WHITE PAPER

TRIMIT ADVANCED PURCHASE INTEGRATION 22.1

This document contains information about the Advanced Purchase Integration 22.1 for Microsoft Dynamics 365 Business Central 2022 release wave 1 (W1) (BC20) in combination with the Portals Package JAN22-003 for the TRIMIT Portals.

Version: 22.1
Date: 24-05-2022

CONTENTS

INTRODUCTION

The **Advanced Purchase Integration** concept is meant to be used together with TRIMIT Supplier Portal and has the following idea:
To save Purchase Documents, which have been modified on the TRIMIT Supplier Portal, to a temporary buffer (Portal Purchase Document) and in this way avoid any possible errors which can arise due to a few reasons, such as data validation or locking errors.

A Document in the **Portal Purchase Document** is a copy of an existing standard Purchase Quote or -Order with the only difference that it contains changes made on TRIMIT Supplier Portal.
The Portal Purchase Documents can be posted/promoted to standard Purchase Documents at a later point. All changes will be merged. This way of handling Purchase Documents can prevent a user from facing possible error messages on the TRIMIT Supplier Portal and thus - avoiding negative experience of using TRIMIT Supplier Portal web solution.

In return, potential errors will be handled at the TRIMIT back end, during a procedure of promoting a Purchase Document from the temporary buffer (Portal Purchase Document) to a standard Purchase Document - whether Quote or Order. This way potential errors can be handled less painful for the web portal end users.

Another, but not less important idea under presenting the Advanced Purchase Integration – to reduce the time for processing and saving modifications made in Purchase Documents on TRIMIT Supplier Portal by skipping data validation procedures during document update.

The functionality described is the functionality in **TRIMIT 22.1 for Business Central W1 BC20.X** in combination with the **Portals Package JAN22-003**.
The pictures in this White Paper are based on the demo database for **TRIMIT 22.1,** which is based on Microsoft Dynamics 365 Business Central 2022 release wave 1, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT Advanced Purchase Integration contains the following objects:

Tables	***6037030***	***trm Purchase Import Jnl Line***
	6037031	***trm Purchase Import Jnl Header***
	6037050	***trm VarDim Order Import***
	6037051	***trm Dimension Set Entry Import***
	6037053	***trm Purchase Comment Import***
	6037211	***trm Filter Formula Purchase***
	6038150	***trm Portal Purchase Header***
	6038151	***trm Portal Purchase Line***
Pages	***6037007***	***trm Portal Purch Doc Errors***
	6037009	***trm Purchase Comnt Import List***
	6037010	***trm Portal Purchase Document***
	6037011	***trm Portal Purch Doc Subpage***
	6037012	***trm Posted Portal Purch Doc***
	6037015	***trm Dimension Set Entry Import***
	6037016	***trm VarDim Orders Import***
	6037153	***trm Portal Purchase Doc List***
	6037154	***trm Portal Purch Doc Err List***
	6037155	***trm Posted Port Purch Doc List***
	6027215	***trm Filter Formulas Purchase***
	6037404	***trm Container Purch Line List***
Codeunits	***6037329***	***trm Create Purchase Order***
	6038004	***trm API Purchase Create***
	6038005	***trm API Purchase Update***
	6038122	***trm Adv.Purchase Int. Handling***

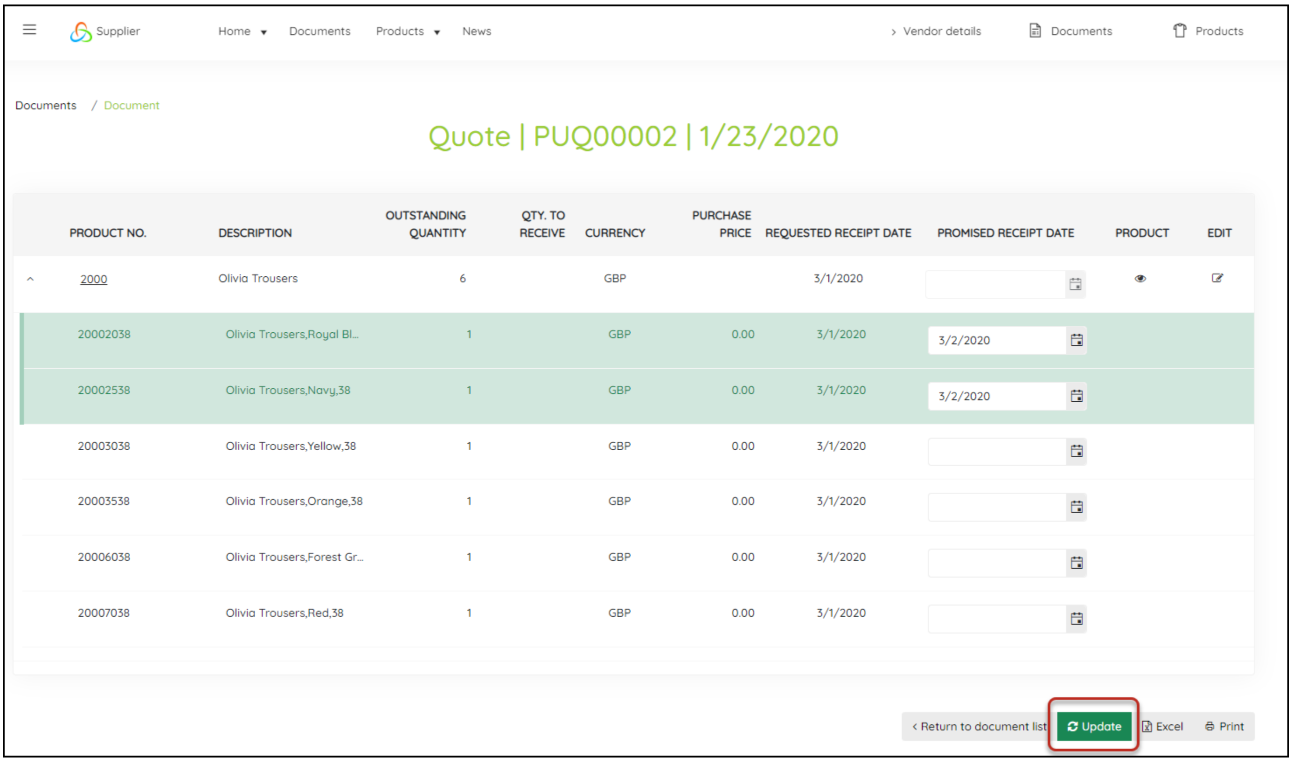
ADVANCED PURCHASE INTEGRATION SETUP

Advanced Purchase Integration cannot be disabled and avoided in TRIMIT when using TRIMIT Supplier Portal. The only setup available is printing features, which will be described in section Printing Advanced Purchase Integration Documents.

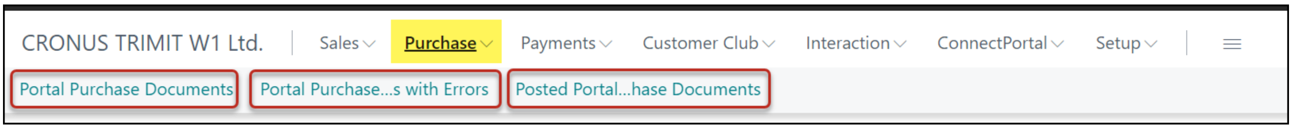
PORTAL PURCHASE DOCUMENTS

Portal Purchase Documents are representing the received Purchase Documents from the TRIMIT Supplier Portal. You cannot change the **Portal Purchase Documents**; only perform various actions before they end up being promoted.
The **Portal Purchase Documents** are the responsibility of the Purchase Department until released / ready for posting. Altering the **Portal Purchase Document** in the process could create data inconsistency.

A Purchase Document from the TRIMIT Supplier Portal is placed into **Portal Purchase Documents** when it is being modified on the TRIMIT Supplier Portal. Modification on the TRIMIT Supplier Portal is accomplished by changing Data on the Document (**Promised Receipt Date** on a Quote or **Promised Receipt Data** and/or **Qty. to Receive** on an Order) and clicking **Update** button, which appears instantly after Document modification, as shown in picture below.



When using the Role Center of **TRIMIT Portal Administrator**, it is possible to find 3 Pages for Advanced Purchase Integration Documents, by clicking ***Purchase***:



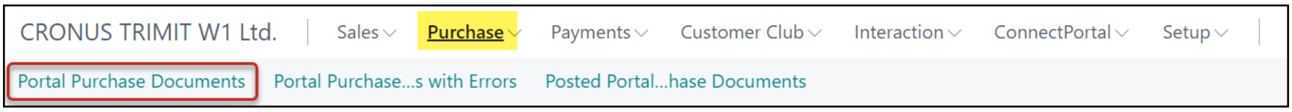
The Pages are

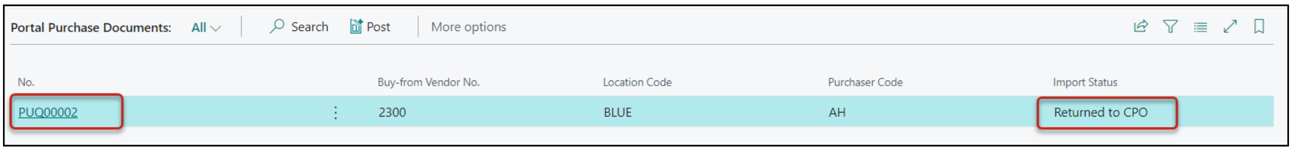
1. **Portal Purchase Documents** – Documents received from Portal, i.e., modified on TRIMIT Supplier Portal.
2. **Portal Purchase Documents with Errors** – Documents containing errors after attempt to promote (Post) to a standard Purchase Quote or -Order.
3. **Posted Portal Purchase Documents** – Documents promoted to standard Purchase Quote or -Order are saved to this page.

PORTAL PURCHASE DOCUMENTS

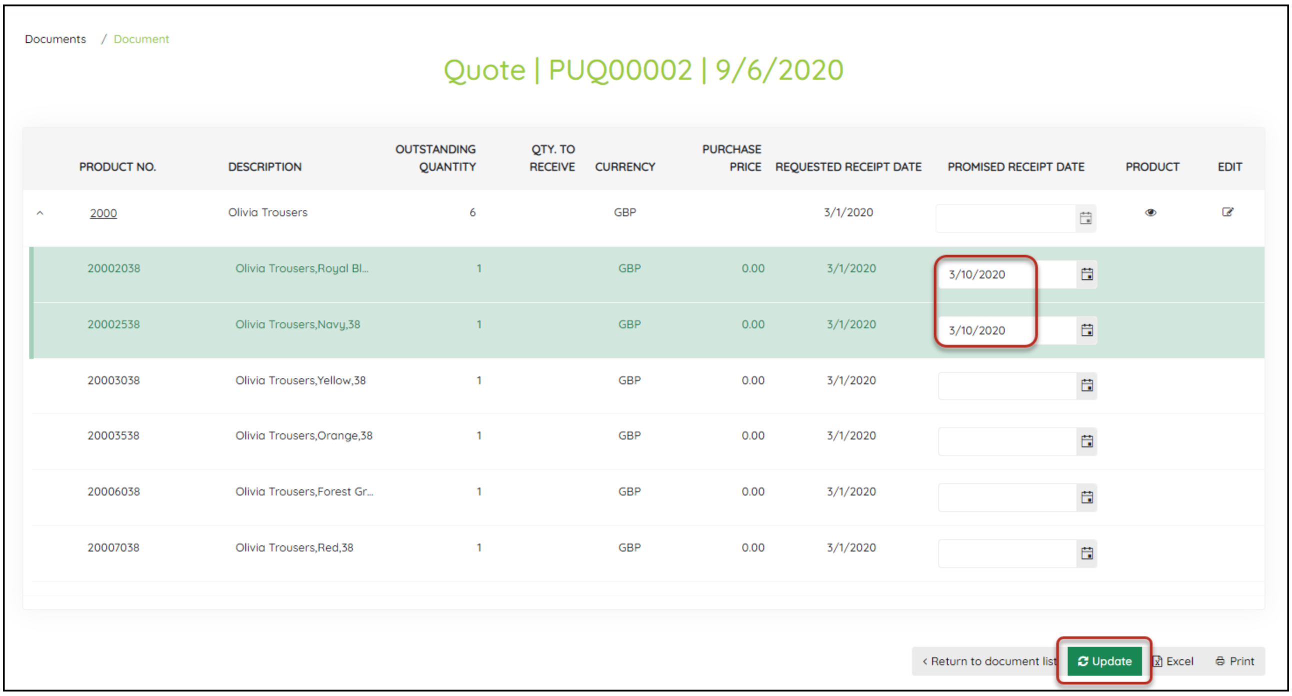
In this Page, you can find Purchase Documents not yet Posted.

To open this Page, click ***Purchase, Portal Purchase Documents*** in the Role Center ***TRIMIT Portal Administrator*** or use **Tell me** *Portal Purchase Documents*.



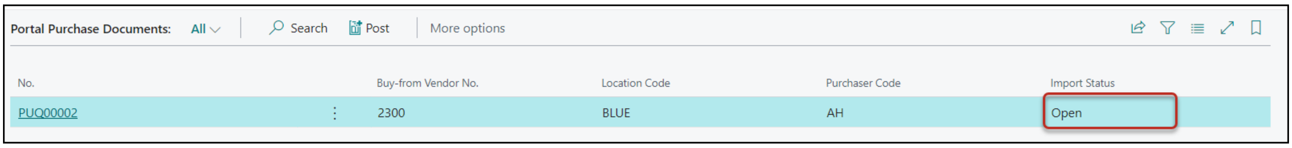


If you only clicked **Update** on the Supplier Portal, the **Import Status** of the Portal Purchase Document will be set to *Returned to CPO* (CPO stands for ConnectPortal – the old name for the administrative layer of the TRIMIT Portals which is now called **Modelyn**).

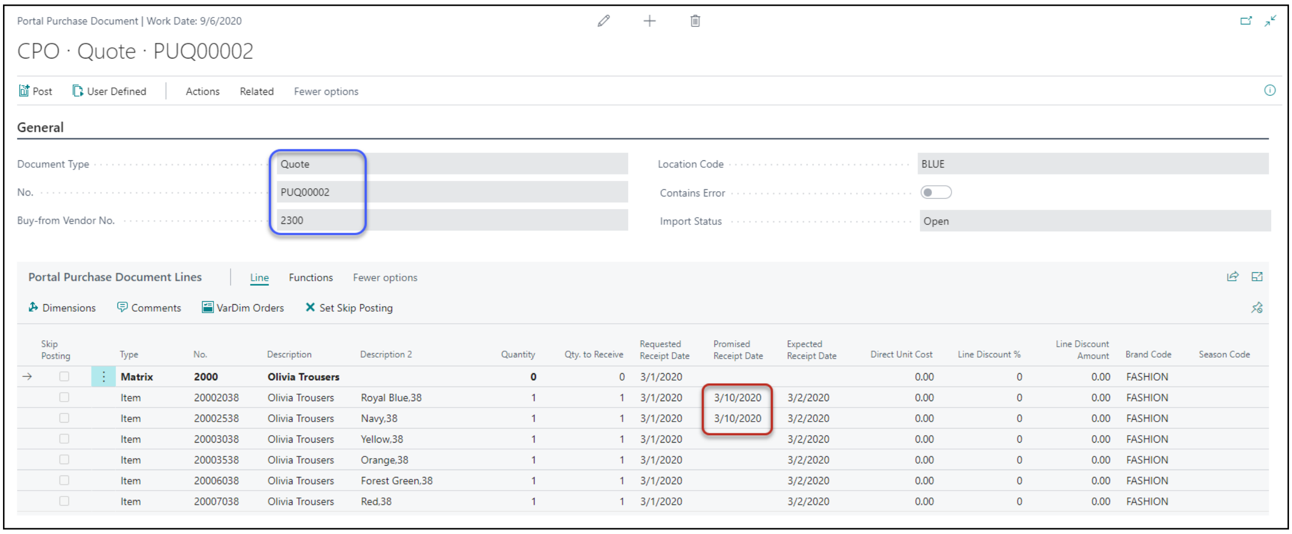


After clicking the **Update** button, the **Check in** button appears.

After clicking this **Check in** button, the **Import Status** in the **Portal Purchase Document** will be set to *Open*.



If you double-click on the **No.** *PUOQ00002* you can open the Card:



DESCRIPTION OF THE FIELDS

DOCUMENT TYPE

This field indicates the **Document Type** that the Portal Purchase Document will get by posting: *Quote* or *Order.* So, if the **Document Type** is *Quote*, you can find the finalized Portal Purchase Document in the standard Purchase Quotes.

NO.

This is the number which the posted Portal Purchase Document will get. It is also the reference point when calling the Portal Purchase Document for editing or printing.

BUY-FROM VENDOR NO.

Shows for which Vendor the Portal Purchase Document is created.

LOCATION CODE

This field shows the default Location Code for the Portal Purchase Document.

CONTAINS ERROR

This field states if the Portal Purchase Document has not been posted successfully. If so, the Purchase Responsible must take action to sort out why the Portal Purchase Document could not be posted.

IMPORT STATUS

This field shows the Status for the Portal Purchase Document.

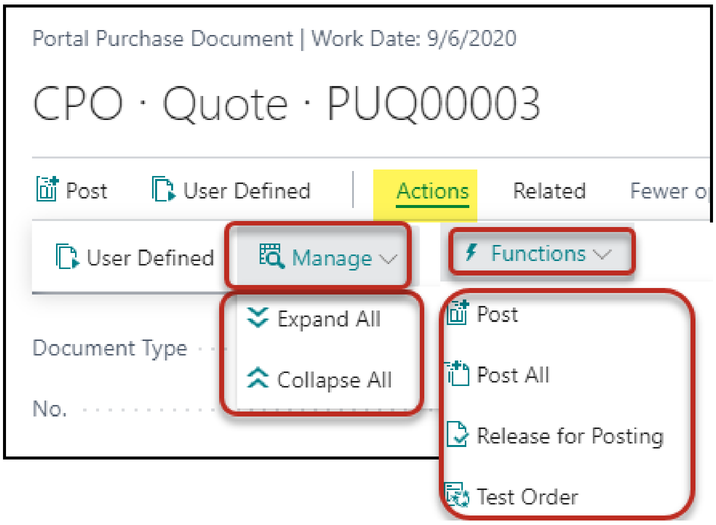
It is set by the system automatically. It can have the following values:

Open	When a Purchase Quote/-Order has been updated and checked in on the Supplier Portal.
Returned to CPO	When a Purchase Quote/-Order has been updated but not yet has been checked in on the Supplier Portal.
Posting is running	When the posting procedure is running.

NOTE:

The **Portal Purchase Document Lines** content is 1:1 with a standard TRIMIT Purchase Line.

HEADER ACTIONS



MANAGE, COLLAPSE ALL

This action will collapse all the Matrix Lines, so only the Matrix Lines will be shown, and not the underlying Item Lines.

MANAGE, EXPAND ALL

This action will expand all the Matrix Lines, so Matrix Lines and underlying Item Lines will be shown.

FUNCTIONS, POST

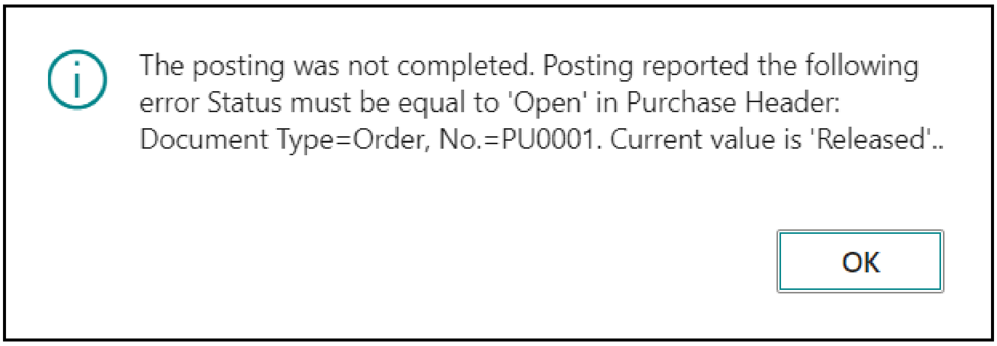
This function will Post (promote) the current Portal Purchase Document. Posting will update a Purchase Document in TRIMIT. Based on the Type of the Document it will be a Purchase *Quote* or a Purchase *Order.*

FUNCTIONS, POST ALL

This function will Post (promote) all Portal Purchase Documents. Posting will update the Purchase Documents in TRIMIT. Based on the Type of the Documents it will be Purchase *Quotes* and/or Purchase *Orders.*

NOTE

Keep in mind that posting (updating Purchase Order) can only take place if the **Status** of the Purchase Order is *Open*. Otherwise, you will get an error message, but the Portal Purchase Document will – based on this - not get a checkmark in **Contains Error.**



FUNCTIONS, RELEASE FOR POSTING

A Portal Purchase Document can be in a stage where posting is not allowed. If, for some reason, you wish to force a manual posting of the Portal Purchase Document, you can release it for posting.

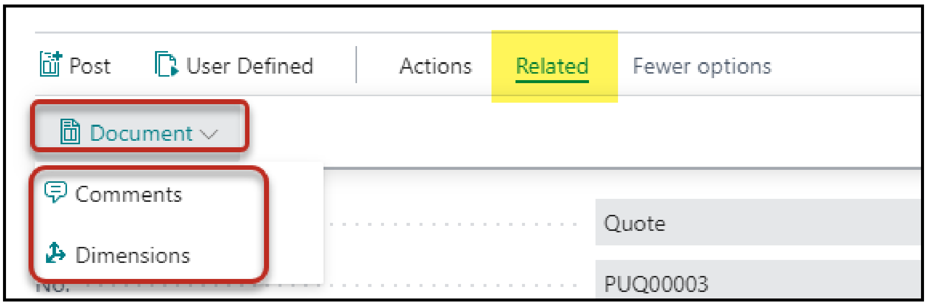
Posting is not allowed under the following Conditions:

Editing mode	The Portal Purchase Document can be opened for editing on the Supplier Portal. In such case, the Portal Purchase Document is internally marked as being edited.
Posting mode	The Portal Purchase Document can be in posting mode because another user has started a posting of the same Portal Purchase Document.
Error mode	The Portal Purchase Document cannot be posted if it is marked with Errors. Errors must be handled and then the Portal Purchase Document can be released for posting.

FUNCTIONS, TEST ORDER

You can choose this Function to run a test for errors. Please see the subject Handling Posting Errors later in this document for detailed explanation of usage.

HEADER RELATED



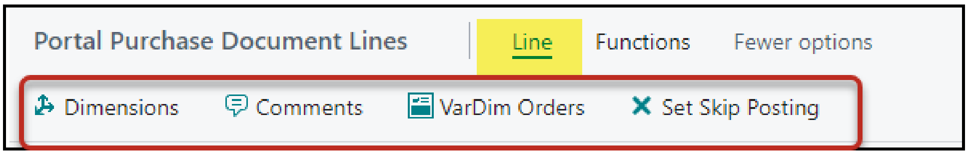
DOCUMENT, COMMENTS

This will show the Comments that are related to the Portal Purchase Document.
Usually, the same Comments that might be related to the original Purchase Quote or -Order.

DOCUMENT, DIMENSIONS

This will show the Dimensions that are related to the Portal Purchase Document.
Usually, the same Dimensions that might be related to the original Purchase Quote or -Order.

LINES ACTIONS



LINE, DIMENSIONS

This will show the Dimensions that are related to the Portal Purchase Document Line.
Usually, the same Dimensions that might be related to the original Purchase Quote Line or -Order Line.

LINE, COMMENTS

This will show the Comments that are related to the Portal Purchase Document Line.
Usually, the same Comments that might be related to the original Purchase Quote Line or -Order Line.

LINE, VARDIM ORDERS

This action opens the **VarDim Order** page, displaying the configuration related to the Item on the Portals Purchase Document Line.

LINE, SET SKIP POSTING

Use this function to exclude Portal Purchase Document Lines from posting, which cannot be posted due to errors. Please see the subject Handling Posting Errors later in this document for detailed explanation of usage.

Document Line cannot be skipped for posting if this Line has already been posted (promoted) to a standard Purchase Document once.

HANDLING POSTING ERRORS

Web documents coming in through the system can become invalid in the process because conditions change. This often requires a Purchase Responsible to evaluate faulty Documents during the day.

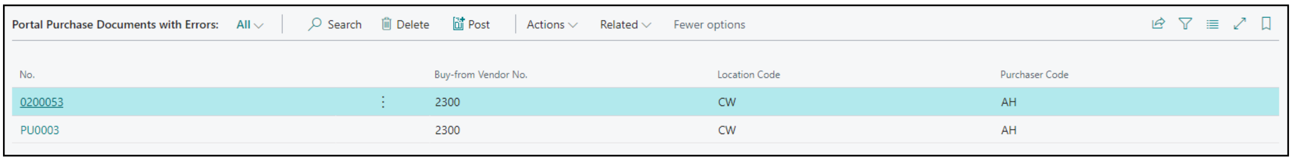
Therefore, the Advanced Purchase Integration methodology also considers handling of situations where Portal Purchase Documents cannot be posted because of errors.

To help the process, TRIMIT provides detailed error logging.

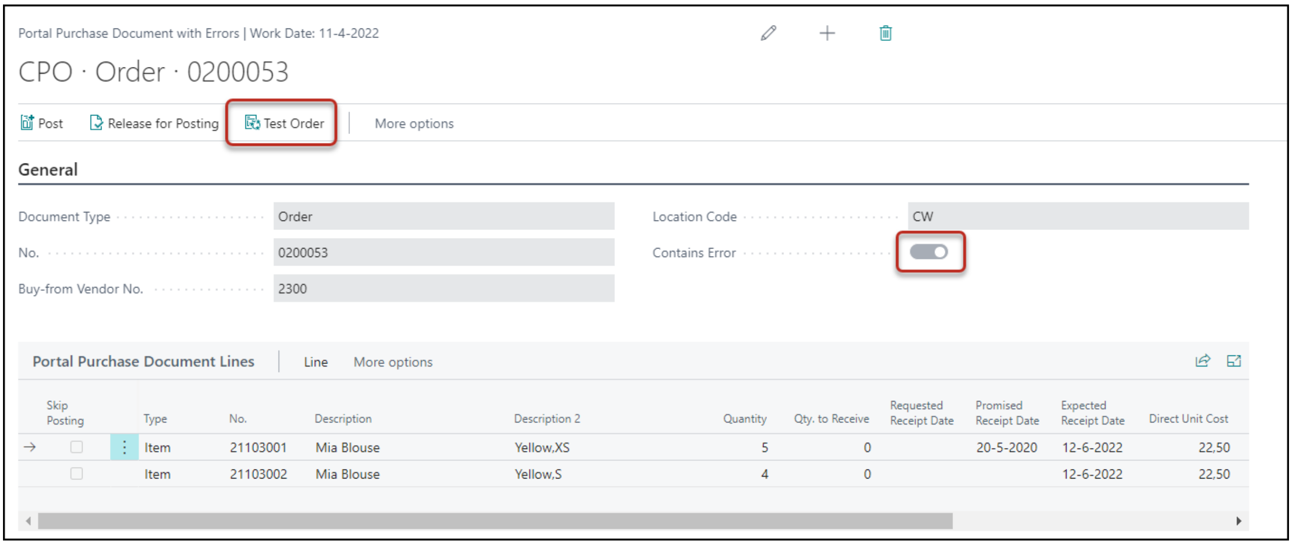
You can open all Portal Purchase Documents which have been marked with Errors. Content and functionality are as described in the previous section about Portal Purchase Documents**.**

The Page is filtering on field **Contains Error.**

To open this Page, click ***Purchase, Portal Purchase Documents with Errors*** in the Role Center ***TRIMIT Portal Administrator*** or use **Tell me** *Portal Purchase Documents with Errors*.

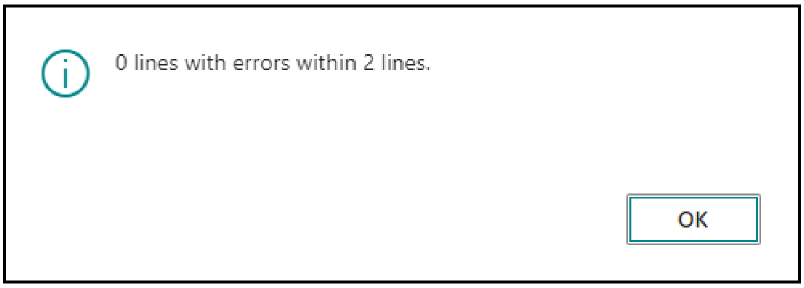


By clicking on the **No.** field or via ***Related, Card***, you can open the Card:



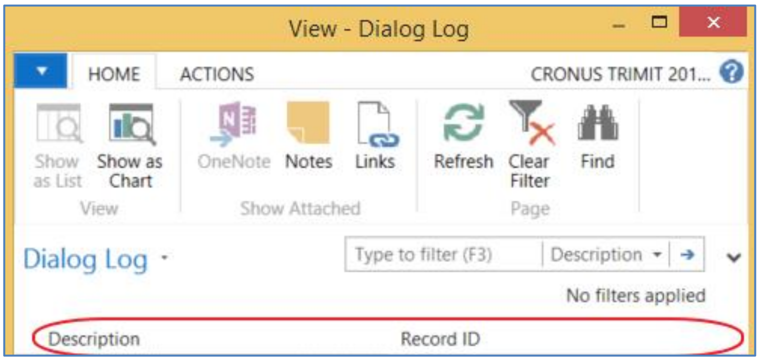
TEST ORDER

Clicking ***Test Order*** will simulate a posting which will reveal any potential Errors that the Portal Purchase Document may have. If Errors are encountered, they are logged with Error Description and a reference to the record that contains the Error.
A **Dialog Log** page will open automatically after the Action **Test Order.**
If the Portal Purchase Document does not contain errors, a simple confirmation is provided:



ERROR LOG

The Error Log page is a general message logging tool. It is used in various areas of TRIMIT to show result lists from test runs, error checking's etc.



DESCRIPTION OF THE FIELDS

DESCRIPTION

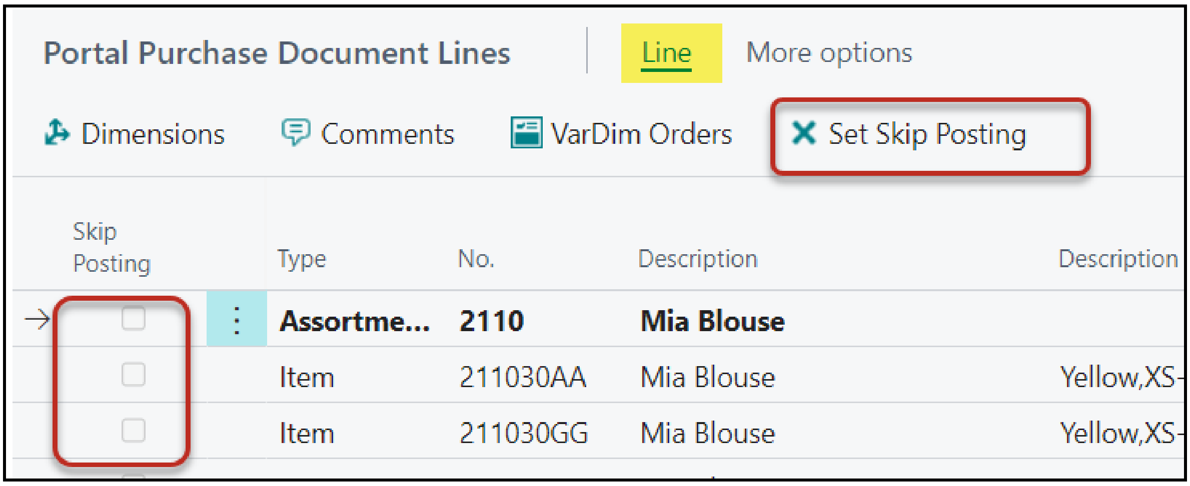
Contains the error message.

RECORD ID

This field contains a reference to the record that has the error. The reference is always the full key description.

LINES WITH ERRORS

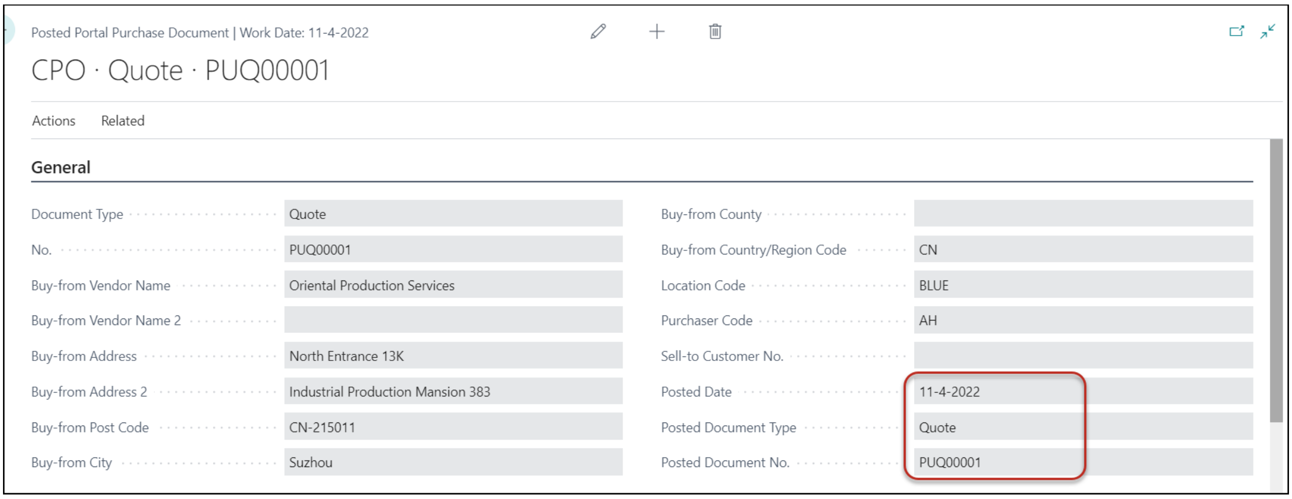
Based on the **Dialog Log**, you can determine if you need to change data in the system to make sure that the Portal Purchase Document can be posted.
Another possibility is to use the **Set Skip Posting** Action.
Any Portal Purchase Document is non-editable. However, using **Skip Posting** (on the **Line *Actions, Line, Set Skip Posting***), you can checkmark individual Lines thus excluding them from the posting.
Simply checkmark a Line for exclusion by clicking the Action and the Line will be skipped by next posting.
Using **Set Skip Posting** for an already skipped Line will remove the checkmark and re-include the Line for posting.



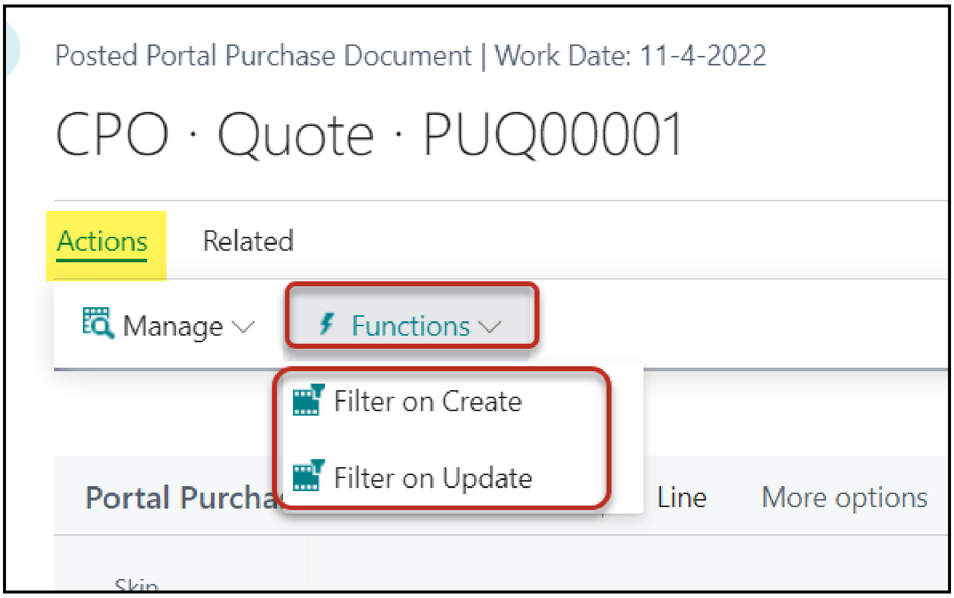
POSTED PORTAL PURCHASE DOCUMENTS

For statistics and documentation, the Posted Portal Purchase Documents are kept.

In Role Center ***TRIMIT Portal Administrator*** clicking ***Purchase, Posted Portal Purchase Document*** or via **Tell me** *Posted Portal Purchase Documents,* you can find the history log for all incoming Portal Purchase Documents that have been posted (promoted).



HEADER ACTIONS



FUNCTIONS, FILTER ON CREATE

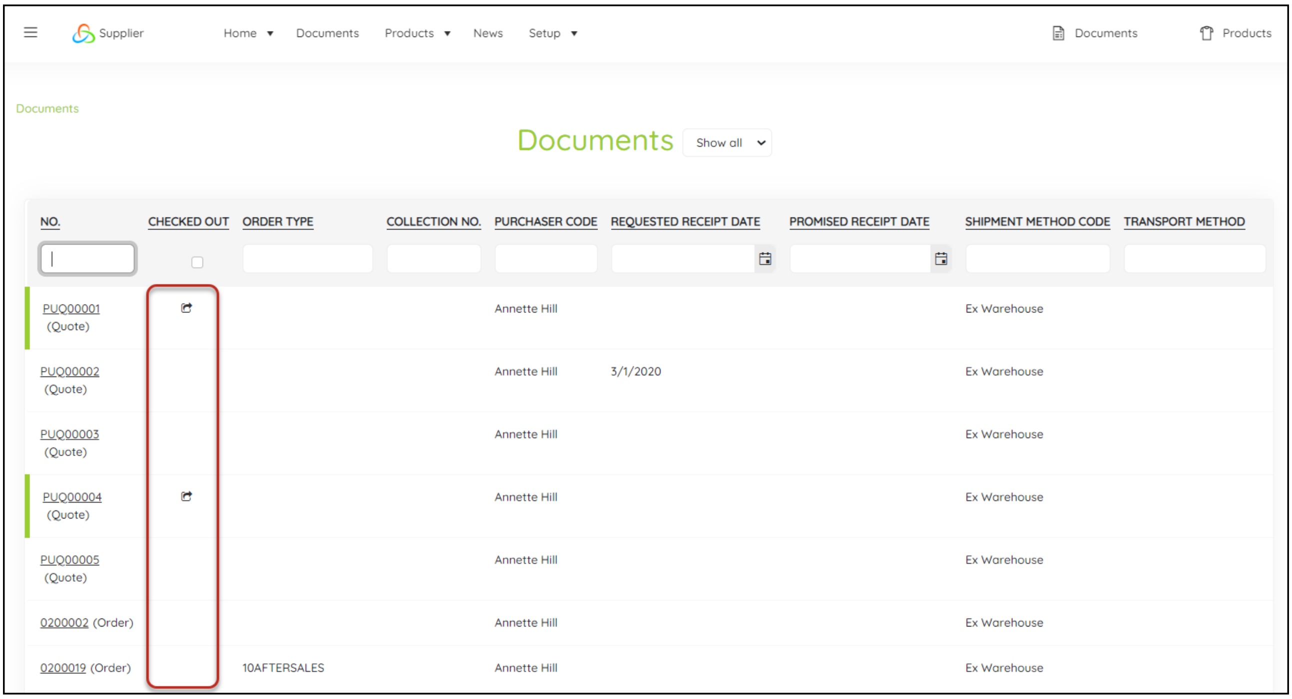
This filters out Posted Documents which have been Created and Posted directly.

FUNCTIONS, FILTER ON UPDATE

This filters out Posted Documents where the Purchase document has been reopened and modified before posting.

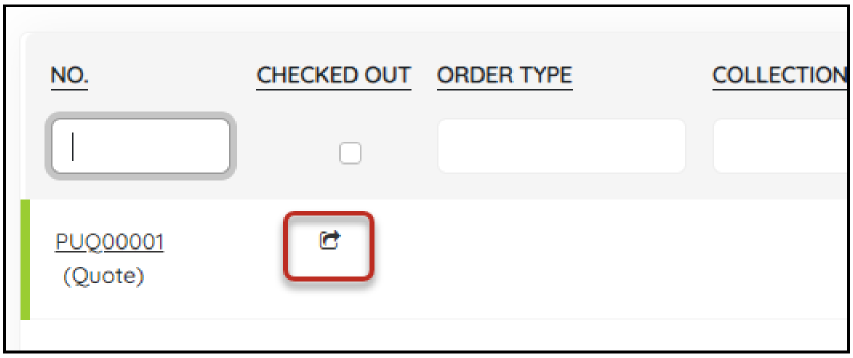
ADVANCED PURCHASE INTEGRATION ON PORTALS

As it was mentioned before – if a Purchase Quote or Order gets modified on Supplier Portal, then it will be placed into Portal Purchase Document. Moreover, the Document on the Portal will be marked as modified and **CHECKED OUT** to a Purchaser who last made a modification to this Document.

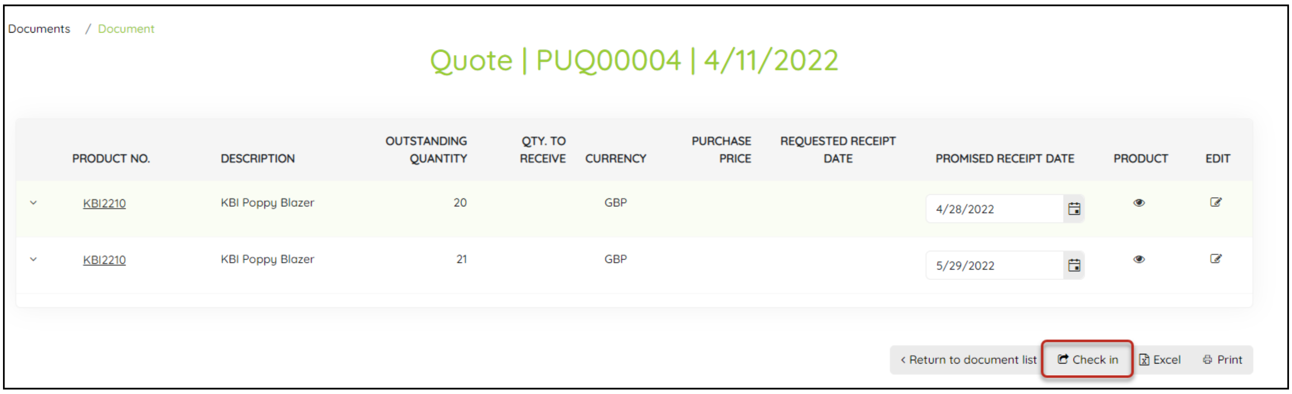


In order to promote this Document to a standard Purchase Document TRIMIT - this Order or Quote must be checked in on the Supplier Portal. This means that the alterations on this Document on the Supplier Portal is finished, and it does not require more changes.

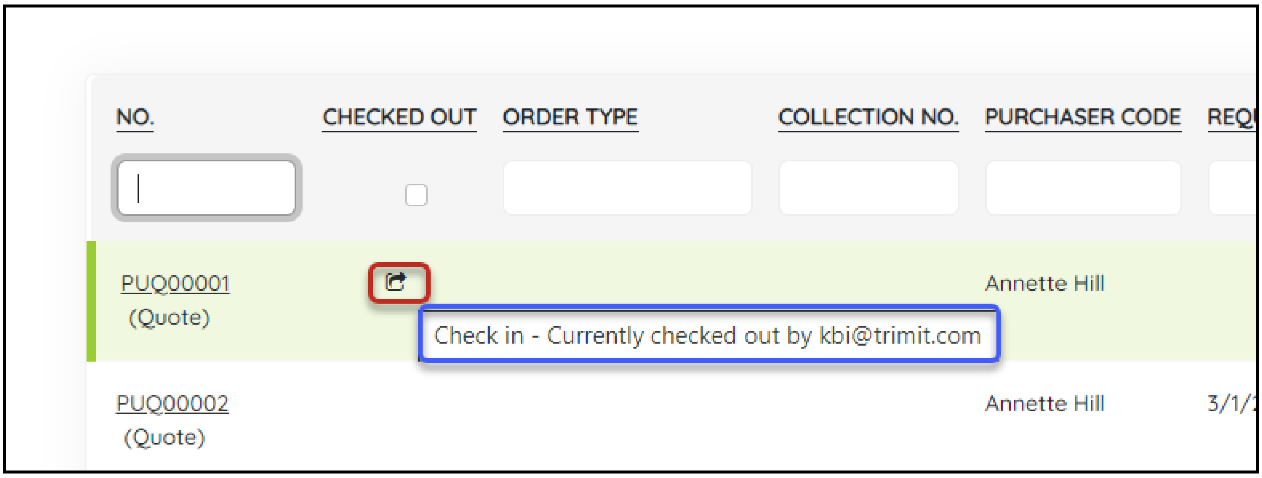
To check-in a document you can click on the **CHECKED OUT** icon in the Documents List:



Or open the checked out Document on Supplier Portal and click on **Check in** button in the right bottom corner of the page:

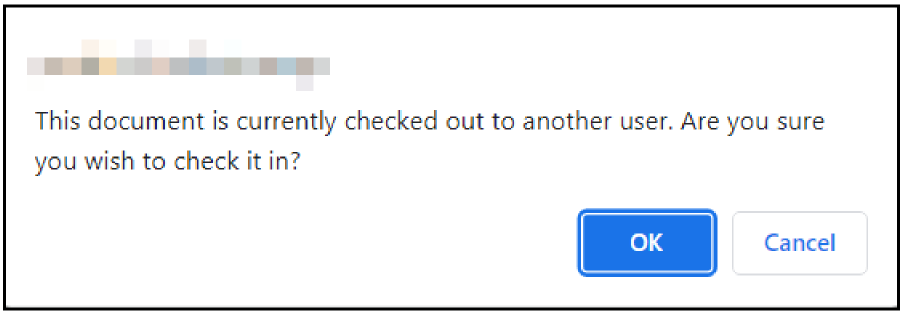


It is possible to see who made changes to a document last and thus checked it out. To do this – hover the mouse over “checked out” icon.



Or open the Document and hover mouse over the **Check in** button to see to whom it is checked out to.

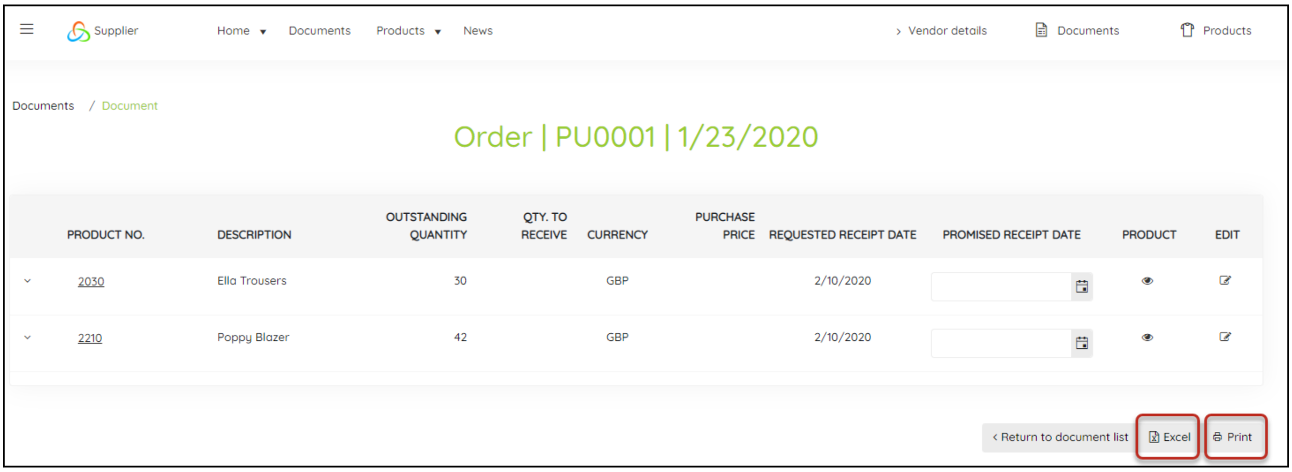
If document is being checked out by another Purchaser, but it needs to be checked in immediately – then after clicking on **Check in** button there will be a message giving a warning which looks as follows:



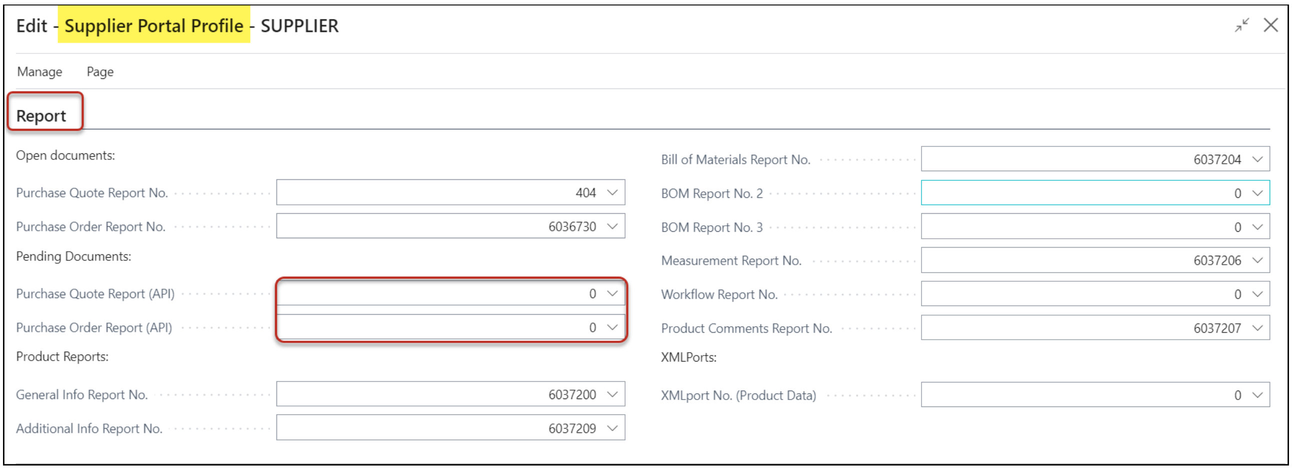
To proceed click **OK** button.

PRINTING ADVANCED PURCHASE INTEGRATION DOCUMENTS

The Supplier Portal gives ability to print Purchase Documents which have been modified and thus being placed into the Portal Purchase Documents. The reports can be printed in Excel or PDF formats.



In order to set up the reports for this purpose click ***Portal Profiles*** in the Role Center ***TRIMIT Portal Administrator*** or use **Tell me** *Portal Profiles.*
Choose the Portal Profile for your Supplier Portal and open its card.
On FastTab ***Report***, under **Pending Documents**, specify needed reports.



NOTE:
TRIMIT does not deliver reports for the Advanced Purchase Integration Documents, since the purpose of a document from Portal Purchase Documents can vary from being a preliminary purchase list to a full Quote/confirmation depending on how the system is used. Portal Purchase Documents are non-validated orders so the legality of making a Quote/Order Confirmation could vary depending on local rules an