



WHITE PAPER

TRIMIT WIZARD AND COPY INFORMATION

23.2

This document contains information regarding the Master Wizard and Copy Info functionality in TRIMIT 23.2 for Microsoft Dynamics 365 Business Central 2023, Wave 2 (W1).

Version: 23.2
Date: 18-04-2024

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INTRODUCTION

In TRIMIT, you can copy one Master to another new Master by using the **Wizard**.

You can use the same **Wizard** also for creating new Masters from blank.

You can use the same **Wizard** also for maintaining information – copy specific information from one Master to another Master.

When copying a Master, you are also able to determine which information should – by default – already simply be copied, and for which information of the Master you want to interfere to determine what exactly should be copied.

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

It will only describe the TRIMIT fields/functionality and not the standard Business Central fields/functionality.

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

The functionality described is the functionality as of **TRIMIT 23.2 for Business Central W1 BC23.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 23.2**, which is based on Microsoft Dynamics 365 Business Central 2023 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT Wizard and Copy Info contains the following objects:

The tables **6037134** ***trm Master Wizard Setup***

The pages **6037129** ***trm Master Wizard***
 6037137 ***trm Master Wizard Setup List***
 6037138 ***trm Master Wizard Setup***
 6037199 ***trm Copy Values by Wizard***

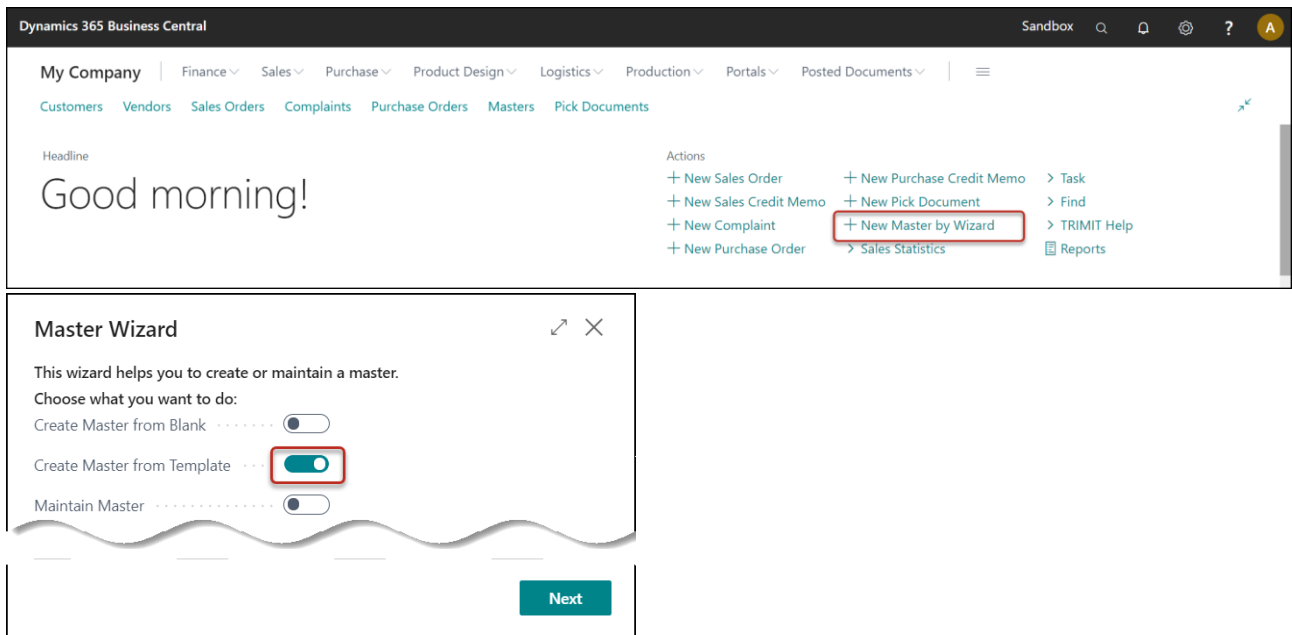
The codeunits **6037100** ***trm Call Create Master Wizard***

SETUPS

MASTER WIZARD SETUP

With the **Master Wizard Setup**, you can determine which information should be copied – by default – from one Master to a new Master when you use the **Copy Master by Wizard** functionality in TRIMIT. You can also determine which information you want to be able to change or select during the Wizard.

To create the **Master Wizard Setups**, you can click **New Master by Wizard** in the *Actions* of the **Profile TRIMIT Small Business** to open the Wizard first, and then choose **Create Master from Template**.

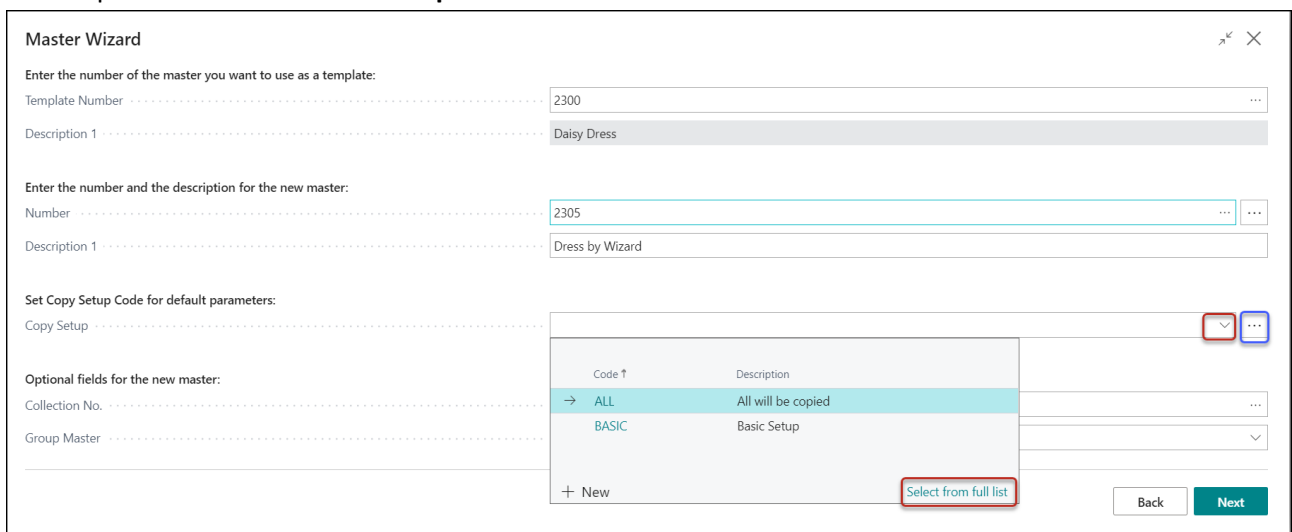


The screenshot shows the Dynamics 365 Business Central interface. In the top navigation bar, the 'Actions' menu is open, and the 'New Master by Wizard' option is highlighted with a red box. Below the navigation bar, the 'Master Wizard' dialog is open. It contains the following options:

- Create Master from Blank: ☐
- Create Master from Template: ☒ (highlighted with a red box)
- Maintain Master: ☐

A 'Next' button is visible at the bottom right of the dialog.

In field **Copy Setup** you can now press **Look up value** (Alt+Down arrow) and click **+ New** or **Select from full list** to open the **Master Wizard Setup List**.



The screenshot shows the 'Master Wizard' form. It contains the following fields and sections:

- Enter the number of the master you want to use as a template:**
 - Template Number: 2300
 - Description 1: Daisy Dress
- Enter the number and the description for the new master:**
 - Number: 2305
 - Description 1: Dress by Wizard
- Set Copy Setup Code for default parameters:**
 - Copy Setup: [Dropdown menu]
- Optional fields for the new master:**
 - Collection No.: [Dropdown menu]
 - Group Master: [Dropdown menu]

At the bottom right, there is a table with the following data:

Code ↑	Description
→ ALL	All will be copied
BASIC	Basic Setup

Below the table, there is a '+ New' button and a 'Select from full list' button (highlighted with a red box). At the bottom right, there are 'Back' and 'Next' buttons.

Once you have entered a **Copy Setup**, you can click **AssistEdit** (Alt+Right arrow) to open the Card of the **Master Wizard Setup**.

Select - Master Wizard Setup List

+ New

Edit List

⋮

↗

✕

Code ↑	Description	Default Collection No.
→ ALL	All will be copied	
BASIC	Basic Setup	

Delete

Edit

View

Open in Excel

Show as menu

Now you can open the Card of the **Master Wizard Setup** by clicking **+New** or **Show the rest, Edit** or **View**.

← Master Wizard Setup

✎

+

✕

✓ Saved

🔖

🔗

↗

ALL

General

Code

ALL

Default Collection No.

Description

All will be copied

Master >

Sales & Purchase >

Bill of Materials >

Yes

Inventory >

Measurement Chart >

No

Additional Info >

Additional Comments >

No

Workflow >

No

Matrix >

Assortment >

Wizard >

Numbering >

FASTTAB GENERAL

CODE

Unique Code for this **Master Wizard Setup**

DESCRIPTION

Description for this **Master Wizard Setup**

DEFAULT COLLECTION NO.

You can enter a **Collection No.**, which will be filled in the **Master Wizard** when you choose this **Code** in your Wizard.

FASTTAB MASTER

Master	
Copy Master Pictures	☐
Copy Dimensions	☒
Copy Extended Text	☒
Copy Item Translations	☒
Copy Item Attributes	☒
Copy General Comments	☒

COPY MASTER PICTURES

A checkmark in this Field will copy the Pictures from the **Template Number** to the **Number**.
No checkmark means, that the Pictures will not be copied.

COPY DIMENSIONS

A checkmark in this Field will copy the Dimensions from the **Template Number** to the **Number**.
No checkmark means, that the Dimensions will not be copied.

COPY EXTENDED TEXT

A checkmark in this Field will copy the Extended Text from the **Template Number** to the **Number**.
No checkmark means, that the Extended Text will not be copied.

COPY ITEM TRANSLATIONS

A checkmark in this Field will copy the Item Translations from the **Template Number** to the **Number**.
No checkmark means, that the Item Translations will not be copied.

COPY ITEM ATTRIBUTES

A checkmark in this Field will copy the Item Attributes from the **Template Number** to the **Number**.
No checkmark means, that the Item Attributes will not be copied.

COPY GENERAL COMMENTS

A checkmark in this Field will copy the General Comments that are directly related to the **Template Number** to the **Number**.
No checkmark means, that the General Comments will not be copied.

FASTTAB SALES & PURCHASE

Sales & Purchase	
Copy Sales Prices	☒
Set Sales Prices = 0	☐
Copy Sales Discounts	☒
Copy Purchase Prices	☒
Set Purchase Prices = 0	☐
Copy Item Vendor	☒
Copy Item Charge	☒
Set Item Charge = 0	☐

COPY SALES PRICES

A checkmark in this Field will copy the Sales Prices and the VarDim Adjustments for the Sales Prices from the **Template Number** to the **Number**.

If Sales Prices of the **Template Number** have **Search Expressions** and related Search Table Lines, new Search Tables and Search Table Lines will be created for the **Number** based on the **Template Number** Search Tables.

In the new created Search Tables only the Variants (colors, sizes, etc.) of the **Number** will be included.

If the **Number** contains more Variants (colors, sizes, etc.) as the **Template Number**, the Prices in the Search Table Lines will be filled based on the **Unit Price** in the Sales Prices.

If Sales Prices of the **Template Number** have **Formulas**, the same Formulas will also be connected in the Sales Prices of the **Number**.

If the Sales Prices of the **Template Number** also have Sales Prices per Dimension, they will also be copied for the corresponding Sales Prices of the **Number**.

No checkmark means, that the Sales Prices will not be copied.

NOTE

Keep in mind that if you have a **Formula** to determine Sales Prices or VarDim Adjustments, and would change the **Formula**, this can influence the prices of several different Masters.

SET SALES PRICES = 0

If **Copy Sales Prices** have a checkmark, and the **Set Sales Prices = 0** have a checkmark, the records of the Sales Prices including **Search Expressions**, **Search Table Lines** and **Formulas** will be copied as described above.

However, the actual field for the **Unit Price** will be set to 0,00 as well as the **Unit Price** in the Search Table Lines.

This is also applicable in the **VarDim Adjustment** Prices, where the **Adjustment Amount Sales** and **Adjustment Sales in %** will be set to 0,00.

COPY SALES DISCOUNT

A checkmark in this Field will copy the Sales Line Discounts from the **Template Number** to the **Number**.

COPY PURCHASE PRICES

A checkmark in this Field will copy the Purchase Prices from the **Template Number** to the **Number**.

If Purchase Prices of the **Template Number** have **Search Expressions** and related Search Table Lines, new Search Tables and Search Table Lines will be created for the **Number** based on the **Template Number** Search Tables.

In the new created Search Tables only the Variants (colors, sizes, etc.) of the **Number** will be included.

If the **Number** contains more Variants (colors, sizes, etc.) as the **Template Number**, the Prices in the Search Table Lines will be filled based on the **Unit Price** in the Purchase Prices.

If Purchase Prices of the **Template Number** have **Formulas**, the same Formulas will also be connected in the Purchase Prices of the **Number**.

If the Purchase Prices of the **Template Number** have also Purchase Prices per Dimension, they will also be copied for the corresponding Purchase Prices of the **Number**.

No checkmark means, that the Purchase Prices will not be copied.

NOTE

Keep in mind that if you have a **Formula** to determine Purchase Prices, and would change the **Formula**, this can influence the prices of several different Masters.

SET PURCHASE PRICES = 0

If **Copy Purchase Prices** have a checkmark, and the **Set Purchase Prices = 0** have a checkmark, the records of the Purchase Prices including **Search Expressions**, **Search Table Lines** and **Formulas** will be copied as described above.

However, the actual field for the **Direct Unit Price** will be set to 0,00 as well as the **Direct Unit Price** in the Search Table Lines.

COPY ITEM VENDOR

A checkmark in this Field will copy the Item Vendor Catalog (table 99, Item Vendor) from the **Template Number** to the **Number**.

COPY ITEM CHARGE

A checkmark in this Field will copy the Item Charge Calculation Lines that are related to the Master or Items from the **Template Number** to the **Number**.

SET ITEM CHARGE = 0

If you have a checkmark in **Copy Item Charge** and a checkmark in **Set Item Charge = 0**, the Item Charge Calculation Lines will be copied, but the Field **Item Charge Unit Amount (LCY) or %** will be set to 0,00.

FASTTAB BILL OF MATERIALS

Bill of Materials	
Copy Bill of Materials	☒
Incl. BOM Auto Formula	☒
Incl. BOM Comments	☒

COPY BILL OF MATERIALS

A checkmark in this Field will copy the Bill of Materials (BOM Component Lines) that is related to the **Template Number** to the **Number** from the Master Wizard.

If BOM Component Lines of the **Template Number** have **Search Expressions** and related Search Table Lines, new Search Tables and Search Table Lines will be created based on the **Template Number** Search Tables. In the new created Search Tables only the Variants (colors, sizes, etc.) of the **Number** will be included.

If the **Number** contains more Variants (colors, sizes, etc.) as the **Template Number**, the **Quantity per** in the Search Table Lines for the **Number** will be filled based on the **Quantity per** in the BOM Component Line. These Search Tables will only be filled, and the automatic generated Formula will only be copied to a new Formula, if the **Incl. BOM Auto Formula** does have a checkmark.

If the BOM Component Line of the **Template Number** contains a **Formula** – not based on the Search Expression – a new identical Formula will be created. If the Formula Lines also contain a Search Table, also a new Search Table will be created.

No checkmark means, that the Item Bill of Materials and its Search Tables and Formulas will not be copied.

INCL. BOM AUTO FORMULA

A checkmark in this Field will copy the Formulas that have been generated automatically that are related to the **Template Number** to the **Number** from the Master Wizard.

Usually, these Formulas have been created based on the **Search Expression**.

No checkmark means, that the automatically generated Formulas will not be copied.

INCL. BOM COMMENTS

A checkmark in this Field will copy the Bill of Materials Comments that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Item Bill of Materials Comments will not be copied.

FASTTAB INVENTORY

Inventory	
Copy Stockkeeping Unit	☒

COPY STOCKKEEPINT UNIT

A checkmark in this Field will copy the Stockkeeping Units from the **Template Number** to the **Number** from the Master Wizard.

For the Items (Master/Color/Size/...) that were already related to the **Template Master**, the Stockkeeping Units from those Items will be copied to the new **Number** related Items including the data in those SKU's.

For new **Number** related Items (Master/Color/Size/...) that were not already created for the **Template Master**, Stockkeeping Units will be created for the same Locations as for the **Template Master**, but the data in those Stockkeeping Units will be based on the data in the Master SKU itself, so you might have to change them afterwards!

FASTTAB MEASUREMENT CHART

Measurement Chart	
Copy Measurement Chart	☒
Include Measurement Special Columns ..	☐
Include Measurement Special Values	☐
Include Measurement Pictures	☒
Include Measurement Comments	☒

COPY MEASUREMENT CHART

A checkmark in this Field will copy the last Version of the Measurement Chart that is related to the **Template Number** to the **Number** from the Master Wizard with **Version 0**.

I.e. if the **Template Number** has **Version 0, 1** and **2**, the values of **Version 2** will be copied as the **Version 0** for the **Number**. The Description of this **Version 0** will be "Copy of" + Description of **Version 2** of the **Number**.

No checkmark means, that the Measurement Chart will not be copied and the **Include** Fields of this FastTab will be disabled.

INCLUDE MEASUREMENT SPECIAL COLUMNS

A checkmark in this Field will copy the Special Columns of the last Version of the Measurement Chart that is related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Special Columns will not be copied.

INCLUDE MEASUREMENT SPECIAL VALUES

A checkmark in this Field will copy the Special Values and its Comments of the Special Columns of the last Version of the Measurement Chart that is related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Special Values and its Comments will not be copied.

INCLUDE MEASUREMENT PICTURES

A checkmark in this Field will copy the Pictures of the last Version of the Measurement Chart that is related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Pictures will not be copied.

INCLUDE MEASUREMENT COMMENTS

A checkmark in this Field will copy the Comments of the last Version of the Measurement Chart that is related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Comments will not be copied.

FASTTAB ADDITIONAL INFO

Additional Info	
Copy Composition	☒
Copy Care Label	☒
Copy Sustainability Info	☒
Copy Additional Info	☒
Copy Additional Tags	☒

COPY COMPOSITION

A checkmark in this Field will copy the Composition Lines that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Composition Lines will not be copied.

COPY CARE LABEL

A checkmark in this Field will copy the Care Label Lines that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Care Label Lines will not be copied.

COPY SUSTAINABILITY INFORMATION

A checkmark in this Field will copy the Sustainability Lines that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Sustainability Lines will not be copied.

COPY ADDITIONAL INFO

A checkmark in this Field will copy the Additional Info Lines that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Additional Info Lines will not be copied.

COPY ADDITIONAL TAGS

A checkmark in this Field will copy the Additional Tag Lines that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Additional Tag Lines will not be copied.

FASTTAB ADDITIONAL COMMENTS

Additional Comments	
Copy Additional Comments	☒
Filter Additional Comments Code	
Include Additional Pictures	☒

COPY ADDITIONAL COMMENTS

A checkmark in this Field will copy the Additional Comments that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Additional Comments will not be copied and the other Fields on this FastTab will be disabled.

INCLUDE ADDITIONAL PICTURES

A checkmark in this Field will copy the Pictures related to the Additional Comments that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Pictures will not be copied.

FILTER ADDITIONAL COMMENTS CODE

In this Field, you can set a **Filter** for the Additional Comments Codes you want to copy from the **Template Number** to the **Number** from the Master Wizard.

FASTTAB WORKFLOW

Workflow	
Copy Workflow	☒
Set Workflow Collection No.	☐
Include Workflow Values	☐

COPY WORKFLOW

A checkmark in this Field will copy the Workflow Steps that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means, that the Workflow Steps will not be copied and the other Fields on this FastTab will be disabled.

Some fields in the Workflow Steps will however not be copied unless you have a checkmark in **Include Workflow Values**.

INCLUDE WORKFLOW VALUES

A checkmark in this Field will copy al the fields of the Workflow Steps that are related to the **Template Number** to the **Number** from the Master Wizard.

This also includes the following fields, which will not be copied if no checkmark has been entered in this Field: Closed, Closing Date, Closed by Type, Closed By, Approved, Rejected

Workflow for Master: 2010												
Search + New Edit List Delete Create from Template Copy Comments Open in Excel More options												
Step No.	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Closing Date	Closed by Type	Closed By	Approved	Rejected	Assign Status Code	
→ 10	Idea (Story Board)	16-6-2019	User Group	DESIGN	☐		User		☐	☐	IDEA	
20	Design	16-6-2019	User Group	DESIGN	☐		User		☐	☐		
30	Proto Sample	16-6-2019	Vendor	2300	☐		User		☐	☐		
50	Fit Sample	8-9-2019	Vendor	2300	☐		User		☐	☐		
70	Ordering Salesmen Samples	22-9-2019	User Group	PURCHASE	☐		User		☐	☐		
90	Start Pre-Sales	1-12-2019	User Group	SALES	☐		User		☐	☐	READY	

SET WORKFLOW COLLECTION NO.

A checkmark in this Field will fill the **Collection No.** in the Workflow Steps of the **Number 2** based on the field **Collection No.** of the Master Wizard – which can be based on the [Default Collection No.](#) in the Master Wizard Setup.

No checkmark will not fill the **Collection No.** in the Workflow Steps.

FASTTAB MATRIX

Matrix

Skip Create Matrix ☐

Copy Matrix Variant 1 ☒

Copy Matrix Variant 2 ☒

Copy Matrix Variant 3 ☒

SKIP CREATE MATRIX

A checkmark in this Fields will **not** copy the Matrix of the **Template Number** to the **Number** from the Master Wizard.

This means, that you can create the Matrix manually after the copy has been executed.

No checkmark means, that the Matrix will be copied, and you are able to enter checkmarks in the other Fields on this FastTab.

COPY MATRIX VARIANT 1 / 2 / 3

A checkmark in this Field will automatically copy the same VarDim Variant Options of Variant 1, 2, 3 of the **Template Number** to the **Number** from the Master Wizard.

NOTE

You can also add the **Copy Matrix Variant 4 / 5 / 6 / 7 / 8 / 9** if applicable by using **Personalization**.

FASTTAB ASSORTMENT

Assortment	
Skip Create Assortment	☐
Copy Assortment Variant 1	☒
Copy Assortment Variant 2	☒
Copy Assortment Variant 3	☒

SKIP CREATE ASSORTMENT

A checkmark in this Fields will **not** copy the Assortment Matrix of the **Template Number** to the **Number** from the Master Wizard.

This means, that you can create the Assortment Matrix manually after the copy has been executed.

No checkmark means, that the Assortment Matrix will be copied, and you are able to enter checkmarks in the other Fields on this FastTab.

COPY ASSORTMENT VARIANT 1 / 2 / 3

A checkmark in this Field will automatically copy the same VarDim Variant Options of Assortment Variant 1, 2, 3 of the **Template Number** to the **Number** from the Master Wizard.

NOTE

You can also add the **Copy Assortment Variant 4 / 5 / 6 / 7 / 8 / 9** if applicable by using **Personalization**.

FASTTAB WIZARD

Wizard	
Skip Parameter Page 1	☒
Skip Parameter Page 2	☒
Skip Matrix Variant Page	☒
Skip Assortment Variant Page	☒
Close Wizard when Finished	☒

The Wizard for copying a **Template Number** to a new **Number** can show you several pages with options that you can set/change before it is actually copied.

SKIP PARAMETER PAGE 1

A checkmark in this Field will **not** open the first Page with Parameters. The chosen **Master Wizard Setup** will then simply set these options. If no **Master Wizard Setup** is chosen in the Wizard, this Page with Parameters will not be opened, and the information will simply be copied.

The first Page with Parameters contains the following options:

Master Wizard

↗ ✕

Copy the following informations.

- Mark All ☒
- Copy Dimensions ☒
- Copy Extended Text ☒
- Copy Item Translations ☒
- Copy Sales Prices ☒
- Copy Sales Discounts ☒
- Copy Purchase Prices ☒
- Copy Item Vendor ☒
- Copy Item Charge ☒

Back

Next

SKIP PARAMETER PAGE 2

A checkmark in this Field will **not** open the second Page with Parameters. The chosen Master Wizard Setup will then simply set these options. If no **Master Wizard Setup** is chosen in the Wizard, this Page with Parameters will be opened, and the user can select which information he wants to copy.

The second Page with Parameters contains the following options:

Master Wizard

↖ ✕

Copy the following informations.

- Mark All ☒
- Copy Bill of Materials ☒
- Copy Additional Info ☒
- Copy Measurement Chart ☒
- Copy Workflow ☒
- Copy Master Pictures ☒
- Copy Additional Comments ☒
- Copy Sustainability Info ☒
- Copy Composition ☒
- Copy Care Label ☒
- Copy Item Attributes ☒
- Copy Additional Tags ☒
- Copy Stockkeeping Unit ☒

Back

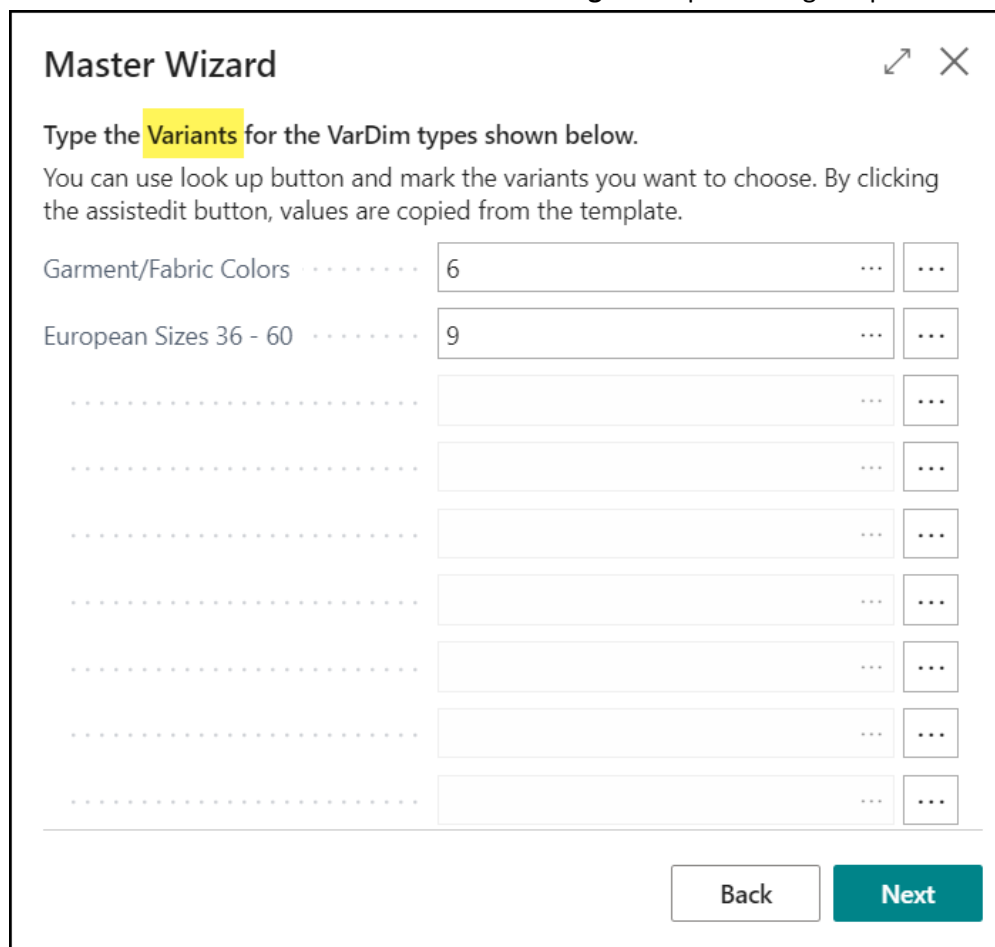
Next

SKIP MATRIX VARIANT PAGE

A checkmark in this Field will not open the Matrix Variant Page in which a user is able to choose the Variants from the **Template Number** that needs to be copied to the **Number** from the Master Wizard.

This only makes sense, if the user wants to copy the Master first and afterwards wants to choose the Variants, or if the Fields **Copy Matrix Variant 1/2/3** (and perhaps **4/5/6/7/8/9**) on the FastTab **Matrix** have checkmarks – so the Variants will be copied automatically.

No checkmark means that the **Matrix Variant Page** will open during the process of the Master Wizard. I.e.:



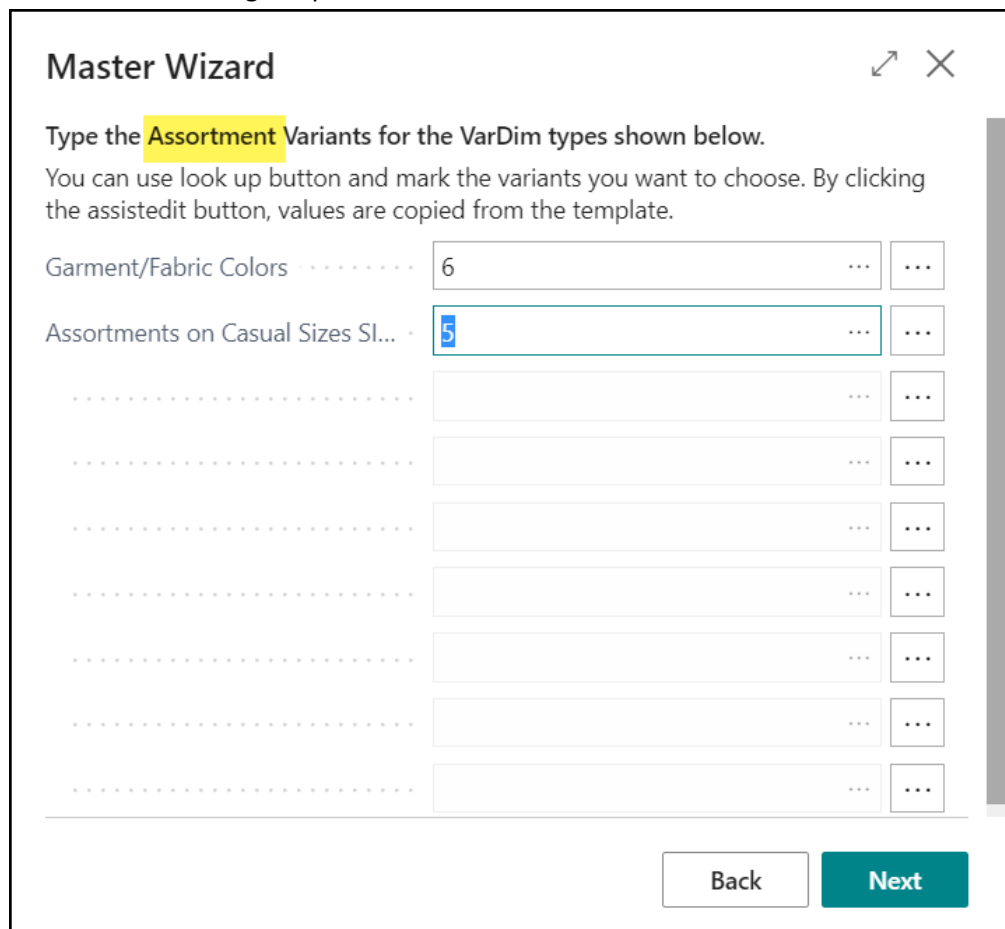
The lines are related to the **Variant 1 – 9** in the VarDim Master of the **Template Number**.

SKIP ASSORTMENT VARIANT PAGE

A checkmark in this Field will **not** open the Assortment Variant Page in which a user is able to choose the Assortment Variants from the **Template Number** that needs to be copied to the **Number** from the Master Wizard.

This only makes sense, if the user wants to copy the Master first and afterwards wants to choose the Assortment Variants, or if the Fields **Copy Assortment Variant 1/2/3** (and perhaps **4/5/6/7/8/9**) on the FastTab **Assortment** have checkmarks – so the Assortment Variants will be copied automatically.

No checkmark means that the **Assortment Variant Page** will open – if the **Template Number** has Assortments - during the process of the Master Wizard. I.e.:



The lines are related to the **Variant 1 – 9** in the Assortments of the **Template Number**.

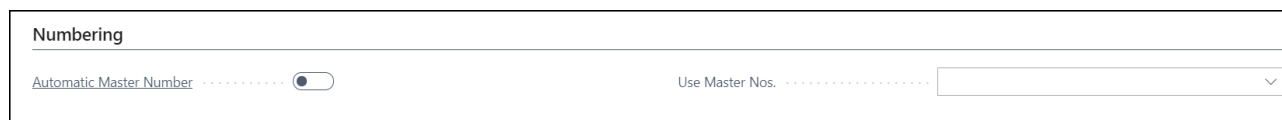
CLOSE WIZARD WHEN FINISHED

This Field determines what will happen after you have copied the **Template Number**:

A checkmark in this Field means, that the Wizard will be closed.

No checkmark in this Field means, that you go back to the first page of the Wizard to enter a new **Template Number/Number** to copy.

FASTTAB NUMBERING



AUTOMATIC MASTER NUMBER

A checkmark in this Field will determine a new Master Number for your copy based on the **Use Master Nos.** No. Series. This will only happen if the **Number** in the Wizard was empty.

No checkmark means, that the new Master will simply get the **Number** that you entered in the Wizard.

USE MASTER NOS.

In this Field, you need to enter a **No. Series** for the new Masters if you have entered a checkmark in **Automatic Master Number**.

INVENTORY SETUP

After you have created the **Master Wizard Setups**, you are able to choose one as a **Default MasterWizard Setup** in the Inventory Setup.

VarDim

Use Master

Use Existing Matrix

Default Collapse Matrix

VarDim Value

Number of Decimals VarDim Value

0

Field Width VarDim Value

0

Interrupt Formula Calculation

Only Current Formula when Stop Condition is met

PDM

Default MasterWizard Setup

Create All Matrix Related Items

Create Collection Relation Automatica...

Collection Variant Options based on

Master VarDim Pos./Neg. List

Description of Variant Item

Variant Description as Item Descriptio...

Variant Description Separator

Comma

VarDim Call

VarDim Master/Item Call

Basic

The content of this Parameter will then by default be shown in the [Options Page](#) of the Wizard.

NEW MASTER BY WIZARD

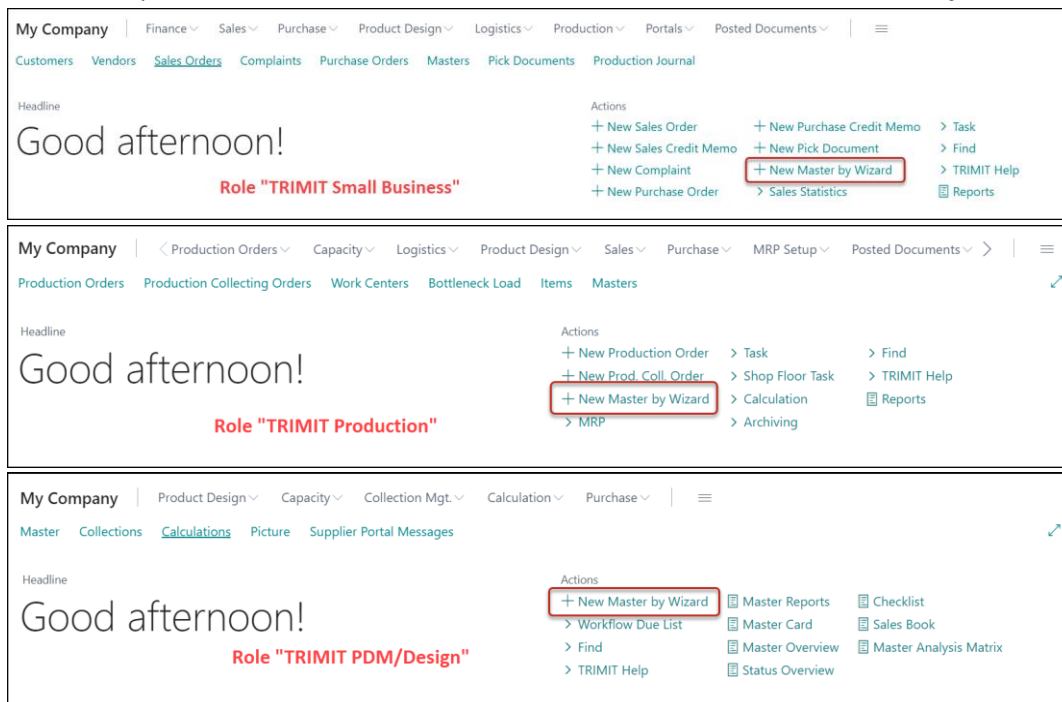
With **New Master by Wizard**, you can copy any existing Master to a new Master, regardless if the Master has a Matrix or not.

You are however also able to use the Wizard for creating a new Master from blank, as well as copying specific information from one existing Master to another existing Master.

By using the [Master Wizard Setup](#), you are able to determine which information should simply be copied and which information you would like to select during the process of copying.

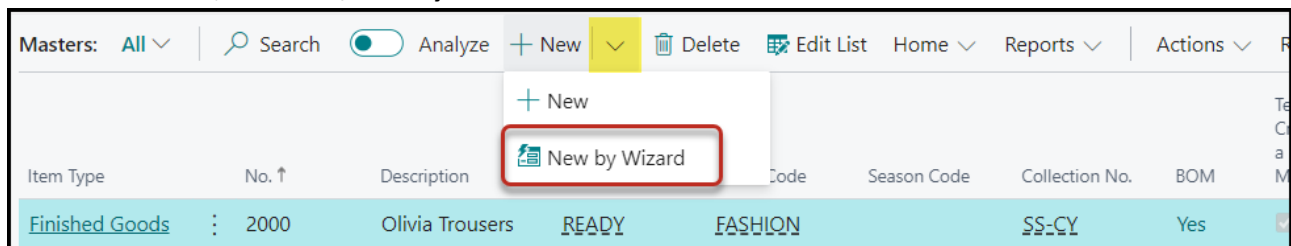
You can start the function:

In several specific TRIMIT Role Centers under the **Actions**, click **+ New Master by Wizard**.



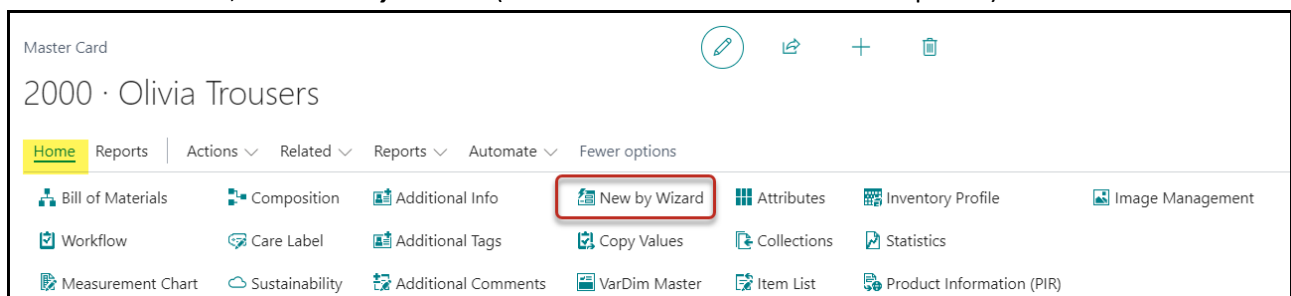
The first screenshot shows the 'TRIMIT Small Business' role center. The 'Actions' menu is open, and the '+ New Master by Wizard' button is highlighted with a red box. The second screenshot shows the 'TRIMIT Production' role center. The 'Actions' menu is open, and the '+ New Master by Wizard' button is highlighted with a red box. The third screenshot shows the 'TRIMIT PDM/Design' role center. The 'Actions' menu is open, and the '+ New Master by Wizard' button is highlighted with a red box.

In the Master List, click **New, New by Wizard**.



The screenshot shows the 'Masters' list interface. The 'New' button in the top bar is clicked, and the dropdown menu is open. The 'New by Wizard' option is highlighted with a red box. The table below shows a list of masters with columns: Item Type, No., Description, Code, Season Code, Collection No., and BOM.

In the Master Card, click **New by Wizard** (in **Home** or **Process** which will be opened).



The screenshot shows the 'Master Card' for '2000 · Olivia Trousers'. The 'Actions' menu is open, and the 'New by Wizard' button is highlighted with a red box. The card also shows various tabs like 'Home', 'Reports', 'Related', 'Reports', 'Automate', and 'Fewer options'.

In the Collection Master Relations, click **New, New Master by Wizard**.

SS-CY Matrix General

Collection Master Relations | Search | Analyze | **New** | Edit List | Delete | Home | Reports | More options

Master Card | Composition | Additional Inf | **+ New** | Matrix Limit. Master Relations | Copy Values

Bill of Materials | Care Label | Measurement | **New Master by Wizard** | Comments | Positive List

No. ↑	Master Description	Status Code	Priv... Label, Mas...	Wor... Exist	VarDim Type Variant 1	Options Var 1	VarDim Type Variant 2	Options Var 2	VarDim Typ Variant 3
→ 2000	Olivia Trousers		☐	☒	COLOR_1	0	SIZE_EU	0	
2020	Isla Trousers		☐	☒	COLOR_1	0	SIZE_EU	0	
2120	Sophia Shirt		☐	☒	COLOR_1	0	SIZE_C	0	
2300	Daisy Dress		☐	☒	COLOR_1	0	SIZE_EU	0	
4710	Scarlett Shoe		☐	☐	SHOE_COLOR	0	SHOE_EU	0	

NEW MASTER FROM BLANK

Master Wizard

This wizard helps you to create or maintain a master.

Choose what you want to do:

Create Master from Blank ☒

Create Master from Template ☐

Maintain Master ☐

Next

With a checkmark in **Create Master from Blank** you can create a new Master from blank.
Click **Next**

Master Wizard

Enter the number and the description for the new master:

Number

Description 1

Optional fields for the new master:

Collection No.

Group Master

Back **Next**

DESCRIPTION OF THE FIELDS:

NUMBER

The Number (Code) for the new Master.

DESCRIPTION 1

The Description for the new Master.

COLLECTION NO.

You can connect this Master already to a Collection No.

If entered, the system will automatically create a Collection Master Relation based on the Parameter in the Inventory Setup **Create Collection Relation Automatically**.

The Collection No. will also be set in the new Master itself.

GROUP MASTER

You can select another Master from which you want to choose the actual Variants (colors and sizes).

The Variants for the new Master will then also be depending on the Variants of this Group Master.

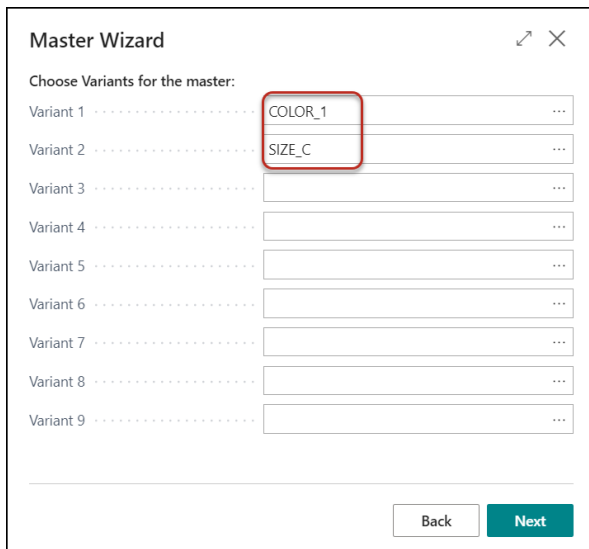
For more information see the **White Paper – TRIMIT Group Master**.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page** in the right top corner, to close the Wizard without creating the new Master.

VARIANT 1 – 9 PAGE



Master Wizard	
Choose Variants for the master:	
Variant 1	COLOR_1
Variant 2	SIZE_C
Variant 3	
Variant 4	
Variant 5	
Variant 6	
Variant 7	
Variant 8	
Variant 9	

Back Next

DESCRIPTION OF THE FIELDS:

VARIANT 1 – 9

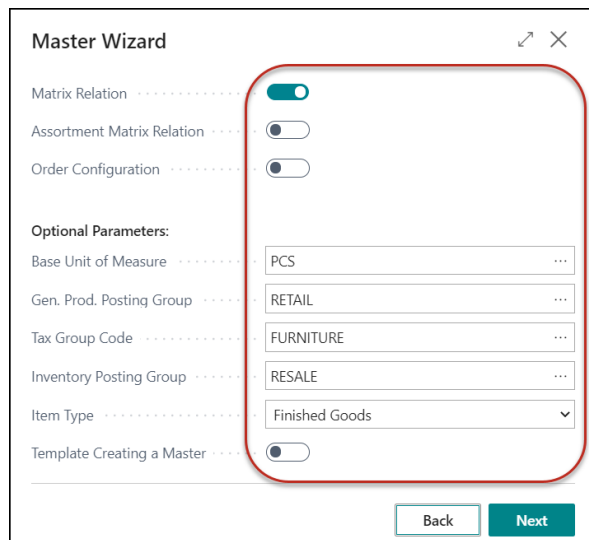
You can choose up to 9 different VarDim Types for the Variants of the new Master.

Click **Next**, to open the next page of the Wizard.

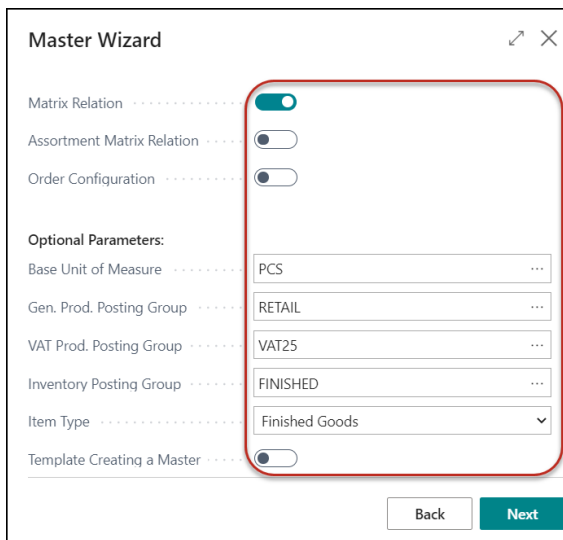
Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page** in the right top corner, to close the Wizard without creating the new Master.

OPTIONAL PARAMETERS PAGE



For US and CA



For all other localizations.

DESCRIPTION OF THE FIELDS:

MATRIX RELATION

Enter a checkmark if you want to use a Matrix for the new Master.

ASSORTMENT MATRIX RELATION

Enter a checkmark if you want to also use an Assortment Matrix for the new Master.

ORDER CONFIGURATION

Enter a checkmark if you want the Master to be a configurable Master for which you will not use Matrices.

BASE UNIT OF MEASURE

You need to enter the **Base Unit of Measure**. This will also be applicable for the **Sales Unit of Measure** and the **Purchase Unit of Measure**.

GEN. PROD. POSTING GROUP

You need to enter the **General Product Posting Group**.

TAX GROUP CODE – ONLY APPLICABLE FOR US AND CA

You need to enter the **Tax Group Code** for the US/CA Taxes.

This is only applicable in the US and CA Localization.

VAT PROD. POSTING GROUP – NOT APPLICABLE FOR US AND CA

You need to enter the **VAT Product Posting Group**. This field can by default be filled with the **VAT Product Posting Group** from the chosen **General Product Posting Group**.

This is not applicable for the US and CA Localization.

INVENTORY POSTING GROUP

You need to enter the **Inventory Posting Group**.

ITEM TYPE

You can choose between *Finished Goods*, *Semi-Finished Goods* and *Raw Materials*.

TEMPLATE CREATING A MASTER

A checkmark in this Field means that the new Master can be used for creating new Masters as a Template Number.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page** in the right top corner, to close the Wizard without creating the new Master.

MATRIX PAGE

Master Wizard

Type the Variants for the VarDim types shown below.
You can use look up button and mark the variants you want to choose. By clicking the assistedit button, values are copied from the template.

Garment/Fabric Colors	0	...	...
Casual Sizes XS - 5XL	0	...	...
.....		...	...
.....		...	...
.....		...	...
.....		...	...
.....		...	...
.....		...	...
.....		...	...

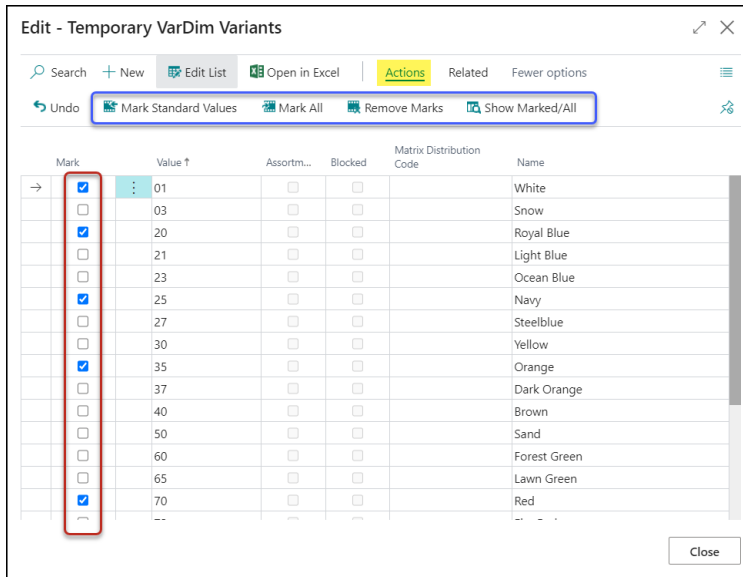
Back

Next

This page will only open if you did have a checkmark in **Matrix Relation**.

It will show the Description of the VarDim Types that you have chosen before for **Variant 1 - 9**.

By clicking **Look up value** (Alt+Down arrow), the list of VarDim Variants will be shown from which you can choose the applicable Values for the new Master.



With the action **Mark Standard Values**, you can enter a checkmark in all the Values at once, for which the field **Standard Value** in the VarDim Variant Options (this field is not by default visible, you need to add it via Personalize) of the VarDim Type has a checkmark.

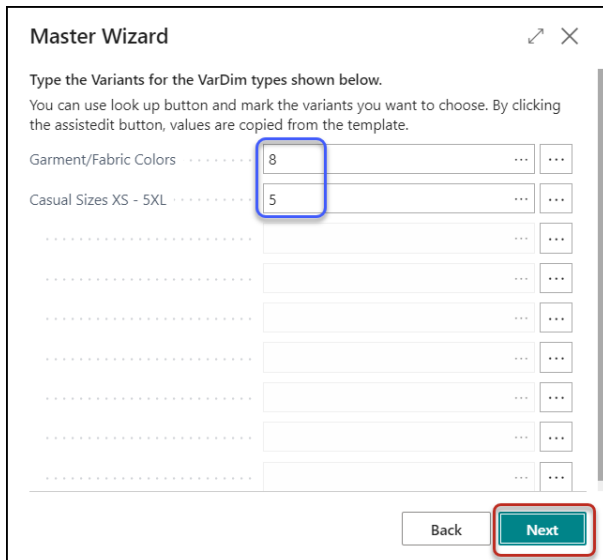
With the action **Mark All**, you can enter a checkmark in all the Values at once.

With the action **Remove Marks**, you can delete all the checkmarks.

With the action **Show Marked/All**, you can filter on the marked Values.

If you have chosen a **Group Master**, and the VarDim Type is also connected to the **Group Master**, only the chosen Values of the **Group Master** will be shown in the list of Values.

After you have chosen the VarDim Variants for the new Master, you see the quantity of chosen VarDim Variants.



Click **Next**, to open the next page of the Wizard. Click **Next**, to open the next page of the Wizard. If no **Assortment Matrix Page** will open, the new Master will now be created.

Click **Back**, to open the previous page of the Wizard.

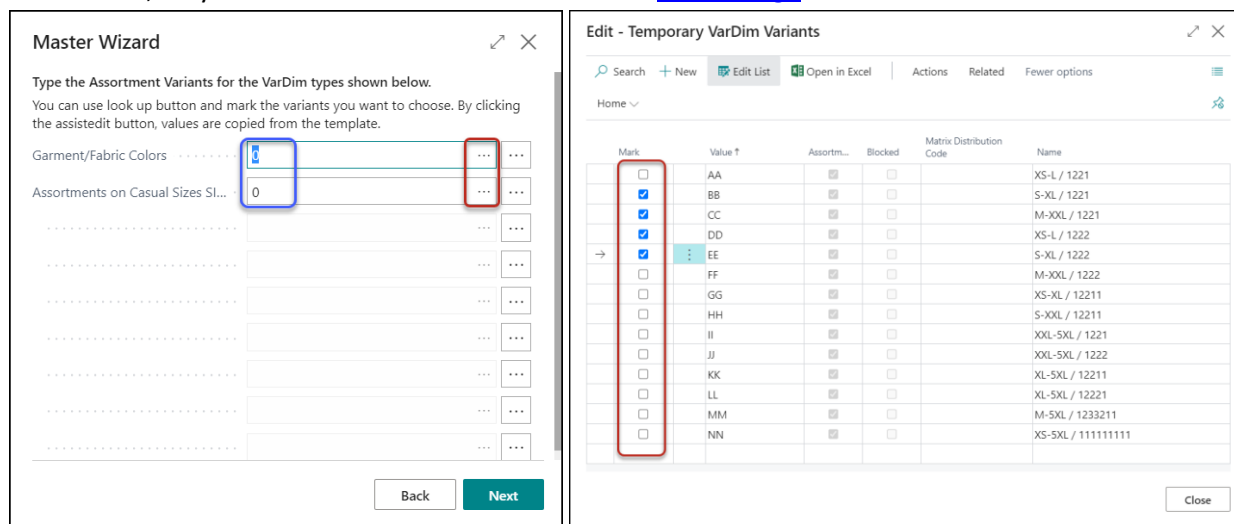
Click **Save and close the page** in the right top corner, to close the Wizard without creating the new Master.

ASSORTMENT MATRIX PAGE

This page will only open if you have a checkmark in **Assortment Matrix Relation**. Otherwise, you will go to the [Last page of the Wizard](#).

Now you can choose the Values for the first Variants of the Master.

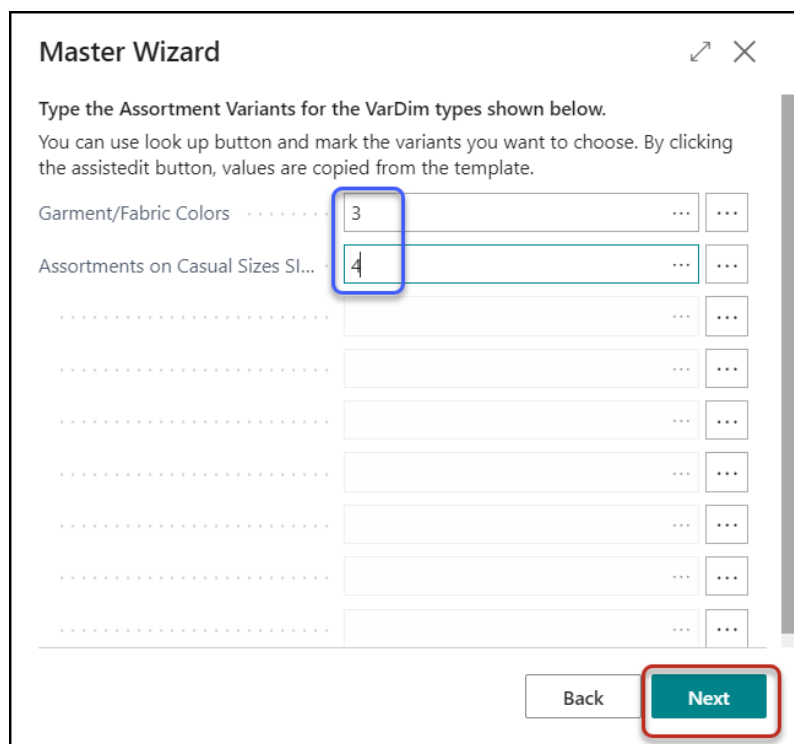
In that case, only the Values that have been chosen in [Matrix Page](#) will be shown and can be chosen.



The screenshot shows two windows side-by-side. The left window is titled 'Master Wizard' and contains a form with two input fields: 'Garment/Fabric Colors' (containing '0') and 'Assortments on Casual Sizes SI...' (containing '0'). The right window is titled 'Edit - Temporary VarDim Variants' and displays a table with columns: Mark, Value #, Assortm..., Blocked, Matrix Distribution Code, and Name. The table lists various size and color combinations, with the 'Mark' column containing checkboxes. A red box highlights the 'Mark' column, and a blue box highlights the 'Value #' column.

The last Variant (in this case *Assortments on Casual Sizes*) represents the Assortments that you can choose.

After you have chosen the VarDim Variants for the new Master, you see the quantity of chosen VarDim Variants.



The screenshot shows the 'Master Wizard' window with the 'Garment/Fabric Colors' field containing '3' and the 'Assortments on Casual Sizes SI...' field containing '4'. The 'Next' button is highlighted with a red box.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page** in the right top corner, to close the Wizard without creating the new Master.

LAST PAGE OF THE WIZARD

The new Master has now been created.

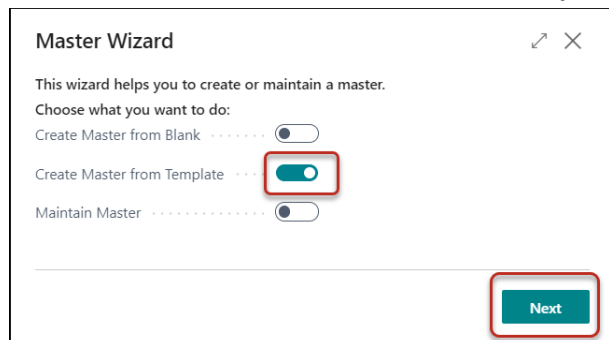
When clicking **Save and close the page** in the right top corner, the Wizard will close.

When clicking **Continue** you will go back to the first page to enter a new Master that you want to create from Blank.



NEW MASTER FROM TEMPLATE

With a checkmark in **Create Master from Template** you can copy one Master to a new Master.



Master Wizard

This wizard helps you to create or maintain a master.

Choose what you want to do:

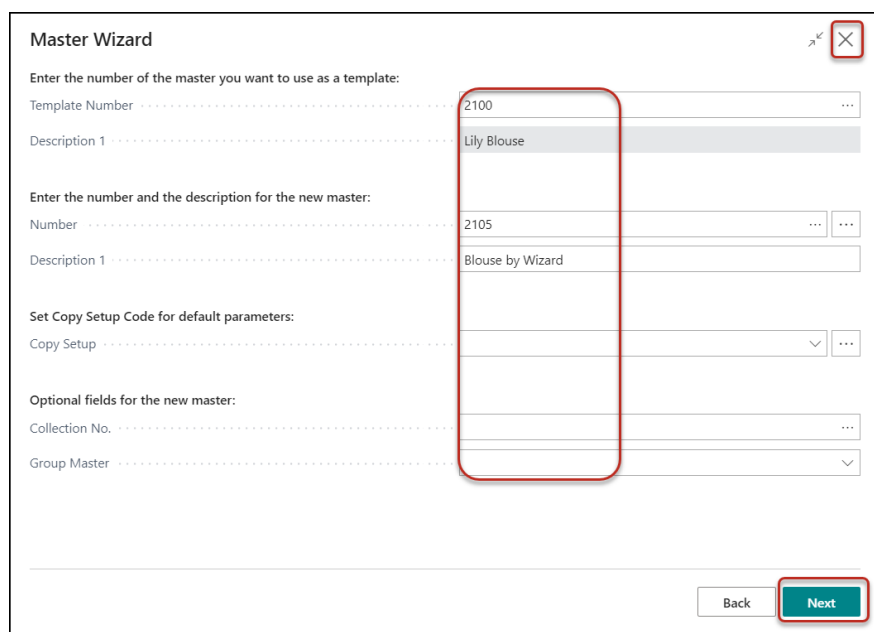
Create Master from Blank ☐

Create Master from Template ☒

Maintain Master ☐

Next

Click **Next**



Master Wizard

Enter the number of the master you want to use as a template:

Template Number

Description 1

Enter the number and the description for the new master:

Number

Description 1

Set Copy Setup Code for default parameters:

Copy Setup

Optional fields for the new master:

Collection No.

Group Master

Back Next

DESCRIPTION OF THE FIELDS:

TEMPLATE NUMBER

The Master that you want to copy from.

Clicking **Look up value** (Alt+Down arrow) will show a list of Masters in which the field **Template Master** has a checkmark.

DESCRIPTION 1

Description 1 of **Template Number** that will be shown.

NUMBER

The Master you want to copy to.

If you leave this Field blank, the system can generate a new Number automatically when you use a **Copy Setup**. See [Automatic Master Number](#)

Pressing **AssistEdit** (Alt+Right arrow) will create a new Master Number for you based on the **No. Series** that has been entered in the Inventory Setup in the parameter **Master Nos. Finished Goods**.

DESCRIPTION 1

Description 1 for the **Number** (the new Master) that you need to enter.

COPY SETUP

Here you can enter a **Master Wizard Setup**, which determines which pages of the Wizard you will see, and which options will – by default – already be set or can be influenced during the Wizard process.

This Field can be filled automatically based on the parameter **Default MasterWizard Setup** in the Inventory Setup.

COLLECTION NO.

You can connect the new Master to a **Collection No.** already by entering it in this Field.

It can automatically be filled based on the **Default Collection No.** of the **Copy Setup** but can still be changed.

This **Collection No.** will then be filled in the Master and based on the Parameter **Create Collection Relation Automatically** in the **Inventory Setup** it can also make a **Collection/Master Relation**.

This field will also automatically be filled based on the Collection if you opened the Wizard via the Collection/Master Relations page.

For more details, see ***White Paper – TRIMIT Collection Management***.

GROUP MASTER

You can enter another Master as the **Group Master**.

This will determine the Variants (colors, sizes, etc.) that you are able to choose for the new Master.

For more details, see ***White Paper – TRIMIT Group Master***.

Click **Next**, to open the next page of the Wizard.

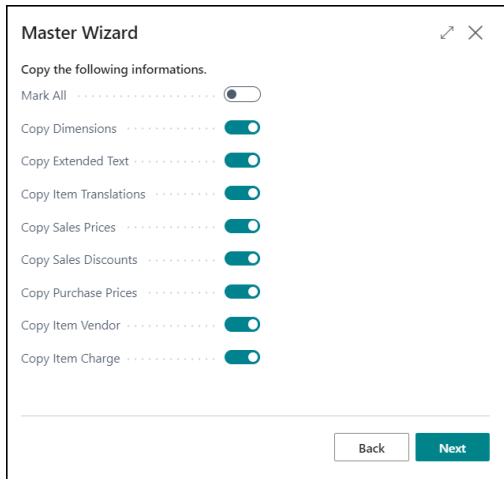
Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page** in the right top corner, to close the Wizard without creating the new Master.

PARAMETER PAGE 1

This page of options will NOT be shown if you did not choose a **Copy Setup**.

This page of options will NOT be shown if you did choose a **Copy Setup** with a checkmark in the field **Skip Parameter Page 1**.



Master Wizard

Copy the following informations.

Mark All ☐

Copy Dimensions ☒

Copy Extended Text ☒

Copy Item Translations ☒

Copy Sales Prices ☒

Copy Sales Discounts ☒

Copy Purchase Prices ☒

Copy Item Vendor ☒

Copy Item Charge ☒

Back Next

The checkmarks will automatically be filled based on the content of a chosen **Copy Setup**.

A checkmark in **Mark All**: will automatically set a checkmark in all the parameters.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

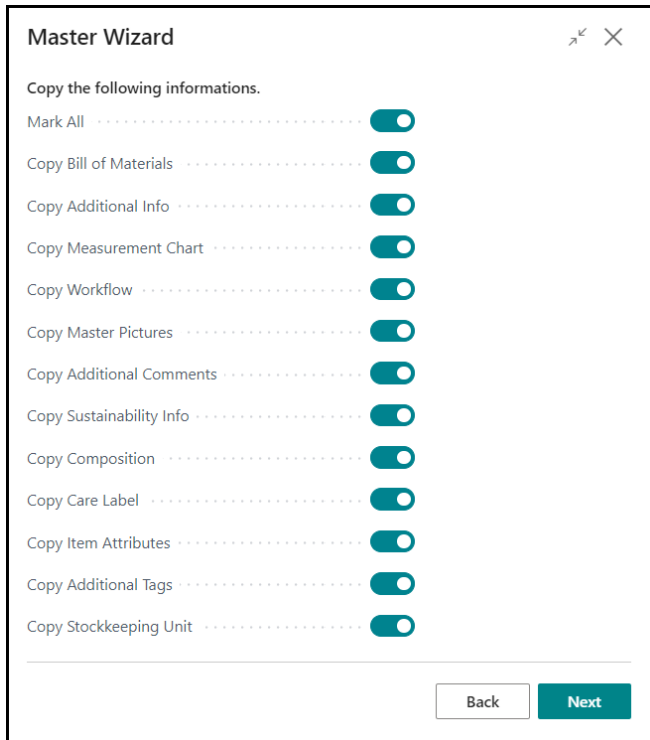
Click **Save and close the page** in the right top corner, to close the Wizard without creating the new Master.

PARAMETER PAGE 2

This page of options will always be shown if you did not choose a **Copy Setup**.

This page of options will NOT be shown if you did choose a **Copy Setup** with a checkmark in the field **Skip**

Parameter Page 2.



Master Wizard

Copy the following informations.

Mark All ☒

Copy Bill of Materials ☒

Copy Additional Info ☒

Copy Measurement Chart ☒

Copy Workflow ☒

Copy Master Pictures ☒

Copy Additional Comments ☒

Copy Sustainability Info ☒

Copy Composition ☒

Copy Care Label ☒

Copy Item Attributes ☒

Copy Additional Tags ☒

Copy Stockkeeping Unit ☒

Back Next

The checkmarks will automatically be filled based on the content of a chosen **Copy Setup**.

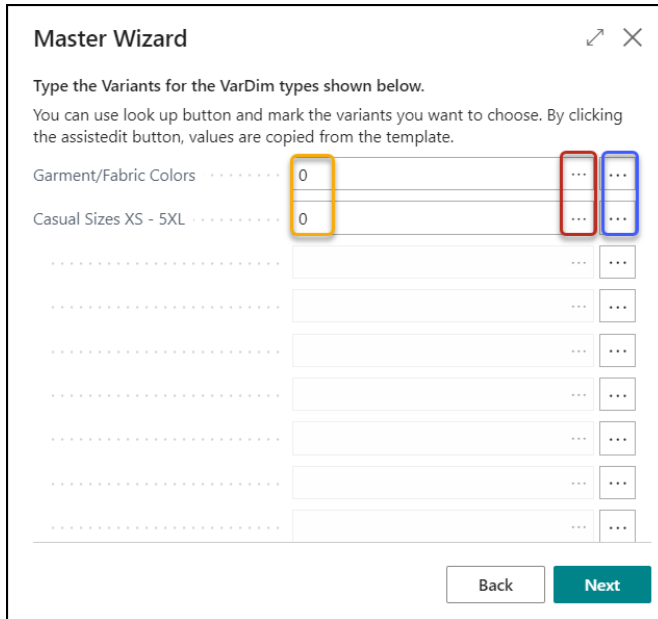
A checkmark in **Mark All:** will automatically set a checkmark in all the parameters.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page** in the right top corner, to close the Wizard without creating the new Master.

MATRIX PAGE



The screenshot shows the 'Master Wizard' window. It has a title bar with a maximize icon and a close icon. Below the title bar, there is a text area with instructions: 'Type the Variants for the VarDim types shown below. You can use look up button and mark the variants you want to choose. By clicking the assistedit button, values are copied from the template.' Below this, there is a table with two columns: 'Garment/Fabric Colors' and 'Casual Sizes XS - 5XL'. The first row of the table has a text input field with the value '0' and two buttons: a red 'Look up value' button and a blue 'AssistEdit' button. Below the first row, there are several more rows, each with a text input field and two buttons. At the bottom of the window, there are two buttons: 'Back' and 'Next'.

This page will open if you did not choose a **Copy Setup** and the **Template Number** has a Matrix.

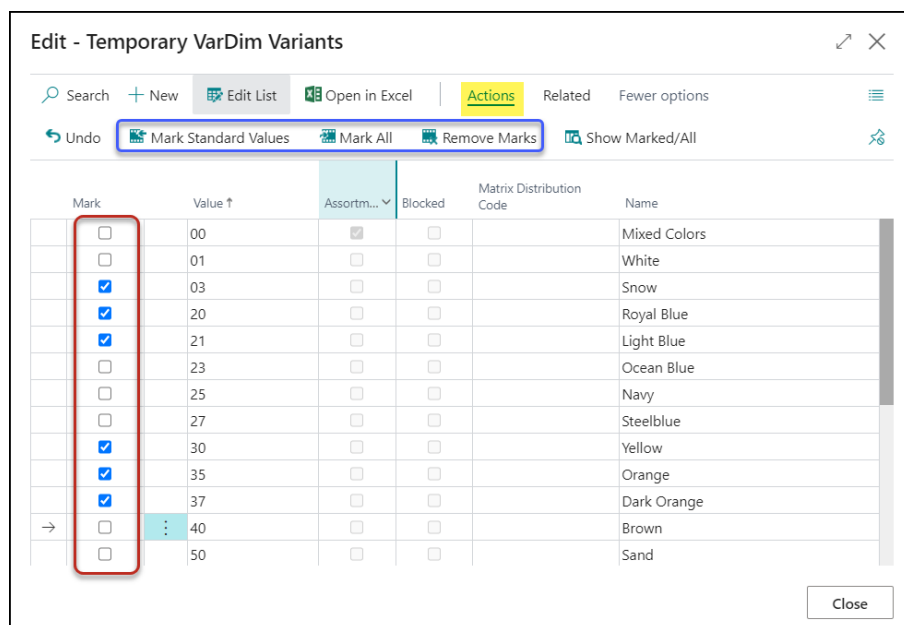
This page will NOT open if the **Template Number** does not have a Matrix, like for configurable Masters.

This page will NOT open if you did choose a **Copy Setup** with a checkmark in the field **Skip Create Matrix**.

This page will show the VarDim Types that are connected to the **Template Number**. The quantity of chosen Values can already be filled based on a chosen **Copy Setup** and the [Copy Matrix Variant 1 / 2 / 3](#) (and the 4/5/6/7/8/9)

By clicking **Look up value** (Alt+Down arrow), the list of all VarDim Variants will be shown from which you can choose the applicable Values for the new Master **Number**.

By clicking **AssistEdit** (Alt+Right arrow), the chosen Values of the **Template Number** will already be chosen.



With the action **Mark Standard Values**, you can enter a checkmark in all the Values at once, for which the field **Standard Value** in the VarDim Variant Options (this field is not by default visible, you need to add it via Personalize) of the VarDim Type has a checkmark.

With the action **Mark All**, you can enter a checkmark in all the Values at once.

With the action **Remove Marks**, you can delete all the checkmarks.

With the action **Show Marked/All**, you can filter on the marked Values.

If you have chosen a **Group Master**, and the VarDim Type is also connected to the **Group Master**, only the chosen Values of the **Group Master** will be shown in the list of Values.

Click **Close** after you have chosen the applicable Values.

Click **Next**, to open the next page of the Wizard. If no **Assortment Matrix Page** will open, the new Master will now be created.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page** in the right top corner, to close the Wizard without creating the new Master.

NOTE

If you choose other Values as from the **Template Number**, you need to check the Sales-/Purchase Prices if you have different Prices for the Values.

If you choose other Values as from the **Template Number**, you need to check the Search Table Lines that you might have in the **Bill of Materials**. They will miss the connections with the new Values.

Master Wizard

Type the Assortment Variants for the VarDim types shown below.

You can use look up button and mark the variants you want to choose. By clicking the assistededit button, values are copied from the template.

Garment/Fabric Colors

Assortments on Casual Sizes SL...

0

Back

Next

Edit - Temporary VarDim Variants

Search

+ New

Edit List

Open in Excel

Actions

Related

Fewer options

Home

Mark	Value ↑	Assortm...	Blocked	Matrix Distribution Code	Name
☐	AA	☒	☐		XS-L / 1221
☒	BB	☒	☐		S-XL / 1221
☒	CC	☒	☐		M-XXL / 1221
☒	DD	☒	☐		XS-L / 1222
→ ☒	EE	☒	☐		S-XL / 1222
☐	FF	☒	☐		M-XXL / 1222
☐	GG	☒	☐		XS-XL / 12211
☐	HH	☒	☐		S-XXL / 12211
☐	II	☒	☐		XXL-5XL / 1221
☐	JJ	☒	☐		XXL-5XL / 1222
☐	KK	☒	☐		XL-5XL / 12211
☐	LL	☒	☐		XL-5XL / 12221
☐	MM	☒	☐		M-5XL / 1233211
☐	NN	☒	☐		XS-5XL / 111111111

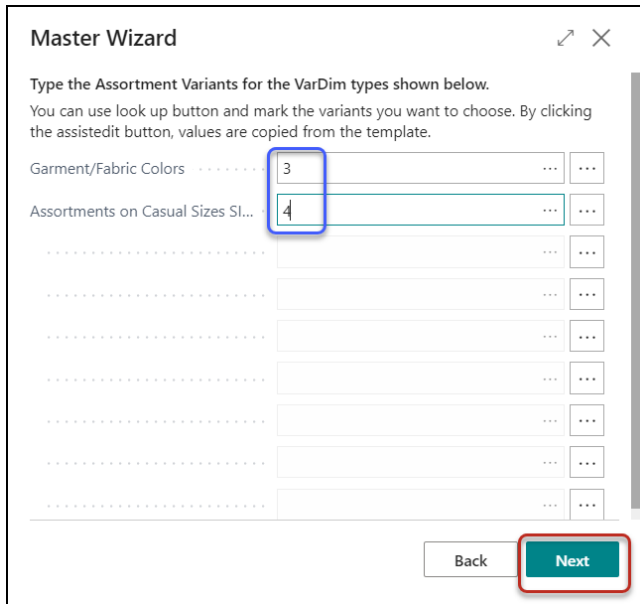
Close

This page will NOT open if you did choose a **Copy Setup** with a checkmark in the field **Skip Create Assortment**.

The quantity of chosen Values can already be filled based on a chosen **Copy Setup** and the [Copy Assortment Variant 1 / 2 / 3](#). (and the 4/5/6/7/8/9).

By clicking **AssistEdit** (Alt+Right arrow), the chosen Values of the **Template Number** will already be chosen.

I.e. if you chose only the colors *Red*, *White* and *Blue* in the **Matrix Page**, you can also only choose these colors and the colors with a checkmark in **Assortment** in the **Assortment Page** – for the same VarDim Type. After you have chosen the Values for the new Master, you see the quantity of Values you have chosen.

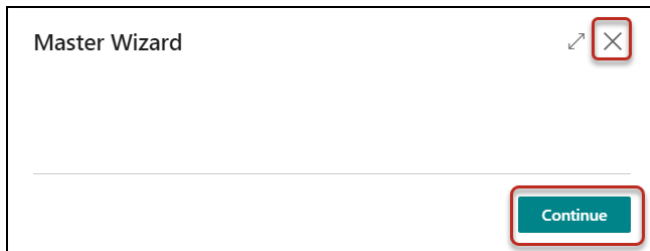


Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page** in the right top corner, to close the Wizard without creating the new Master.

LAST PAGE



The new Master has now been created.

This page will open if you did not choose a **Copy Setup**.

This page will NOT open if you did choose a **Copy Setup** with a checkmark in the field **Close Wizard when Finished**. In that case, the Wizard will close, and you return to the menu or Master List where you started the Wizard from .

When clicking **Continue** you will go back to the first page to enter a **Template Number** and a **Number** for the new Master that you want to create from Template.

The **Continue** button will NOT be visible if you started the Wizard via the Master List or Master Card.

When clicking **Save and close the page** in the right top corner, the Wizard will close.

MAINTAIN MASTER BY WIZARD

Master Wizard

↗

✕

This wizard helps you to create or maintain a master.

Choose what you want to do:

Create Master from Blank ☐

Create Master from Template ☐

Maintain Master ☒

Next

With **Maintain Master**, you can change the Descriptions and chosen Variants of existing Masters.

Master Wizard

↗

✕

Enter the number of the master to be maintained:

Number

Description 1

Description 2

Next

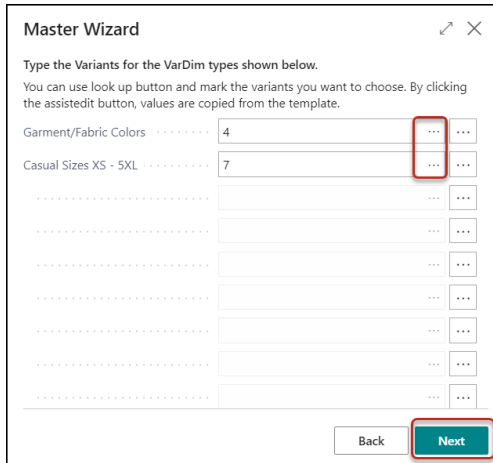
You need to enter the **Number** and the **Description 1 / 2** will be shown which can be changed.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page** in the right top corner, to close the Wizard without changing the Master.

MATRIX PAGE



Now you can select more Variants for the Master.

If no Documents (Sales, Purchase, Production) have been created you could also deselect Variants. Otherwise, you need to make them *not available* by using **Status Codes** that can be set on several levels (Master, VarDim Type, Variant, and Collection). See for details: **White Paper – TRIMIT Collection Management**.

Click **Next**, to open the next page of the Wizard. If no **Assortment Matrix Page** will open, the new Variants will be added to the Master and new related Items can be created based on the Parameter **Create All Matrix Related Items** in the Inventory Setup.

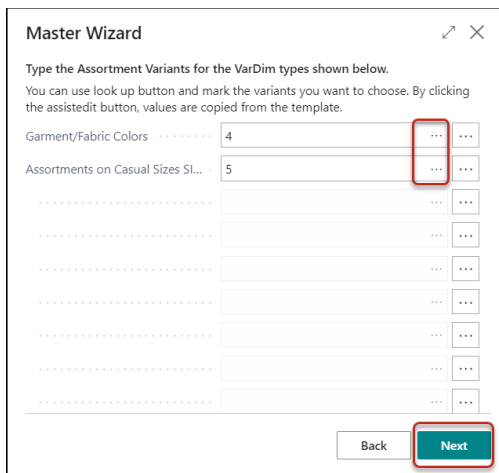
Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page** in the right top corner, to close the Wizard without changing the Master.

NOTE

If you choose new Values, you need to check the Sales-/Purchase Prices if you have different Prices for the Values. If you choose new Values, you need to check the Search Table Lines that you might have in the **Bill of Materials**. They will miss the connections with the new Values.

ASSORTMENT MATRIX PAGE



Now you can select more Assortment Variants for the Master.

If you added new Variants for i.e. **Garment/Fabric Colors** in the Matrix Page, you are now also able to select them for the Assortment Matrix.

If no Documents (Sales, Purchase, Production) have been created you could also deselect Assortment Variants.

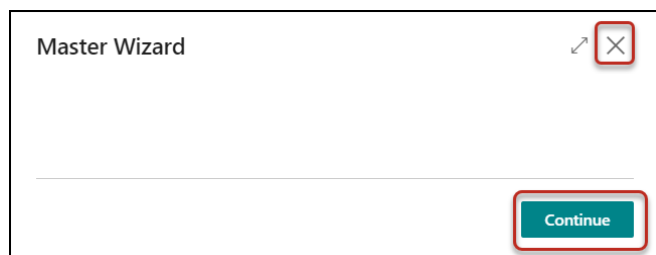
Otherwise, you need to make them *not available* by using **Status Codes** that can be set on several levels (Master, VarDim Type, Variant, and Collection). See for details: **White Paper – TRIMIT Collection Management**.

Click **Back**, to go back to the previous page of the Wizard.

Click **Next**, to go to the next page.

Click **Save and close the page** in the right top corner, the new Assortment Variants will be added to the Master and new related Items can be created based on the Parameter **Create All Matrix Related Items** in the Inventory Setup.

LAST PAGE



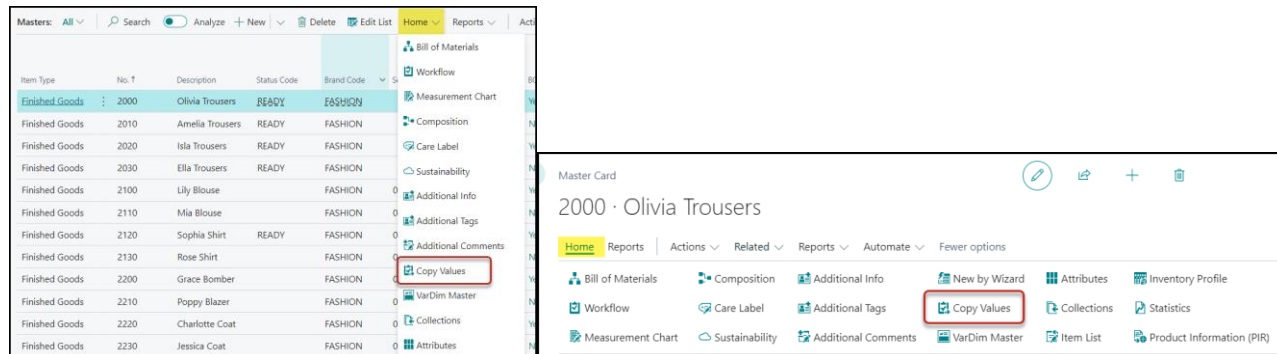
When clicking **Continue** you will go back to the first page to enter a **Number** for which you want to maintain the Variants.

The **Continue** button will NOT be visible if you started the Wizard via the Master List or Master Card.

When clicking **Save and close the page** in the right top corner, the Wizard will close.

COPY VALUES

In the Master List/Card, you can copy information from one Master to another Master by using the action **Process, Copy Values**.



FIRST PAGE

Copy Master by Wizard

Enter the number of the master to copy to.

Copy to Master: 2000

Enter the master you want to copy from.

Copy from Master: 2100

Which of the following information is to be copied

Mark All

Copy Bill of Materials

Copy Additional Info

Copy Measurement Chart

Copy Workflow

Copy Pictures

Copy Additional Comments

Copy Sustainability

Copy Comments

Copy Composition

Copy Care Label

Copy Item Attributes

Copy Additional Tags

Copy Stockkeeping Unit

Next

After you have entered the **Copy to Master** and the **Copy from Master**, you can select the information that you want to copy.

You can compare this with [Parameter Page 2](#) from the Wizard.

NEXT PAGES

Based on the checkmarks you entered on the First Page; you can get extra options that need to be answered before copying the data.

You can compare this with the fields of the [Master Wizard Setup](#).

Copy Master by Wizard

Bill of Materials

Enter the master you want to copy bill of materials from.

Copy from Master: 2100 ...

Include Auto Formula ☒

Back

Next

Copy Master by Wizard

Measurement Chart

Enter the master you want to copy measurements from.

Copy from Master: 2100 ...

Include Special Columns ☐

Include Special Columns Values ... ☐

Include Measurement Pictures ☒

Include Measurement Comments · ☐

Copy from Chart Version 0 ...

Back

Next

Copy Master by Wizard

↗ ✕

Workflow

Enter the master you want to copy workflow from.

Copy from Master: 2100 ...

Include Values ☐

Set Workflow Collection No.

Back

Next

Copy Master by Wizard

↗ ✕

Pictures

Enter the master you want to copy pictures from.

Copy from Master: 2100 ...

General Picture ☒

Additional Pictures ☒

Back

Next

Copy Master by Wizard

Comments

Enter the master you want to copy additional comments from.

Copy from Master: 2100 ...

Additional Comments ☒

Group Code

General Comments ☒

BOM Comments ☒

Back

Next

Copy Master by Wizard

Copy

Click **Copy**, so the information will be copied.

Click **Save and close the page** in the right top corner, to close the process without copying data.

NOTE

The above shown Pages are also used if you click the action **Copy** in the individual Pages of the Master itself.
I.e. if you are in a Master Card and click on the **Additional Comments**, you are also able to copy Comments by using the action **Copy**.

2000 - Olivia Trousers

Additional Comments	Search	Analyze	New	Edit List	Delete	Copy	Comments	More options
Date	Code	Description	Comment	User ID				
→ 4/3/2024	PACKING	Packing Comments		ADMIN				
4/3/2024	PRODUCTION	Production Comments		ADMIN				