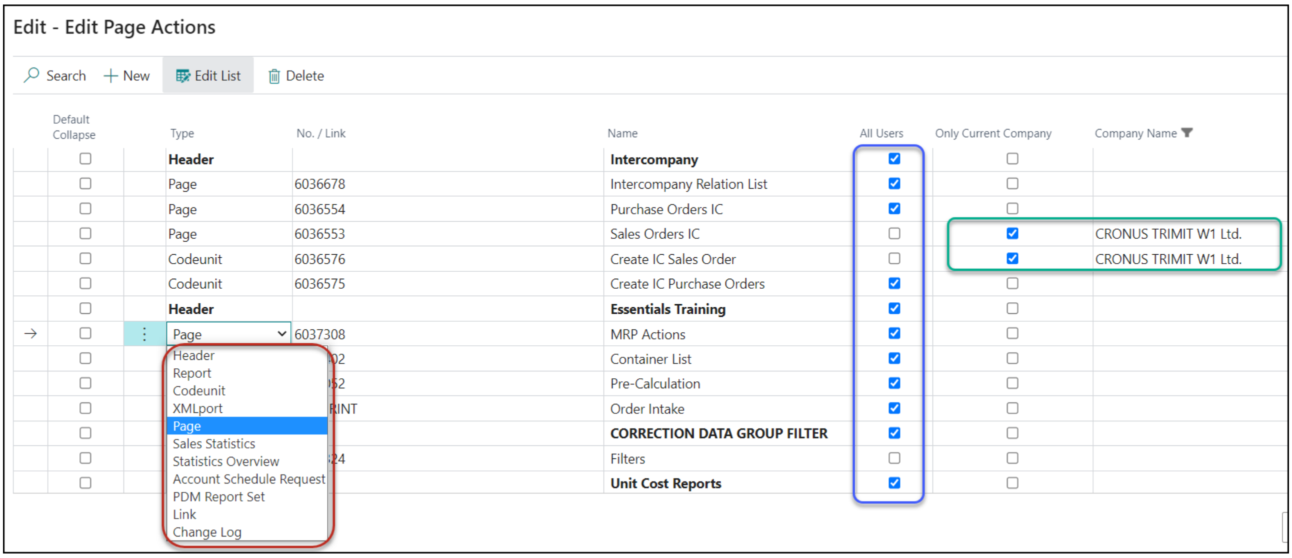


Fig. 14: Manage My Actions.

A user can create his own Actions in the FactBox ***My Actions*** in a TRIMIT Role Center by clicking on **Manage List**. The **Edit Page Actions** page opens (see Fig. 14). In this list, a user can add the Actions he wants.

DEFAULT COLLAPSE

With a checkmark in this field, the user can determine that the Lines beneath this **Header** should be collapsed by default.

TYPE

Actions can be of different **Types** (**red** frame in Fig. 14). These will be discussed below:

HEADER

Actions of the **Type** *Header* are not real Actions. This Type can be used to add free text (**bold** font) into the list by filling the **Name** field. In Fig. 14 the Headers are used to divide the Actions into different Types of Actions, but every user is free if and how he wants to use the *Headers*.

REPORT

With **Type** *Report,* you can select a Report **No**. in the **No./Link** field from the Report List. The name of the Report will show up in the field **Name** but can be changed.

CODEUNIT

With **Type** *Codeunit,* you can select a Codeunit **No.** in the **No./Link** field from the Codeunit List. The name of the Codeunit will show up in the field **Name** but can be changed**.**

XMLPORT

With **Type** *XMLport,* you can select an XMLport **No.** in the **No./Link** field from the XMLport List. The name of the XMLport will show up in the field **Name** but can be changed**.**

PAGE

With the Action **Type** *Page,* you can select a Page **No.** in the **No./Link** field from the Page List.
The name of the Page will show up in the field **Name** but can be changed**.**

STATISTICS REQUEST

Statistics Request is a tool developed by TRIMIT that enables the user to export data to for instance Excel. This feature is discussed in Statistics Request.
With the Action **Type** *Statistics Request,* you can select a Statistics Setup **No.** in the **No./Link** field from the Statistics Setup List.
The description of the Statistics Setup will show up in the field **Name** but can be changed**.**

ACCOUNT SCHEDULE REQUEST

Account Schedule Request is a tool developed by TRIMIT that enables the user to run a standard Business Central Account Schedule Report. This feature is discussed in Account Schedule Request.

PDM REPORT SET

With **Type** *PDM Report Set,* you can select a PDM Report Set **No.** from the List. The name of the PDM Report Set will show up in the field **Name** but can be changed**.**
For more details regarding **PDM Report Set** see ***White Paper – TRIMIT PDM Report Set.***

LINK

With **Type** *Link***,** you can select a URL to open a website. In that case, the URL needs to be filled in **No./Link.**

CHANGE LOG

With **Type** *Change Log,* the Change Log Entries can be shown. You don't have to enter a **No./Link**.
The **Name** will automatically be filled with *Change Log*.

ALL USERS

With a checkmark in this field, you can determine that this Action is applicable for all Users, and not only for the user that created this Action (see **blue** frame fig. 14).
Without a checkmark in this field, it means, that only the user that created this Action will see it in his My/Page Actions.

ONLY CURRENT COMPANY

With a checkmark in this field, you can determine that this Action will only be in the My/Page Actions for current company; in that case the field **Company Name** will be filled automatically with the **Name** of the current company (see **green** frame fig. 14).
Without a checkmark in this field, it means, that this Action will be in the My/Page Actions in any Company of the database.

PAGE ACTIONS – VIA MANY PAGES

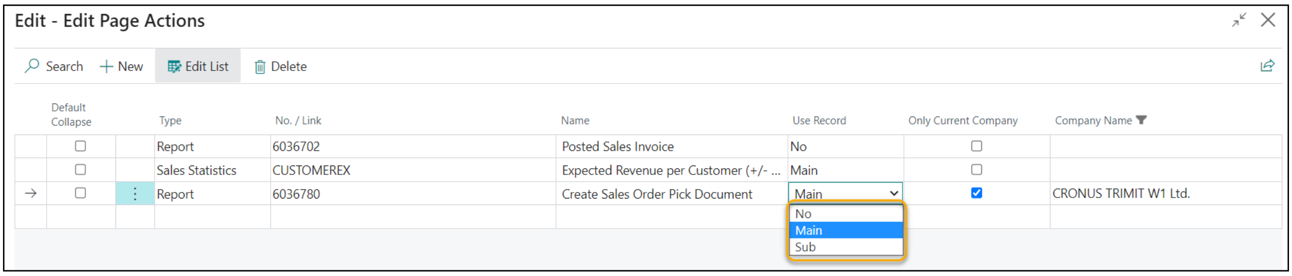


Fig. 15: Manage Page Actions.

A user can create his own Actions in the FactBox ***Page Actions*** in many pages, by clicking on **Manage List**. The **Edit Page Actions** page opens (see Fig. 15). In this list, a user can add the Actions he wants.

See My Actions – via a Role Center for most of the fields in Fig. 15

USE RECORD

This field is only applicable in the **Page Actions** which can be added to any Page and is not applicable in the **My Actions** in the Role Centers of TRIMIT.

If a specific Action needs to be run on a List or Page there are three options:

1. The Action is a generic.
2. The Action is specific depending on the main record.
3. The Action is specific depending on the sub record.

To establish this TRIMIT has introduced the field **Use Record** (see orange frame Fig. 15.)

The **Use Record** field has two options:

No	The Action is executed regardless which Record is selected.
Main	The Action is executed on the Main record of the selected line/record. I.e., for the Page Actions in the Sales Order, this would be the Sales Header.
Sub	The Action is executed on the Sub record of the selected line/record. I.e., for the Page Actions in the Sales Order, this would be the Sales Line you are standing on.

TRIMIT SEARCH FUNCTION

TRIMIT has introduced a new Search Function, which makes it possible for the user to find Documents much easier than in standard Business Central. The Search Functions can be found in the Actions of the specific TRIMIT Profiles/Role Centers as shown in Fig. 16.

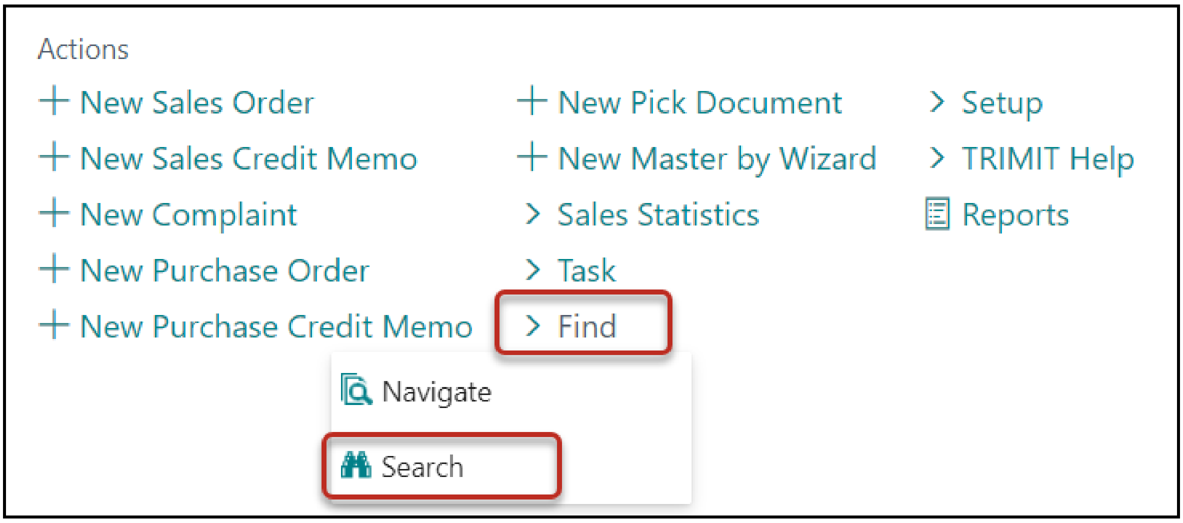


Fig. 16: Actions of the Small Business profile.

If you click on the ***Find, Search,*** the following Page opens (see Fig. 17.) In this Page, a user can search very easily for all the entities shown.
There is no need for using ‘@’, ‘*’ or any other symbol. This is illustrated below.

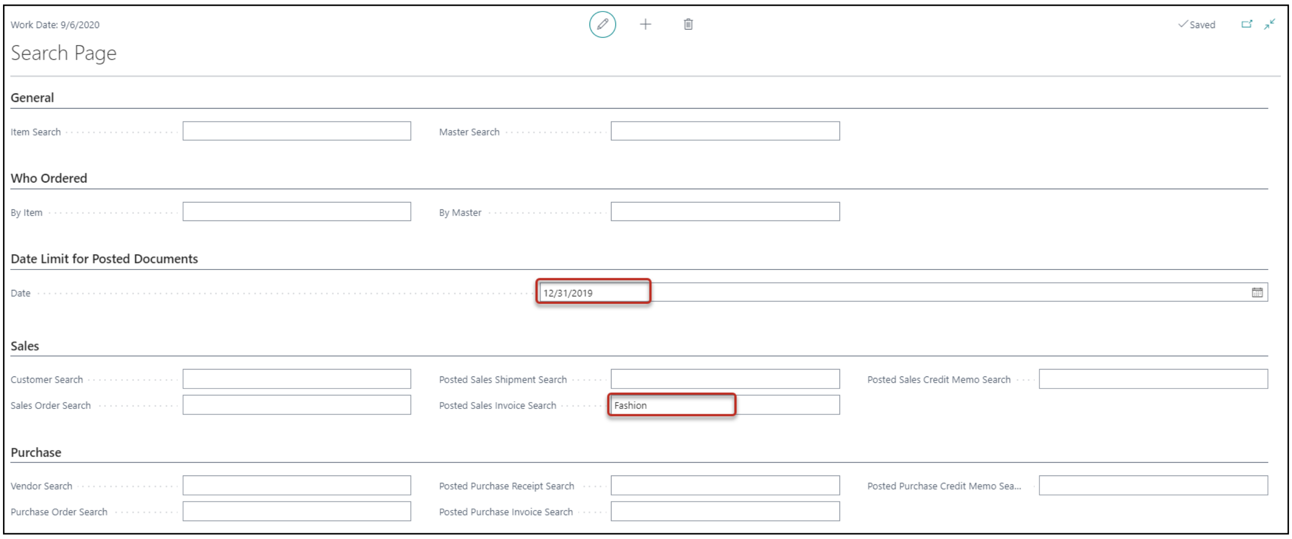


Fig. 17: Search Page.

In each Field, (individually) you can enter a Filter and press **OK:**

Item Search	A list of Items will be shown based on the entered Filter.
Master Search	A list of Masters will be shown based on the entered Filter.
By Item	A list of Sales Document Lines will be shown with an Item in it based on the entered Filter.

By Master	A list of Sales Document Lines will be shown with a Master in it based on the entered Filter.
Date	This field will by default be filled with the Work Date – 90 Days. You can also use the field **Default Search Date Start** in the Role Center Setup to set this field. This field will limit the filtered Posted Sales-/Purchase Documents as described below.
Customer Search	A list of Customers will be shown based on the entered Filter.
Sales Order Search	A list of Sales Orders will be shown based on the entered Filter.
Posted Sales Shipment Search	A list of Posted Sales Shipments will be shown based on the entered Filter and the **Date** on the FastTab **Date Limit for Posted Documents.**
Posted Sales Invoice Search	A list of Posted Sales Invoices will be shown based on the entered Filter and the **Date** on the FastTab **Date Limit for Posted Documents.**
Posted Sales Credit Memo Search	A list of Posted Credit Memos will be shown based on the entered Filter and the **Date** on the FastTab **Date Limit for Posted Documents.**
Vendor Search	A list of Vendors will be shown based on the entered Filter.
Purchase Order Search	A list of Purchase Orders will be shown based on the entered Filter.
Posted Purchase Receipts Search	A list of Posted Purchase Receipts will be shown based on the entered Filter and the **Date** on the FastTab **Date Limit for Posted Documents.**
Posted Purchase Invoice Search	A list of Posted Purchase Invoices will be shown based on the entered Filter and the **Date** on the FastTab **Date Limit for Posted Documents.**
Posted Purchase Credit Memo Search	A list of Posted Credit Memos will be shown based on the entered Filter and the **Date** on the FastTab **Date Limit for Posted Documents.**

If for instance the field **Customer Search** is filled with *furnish* the following list will pop-up (see Fig. 18):

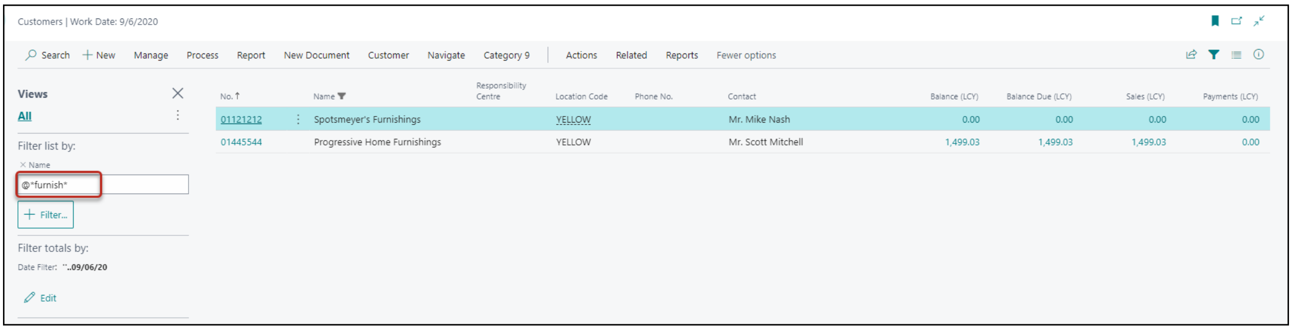


Fig. 18: Customer list with search criteria 'furnish'.

If there is only one result, the appropriate Customer Card will be opened immediately.

It is also possible to use a part of the name of the Customer or Vendor in the other fields. This way it is possible to avoid entering Document Numbers.
This is illustrated with the following example:
Let us assume that the customer *The Fashion Store UK* calls and has a question about an Invoice. While talking on the phone the user can type *fashion* in the field **Posted Sales Invoice Search** as shown below in Fig. 19 the result will be a list of **Posted Sales Invoices** of this Customer.

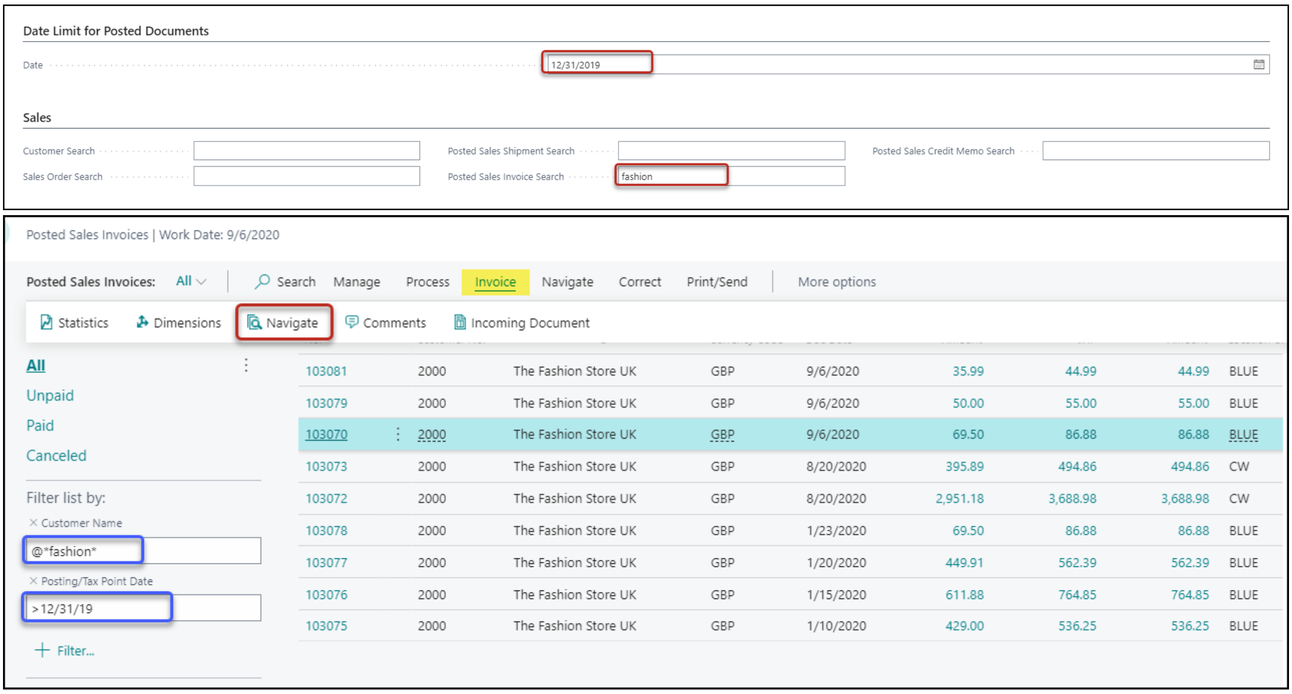


Fig. 19: Search for Posted Sales Invoices

This way searching for the required document goes very fast. The next step is to select the right Invoice **No.** and click on ***Invoice, Navigate*** to have a look at the entries connected to this document.

ACCOUNT SCHEDULE REQUEST

In this chapter is explained how to create an Action of the **Type** *Account Schedule Request*.
The purpose of this Action is to create an Account Schedule Report.

In order to create an Action of the **Type** *Account Schedule Request* following steps needs to be taken:

- Go to a ***Page Actions*** FactBox or to the ***My Actions*** FactBox.
- Click ***Manage List***. The **My Actions** List opens
- Choose **Type** *Account Schedule Request* as shown in Fig. 20.

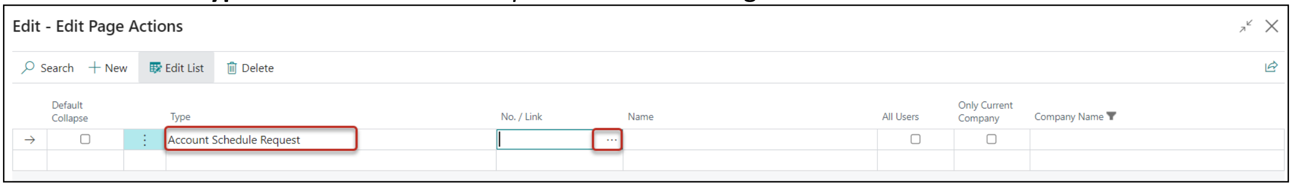


Fig. 20: Edit – My Actions

- Drill down in the field **No**. The **Account Schedule Setup List** opens.
- Click ***+ New***. The **Account Schedule Setup** opens.
- Enter the appropriate data in the Setup for instance as in Fig. 21.

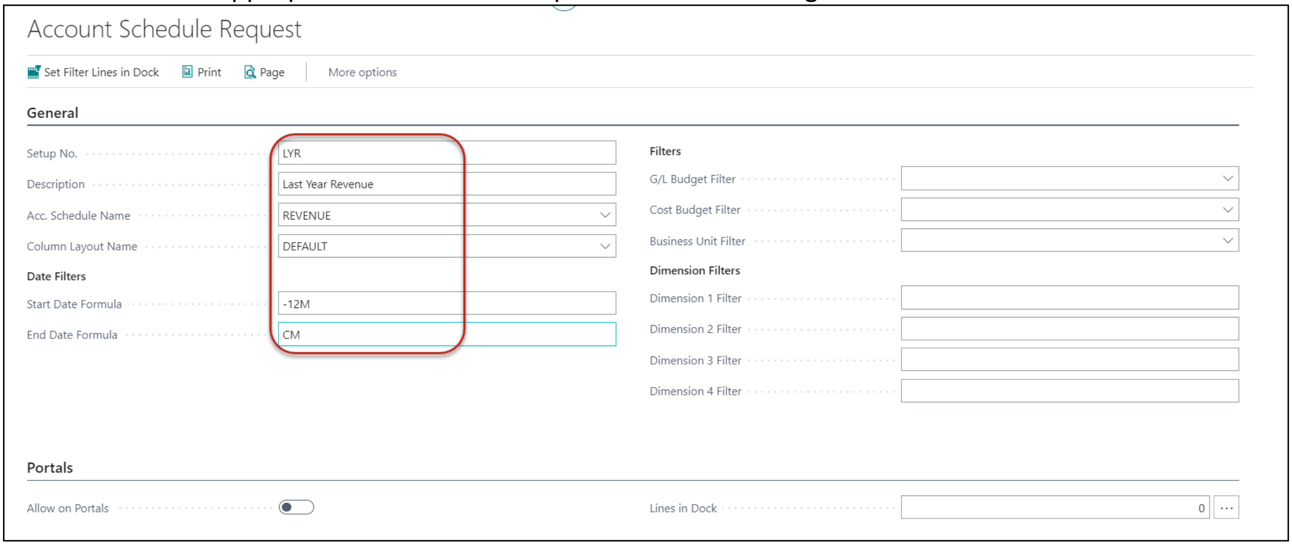


Fig. 21: Account Schedule Setup

FIELDS OF THE ACCOUNT SCHEDULE SETUP

SETUP NO. AND DESCRIPTION

Here you enter the **No.** and **Description** of the Account Schedule Request.

ACC. SCHEDULE NAME AND COLUMN LAYOUT NAME

In these fields, you can select the appropriate **Account Schedule Name** and **Column Layout Name**. Both are standard Business Central and will not be described in detail here.

START DATE FORMULA AND END DATE FORMULA

With these date Formulas you determine what the **Starting Date** and **Ending Date** is compared to the date on which the **Account Schedule Request** Action is executed.

G/L BUDGET FILTER, COST BUDGET FILTER AND BUSINESS UNIT FILTER

In these fields, you can enter the **G/L Budget**, **Cost Budget** and **Business Unit** respectively if these filters are required. These are standard Business Central entities and will not be described in detail here.

GLOBAL DIMENSION FILTERS

In these fields, you can enter filters of **Global Dimension 1** and **Global Dimension 2**, which are setup in the Demo Company for *Brands* and *Seasons*.

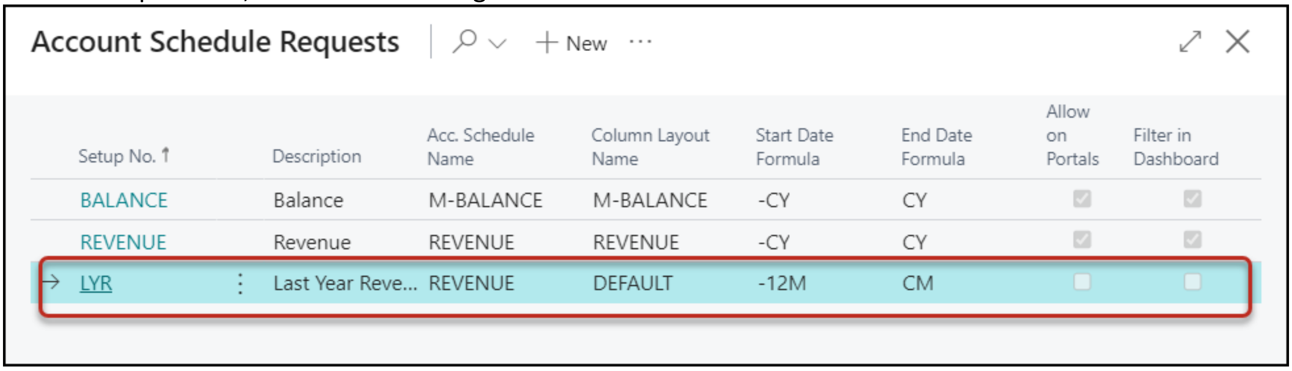
ALLOW IN PORTALS

With this field you can determine of this specific **Account Schedule Request** could also be chosen on the Portals. I.e., for the **InSite Portal.**

LINES IN DOCK

With this field, you can determine which Lines of the **Account Schedule Request** should be shown in the Dock on a Portal if **Allow in Portals** has been set to *Yes.*

- After entering appropriate data as for instance in Fig. 21 click **OK** to return to Account Schedule Request List, which looks like Fig. 22 now.



Setup No. ↑	Description	Acc. Schedule Name	Column Layout Name	Start Date Formula	End Date Formula	Allow on Portals	Filter in Dashboard
BALANCE	Balance	M-BALANCE	M-BALANCE	-CY	CY	☑	☑
REVENUE	Revenue	REVENUE	REVENUE	-CY	CY	☑	☑
LYR	Last Year Reve...	REVENUE	DEFAULT	-12M	CM	☐	☐

Fig. 22 Account Schedule Request List

- Click **OK** button to go back to the **My Actions** page.
- Click **OK** to go back to the FactBox, which looks like Fig. 23.

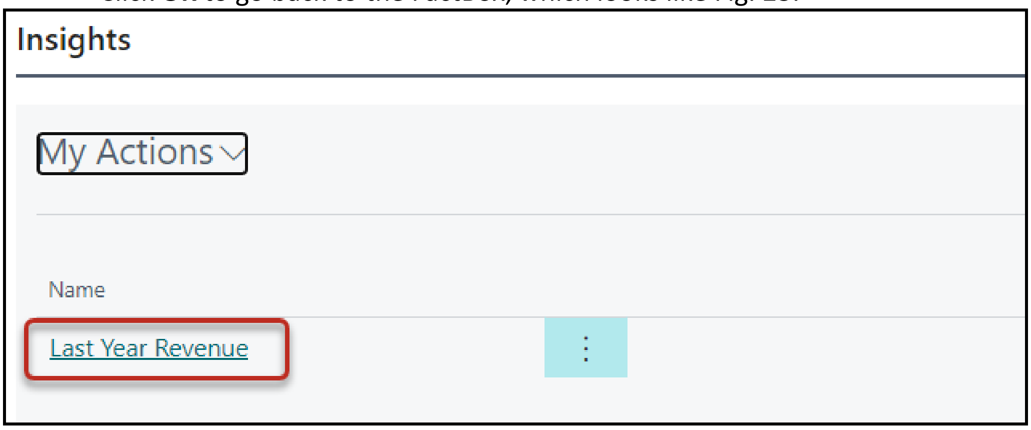
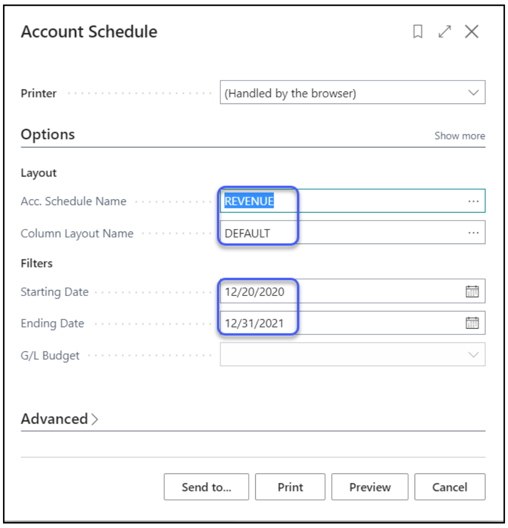


Fig. 23: Page Actions with the created Account Schedule Request.

- By double clicking on the **Name** (or click ***My Actions, Run***), the appropriate Account Schedule Report can be created (see Fig. 24).



Revenues

12/20/2021
Page 1 / 1
ADMIN

Period: 12/20/20..12/31/21
My Company

Fiscal Start Date: 01/01/21
All amounts are in GBP.

Description	Net Change Debit	Net Change Credit	Balance at Date Debit	Balance at Date Credit
REVENUE				
Sales of Retail				
Sales, Retail - Dom.		1,021.42		1,021.42
Sales, Retail - EU				
Sales, Retail - Export				
Job Sales Adjmt, Retail				
Sales of Retail, Total		1,021.42		1,021.42
Revenue Area 10..30, Total				
Revenue Area 40..85, Total				
Revenue, no Area code, Total		359.90		359.90
Revenue, Total		**1,021.42**		**1,021.42**

Fig. 24: Creation of Account Schedule Report.

STATISTIC REQUEST

The purpose of Actions of the **Type** *Statistic Request* is to export Sales related Statistical Data from Business Central/TRIMIT for instance to Excel. This is limited to specific decimal figures, such as Quantities, Revenues, Budgets, etc. This will be described below. In this chapter is also described how to create and use Actions of this Type.

In order to create an Action of the **Type** *Statistic request* the following steps needs to be taken:

- Go to a **Page Actions** FactBox or to the **My Actions** FactBox.
- Click ***Manage List***. The **My Actions** List opens
- Choose **Type** *Statistic Request* as shown in Fig. 25.

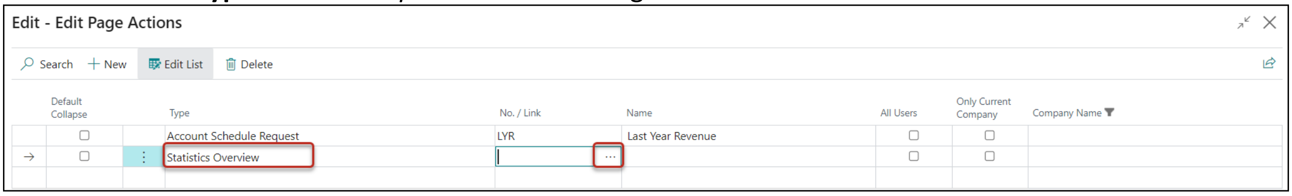


Fig. 25: Edit – My Actions

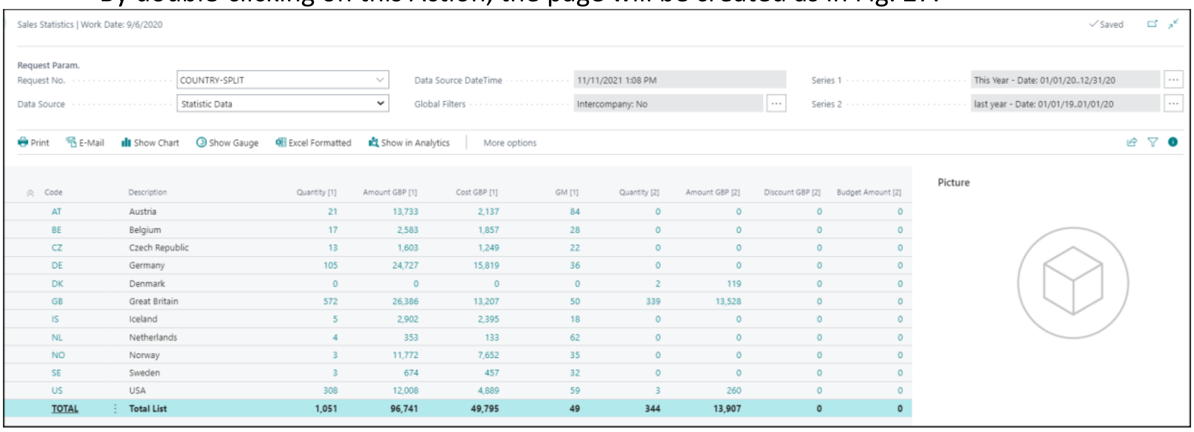
- Drill down in the field **No**. The **Statistics Setup List** opens, and you can choose a specific **Statistics Setup.**
- How to setup these **Statistics Setups** is in detail described in the ***White Paper – TRIMIT Sales Statistics.***

Let us assume that the user wants to create a chart on the screen in which he can compare the revenue versus the costs for different countries. This could be the ***COUNTRY-SPLIT*** *setup.*

- This Statistic Request is now visible in the Page Actions (see fig. 26).

Fig. 26: Page Actions with Statistic request.

- By double-clicking on this Action, the page will be created as in Fig. 27.



Code	Description	Quantity [1]	Amount GBP [1]	Cost GBP [1]	GM [1]	Quantity [2]	Amount GBP [2]	Discount GBP [2]	Budget Amount [2]
AT	Austria	21	13,733	2,137	84	0	0	0	0
BE	Belgium	17	2,583	1,857	28	0	0	0	0
CZ	Czech Republic	13	1,603	1,249	22	0	0	0	0
DE	Germany	105	24,727	15,819	36	0	0	0	0
DK	Denmark	0	0	0	0	2	119	0	0
GB	Great Britain	572	26,386	13,207	50	339	13,528	0	0
IS	Iceland	5	2,902	2,395	18	0	0	0	0
NL	Netherlands	4	353	133	62	0	0	0	0
NO	Norway	3	11,772	7,652	35	0	0	0	0
SE	Sweden	3	674	457	32	0	0	0	0
US	USA	308	12,008	4,889	59	3	260	0	0
TOTAL	Total List	1,051	96,741	49,795	49	344	13,907	0	0

Fig. 27: Example of Statistic.

CONCLUSION

In this document has extensively been described which features TRIMIT has added in order to enhance the way of working optimally with the Role Centers. This includes:

- TRIMIT Profiles
- New FactBoxes: My Actions and Page Actions
- Account Schedule Requests and Statistic Requests
- Search Function

The function of these features is to improve the user experience of Business Central/TRIMIT under the condition that the solution stays upgradeable.

TRIMIT strongly believes that this is a very good selling point and needs appropriate attention both in pre-sales as during implementation.