



WHITE PAPER

TRIMIT ADVANCED SALES INTEGRATION 24.1

This document contains information about the Advanced Sales Integration 24.1 for Microsoft Dynamics 365 Business Central 2024 release wave 1 (W1) (BC24) in combination with TRIMIT Portals AUG23.

Version: 24.1
Date: 10-07-2024

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INTRODUCTION

Advanced Sales Integration covers a method for receiving Sales Orders or Sales Quotes in TRIMIT from the Sales Agent Portal or the Business to Business (B2B) Webshop.

This method has been introduced to support buffering when working with large Orders e.g., in presales timeframes. Processing large Orders can in peak hours stress the system and leave web users in a situation where they experience poor performance or errors due to database locks.

The **Advanced Sales Integration** divides the normal process where Web Orders are delivered and created directly in the backend system (TRIMIT) into two steps ensuring better performance and user experience.

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 in **TRIMIT 24.1 for Business Central W1 BC24.X** in combination with the **Portals Package AUG23**.

The pictures in this White Paper are based on the demo database for **TRIMIT 24.1**, which is based on Microsoft Dynamics 365 Business Central 2024 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 Sales Integration contains the following objects:

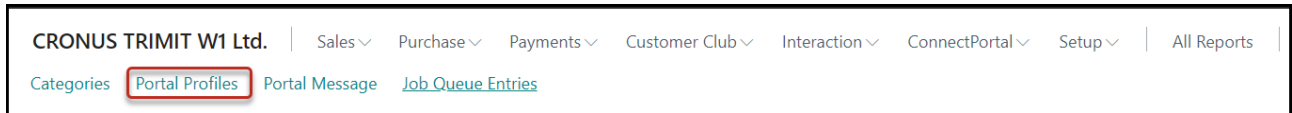
The tables	6037028	<i>trm Sales Import Journal Line</i>
	6037029	<i>trm Sales Import Jnl Header</i>
	6037049	<i>trm Sales Comment Import</i>
	6037050	<i>trm VarDim Order Import</i>
	6037051	<i>trm Dimension Set Entry Import</i>
The pages	6037013	<i>trm Portal Sales Doc Errors</i>
	6037015	<i>trm Dimension Set Entry Import</i>
	6037016	<i>trm VarDim Orders Import</i>
	6037017	<i>trm Sales Comment Import List</i>
	6037018	<i>trm Portal Sales Documents</i>
	6037019	<i>trm Portal Sales Doc Subpage</i>
	6037020	<i>trm Posted Portal Sales Doc</i>
	6037150	<i>trm Portal Sales Document List</i>
	6037151	<i>trm Portal Sale Doc Error List</i>
The Codeunits	6038119	<i>trm Adv.Sales Int. Handling</i>
	6038120	<i>trm NAS ASI Posting Template</i>
	6038121	<i>trm NAS Post ASI Doc Template</i>
The reports	6038102	<i>trm Batch Delete ASI Documents</i>

ADVANCED SALES INTEGRATION SETUP

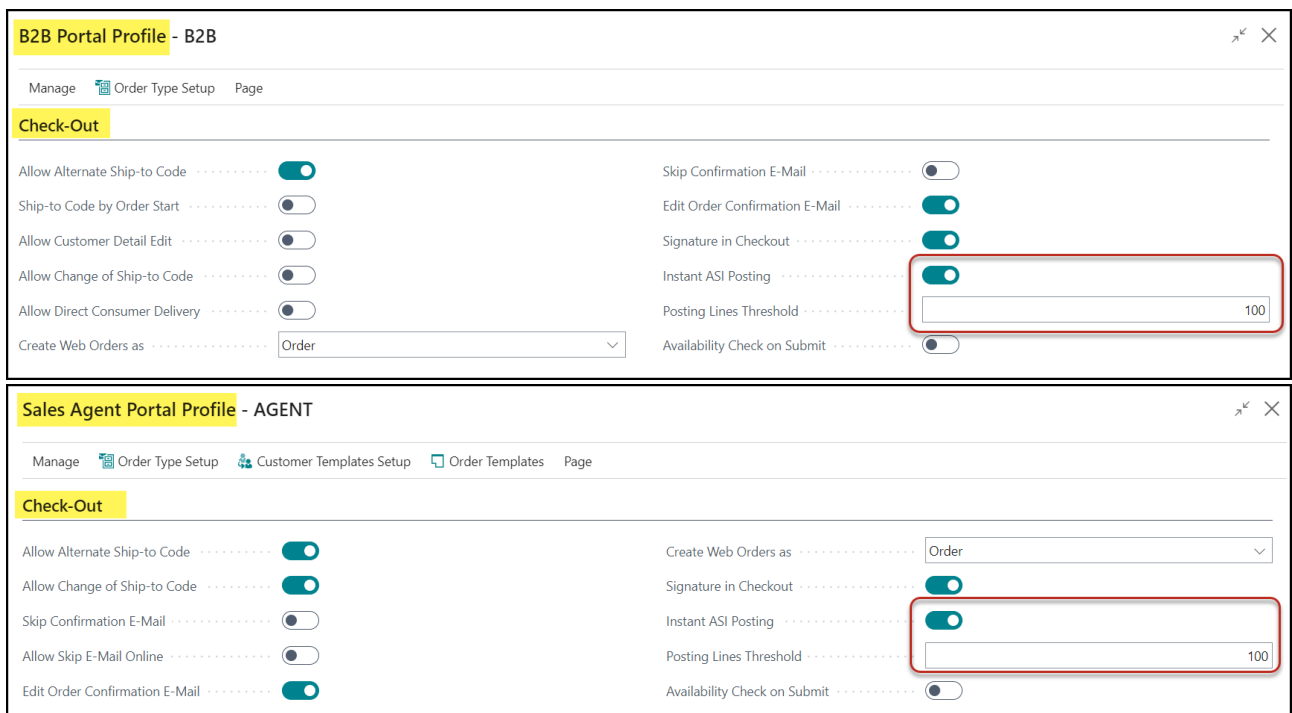
Activating Advanced Sales Integration can be done on various levels either per **Portal Profile** or per specific **Order Types**.

PORTAL PROFILE

In the Role Center **TRIMIT Portal Administrator**, you can click **Portal Profiles** or use **Search Portal Profiles**.



Choose a Portal Profile for the Sales Agent Portal or the B2B Webshop, can double click the **Code** to open the Card.



DESCRIPTION OF THE FIELDS

INSTANT ASI POSTING

Setting this field to **TRUE** activates Instant Posting of Portals Sales Documents in Advanced Sales Integration – meaning that an Order on the Portal will immediately be created as a Sales Quote or Sales Order (based on **Create Web Orders as**) when finalizing the Order on the Portal.

Setting this field to **FALSE** means, that when finalizing the Order on the Portal, it will be written in the **Portal Sales Document**, from where it needs to be promoted (posted) to an actual Sales Quote or -Order. This field can also be overruled by the corresponding field in an Order Type.

POSTING LINES THRESHOLD

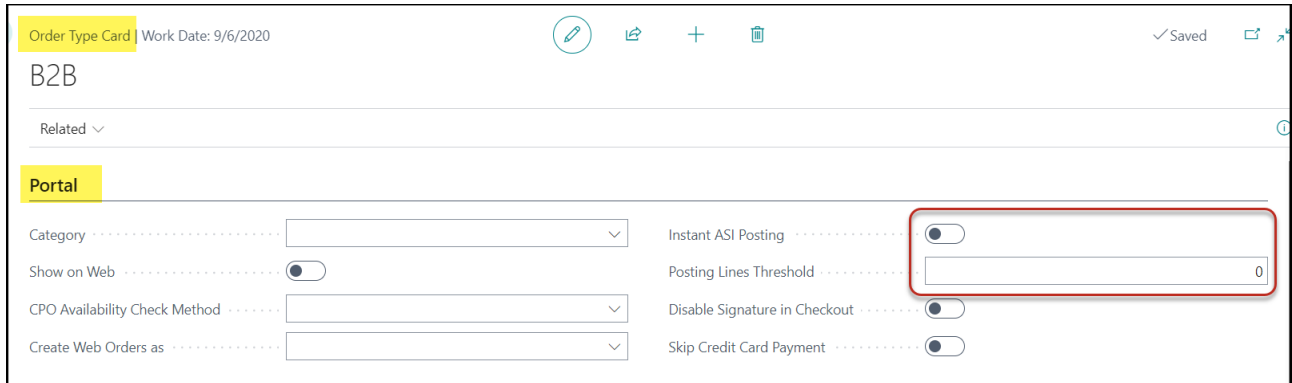
Specify the maximum number of Sales Lines in the Portals Sales Document, which allows Instant Posting.

This works in combination with field **Instant ASI Posting** (ASI = Advanced Sales Integration).

This field can also be overruled by the corresponding field in an Order Type.

ORDER TYPE

Via **Search Order Type**, you can setup usage of Advanced Sales Integration for an Order Type:



Order Type Card | Work Date: 9/6/2020

B2B

Related ▾

Portal

Category ▾

Show on Web ☐

CPO Availability Check Method ▾

Create Web Orders as ▾

Instant ASI Posting ☐

Posting Lines Threshold

Disable Signature in Checkout ☐

Skip Credit Card Payment ☐

DESCRIPTION OF THE FIELDS

INSTANT ASI POSTING

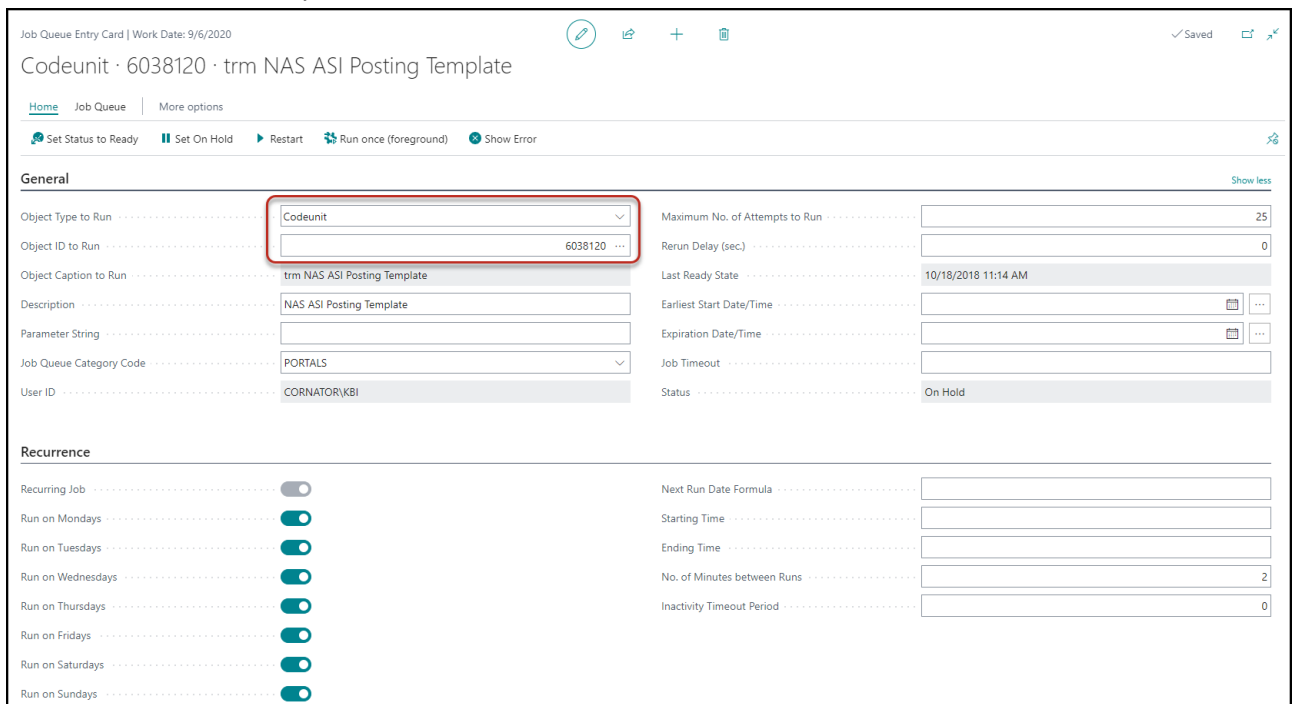
If the [Instant ASI Posting](#) in the Portal Profile is set to *FALSE*, the field in the Order Type can overrule this if set to *TRUE*.

POSTING LINES THRESHOLD

If the **Instant ASI Posting** in the Order Type is set to *TRUE*, the [Posting Lines Threshold](#) of the Portal Profile will be overruled by this field in the Order Type.

AUTOMATIC POSTING BY JOB QUEUE ENTRY

Via **Search Job Queue Entries**, you can set up a Job Queue Entry which can post your **Portal Sales Documents** automatically.



Job Queue Entry Card | Work Date: 9/6/2020

Codeunit · 6038120 · trm NAS ASI Posting Template

Home Job Queue More options

Set Status to Ready Set On Hold Restart Run once (foreground) Show Error

General

Object Type to Run ▾

Object ID to Run 6038120

Object Caption to Run trm NAS ASI Posting Template

Description NAS ASI Posting Template

Parameter String

Job Queue Category Code PORTALS

User ID CORNATOR(KBI)

Maximum No. of Attempts to Run 25

Rerun Delay (sec) 0

Last Ready State 10/18/2018 11:14 AM

Earliest Start Date/Time

Expiration Date/Time

Job Timeout

Status On Hold

Recurrence

Recurring Job ☐

Run on Mondays ☐

Run on Tuesdays ☐

Run on Wednesdays ☐

Run on Thursdays ☐

Run on Fridays ☐

Run on Saturdays ☐

Run on Sundays ☐

Next Run Date Formula

Starting Time

Ending Time

No. of Minutes between Runs 2

Inactivity Timeout Period 0

- ✓ Set **Object Type to Run** to *Codeunit*.
- ✓ Set **Object ID to Run** to *6038120*

NOTE

Job Queue is standard Business Central functionality. For more information on setting up Job Queue entries please consult documentation delivered by Microsoft.

THE NAS ASI POSTING TEMPLATE CODEUNIT

NAS = Navision Application Server, ASI = Advanced Sales Integration

This Codeunit will execute posting of **Portal Sales Documents** and handle error situations.

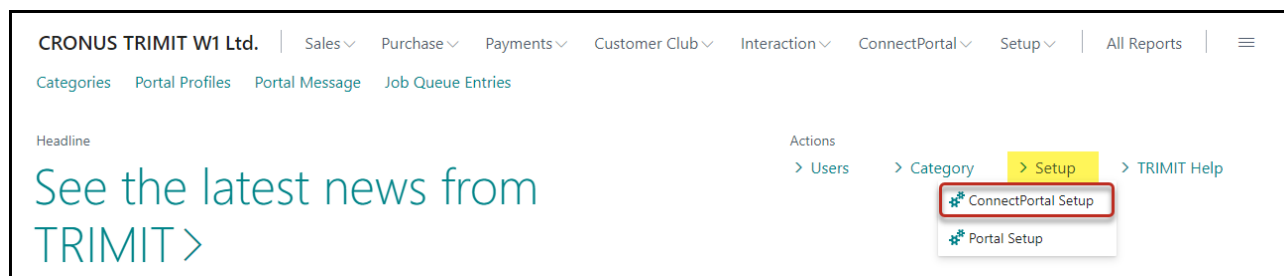
If a Document cannot be posted for any number of reasons, the Codeunit will detect this and flag that the Portal Sales Document contains errors.

Errors can differ and can be divided into two groups: Data errors or Locking errors.

The difference is that a Data error must be fixed before the posting can be completed whereas the Locking error is raised at the point of posting. A document blocked by a Locking error will be posted as soon as the lock is passed. So, to handle that situation, you can set up several retries so that, if a posting did not complete, the NAS can try again on the next Job Queue schedule.

CONNECTPORTAL SETUP

In the Role Center **TRIMIT Portal Administrator**, you can click **Setup, ConnectPortal Setup** or via **Search ConnectPortal Setup** you can set the number of posting attempts before flagging a Portal Sales Document with an error indication.



Work Date: 9/6/2020

ConnectPortal Setup

Web Service

General

Admin E-Mail	admin@cronus.com	Order Handling	
Default Language Code	1033	Posting Attempts	3
Company Identifier		Open Orders Date Formula	
Include in License Check	Authorization Codes & Relations	Web Transaction Max Log	200

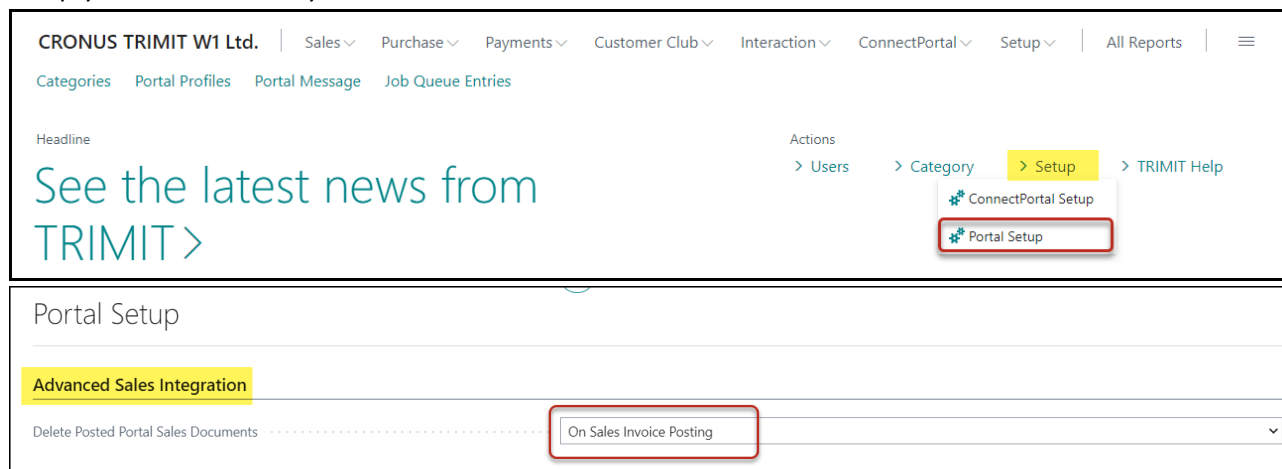
DESCRIPTION OF THE FIELD

POSTING ATTEMPTS

In this field you can enter the number of times to retry posting before the automatic posting will flag a document with containing errors.

PORTAL SETUP

In the Role Center **TRIMIT Portal Administrator**, you can click **Setup, Portal Setup** or via **Search Portal Setup** you can set the way the Posted Portal Sales Documents should be deleted.



DESCRIPTION OF THE FIELD

DELETE POSTED PORTAL SALES DOCUMENTS

The parameter **Delete Posted Portal Sales Documents** determines when and how the **Posted Portal Sales Documents** will be deleted: Automatically or Manually.

You can choose between the following two options:

On Sales Order Deletion	Automatically, when deleting a regular Sales Order (I.e., when posting the Invoice), the corresponding Posted Portal Sales Document will be deleted.
By Batch	Manually, you can run the report Batch Delete ASI Documents to determine – by using the Filters – which Posted Portal Sales Documents you want to delete but only if the regular Sales Order already has been deleted.

PORTAL SALES DOCUMENTS

Portal Sales Documents are representing the received Web Orders from the Sales Agent Portal or the B2B Webshop. You cannot change the **Portal Sales Documents**; only perform various actions before they end up being promoted.

The **Portal Sales Documents** are the responsibility of the Sales Agent or Sales Department until released / ready for posting. Altering the **Portal Sales Document** in the process could create data inconsistency.

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

CRONUS TRIMIT W1 Ltd.	Sales	Purchase	Payments	Customer Club	Interaction	ConnectPortal	Setup
Portal Sales Documents	Portal Sales ...ts with Errors	Portal Sales D...ent Templates	Posted Portal Sales Documents				

The Pages are:

1. **Portal Sales Documents** – Documents received from SA or B2B.
2. **Portal Sales Documents with Errors** – Documents containing errors after attempt to promote (Post) to a standard Sales Quote or -Order.
3. **Portal Sales Document Templates**
4. **Posted Portal Sales Documents** – Documents promoted to standard Sales Quote or -Order are saved to this page.

PORTAL SALES DOCUMENTS

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

To open this Page, click **Sales, Portal Sales Documents** in the Role Center **TRIMIT Portal Administrator** or use **Search Portal Sales Documents**.

CRONUS TRIMIT W1 Ltd.	Sales	Purchase	Payments	Customer Club	Interaction	ConnectPortal	Setup	All Reports	
Portal Sales Documents:	All			Document	Actions	Related	Fewer options		
No.	Sell-to Customer No.	Sell-to Customer Name	Location Code	Salesperson Code	Import Status	Portal User	Sales Channel		
WOB000001	2000	The Fashion Store UK	BLUE	JR	Open		B2B		
WOB000002	2000	The Fashion Store UK	BLUE	JR	Open		B2B		
WOB000003	2000	The Fashion Store UK	BLUE	JR	Open		B2B		

By clicking on the **No.** (or clicking **Document, Card**) it is possible to open the card of the Portal Sales Document:

Portal Sales Document | Work Date: 9/6/2020

+

CPO · Order · WOB000001

Post

Actions

Related

Fewer options

General

Document Type

Order

Sell-to Address

20 Savile Row

Sell-to Country/Regio...

GB

No.

WOB000001

Sell-to Address 2

Mayfair

End Customer No.

Sell-to Customer No.

2000

Sell-to Post Code

WC1 3DG

Import Status

Open

Sell-to Customer Name

The Fashion Store UK

Sell-to City

London

Sell-to Customer Na...

Sell-to County

Portal Sales Document Lines

Line

Functions

Comments

VarDim Orders

Set Skip Posting

Skip Posti...	Type	No.	Description	Description 2	Quantity	Qty. per Unit of Measure	Shipment Date	Period Code	Unit Price	Line Discount %	Line Discount Amount	Line Amount
→ ☐	Matrix	2000	Olivia Trousers		2	1	9/6/2020		39.00	0	0.00	78.00
☐	Item	20002040	Olivia Trousers	Royal Blue,40	1	1	9/6/2020		39.00	0	0.00	39.00
☐	Item	20002042	Olivia Trousers	Royal Blue,42	1	1	9/6/2020		39.00	0	0.00	39.00

Invoicing

Show less

Bill-to Customer No.

2000

Bill-to Address

20 Savile Row

Bill-to City

London

Bill-to Contact No.

CTT00003

Bill-to Address 2

Mayfair

Bill-to Contact

Charley Nelson

Bill-to Name

The Fashion Store UK

Bill-to Post Code

WC1 3DG

Shipping

Show less

Ship-to Code

Ship-to Contact

Charley Nelson

Shipping Agent Code

Ship-to Name

The Fashion Store UK

Blanket Sales Order No.

Shipping Agent Servic...

Ship-to Address

20 Savile Row

Ready for Shipping

☐

Shipping Time

Ship-to Address 2

Mayfair

Location Code

BLUE

Package Tracking No.

Ship-to Post Code

WC1 3DG

Outbound Whse. Han...

Shipment Date

9/6/2020

Ship-to City

London

Shipment Method Co...

CIF

Shipping Advice

Partial

Portal Information

Profile Type

BusinessToBusiness

Portal Profile

B2B

Portal User

DESCRIPTION OF THE FIELDS

DOCUMENT TYPE

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

NO.

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

SELL-TO

Detailed information of the Customer **No.** for which the Portal Sales Document is created.

END CUSTOMER NO.

Customer No. of a new registered Customer on the B2C Webshop. Therefore, only applicable for a Portal Sales Document based on the B2C Webshop or InStore Webshop.

FASTTAB INVOICING

On this FastTab the detailed information of the **Bill-to Customer** of the Portal Sales Document.

FASTTAB SHIPPING

On this FastTab the detailed information of the **Ship-to Customer** of the Portal Sales Document and other fields regarding Shipping a Sales Quote/Order.

FASTTAB PORTAL

PROFILE TYPE

The **Profile Type** from the Portal Profile for which the Portal Sales Document was created.

PORTAL PROFILE

The **Portal Profile** for which the Portal Sales Document was created.

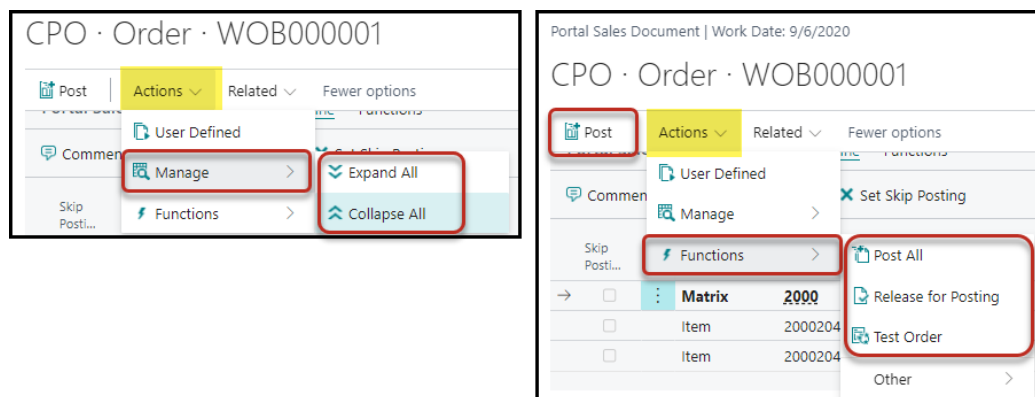
PORTAL USER

The **Portal User** that created the Portal Sales Document.

NOTE

The Portal Sales Document Lines content is 1:1 with a standard Sales Line.

HEADER ACTIONS



MANAGE, EXPAND ALL

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

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.

FUNCTIONS, POST

This function will Post (promote) the current Portal Sales Document. Posting will create a Sales Document in TRIMIT based on the **Document Type** of the Portal Sales Document (*Sales Quote* or *Sales Order*).

FUNCTIONS, POST ALL

This function will Post (promote) all Portal Sales Documents to regular Sales Documents in TRIMIT based on the **Document Type** of the Portal Sales Document (*Sales Quote* or *Sales Order*).

FUNCTIONS, RELEASE FOR POSTING

A Portal Sales 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 Sales Document, you can release it for posting.

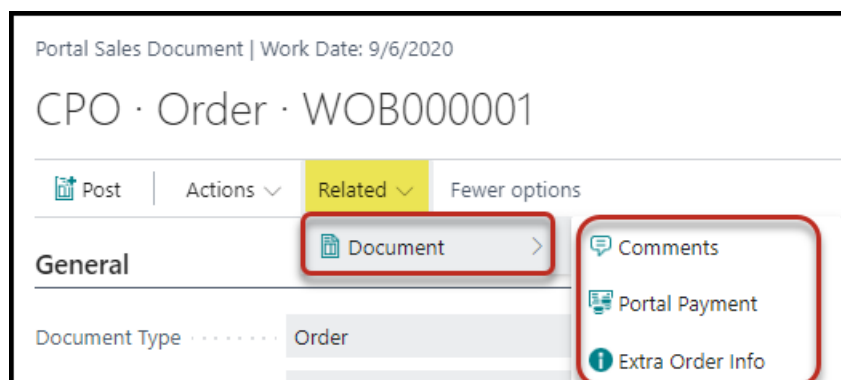
Posting is not allowed under the following Conditions:

Editing mode	The Portal Sales Document can be opened for editing on the SA or B2B. In such case, the Portal Sales Document is internally marked as being edited.
Posting mode	The Portal Sales Document can be in posting mode because another user or a Job Queue process has started a posting of the same Portal Sales Document.
Error mode	The Portal Sales Document cannot be posted if it is marked with Errors. Errors must be handled and then the Portal Sales 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 Order Comments that were entered on the SA/B2B for this Portal Sales Document.

PORTAL PAYMENT

If the Customer on the SA/B2B also had to pay the Web Order upfront, you can see the details of the Payment for this Portal Sales Document.

Portal Payment Card | Work Date: 9/6/2020

11

New
Restore From Archive...
More options

General

No.	11	Captured Amount	0.00
Document Type	Order	Refunded Amount	0.00
Document No.	WOB000001	Paid by Gift Card/Points	☐
Customer No.	2000	Transaction Status	Pending
Payment Service Provider		Paid from	B2B
Transaction No.	(7C3A7833-DFD9-4477-BE88-BB830A32F0B2)	Creation Date	9/6/2020
Card No.		Creation Time	7:25:44 AM
Card Type		Allow Posting on Error	☐
Amount	97.50	Processing Status	
Currency Code	GBP	Processed Time	

Lines
Delete Line
Create Refund
Navigate

Transaction Type	Transaction Result	Trigger Document Type	Trigger Document No.	Amount	Currency Code	Transaction No.	Split Payment	Close Payment	Response Description	Processed Date/Time
(There is nothing to show in this view)										

See **White Paper – Portal Payment Setup** for more details regarding this Card.

EXTRA ORDER INFO

This will show extra information regarding the Portal Sales Document.

Order Extra Info - Order - WOB000001

Open Document
Page

General

Init. Document Type	Order	Init. No.	WOB000001	Order Date	9/6/2020
---------------------------	-------	----------------	-----------	------------------	----------

Delivery

Delivery Method		Ship-to Code		Ship-to Phone	
Parcel Shop ID		Ship-to Country/Region Code	GB	Direct Consumer Delivery	☐
Wrapping	☐	Ship-to E-Mail		Order Confirmation E-Mail	kbi@trimit.com

Customer

Bill-to Customer No.	2000	Bill-to E-Mail		Sell-to E-Mail	
Bill-to Name	The Fashion Store UK	Bill-to Phone No.		Sell-to Phone No.	
Bill-to Name 2		Sell-to Customer No.	2000		

InStore B2C

InStore B2C Order	☐	InStore Payment Amount	0.00	InStore Payment Completed	☐
Referrer Code		InStore Payment Currency		InStore Payment Received By	

Signature

Signature Name	KBI	Signature	
----------------------	-----	-----------------	---

NOTE

You will not see any Dimensions related to the Portal Sales Document Header or Line.

However, when Posting the Portals Sales Document, where a regular Sales Quote or -Order is created, the system will determine the Dimensions on the Header and the Lines.

LINES ACTIONS

Portal Sales Document Lines

Line

Functions

Comments

VarDim Orders

Set Skip Posting

LINE, COMMENTS

Opens any comments related to the Portal Sales Document Line.

LINE, VARDIM ORDERS

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

LINE, SET SKIP POSTING

Use this function to exclude Portal Sales 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.

HANDLING POSTING ERRORS

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

Therefore, the Advanced Sales Integration methodology also considers handling of situations where Portal Sales Documents cannot be posted because of errors. To help the process, TRIMIT provides detailed error logging.

In the Role Tailored Client, you can open all Portal Sales Documents which have been marked with errors. Content and functionality are as described in the previous section about [Portal Sales Documents](#).

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

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

Portal Sales Document with Errors

Work Date: 11-4-2022

CPO · Order · WOS000753

Post

Actions

Related

Fewer options

General

Document Type

Order

Location Code

BLUE

No.

WOS000753

Contains Error

☒

Sell-to Customer No.

3000

Portal Sales Document Lines

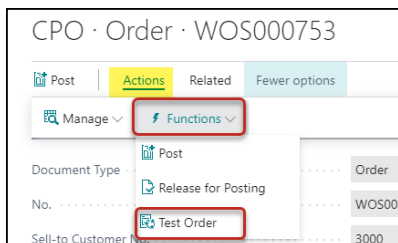
Line

Functions

Fewer options

Skip Post...	Type	No.	Description	Description 2	Quantity	Qty. per Unit of Measure	Shipment Date	Period Code	Unit Price	Line Discount %	Line Discount Amount	Line Amount	Brand Code	Season Code
☐	Matrix	KBI2012	KBI Amelia Trousers		5	1	15-4-2022		39.00	0	0.00	195.00	FASHION	02-SUMMER
→ ☐	Item	KBI20120138	KBI Amelia Trousers	White.38	1	1	15-4-2022		39.00	0	0.00	39.00	FASHION	02-SUMMER
☐	Item	KBI20120140	KBI Amelia Trousers	White.40	1	1	15-4-2022		39.00	0	0.00	39.00	FASHION	02-SUMMER
☐	Item	KBI20120142	KBI Amelia Trousers	White.42	1	1	15-4-2022		39.00	0	0.00	39.00	FASHION	02-SUMMER
☐	Item	KBI20129940	KBI Amelia Trousers	Black.40	1	1	15-4-2022		39.00	0	0.00	39.00	FASHION	02-SUMMER
☐	Item	KBI20129942	KBI Amelia Trousers	Black.42	1	1	15-4-2022		39.00	0	0.00	39.00	FASHION	02-SUMMER

ACTION, FUNCTIONS, TEST ORDER

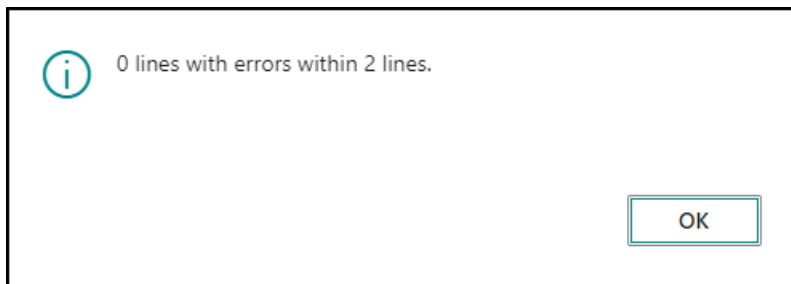


Test Order will simulate a posting (promote Portal Sales Document to regular Sales Quote or -Order) which will reveal any potential errors that the Portal Sales Document may have.

If Errors are encountered, they are logged with error description and a reference to the record that contains the error.

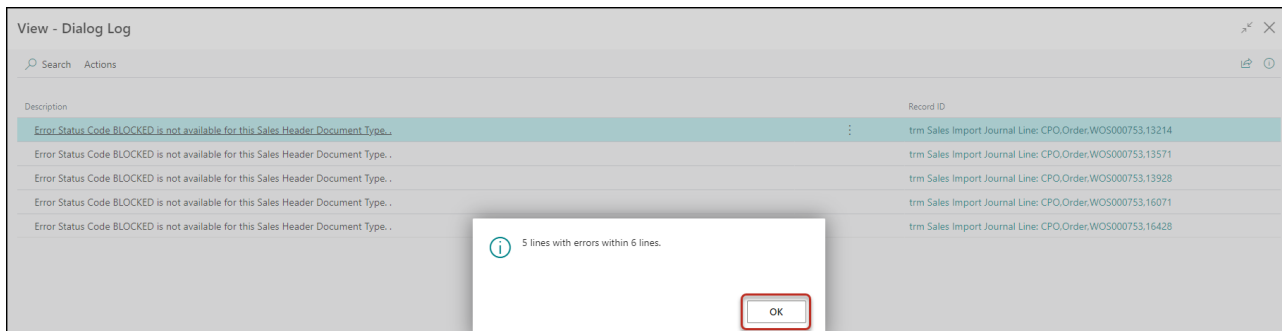
A [Dialog Log](#) page will open automatically after the Action **Test Order**.

If the Portal Sales Document does not contain errors during **Test Order**, a simple confirmation is provided:



DIALOG LOG

The Dialog 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.



Click **OK**.

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 Sales Document can be posted.

Another possibility is to use the **Set Skip Posting** Action.

Any Portal Sales 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.

Portal Sales Document Lines

Line

Functions

Comments

VarDim Orders

Set Skip Posting

Skip Posting	Type	No.	Description	Description 2	Quantity	Qty. per Unit of Measure	Shipment Date	Period Code	Unit Price	Line Discount %	Line Discount Amount	Line Amount
→ ☐	Matrix	2300	Daisy Dress		1	1	9/6/2020		55.00	0	0.00	55.00
☐	Item	23002042	Daisy Dress	Royal Blue,42	1	1	9/6/2020		55.00	0	0.00	55.00

PORTAL SALES DOCUMENT TEMPLATES

In Role Center **TRIMIT Portal Administrator** clicking **Sales, Portal Sales Document Templates** or via **Search Portal Sales Document Templates**, you can find the Order Templates that have been created on the B2B Webshop or Sales Agent Portal.

In the **Order details** page of a Sales Order on the Sales Agent Portal, you can determine that the entered Sales Order can also be used as an **order template**:

Order no.	WOS000816
Order type	SA
External document no.	
Order comment	Lily Blouse Template
Mark as order template	☒ Remember to save a comment for your order template
Global	☒

Hover to see options

BACK

UPDATE ORDER

CLOSE ORDER TEMPLATE

If you do enter a checkmark in **Mark as order template**, you are also able to choose if this Template is a Global template or not – meaning that it can be used by all users of the Sales Agent Portal or only the user that created the template.

After clicking **CLOSE ORDER TEMPLATE**, you can see the Template Order on the Home page of the Sales Agent Portal in the dock **My Account** under the **Order templates**.

My Account

My details
My orders
Order templates
Reset password
Shopping settings

Order Templates

GLOBAL	COMMENT	ORDER TYPE	ORDER NO.	DATE	EDIT	DELETE
✓	This is a comment for the order with a lot of epic information	SA	WOS000078	30/09/2021		
✓	Bicycle order template	SA	WOS000513	26/11/2021		
✓	Global with dress 2300	SA	WOS000545	06/12/2021		
✓	Order Template - dresses	SA	WOS000631	11/01/2022		
✓	Lily Blouse Template	SA	WOS000816	11/04/2022		

Only the **Order Templates** that have been created by the current user can be edited or deleted.

The details of these Order Templates can also be seen in the ERP via **Portal Sales Document Templates**.

CRONUS TRIMIT W1 Ltd.

Sales
Purchase
Payments
Customer Club
Interaction
ConnectPortal
Setup

Portal Sales Document Templates:
All
Search
Delete
Document
Templates
Actions
Related
Fewer options

Document Type	No. ↓	Order Type	Global Order Template	Salesperson Code	User E-Mail
Order	WOS000816	SA	✓	JR	kbi@trimit.com
Order	WOS000631	SA	✓	JR	kbi@trimit.com
Order	WOS000545	SA	✓	JR	admin@trimit.com
Order	WOS000544	SA		JR	sa@trimit.com
Order	WOS000543	SA		JR	sa@trimit.com
Order	WOS000513	SA	✓	JR	admin@trimit.com
Order	WOS000299	SA		JR	sa@trimit.com

By clicking **Document, Card** you can see the details of this Template Order.

Edit - Portal Sales Document - CPO - Order - WOS000816

Manage
Post
Page
Actions
Related
Fewer options

General

Document Type: Order

No.: WOS000816

Sell-to Address: 20 Savile Row

Sell-to Country/Region Code: GB

Sell-to Customer No.: 2000

Sell-to Customer Name: The Fashion Store UK

Sell-to Customer Name 2:

Sell-to Address 2: Mayfair

Sell-to Post Code: WC1 3DG

Sell-to City: London

Sell-to Country:

End Customer No.:

Import Status: Active on Portal

Portal Sales Document Lines
Line
Functions
Fewer options

Dimensions
Comments
VarDim Orders
Set Skip Posting

Skip Posting	Type	No.	Description	Description 2	Quantity	Qty. per Unit of Measure	Shipment Date	Period Code	Unit Price	Line Discount %	Line Discount Amount	Line Amount	Brand Code	Season Code
→	Matrix	KBI2190	KBI Lily Blouse - Produc...		4	1	11-4-2022		26.9955	0	0.00	107.97	FASHION	02-SUMMER
	Item	KBI21002004	KBI Lily Blouse - Production	Royal Blue,L	1	1	11-4-2022		26.999	0	0.00	26.99	FASHION	02-SUMMER
	Item	KBI21003504	KBI Lily Blouse - Production	Orange,L	1	1	11-4-2022		26.999	0	0.00	26.99	FASHION	02-SUMMER
	Item	KBI21007004	KBI Lily Blouse - Production	Red,L	1	1	11-4-2022		26.999	0	0.00	26.99	FASHION	02-SUMMER
	Item	KBI21009904	KBI Lily Blouse - Production	Black,L	1	1	11-4-2022		27.003	0	0.00	27.00	FASHION	02-SUMMER

Invoicing

Bill-to Customer No.: 2000

Bill-to Contact No.: CTT00003

Bill-to Name: The Fashion Store UK

Bill-to Address: 20 Savile Row

Bill-to Address 2: Mayfair

Bill-to Post Code: WC1 3DG

Bill-to City: London

Bill-to Contact: Charley Nelson

POSTED PORTAL SALES DOCUMENTS

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

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

Posted Portal Sales Documents: All						
Search Card Open Sales Document Related Fewer options						
No. 1	Sell-to Customer No.	Sell-to Customer Name	Location Code	Salesperson Code	Portal User	Sales Channel
WOS000750	3000	The Furniture Shop UK	BLUE	JR		SA
WOS000752	2000	The Fashion Store UK	BLUE	JR		SA
WOS000753	3000	The Furniture Shop UK	BLUE	JR		SA
WQB000001	2000	The Fashion Store UK	BLUE	JR		B2B

By clicking **Open Sales Document**, you can open the regular created Sales Order or Sales Quote.

By clicking **Card**, you can open the Card:

Posted Portal Sales Document | Work Date: 11-4-2022

CPO · Order · WOS000753

New Actions Related Fewer options

General

Document Type

Order

Sell-to City

London

No.

WOS000753

Sell-to County

Sell-to Customer No.

3000

Sell-to Country/Region Code

GB

Sell-to Customer Name

The Furniture Shop UK

Posted Date

11-4-2022

Sell-to Customer Name 2

Posted Document Type

Order

Sell-to Address

30 Savile Row

Posted Document No.

WOS000753

Sell-to Address 2

Mayfair

End Customer No.

Sell-to Post Code

WC1 3DG

Portal Sales Document Lines

Line More options

Skip Posting	Type	No.	Description	Description 2	Quantity	Qty. per Unit of Measure	Shipment Date	Period Code	Unit Price	Line Discount %	Line Discount Amount	Line Amount	Brand Code	Seq
→	Matrix	KBI2012	KBI Amelia Trousers		5	1	15-4-2022		39.00	0	0.00	195.00	FASHION	02
	Item	KBI20120138	KBI Amelia Trousers	White.38	1	1	15-4-2022		39.00	0	0.00	39.00	FASHION	02
	Item	KBI20120140	KBI Amelia Trousers	White.40	1	1	15-4-2022		39.00	0	0.00	39.00	FASHION	02
	Item	KBI20120142	KBI Amelia Trousers	White.42	1	1	15-4-2022		39.00	0	0.00	39.00	FASHION	02
	Item	KBI20129940	KBI Amelia Trousers	Black.40	1	1	15-4-2022		39.00	0	0.00	39.00	FASHION	02

On the Posted Portal Sales Document header, you can find the reference to the Sales Document created in TRIMIT.

Via **Actions, Manage** you can Expand/Collapse all the Matrix Lines of the Posted Portal Sales Document.

Posted Portal Sales Document | Work Date: 9/6/2020

CPO · Order · WOS000001

New Actions Related Fewer options

General

Manage

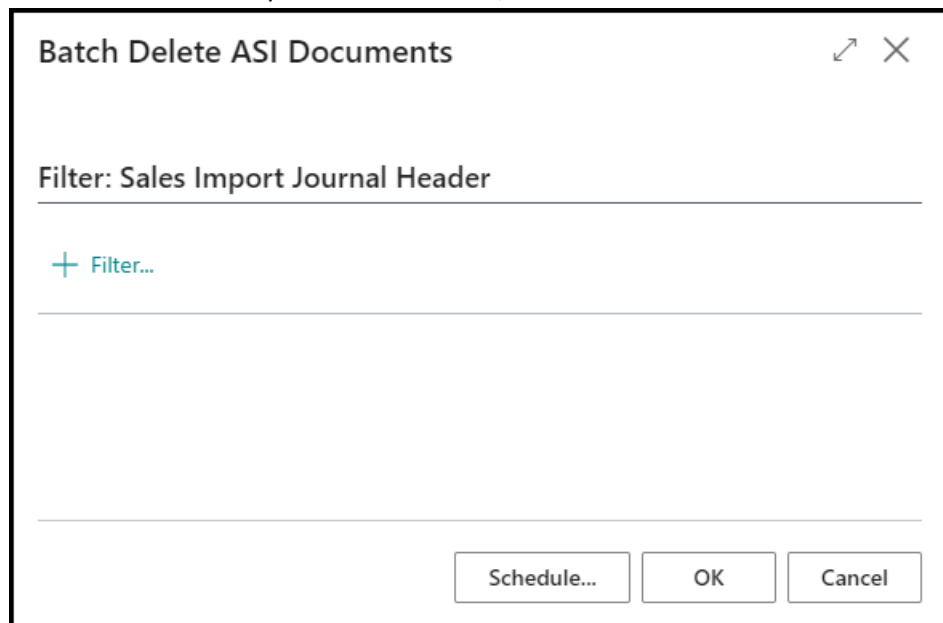
Expand All

Collapse All

DELETING THE POSTED PORTAL SALES DOCUMENTS

Based on the parameter **Delete Posted Portal Sales Documents** in the Portal Setup, the **Posted Portal Sales Document** will be deleted automatically when posting and deleting the regular Sales Order or by using the report **Batch Delete ASI Documents** – to be find by using **Search Batch Delete ASI Documents**.

In this report you can set your own filters, but only the Posted Portal Sales Documents for which the regular Sales Order has been posted and deleted, will be deleted from the Posted Portal Sales Documents.



ADVANCED SALES INTEGRATION ON PORTALS

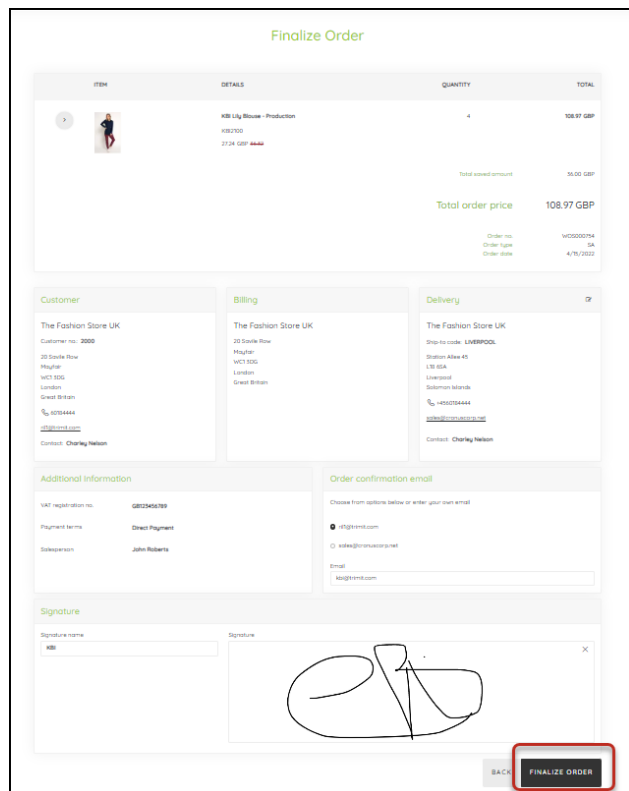
If the Advanced Sales Integration is selected (in the **Portal Profile** or the **Order Type** setting **Instant ASI Posting** to **FALSE**), the Sales Agent Portal and the Business to Business (B2B) Webshop do not allow creation of Sales Quotes/Orders directly.

All Web Orders which are saved will then be stored in the Portal Sales Documents.

Portal Sales Documents can be posted as Sales Quotes or -Orders. From the Sales Agent's/Sales Departments point of view the difference is minor but notable in the Solution.

This topic will go through the specifics of Web Orders going through the Advanced Sales Integration system.

FINALIZING A WEB ORDER



Finalize Order

ITEM	DETAILS	QUANTITY	TOTAL
1	 W8 Lily Blouse - Production 470720 27.24 GBP 44.40	4	108.97 GBP
Total saved amount			36.00 GBP
Total order price			108.97 GBP
Order no.		W02000704	
Order type		SA	
Order date		4/76/2022	

Customer
 The Fashion Store UK
 Customer no. 2000
 20 South Row
 Hagger
 WC1 3SG
 London
 Great Britain
 02034444
info@fashionstore.net
 Contact: Charley Nelson

Billing
 The Fashion Store UK
 20 South Row
 Hagger
 WC1 3SG
 London
 Great Britain

Delivery
 The Fashion Store UK
 Ship to code: LIVERPOOL
 Station Alley 45
 L3 6BA
 Liverpool
 Salomon Islands
 00254444
info@fashionstore.net
 Contact: Charley Nelson

Additional information
 VAT registration no. GB23456789
 Payment terms Direct Payment
 Salesperson John Roberts

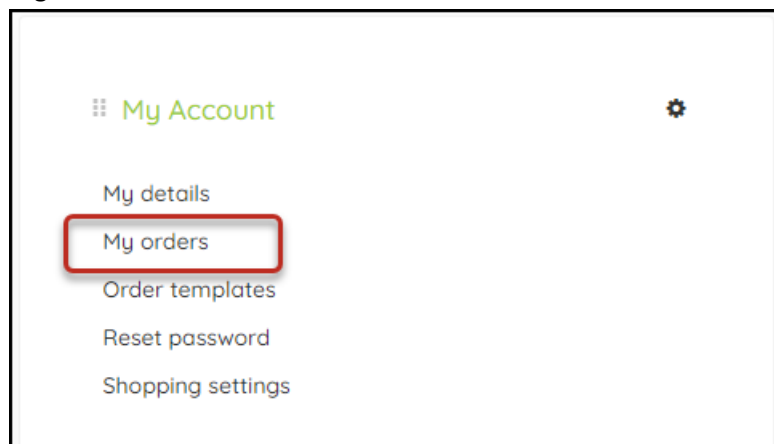
Order confirmation email
 Choose from options below or enter your own email
 info@fashionstore.net
 info@fashionstore.net
 Email

Signature
 Signature name

 Signature


After Finalizing a Web Order in the Sales Agent Portal or B2B Webshop, the Sales Agent/Customer can go to the Orders page and find the newly saved order.

If the Web Order is going through the Advanced Sales Integration system, it can be found by using the Status filter. All Web Orders/Portal Sales Documents not yet posted can be found using the filter **Pending**. A Web Order/Portal Sales Document will have the status **Pending** if it has not been promoted (posted) to a regular Sales Quote- or Order in TRIMIT.



My Account

- My details
- My orders**
- Order templates
- Reset password
- Shopping settings

You're shopping as: 2000 The Fashion Store UK

My Orders

CUSTOMER NO.	CUSTOMER NAME	ORDER NO.	DATE	STATUS	ORDER TYPE	CREATE ORDER	EDIT	PRINT	COPY	DELETE
				Pending						
2000	The Fashion Store UK	WOB000674	1/25/2022	Pending	10AFTERSALES					
2000	The Fashion Store UK	WOB000792	4/15/2022	Pending	B2B					
2000	The Fashion Store UK	WOS000453	1/5/2022	Pending	SA					
2000	The Fashion Store UK	WOS000754	4/15/2022	Pending	SA					
3000	The Furniture Shop UK	WOS000751	4/15/2022	Pending	SA					

All activities are available for Pending Sales Documents

PRINTING PENDING ORDERS

The Advanced Sales Integration supports printing of Web Orders/Portal Sales Documents. This is beneficial since the timeframe from pending to being posted is a decision set up on a Job Queue.

In a company it can be decided to run posting at off-peak hours in which case a preliminary print for the customer could be relevant.

In the **Portal Profile**, you can set the Report Numbers for the reports when using the Advanced Sales Integration.

Edit - Sales Agent Portal Profile - AGENT

Manage
Order Type Setup
Customer Templates Setup
Tag Filters
Page
Related
Fewer options

Report

Quote Report No.	6036700	Quote Report (ASI)	0
Order Confirmation Report No.	6036701	Order Confirmation (ASI)	0
Invoice Report No.	0	Posted Invoice Report No.	6036702
Credit Memo Report No.	0	Posted Credit Memo Report No.	6036703
Return Order Confirmation	0	Statement Report No.	6036650
Blanket Sales Order No.	0	Customer Aging Report No.	106

Edit - B2B Portal Profile - B2B

Manage
Order Type Setup
Tag Filters
Page
Related
Fewer options

Report

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

NOTE

TRIMIT does not deliver reports for the Pending Documents, since the purpose of a document from Portal Sales Documents can vary from being a preliminary sales list to a full Quote/Order Confirmation depending on how the system is used. Portal Sales Documents are non-validated orders so the legality of making a Quote/Order Confirmation could vary depending on local rules and regulations.