



WHITE PAPER

Category Management

TRIMIT version: **25.1**

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Introduction

TRIMIT Category Management is a tool to support sales activities on the Standard Out-of-the-Box e-commerce of TRIMIT. It provides users of TRIMIT an easy and familiar approach to publish and maintain Products on their TRIMIT e-commerce sites.

The Structures build will provide web users a logical and easy navigation to Products.

The Categories can be used for the TRIMIT B2C Webshop, TRIMIT B2B Webshop and TRIMIT Sales Agent based on settings in the **Portal Profiles**.

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 25.1 for Business Central W1 BC26.X**.

The pictures in this White Paper are based on the demo data for **TRIMIT 25.1**, which is based on Microsoft Dynamics 365 Business Central 2025 Release Wave 1, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

Components

TRIMIT Category Management contains the following objects:

The tables

6036327 trm Temp Category Management
6036704 trm Group Codes
6038120 trm Category
6038121 trm Category Line
6038122 trm Category Buffer
6038206 trm CPO Category Buffer Header
6038207 trm CPO Category Buffer Line
6038212 trm Tag Filter Setup

The pages

6036682 trm Group Code
6038119 trm Category Line Card
6038120 trm Category Card
6038121 trm Category List
6038122 trm Category Lines
6038124 trm Category Management
6038125 trm Category Man Subform
6038135 trm Attach to Category
6038136 trm Category TreeView
6038153 trm Portal Browser
6038154 trm Category Copy Wizard
6038158 trm Category Lines All
6038212 trm Tag Management

The reports

6036813 trm Category Management

The codeunits

6038111 trm Category Handling
6038113 trm Call Generate Category

The queries

6038100 trm Portal Category Distinct
6038104 trm Category Master Distinct

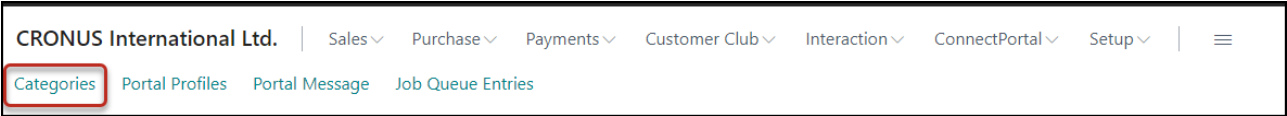
Create Category Structures

In this chapter, we will go through the setup of a Category Structure which is used for the Categories shown on TRIMIT e-commerce.

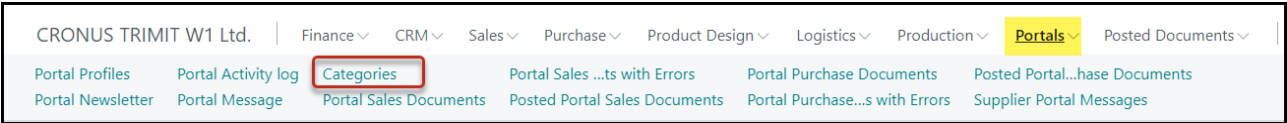
The Categories can also be used in the TRIMIT External API, where it can determine the Masters/Items for which data should be exported. For more details: see **White Paper – TRIMIT External API**.

Category

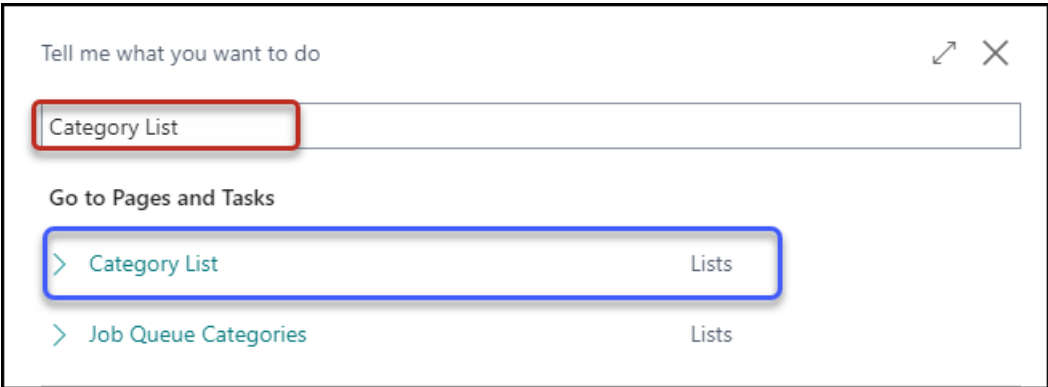
In Role Center **TRIMIT Portal Administrator** you can open the Category List by clicking **Categories**.



In Role Center **TRIMIT Small Business** you can open the Category List by clicking **Portals, Categories**.



Otherwise, find it via **Tell me Category List**.



Categories: All ▾ 🔍 + New 🗑️ Delete 📝 Edit List 📊 Category Lines 📄 Show Category 🏷️ Tag Filters 🔄 Copy Wizard 📇 Card ...											
No.	Description	Matrix Limitation	Do not show on First Level ▼	Alternative Sorting ↑	Customer Club Level	Collection	Tag Filter Group	Expand On Overview	Google Product Taxonomy ID	Category Lines Attached	Attached to Category Lines
AGENT	Sales Agent Top Level		☐	0	Level 0			Inherited	0	☒	☐
AGENT_F_CABINETS	Cabinets		☐	0	Level 0			Inherited	0	☒	☒
AGENT_F_CHAIRS	Cabinets		☐	0	Level 0			Inherited	0	☒	☒
AGENT_F_SOFAS	Sofas		☐	0	Level 0			Inherited	0	☒	☒
AGENT_F_TABLES	Tables		☐	0	Level 0			Inherited	0	☒	☒
AGENT_FASHION	Fashion		☐	0	Level 0		FASHION	Inherited	0	☒	☒
AGENT_FURNITURE	Furniture		☐	0	Level 0		FURNITURE	Inherited	0	☒	☒
AGENT_GIFTCARDS	GiftCards		☐	0	Level 0			Inherited	0	☒	☐
AGENT_TEAM	Team Wear		☐	0	Level 0			Inherited	0	☒	☒

Description of the Fields

No.

This is the unique identity of a Category. It is recommended to give it a meaningful name.

Description

This Field contains a descriptive name for the Category. This **Description** will be shown on TRIMIT e-commerce sites and must help the web user to quickly determine the content of the Category.

Matrix Limitation

Here you can determine that only specific Variants like Colors or Sizes can be used. This means that if you connect a **Matrix Limitation Setup** to a Category, only specific Variants like Colors or Sizes from the connected Masters to a Category will be shown on the portal. I.e.: for a "Summer" Category you only want to see the Colors 100 – 200, for a "Winter" Category you only want to see the Colors 150 – 250.

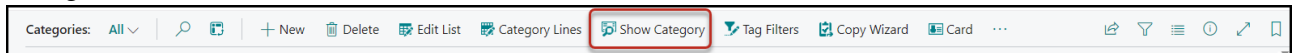
You can see in the **White Paper – TRIMIT Collection Management** how you can setup these **Matrix Limitation Setups**.

Do no show on First Level

The list of Categories can grow over time. To help keeping an overview you can hide (Sub-) Categories in the page **trm Category List (6038121)** by selecting this option.

This page will by default always hide Categories with this Field set to *TRUE*.

Click [Show Category](#) or [Related, Show Category](#) or [Actions, Show All Categories](#) to reveal hidden Categories.



To change the view – adjust filters on Category list page again.

This Field does not affect viewing Categories on Portals.

Alternative Sorting

Instead of the sorting of the Categories according to the Alphabet, you can enter an **Alternative Sorting**, so the Categories in the Category List will be shown according to this **Alternative Sorting**.

This sorting is only related to **Categories** page and does not affect the sorting on Portals. Sorting on e-commerce can be changed on **Category Lines** page. Change requires running the Schedules.

Customer Club Level

Related to B2C Webshop. **Customer Club Level** can be set on the Category. Available options in this Field are *Level 0 – Level 5*. If **Customer Club Level** is set, then this means that only members of this **Customer Club Level** and members of **Customer Club Level** above can see this Category.

Change requires running Schedules.

Collection

In this Field you can enter a **Collection No.** that can be applicable for underlying Category Lines of **Type Collection from Category**.

For more details see [Type](#).

Tag Filter Group

In this Field, you can enter a **Tag Filter Group** to determine which Tag Filters you would like to see in the Product Overview Page of this specific Category.

For more details see [Tag Filters](#).

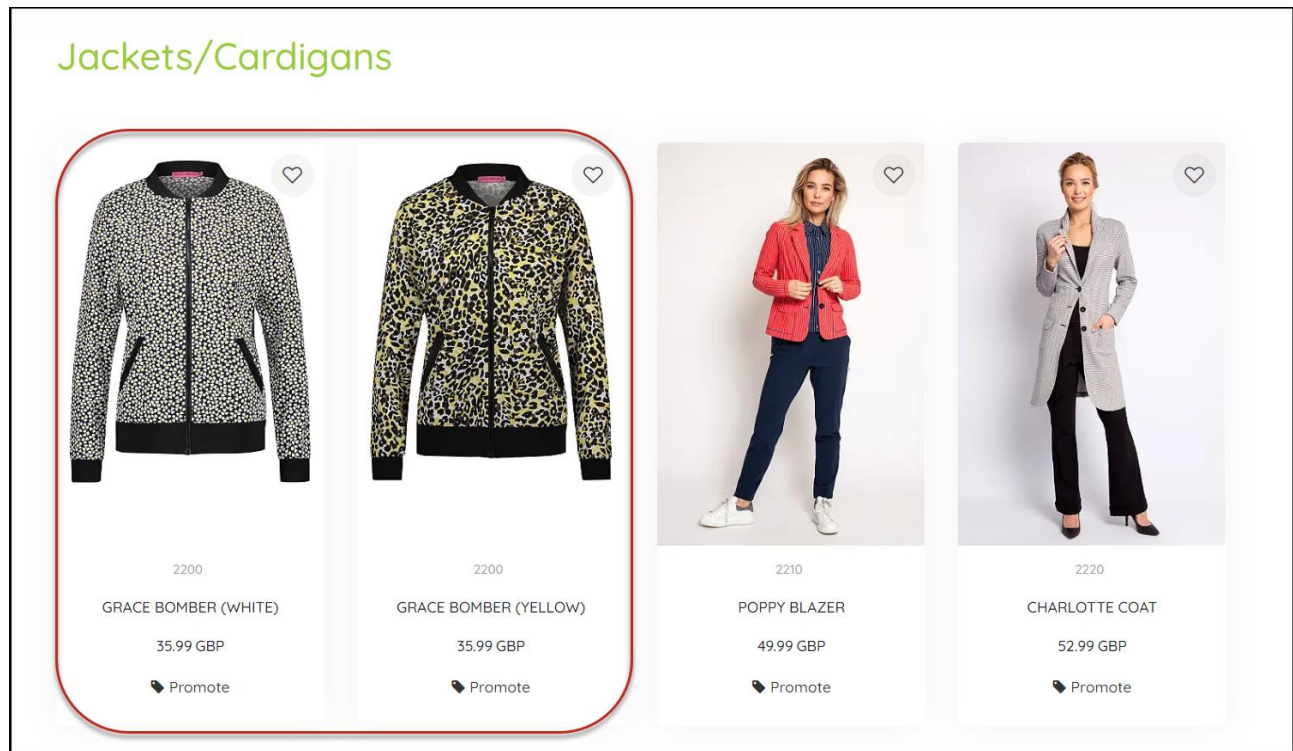
Expand on Overview

Expanding the Overview means that in the Product Overview Page, not the Masters, but the Masters+First Variant (typically the Colors) will be shown.

You can choose between the following three options:

Inherited	The field Expand On Overview from the overlying level will be taken.
Yes	You want the Product Overview Page to show the Master+First Variant Products.
No	You simply want the Master Pictures to be shown in the Product Overview Page.

If set to Yes, it could look as follows:



Google Product Taxonomy ID

This Field indicates the unique Product Group number of Google.

I.e., 5622 for Baby & Toddler Outfits or 4355 for Kitchen & Dining Room Tables.

These IDs can be used for Google Analytics. See [Open Google Product Taxonomy](#)

Category Lines Attached

This Field indicates if there are Category Lines attached to the current Category.

It is automatically updated by the system and non-editable.

Attached to Category Lines

This Field indicates if this Category is attached to a Parent Category.

It is automatically updated by the system and non-editable.

Accessories, Complementary Items, Related Bought Items

These Fields are not shown by default; you can add them via **Personalize**.

The system will put a checkmark if *Accessories*, *Complementary Items* or *Related Bought Items* have been attached to this Category. See [Type](#) for more details.

Use CPO Category Buffer

This Field is not shown by default; you can add it via **Personalize**.

Used in connection to data synchronization between TRIMIT and e-commerce. Set to **TRUE** after running the Action **Pre-Generate Category Data** for the Top-Level Category of the Sales Agent or B2B Webshop, and when running the **Products – Master Choices** Schedule on B2B Webshop.

Tag Filters

Tag Group

Group Codes

🔍

📄

+ New

📋 Edit List

🗑 Delete

🔍 Tag Filters

More options

Code ↑	Description
→ <u>DRESSES</u>	Tags for Dresses
FASHION	Tags for Fashion
FURNITURE	Tags for Furniture

After entering a **Code** and **Description**, you can click **Tag Filters** to determine the applicable Filters for this **Tag Group**.

Tag Management					
🔍 + New Edit List Delete Translations					🔗 ☰
Type		Code ↑	Description		Sorting
Item Attribute		13	TRIMIT_COLOR		1
Item Attribute		15	TRIMIT_GARMENTSTYLE		2
Brand Code			Brand Code		3
Season Code			Season Code		4
Item Group			Item Group		5

Description of the Fields

Type

You can choose the **Type** for filtering.

You can choose between the following **Types**:

Options

🔍 ↘

	Description
→	Item Attribute
1	VarDim Variant
2	Brand Code
	Season Code
	Collection
	Periode Code
	Group Master
3	Design
4	Item Group
5	Gender
6	Item Statistics Group 4
7	Item Statistics Group 5
	Item Category Code
	Product Family

1 and 2 are the names of the **Global Dimension 1** and **2**

3 – 7 are the **Caption Class Setup** for the **Item Statistics Groups 1 - 5**

Code

You can enter a Filter for the **Type** *Item Attribute* and *VarDim Variant*.

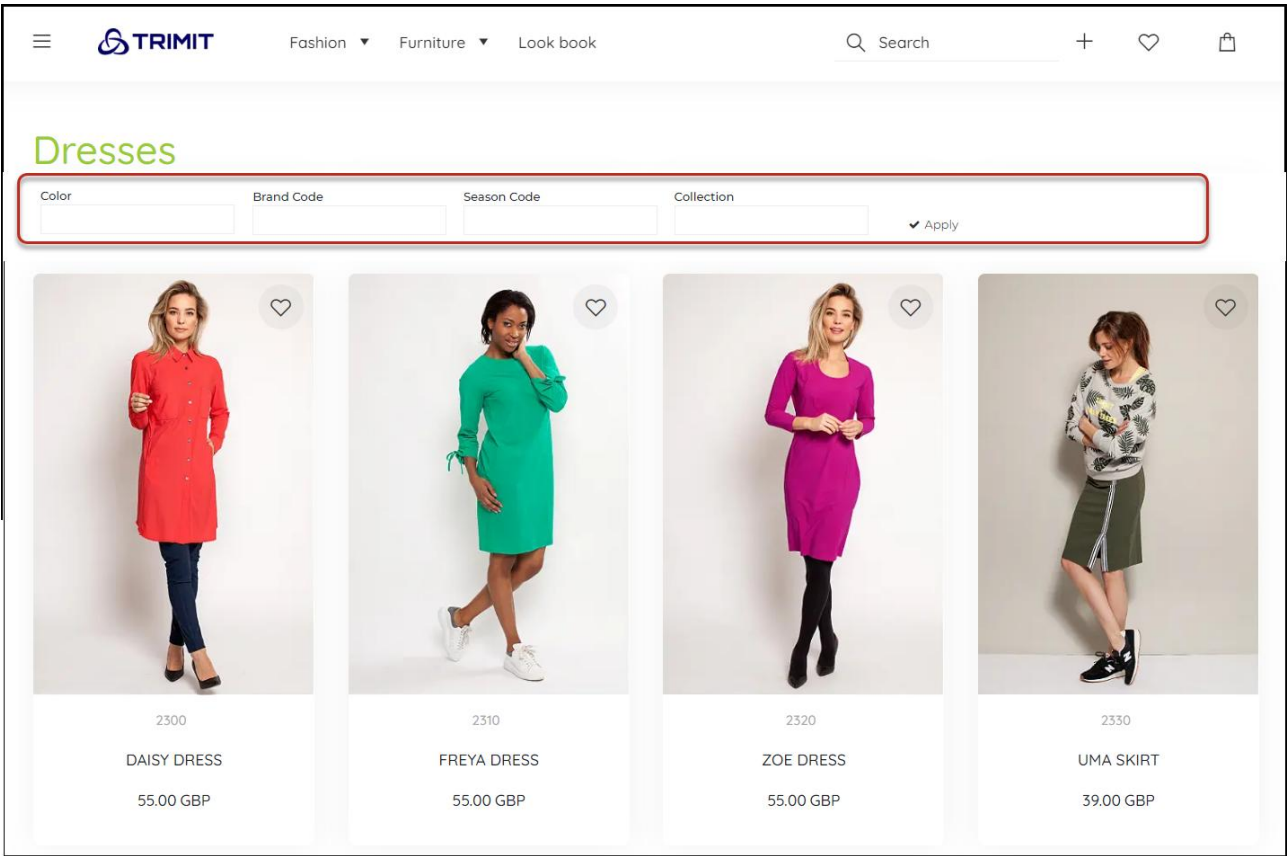
Description

The Description of the **Code** will be shown but can be changed.

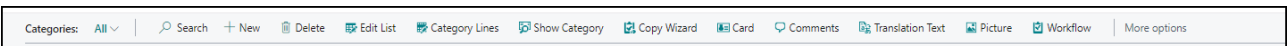
Sorting

Sorting of the Tags, from "o" to "n" (Integer), where "o" is first and "n" is last in the list.

By using the **Tag Filters**, the Product Overview Page could look as follows:



Functions on Categories Page



Category Lines

Opens **Category Lines** page. Here it is possible to create Sub-Category levels and attach Category related Items. This page will be described in detail in [Category Lines](#).

Edit - Category Lines - AGENT

Search

+ New

Edit List

Delete

All Category Lines

More options

Type	No.	Matrix Limitation	Description	Logo Placement	Visual Configuration	Configuration filters Y-axis	Allow Bulk Sale on Webshop	Filter Delivery Period	Category Lines 2	Gift Card	Customer Club Level	Alternative Sorting	Effective Date	Expiry Date	Handle Item as	Sales Status
Category	AGENT_FASHION		Fashion	No	No	Yes	☐		☐	☐	Level 0	0				Sellable
→ Category	AGENT_FURNITURE		Furniture	No	No	Yes	☐		☐	☐	Level 0	0				Sellable

Show Category

This activity will open a graphical presentation of the Category Structure. Often Structures are under development for some time before being published on the web. This feature will help users to work with Structures without having to check content on any website.

On the **Category Tree View** page, it is possible to show and hide all the subcategories by clicking the **Toggle Expand/Collapse All**, but also on every Line, you can click to **Collapse row** or **Expand row**. Clicking **Related Record** opens the Category card for Categories and the Master-/Item card for Masters or Items.

Clicking **Category Line** opens **Category Lines** page for that specific **Category**.

Edit - Category Tree View

Related Record

Category Line

Related

Fewer options

Category Type

Category

Category

Category

Master

Master

Master

Master

Category

Master

Master

Master

Master

Master

Master

Master

No.

AGENT

AGENT_FASHION

AGENT_W_TROUSERS

2000

2010

2020

2030

AGENT_W_TOPS

2100

2110

2120

2130

2600

2610

Description

Fashion

Trousers

Olivia Trousers

Amelia Trousers

Isla Trousers

Ella Trousers

Tops

Lily Blouse

Mia Blouse

Sophia Shirt

Rose Shirt

Helen Blouse

Hope Shirt

Description 2

Matrix Limitation

Alternative Sorting

0

0

0

0

0

0

0

0

0

0

0

0

0

0

Copy Wizard

With this action, you can copy Categories and Category Lines from one Category to another existing Category or to a new Category.

Category Setup

The wizard will guide you through the copy process

Choose Copy Method

Copy to Existing Category ☐

Copy to New Category ☒

Back Next Finish

Category Setup

Copy from Category

No. AGENT

Description Sales Agent Top Level

Set Name for the new Category

No. AGENT-2

Description SA Top SS-CY

Matrix Limitation

Collection SS-CY

Customer Club Level Level 0

Alternative Sorting 0

Do not show on First Level ☐

Back Next Finish

Category Setup

Copy All Lines ☐

Select Lines to Copy ☒

Back Next Finish

With **Select Lines to Copy** you can choose the Category Lines that you want to copy:

Category Lines - AGENT												
Type	No.	Matrix Limitation	Description	Logo Placement	Visual Configuration	Configuration filters Y-axis	Allow Bulk Sale on Webshop	Filter Delivery Period	Cat... Lines	Gift Card	Customer Club Level	Alternative Sorting
→ Category	AGENT_FASHION		Fashion	No	No	Yes	☐		☒	☐	Level 0	0
Category	AGENT_FURNITURE		Furniture	No	No	Yes	☐		☒	☐	Level 0	0

After clicking **Next** again it will show:

Category Setup

Click Finish to complete the copy.

Result Copy 1 line(s) from category AGENT to category AGENT-2

Back Next Finish

After clicking **Finish**, the Category Lines will be copied to the new Category.

Categories: All ▾ Search + New Delete Edit List Category Lines Show Category Copy Wizard Card Comments ...									
No.	Description	Matrix Limitation	Do not show on First Level ▾	Alternative Sorting ↑	Customer Club Level	Collection	Google Product Taxonomy ID	Category Lines Attached	Attached to Category Lines
AGENT_W_JACKETS	Blazers		☐	0	Level 0		0	☒	☒
AGENT_W_TOPS	Tops		☐	0	Level 0		0	☒	☒
AGENT_W_TROUSERS	Trousers		☐	0	Level 0		0	☒	☒
AGENT-2	SA Top SS-CY		☐	0	Level 0	SS-CY	0	☒	☐
B2B	B2B Top Level		☐	0	Level 0		0	☒	☐
B2B_F_CABINETS	Cabinets		☐	0	Level 0		0	☒	☒
B2B_F_CHAIRS	Chairs		☐	0	Level 0		0	☒	☒

Card

Opens the Category card.

Category Card

AGENT

New
Related
Fewer options

Show Category

General

No.

AGENT

Description

Sales Agent Top Level

Description 2

Search Description

SALES AGENT TOPLEVEL

Category Lines Attached

☐

Related Picture ▾

Picture No.

ADD

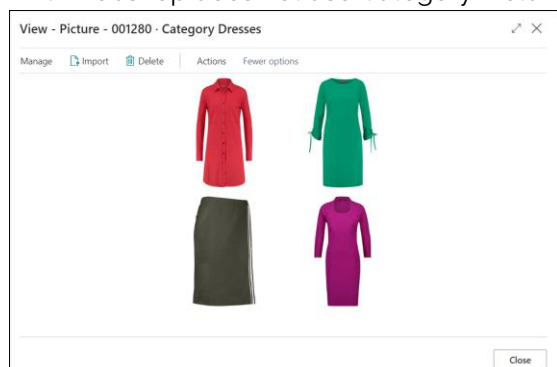
Comments

This function will open the **Comment Sheet** in which you can relate information to the Category. The commentary part is for Business Central only and is not used on any standard TRIMIT Portal. The Date is not mandatory and only an indication on when the Comment was created. The **Comment** holds free text. You can apply a **Language Code** for the language in which the Comment was created.

Comment Sheet				Not saved
Search New Edit List Delete Process More options				
Date	Comment	Language Code		
→ 1-1-2022	This Category Structure is for our Summer Collection of the Sales Agent Portal			

Picture

A Category can have a Picture attached which will be used on TRIMIT Portals. Pictures attached to Categories give a nice "Clickable area" and help the user to understand the content of a Category. Pictures are automatically scaled for web usage. A Category can only hold one Picture. Category Pictures can be applied to Sales Agent and B2B Webshop. B2C Webshop does not use Category Pictures.



Translation Text

User Language may differ on a web page, and you can create Translations for the Descriptions of the Categories, so they respond to the language rules set by a e-commerce solution. **Translation Text** will open the **Translated Text Sheet**. In this worksheet, you can specify per **Language Code** the Translation for **Description** and **Description 2**.

Translated Text Sheet					✓ Saved	🔗	🔗
🔍 Search	+ New	✎ Edit List	🗑 Delete			🔗	🔍
Language Code ↑		Description		Description 2			
→	DAN	⋮	Kjoler				
	DEU		Kleider				
	ENU		Dresses				
	FRA		Robe				
	NLD		Jurken				
	NOR		Kjoler				
	SVE		Klänningar				

Workflow

You can connect Workflow Steps to a Category, the same way as for i.e., Masters.
For this Workflow related to a Category, you can also create a Workflow Template if you like.

Workflow for trm Category: AGENT_W_DRESSES											
🔍 Search	+ New	✎ Edit List	🗑 Delete	📄 Create from Template	📄 Copy	💬 Comments	More options				
Step No.	Depending on Steps	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Closing Date	Closed by Type	Closed By	Assign Status Code	
10	0	Define Category	1-6-2022	User Group	SALES	☐		User			
20	10	Add Masters/Items	6-6-2022	User Group	SALES	☐		User			
30	10	Add Category Picture	6-6-2022	User Group	DESIGN	☐		User			
40	10	Add Category Translations	6-6-2022	User Group	SALES	☐		User			
50	20,40	Add Category to Toplevel	10-6-2022	User Group	SALES	☐		User			
60	50	Add pictures in PIR	17-6-2022	User Group	DESIGN	☐		User			
→ 70	⋮ 60	Check Portal	30-6-2022	User Group	SALES	☐		User			

See **White Paper – TRIMIT Workflows** for more details.

Actions on Categories Page

After clicking **Edit List**:

Categories: All 🔍 📄 + New 🗑 Delete ✎ Edit List 📄 Category Lines 📄 Show Category 🏷 Tag Filters 📄 Copy Wizard 📄 Card 💬 Comments 📄 Translation Text 📄 Picture 📄 Workflow											
Actions ⌵ ...											
No.	Description	Matrix Limitation	Do not show on First Level ▼	Alternative Sorting ↑	Customer Club Level	Collection	Tag Filter Group				
AGENT	⋮ Sales Agent Top Level		☐	0	Level 0			Move Content To	📄	gle Product taxonomy / ID	0
AGENT_F_CABINETS	Cabinets		☐	0	Level 0			Copy Content To	📄		0
AGENT_F_CHAIRS	Cabinets		☐	0	Level 0			Show all Categories	📄		0
AGENT_F_SOFAS	Sofas		☐	0	Level 0			Hide Categories Underlying Levels	📄		0
AGENT_F_TABLES	Tables		☐	0	Level 0			Pre-Generate Category Data	📄		0
AGENT_FASHION	Fashion		☐	0	Level 0	FASHION		Open Google Product Taxonomy	📄		0
								Other	>		0

Move Content To

Allows moving the content of the currently selected Category to another Category.
Clicking this action opens a dialog window. To move the entire content of the Category, click **Yes**.
To select the content of the Category to be moved click **No**.

Copy Content To

This action has the same functionality as **Move Content To** action, but it allows duplicate Category content by copying from a target to destination Category.

Show all Categories

This action will show all Categories.

Hide Categories Underlying Levels

This action applies a filter to the list and will hide all Categories with the Field **Do not show on First Level** set to Yes.

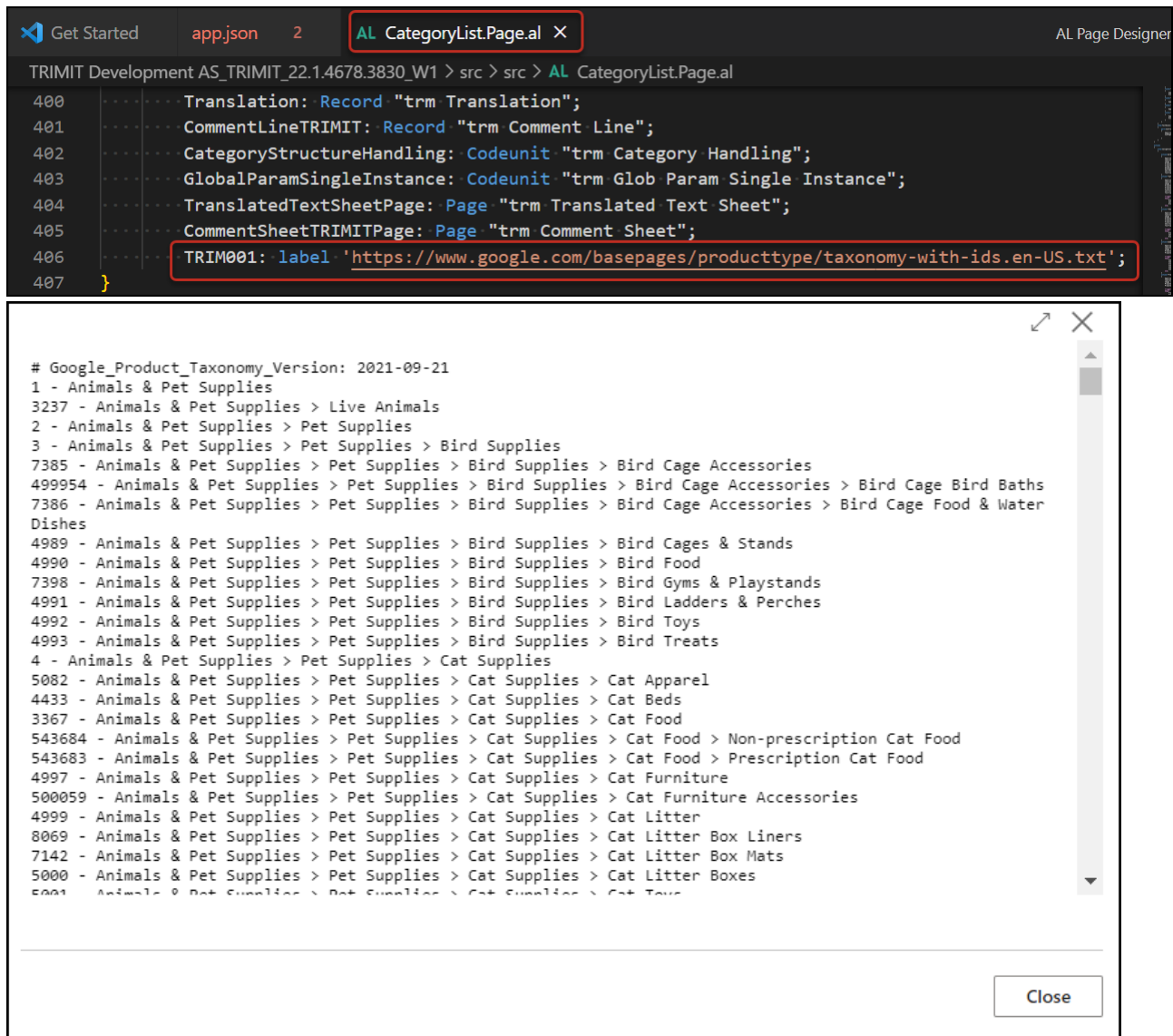
Pre-Generate Category Data

Activates Category Data Generation in connection to Portal's data synchronization.

Otherwise, the Portals will generate it for you when needed for synchronizing the data.

Open Google Product Taxonomy

This will show the list of the Product codes based on **Google Product Taxonomy** based on the following website: <https://www.google.com/basepages/producttype/taxonomy-with-ids.en-US.txt>, which is hard-coded in:



The screenshot shows the AL Page Designer interface. The top bar includes 'Get Started', 'app.json', and '2' tabs. The active tab is 'AL CategoryList.Page.al'. The main editor displays the following code:

```
TRIMIT Development AS_TRIMIT_22.1.4678.3830_W1 > src > src > AL CategoryList.Page.al
400 ..... Translation: Record "trm Translation";
401 ..... CommentLineTRIMIT: Record "trm Comment Line";
402 ..... CategoryStructureHandling: Codeunit "trm Category Handling";
403 ..... GlobalParamSingleInstance: Codeunit "trm Glob Param Single Instance";
404 ..... TranslatedTextSheetPage: Page "trm Translated Text Sheet";
405 ..... CommentSheetTRIMITPage: Page "trm Comment Sheet";
406 ..... TRIM001: label "https://www.google.com/basepages/producttype/taxonomy-with-ids.en-US.txt";
407 }
```

Below the code editor, a window displays a list of Google Product Taxonomy codes and their corresponding categories. The list is as follows:

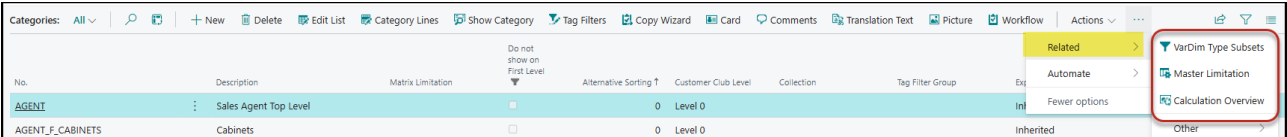
```
# Google_Product_Taxonomy_Version: 2021-09-21
1 - Animals & Pet Supplies
3237 - Animals & Pet Supplies > Live Animals
2 - Animals & Pet Supplies > Pet Supplies
3 - Animals & Pet Supplies > Pet Supplies > Bird Supplies
7385 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Cage Accessories
499954 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Cage Accessories > Bird Cage Bird Baths
7386 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Cage Accessories > Bird Cage Food & Water
Dishes
4989 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Cages & Stands
4990 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Food
7398 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Gyms & Playstands
4991 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Ladders & Perches
4992 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Toys
4993 - Animals & Pet Supplies > Pet Supplies > Bird Supplies > Bird Treats
4 - Animals & Pet Supplies > Pet Supplies > Cat Supplies
5082 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Apparel
4433 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Beds
3367 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Food
543684 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Food > Non-prescription Cat Food
543683 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Food > Prescription Cat Food
4997 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Furniture
500059 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Furniture Accessories
4999 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Litter
8069 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Litter Box Liners
7142 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Litter Box Mats
5000 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Litter Boxes
5001 - Animals & Pet Supplies > Pet Supplies > Cat Supplies > Cat Toys
```

A 'Close' button is located at the bottom right of the list window.

This list can be used to fill the [Google Product Taxonomy ID](#).

Related on Categories Page

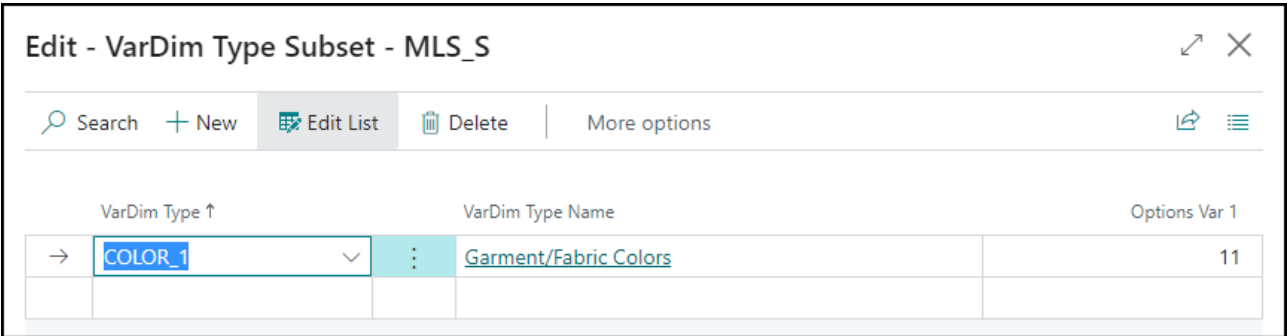
After clicking **Edit List**:



Besides the functions already mentioned in [Functions on Categories Page](#)

VarDim Type Subsets

If you have entered a **Matrix Limitation** for the Category, you can see the **VarDim Type Subset** of this **Matrix Limitation Setup**. I.e., for *MLS_S*:



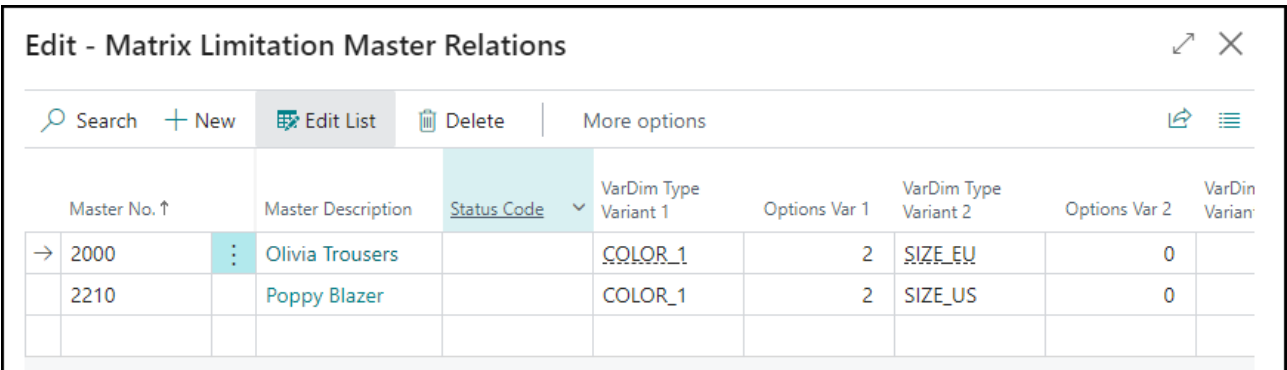
By changing the **VarDim Type Subset**, it will affect all Masters with these specific **VarDim Types** throughout the whole Category Structure of this specific Category.

Note

How to setup the **VarDim Type Subsets** for a **Matrix Limitation** can be seen in detail in the **White Paper – TRIMIT Collections**.

Master Limitation

If you have entered a **Matrix Limitation** for the Category, you can see the **Matrix Limitation Master Relations** of this **Matrix Limitation Setup**. I.e., for *DROP1*:



By changing the **Master Relations**, it will affect these Masters throughout the whole Category Structure of this specific Category.

Note

How to setup the **Master Relations** for a **Matrix Limitation** can be seen in detail in the **White Paper – TRIMIT Collections**.

Calculation Overview

This can be found in the **Category Card** via **Related**, or you need to show it via **Personalize** in the **Categories List**.

The image shows two parts of the software interface. On the left is a 'Category Card' for 'AGENT'. It has tabs for 'New', 'Related' (selected), 'Automate', and 'Fewer options'. A dropdown menu is open under 'Related', showing options like 'Category Lines', 'VarDim Type Subsets', 'Master Limitation', 'Comment', 'Translation Text', 'Picture', 'Workflow', 'Pre-Generate Category Data', 'Pre-Generate Matrix Data', and 'Calculation Overview' (highlighted with a red box). On the right is a 'Categories List' for 'CRONUS TRIMIT W1 Ltd.'. It has tabs for 'All', 'Related' (selected), 'Automate', and 'Fewer options'. A table lists categories: 'AGENT' (Sales Agent Top Level), 'AGENT_F_CABINETS' (Cabinets), 'AGENT_F_CHAIRS' (Cabinets), and 'AGENT_F_SOFAS' (Sofas). A dropdown menu is open for the 'AGENT' row, showing 'VarDim Type Subsets', 'Master Limitation', 'Calculation Overview' (highlighted with a red box), and 'Other'. A 'Move' button is visible next to 'Calculation Overview', and a red text label 'Via Personalize' is shown.

Opens **Calculation Overview** page related to the Masters in the Category.
See **White Paper – TRIMIT Calculations** for more details.

In the Category Card, you can also add the field **Calculation Template** via **Personalize**.

Category Lines

This page shows a Structure in which you can create Sub Levels and add Masters / Items related to a Level.

Edit - Category Lines - B2B_W_JACKETS																	
Search + New Edit List Delete All Category Lines Related Fewer options																	
Type	No.	Matrix Limitation	Expand On Overview	Description	Logo Placement	Visual Configurati...	Configurati... filters Y-axis	Allow Bulk Sale on We...	Filter Delivery Period	Cat... Lines 2	Gift Card	Customer Club Level	Alternative Sorting	Effective Date	Expiry Date	Handle Item as	Sales Status
→ Matrix	2200		Yes	Grace Bomber	No	No	Yes	☐		☐	☐	Level 0	0			Matrix	Sellable
Matrix	2210		Inherited	Poppy Blazer	No	No	Yes	☐		☐	☐	Level 0	0			Matrix	Sellable
Matrix	2220		Inherited	Charlotte Coat	No	No	Yes	☐		☐	☐	Level 0	0			Matrix	Sellable
Matrix	2230		Inherited	Jessica Coat	No	No	Yes	☐		☐	☐	Level 0	0			Matrix	Sellable

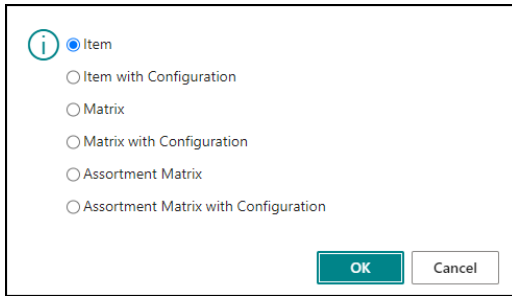
Description of the Fields

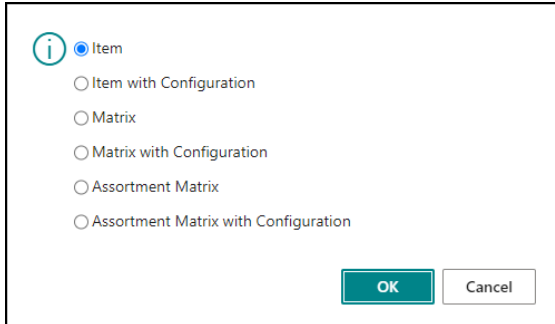
Type

In this Field, you can select which **Type** of Category line you want to create.

You can choose between the following options:

User Defined Category	With this Type you can create a level which can carry a Sub Structure. This is an alternative to creating a Category and will only be a Structure Level in the current Category. Example is the creation of a Category called <i>Fashion</i> and under that you want to divide into <i>Men</i> and <i>Women</i>.
Category	With this Type, you can select an already defined Category as a Sub Structure. This enables the usage of Categories in many levels and different Category Structures.
Item	With this Type, you can select a flat Item. An Item Level has no Sub Levels directly. Via Related/Next Level the system will automatically present the possibility to create only 1 level under this Item Category Line of the Subtype: <i>Accessories, Complementary Items, or Related bought Items.</i> i Accessories Complimentary Items Related bought Items. OK Cancel These options are used on the B2C and B2B Webshops to promote Masters/Items under the specified conditions.
Matrix	With this Type you can only select Masters with an attached Matrix. The standard Sales Agent/B2B will navigate to a specific product page which handles Matrix Sales. In the B2C framework a Matrix is transformed into selection of the Y- and X-Axis. In most cases a selection of Color and Size. A Matrix Level has no Sub Levels directly. Via Related/Next Level the system will automatically present the possibility to create only 1 level under this Matrix Category Line of the Subtype: <i>Accessories, Complementary Items, or Related bought Items.</i>

Assortment Matrix	With this Type you can only select Masters with related Assortments. The Assortment Items will be shown in a Matrix. An Assortment Matrix Level has no Sub Levels directly. Via Related/Next Level the system will automatically present the possibility to create only 1 level under this Assortment Matrix Category Line of the Subtype: <i>Accessories, Complementary Items, or Related bought Items</i>.
Create Variant Combinations	With this Type you can select Masters. The Structure level itself will at runtime automatically create and show all Valid Combinations as Items. A Create Variant Combinations Level has no Sub Levels directly. Via Related/Next Level the system will automatically present the possibility to create only 1 level under this Create Variant Combinations Category Line of the Type: <i>Accessories, Complementary Items, or Related bought Items</i>. NOTE: If at runtime the possible Combinations are hundreds or more – performance may decree.
Collection	With this Type you can select Collections. All Masters/Items related to the Collection will automatically be populated at runtime. When a Collection has been selected you must choose the way the Items are to be sold.  This selection will also be filled in Handle Item as. The chosen Collection will also be filtered based on the Filters in the Category Line Card, FastTab Collection Filters
Global Dimension 1, 2)	These Types allows runtime filtering on Global Dimension Codes. All Items/Masters related to the selected Global Dimension Codes Value will be shown on this Category Structure Level. As Options for the Type you will see the Description based on the Global Dimension 1 and 2 (in the demo company <i>Brand Code</i> and <i>Season Code</i>).
Statistics Group 1, 2, 3, 4, 5	These Types allows filtering on Item Statistics Group Values. At runtime, the Category level is populated either by Items or Masters with the related value. As Options for the Type you will see the Description based on the Caption Class Setup (in the demo company <i>Design, Item Group, Gender, Item Statistics Group 4, Item Statistics Group 5</i>
Period Code	This Type allows filtering on a specific Shipment Date Code. All Items/Masters related to the Shipment Date Code are inserted at the Category level.
Collection from Category	This Type allows you to automatically take the Collection from a higher Category – in the Category Structure. This means, that if the Collection would change, you do not have to change all the

	Category Lines but can simply change the Collection on the highest level, and this will also influence the lower levels with Type Collection for Category. You still need to choose one of the following options – just as with Type Collection.  This selection will also be filled in Handle Item as.
Items Filtered	This will filter Items based on the filled Filters in the Category Line Card , FastTab General Master/Item Filters .
Masters Filtered	This will filter Masters based on the filled Filters in the Category Line Card , FastTab General Master/Item Filters .

Note 1

Be aware that using *Collection*, *Global Dimension* or *Statistics Groups* as a Type on a **Category Line** makes certain restrictions on portals. That is, it will not be possible to use alternative sorting on Master or Item level on the Category which uses Collection, Global Dimension, or Item Statistics group.

Note 2

Be aware that portals do not support Items without related Masters: a flat Item should always have a Master.

No.

Based on the selected **Type** this Field should be filled and the lookup will show accordingly views. I.e., if the **Type** is set to *Matrix* the lookup is filtering on Masters which have a related Matrix or if the **Type** is set to *User Defined Category* the **No.** is free Text. The different lookups are specified above.

Matrix Limitation

This Field will determine which Colors/Sizes/etc. of the Master will be shown on the Portal.

If the **Type** is *Collection*, the **Matrix Limitation** will be filled with the **No.** of the Collection because of the way of filtering the Masters/Colors/Sizes/etc. for the Portals.

In that case, the Field **Matrix Limitation Relation** – a Field that is not in the page by default – will also be set correctly to *Collection* and will therefore influence the lookup in the Field **Matrix Limitation**: the list of Collections.

If the **Type** is *Shipment Group*, the **Matrix Limitation** will be filled with the **No.** of the Shipment Group because of the way of filtering the Masters/Colors/Sizes/etc. for the Portals.

In that case, the Field **Matrix Limitation Relation** – a Field that is not in the page by default – will also be set correctly to *Shipment Group* and will therefore influence the lookup in the Field **Matrix Limitation**: the list of Shipment Groups.

If the **Type** is not *Collection* or *Shipment Group*, you can enter a **Matrix Limitation Setup**.

I.e.: If the Category is "Summer 2023" the **Matrix Limitation Setup** can determine that only the Colors 100-200 can be used and shown on the Portals for all Masters.

If the Category is "Winter 2023" the **Matrix Limitation Setup** can determine that only the Colors 150-250 can be used and shown on the Portals for all Masters.

This means that you do not have to set the Color filters on every Category Line with a Master individually but can simply enter the **Matrix Limitation Setup** in which you already determined your Filters.

Note

How to setup the **Matrix Limitation Setups** is described in detail in the **White Paper – TRIMIT Collections**.

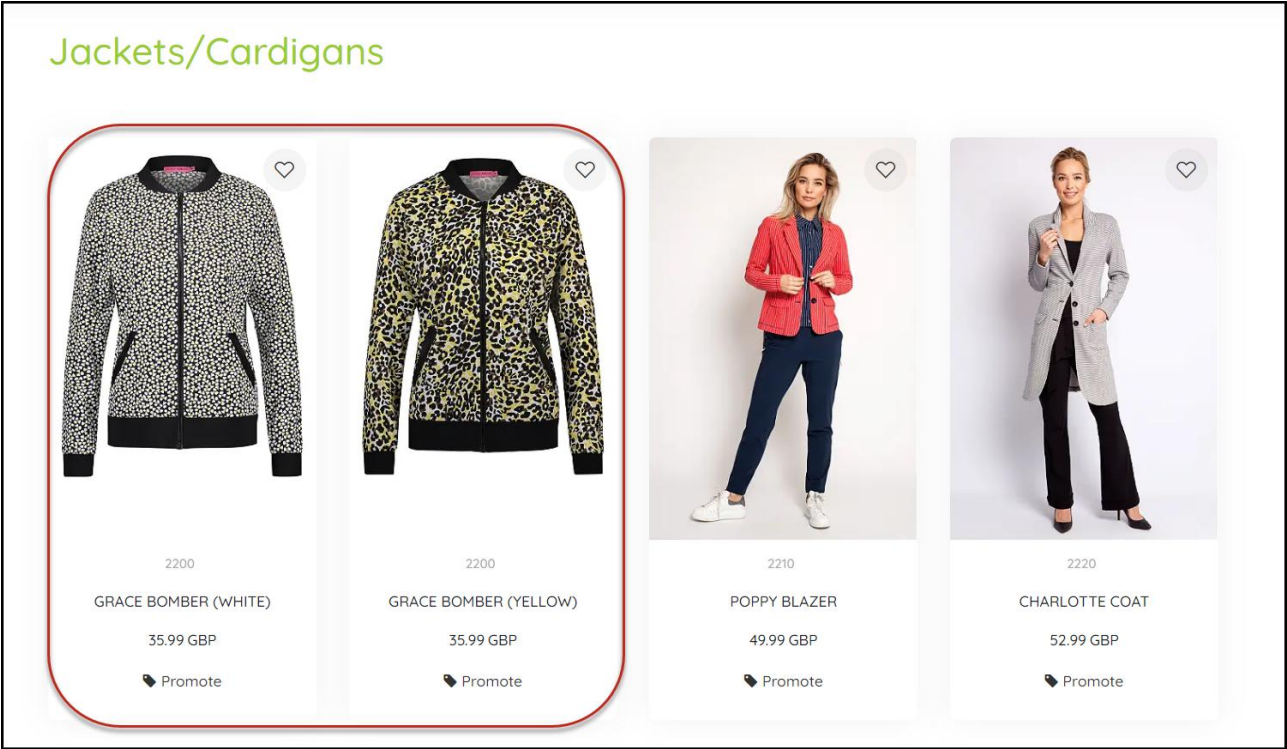
Expand on Overview

Expanding the Overview means that in the Product Overview Page, not the Masters, but the Masters+First Variant (typically the Colors) will be shown.

You can choose between the following three options:

Inherited	The field Expand On Overview from the overlying level will be taken.
Yes	You want the Product Overview Page to show the Master+First Variant Products.
No	You simply want the Master Pictures to be shown in the Product Overview Page.

If set to Yes, it could look as follows:



Description

This Field is populated from the selected **No.**

If the **Type** is *Matrix* and the **No.** is a Master, the Description Field is automatically inheriting the Description from the Master.

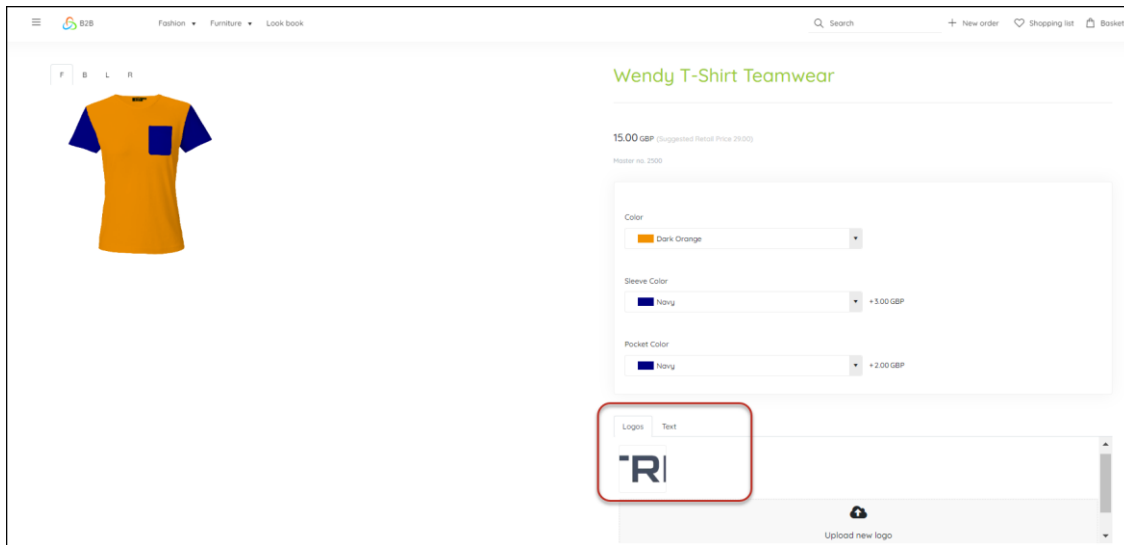
This **Description** is only used in the Structure if no Description is found on the **No.** itself.

If a Translation is requested, the search for a Translation is done on the **No.** itself.

I.e., if the Category Structure is called specifying a preferred Language, then on all Structure Levels the search for a Translation is carried out on the related **Master Data** (Category, Item or Master).

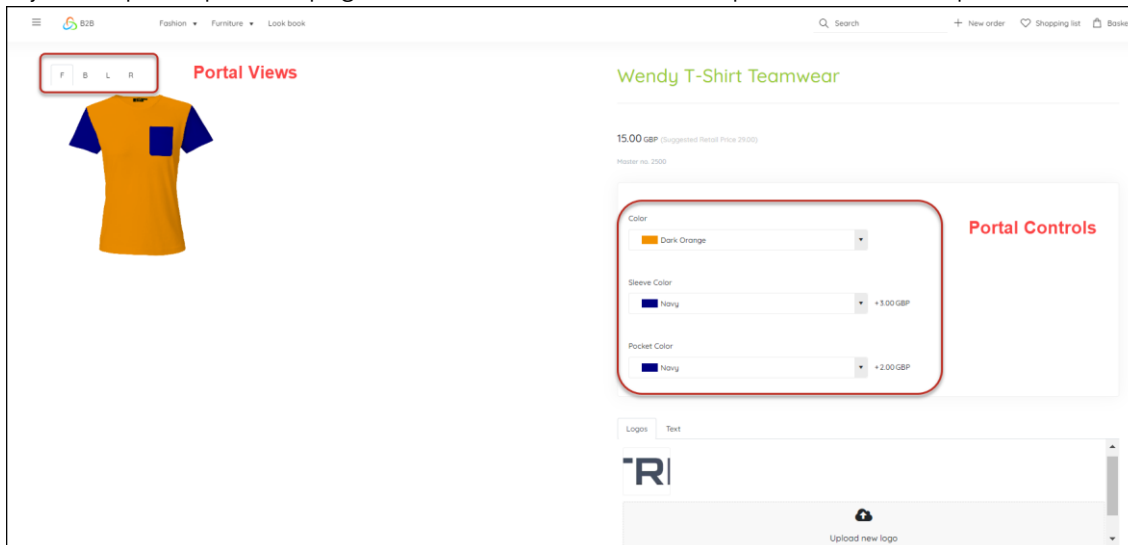
Logo Placement

Related to [Visual Configuration](#). If set to Yes, then it will be possible to use **Logo Placement** and **Text** functionality on corresponding portal Product page. This option takes affect when Category Line **Type** is set to *Matrix*.



Visual Configuration

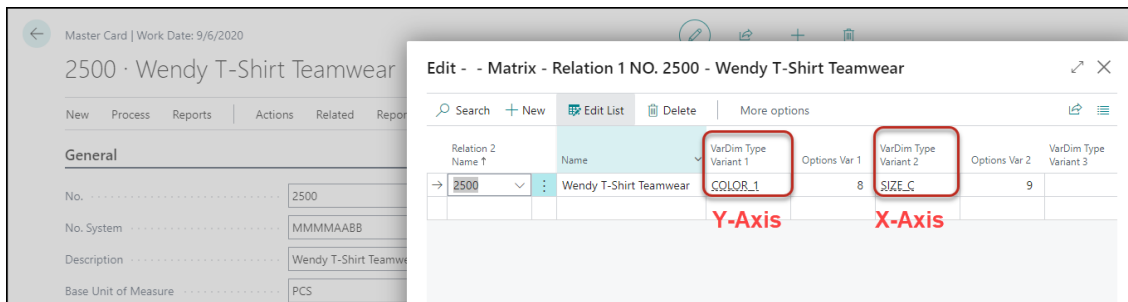
Related to product visual configuration. If set to Yes, then it will be possible to view product views and layers on portal product page and see visual reflection of options selected in portal controls.



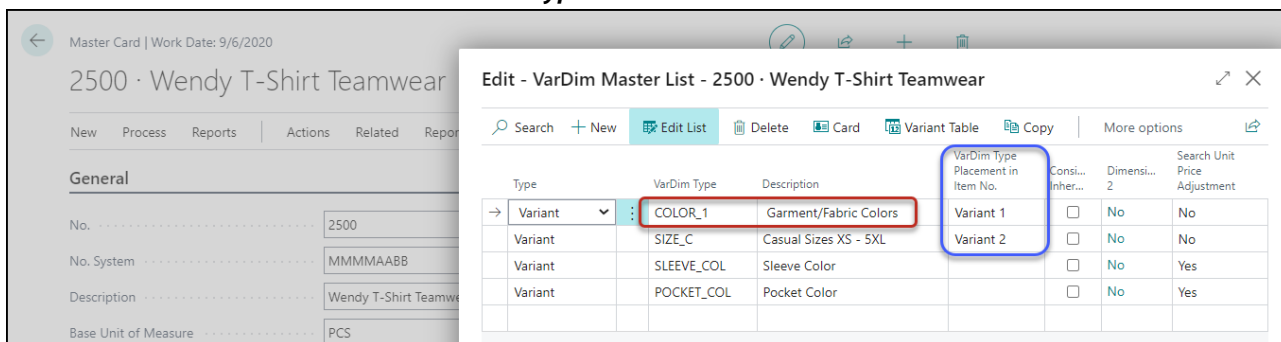
Configuration Filters Y-axis

If the value is set to Yes, then product Matrix, on portals Product page, will display only the VarDim Types (i.e., Color) in the **Portal Controls** which are related to Y-Axis and the VarDim Types that are not related to the Y-Axis or the X-Axis.

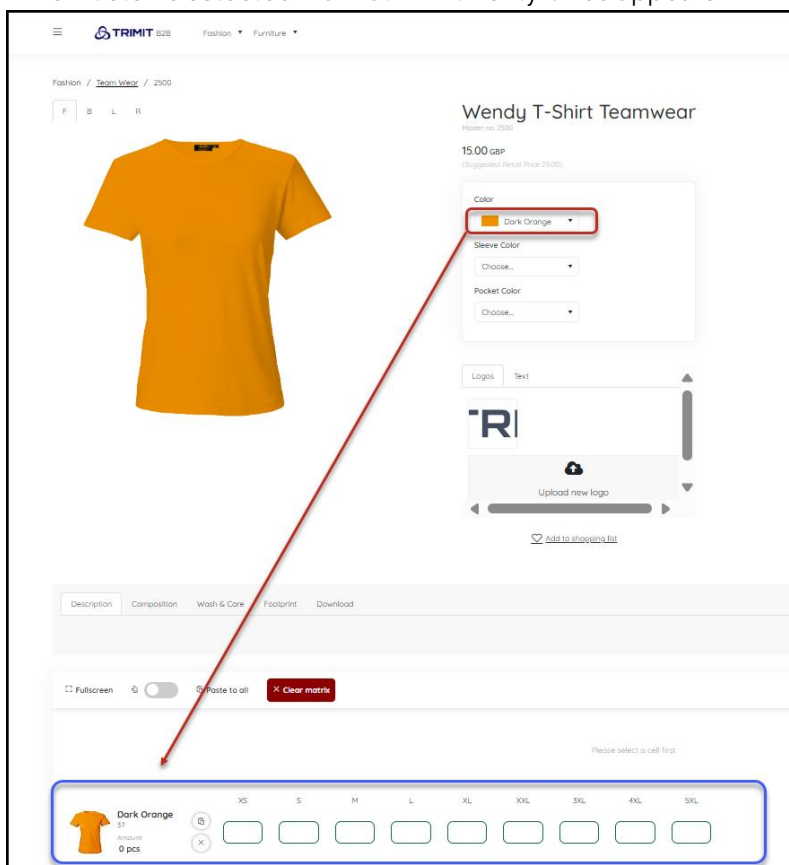
I.e., everything but the last VarDim Type in the **Matrix - Relation 1** List of the Master (via **Actions, Matrix, Matrix, Matrix**):



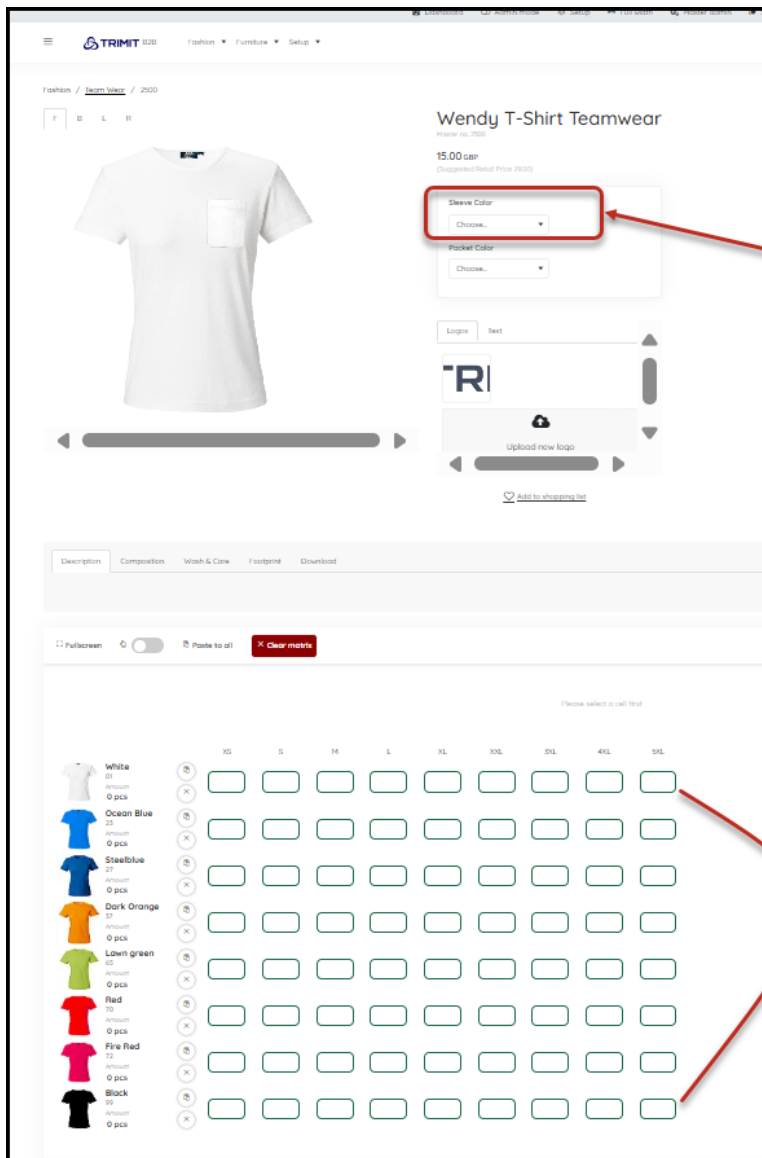
Setup in VarDim Master List (via Master List/Card, **Process, VarDim Master**).
 Color (COLOR_1) is set to Variant 1 in **VarDim Type Placement in Item No** column.
 Sizes (SIZE_C) is set to Variant 2 in **VarDim Type Placement in Item No** column.



Portal Product page.
 I.e., the **Color** Portal Control allows selection of a Color from a drop down.
 When Color is selected – a matrix with only Sizes appears:



When **Configuration Filter Y-axis** Field set to No, then the Product matrix will display all the relevant VarDim Types (i.e., Colors and Sizes) and Portal Control **Color** will not be shown:



Portal Control *Color* is not shown

Color is now the Y-Axis shown

Allow Bulk Sale on Webshop

Only applicable for the B2C Webshop.

If set to *TRUE*, the B2C User can buy Items via a Matrix instead of buying it by selecting the Variants individually.

Filter Delivery Period

If **Type** is set to *Collection* and the Collection has differentiated Items for different Delivery Periods, the content can be detailed to showing only Items belonging to the Collection with the chosen filter for Delivery Periods in this Field.

Category Lines 2

This Field shows if the current Category Line has content on the Next Level.

It is a non-editable Field and automatically updated by the system.

Gift Card

Related to B2C Webshop. Should be set to *TRUE* if the Item is a Gift Card. They are handled differently on the Portals as the regular Items.

Customer Club Level

Related to B2C Webshop. Available options in this Field are *Level 0 – Level 5*.

If **Customer Club Level** is set, then this means that only members of this **Customer Club Level** and members of higher **Customer Club Levels** can see the content this Category Line.

Change requires running Portals Schedules.

Alternative Sorting

A Category Structure is normally created top down on every Level. However, you can change the order in which the Levels are displayed, simply by applying **Alternative Sorting** values. The Field accepts integers and will sort records ascending.

Effective Date

In a Structure, you can set individual Lines to only be visible from a given Date. This enables an administrator to work with and create Structures in advance towards an upcoming sales season.

Expiry Date

A Structure level can have an **Expiry Date** which effectively removes it at runtime if the Date is exceeded.

Handle Item as

This Field specifies how the Item(s) is presented on a Web page. Also, it will do implicit filtering at runtime. Consider that a Collection holds a Master which has Matrix Relations but the Master itself also represents Items which are the specifics of a Color and Size.

If the Category Line specifies **Handle Item As Matrix**, the Masters themselves are shown.

If set to **Handle Item As Item**, the runtime generation will find all the Items under the related Masters and display these Items in the Category List.

You can choose between the following options:

Value	Description	Available for
Blank	This option does not indicate a Sales Method. Not valid if the Category Line is in fact representing a Master/Item directly or a level that is at runtime replaced by an Item List.	
Item	This option indicates that it is an Item known by its unique number. This Item can be sold straight out of the box with no further needed information/configuration.	SA, B2B, B2C
Item With Configuration	This product is an Item that must be configured. This will indicate that a VarDim Order is attached at selling point.	SA, B2B, B2C
Matrix	This option will indicate that the Master must be sold as a Matrix. On TRIMIT Portals the product page applies the Matrix with normal TRIMIT rules showing all valid combination.	SA, B2B, B2C
Assortment Matrix	This option specifies that the Master is sold as a Matrix showing all Assortment combinations.	SA, B2B
Matrix With Configuration	This product is a Master with Matrix and must be configured. This will indicate that a VarDim Order is attached at selling point.	SA, B2B
Assortment With Configuration	This product is a Master with Assortment Matrix and must be configured. This will indicate that a VarDim Order is attached at selling point.	SA, B2B

NOTE

Setting the correct **Handle Item As** is particularly important. Standard TRIMIT Portals will malfunction if an Item or a Master is set to be sold in an illogical manor. If in doubt always test the behavior on the intended Portal.

Sales Status

With this Field you can determine if this Category Line can be bought on the Portals (*Sellable*) or if it will only show the Products – which cannot be bought yet i.e. (*Only show*).

It works on the Category Lines for **Type Matrix**, *Item* and *Collection*, but not for **Type Category**.

Change of **Sales Status** requires data synchronization and clear/disable cache on TRIMIT e-commerce sites.

Description of the Fields not Visible by Default

These Fields could be added via **Personalize**.

Parent No.

Shows the Parent Category (Line) in the Structure.

Description 2

This Field is populated from the selected **No.**, under the same conditions as **Description**.

Portal Code

Code which the CSS on the Portal page can react upon. The Code is your own choice which you then coordinate with the CSS/HTML developer, who can change the Code in the CSS to react accordingly. Read more in **White Paper – TRIMIT Campaign Customization**.

Related on Category Lines page

Edit - Category Lines - B2B_W_JACKETS

Search + New Edit List Delete All Category Lines Related Fewer options

Type	No.	Matrix Limitation	Expand On Overview	Descr	Logo Placement	Visual Configurati...	Configurati... filters Y-axis	Allow Bulk Sale on We...	Filter Delivery Period	Cat... Lines	Gift Card	Customer Club Level	Alternative Sorting
→ Matrix	2200		Inherited	Grac	No	No	Yes	☐		☐	☐	Level 0	0
Matrix	2210		Inherited	Pop	No	No	Yes	☐		☐	☐	Level 0	0
Matrix	2220		Inherited	Char	No	No	Yes	☐		☐	☐	Level 0	0
Matrix	2230		Inherited	Jessi	No	No	Yes	☐		☐	☐	Level 0	0

Category Card

Next Level

Matrix Limitation Setup

Comment

Translation Text

Picture

Move Content To

Copy Content To

Other >

All Category Lines

Use short menu

Category Line Card

This will open the Card of the **Category Line**.

Category Line Card

Category · AGENT_W_TOPS · None · 10000

General

No. 2100Handle Item as Matrix

Collection Filters

Filter Collection Type GeneralFilter Delivery PeriodFilter Collection Group No.

General Item/Master Filters

Brand FilterSeason FilterDesign FilterItem Group FilterGender FilterItem Statistics Group 4 FilterItem Statistics Group 5 FilterFilter Item Category CodeAdditional InfoAdditional Info FilterGeneric Filters

Filter Collection Type

Only applicable for Category Lines with **Type Collection**.
Items/Masters related to a Collection can have a specific **Type** which defines the Collection intent. The valid options are *General*, *Samples*, and *CPO*. This Field will filter out specific **Types** from a given Collection.

Option *General* will not show the Masters/Items that have been connected to a Collection via **Related, Samples Master Relations** or **Related, Samples, Sample Delivery Periods**.
Option *Samples* will only filter the Masters/Items that have been connected to a Collection via **Related, Samples Master Relations** or **Related, Samples, Sample Delivery Periods**.

Collection Card

SPECIALS

Master Relations

Delivery Periods

VarDim Type Subsets

Actions

Related

Automate

Fewer options

General

Collection No. SPECIALSDescription SpecialsBrand CodeSeason CodeStatus Code IDEAPrivate LabelVarDim Type Subset

Calculation TermWorkflow TempFirst Start SalesLast Start SalesCollection Variant Opti...master varDim Pos./Neg. ListCollection Sorting 1

Collections

Samples

Workflow

Calculation Overview

Private Label

Translations

Sample Master Relations

Sample Delivery Periods

Option *CPO* is not implemented.

TRIMIT

WHITE PAPER: CATEGORY MANAGEMENT
Date: October 24, 2025
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Page 26

Filter Collection Group No.

Only applicable for Category Lines with **Type Collection**.

Items/Masters related to a Collection can have a **Group Code** (which is not by default shown in the **Collection/Master Relations** page) which you can use for filtering and thereby only show a subset from a Collection.

Filter Delivery Period

Only applicable for Category Lines with **Type Collection**.

You will only see the **Delivery Periods** that are connected to a chosen **Collection** in the lookup.

Items/Masters related to a Collection can be filtered based on the Delivery Period of the Collection.

Filter Global Dimension 1

Only applicable for Category Lines with **Type Collection** or **Collection from Category**.

Set a Global Dimension 1 Filter to get an Item/Master subset from the Collection of this Category Line.

(Shown as *Brand Filter* in our TRIMIT Demo Company)

Filter Global Dimension 2

Only applicable for Category Lines with **Type Collection** or **Collection from Category**.

Set a Global Dimension 2 Filter to get an Item/Master subset from the Collection of this Category Line.

(Shown as *Season Filter* in our TRIMIT Demo Company)

Item Statistics Group Filter

Using the **Item Statistics Group** for filtering will create the matching subset of Items/Masters.

(Shown as *Design Filter* in our TRIMIT Demo Company based on Caption Class Setup).

Item Statistics Group 2 Filter

Using the **Item Statistics Group 2** for filtering will create the matching subset of Items/Masters.

(Shown as *Item Group Filter* in our TRIMIT Demo Company based on Caption Class Setup).

Item Statistics Group 3 Filter

Using the **Item Statistics Group 3** for filtering will create the matching subset of Items/Masters.

(Shown as *Gender Filter* in our TRIMIT Demo Company based on Caption Class Setup).

Item Statistics Group 4 Filter

Using the **Item Statistics Group 4** for filtering will create the matching subset of Items/Masters.

Item Statistics Group 5 Filter

Using the **Item Statistics Group 5** for filtering will create the matching subset of Items/Masters.

Filter Item Category Code

Using the **Item Category Code** for filtering will create the matching subset of Items/Masters.

Additional Info

You can enter a VarDim Type that is used for the **Additional Info** of the Items/Masters, and this will filter the matching subset based on the **Additional Info Filter**.

Additional Info Filter

You can enter the Value of a VarDim Type set in **Additional Info** for filtering to create the matching subset of Items/Masters.

I.e., **Additional Info** is set to *SLEEVE_LEN (Sleeve Length)* and **Additional Info Filter** is set to *0.5 (Half Sleeve)*. Therefore, for the current Category Line, it will filter on all Items/Masters that have **Additional Info** for the Sleeve Length set to Half Sleeve.

Generic Filters

Only applicable for **Type** *Items Filtered* or *Masters Filtered*.

You can enter Filters on any field of the **Item** if **Type** is *Items Filtered* (1).

You can enter Filters on any field of the **Master** if **Type** is *Masters Filtered* (2).

The image shows two screenshots of the 'Filter Page' interface. Screenshot 1, labeled with a red circle '1', is titled 'Filter: Item'. It contains two dropdown menus: 'No.' with the value '21*' and 'Item Group' with the value '100..199'. Below these are two '+ Filter...' buttons and a 'Filter totals by:' section with another '+ Filter...' button. At the bottom are 'OK' and 'Cancel' buttons. Screenshot 2, labeled with a red circle '2', is titled 'Filter: Master'. It features a '+ Filter...' button, a 'Filter totals by:' section with another '+ Filter...' button, and 'OK' and 'Cancel' buttons at the bottom right.

For Example, 1, the field **Generic Filters** will then be filled with:

The image shows a 'General Item/Master Filters' section with two columns of filter fields. The first column includes 'Brand Filter', 'Season Filter', 'Design Filter', 'Item Group Filter', 'Gender Filter', and 'Item Statistics Group 4 Filter'. The second column includes 'Item Statistics Group 5 Filter', 'Filter Item Category Code', 'Additional Info', 'Additional Info Filter', and 'Generic Filters'. The 'Generic Filters' field is highlighted with a red box and contains the text 'No: 21*, Item Statistics Group 2: 100..199'.

Note

Be aware that applying Filters can create a slow Category generation on the Portals.

Matrix Limitation Relation

Set automatically after the **Type** is selected. It has the following options: *Matrix Limitation Setup*, *Collection* and *Shipment Group*.

Next Level

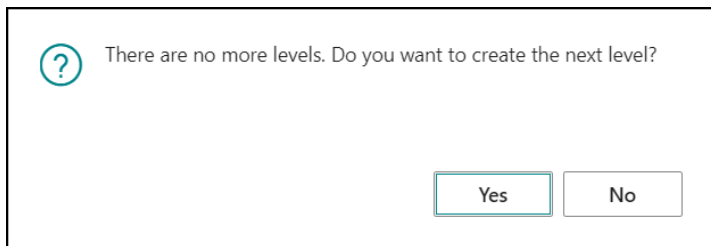
This action will take you to the next Level with relationship to the current **Category Line**.

If the current Category Line represents an Item/Master directly or indirectly the next Level can only be *Accessories*, *Complimentary Items* or *Related bought Items*.

The image shows a 'Next Level' dialog box with three radio button options: 'Accessories' (selected), 'Complimentary Items', and 'Related bought Items'. At the bottom are 'OK' and 'Cancel' buttons.

In that case, the **Subtype** field of the Category Line will be filled with the choice you made. This field can be added to the page of the Category Lines when using Personalization.

If the current level is of **Type** *User Defined Category* or *Category*, the **Next Level** action will take the user to the next Level in the tree Structure. If a Level under the current Level does not exist, the user is prompted to accept the creation of *Next Level*.



There are no more levels. Do you want to create the next level?

Yes No

Matrix Limitation Setup

If the **Matrix Limitation** of the Category Line is of **Matrix Limitation Relation** *Matrix Limitation Setup*, this action will show the **Matrix Limitation Master Relations**.

Comment

This will open the **Comment Sheet** in which you can relate information to the Category Line. These Comments are not used in the Portals, but only for Business Central.

Translation Text

User Language may differ on a web page, and you can create Translations for the Descriptions of the Category Lines, so they respond to the language rules set by a Portal solution. **Translation Text** will open the **Translated Text Sheet**. In this worksheet, you can specify per **Language Code** the translation for **Description** and **Description 2**.

Picture

A Category Line can have a Picture attached which will be used on TRIMIT Portals. Pictures attached to Category Lines give a nice "Clickable area" and help the user to understand the content of a Category Line.

Pictures are automatically scaled for web usage. A Category Line can only hold one Picture. Category Line Pictures can be applied to Sales Agent portal and B2B Webshop. B2C Webshop does not use Category Pictures.

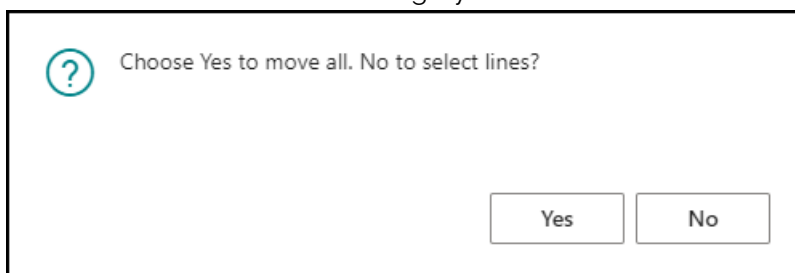
Move Content To

Allows moving the content of the selected Category to another Category.

Even when standing on a Matrix Category Line, it would copy all Category Lines of the current Category!!

Clicking this action opens a dialog window. To move the entire content of the Category, click **Yes**.

To select the content of the Category to be moved click **No**.



Choose Yes to move all. No to select lines?

Yes No

Clicking **Yes** or **No** opens a new window **Choose Destination Category**. Select the destination Category and click **OK**:

Choose Destination category. | 🔍 + New 🗑 Edit List ...

No.	Description	Matrix Limitation	Do not show on First Level	Alternative Sorting	Customer Club Level	Collection	Go Pro Taxon
AGENT_W_ACCESS	Accessories		☐	0	Level 0		
AGENT_W_DRESSES	Dresses/Skirts		☐	0	Level 0		
AGENT_W_JACKETS	Blazers		☐	0	Level 0		
AGENT_W_TOPS	Tops		☐	0	Level 0		
AGENT_W_TROUSERS	Trousers		☐	0	Level 0		
AGENT_W_CARDIGANS	Cardigans		☐	0	Level 0		

OK Cancel

If all Category content must be moved, then there will be a confirmation window as follows:

? 2 Lines will be moved from AGENT_W_DRESSES to AGENT_W_TOPS. Continue?

Yes No

After clicking **Yes**, the content will be moved to selected destination Category.

If user selected to move a part of the Category content, then after clicking **No** in the first dialog window and selecting a destination Category in **Choose Destination Category** window user will be prompted to select the Category Lines to be moved in window **Category Lines**:

Category Lines - AGENT_W_DRESSES | 🔍 + New 🗑 Edit List ...

Type	No.	Matrix Limitation	Description	Logo Placement	Visual Configuration	Configuration filters Y-axis	Allow Bulk Sale on Webshop
☒ Statistics Group 2	155		Dresses	No	No	Yes	☐
☐ Statistics Group 2	230		Skirts	No	No	Yes	☐

OK Cancel

After clicking **OK** there will be shown a confirmation dialog window. To confirm the content moving click **Yes**.

? 1 Lines will be moved from AGENT_W_DRESSES to AGENT. Continue?

Yes No

Copy Content To

This action has the same functionality as **Move Content To** action, but it allows duplicate Category content by copying from a target to destination Category.

All Category Lines

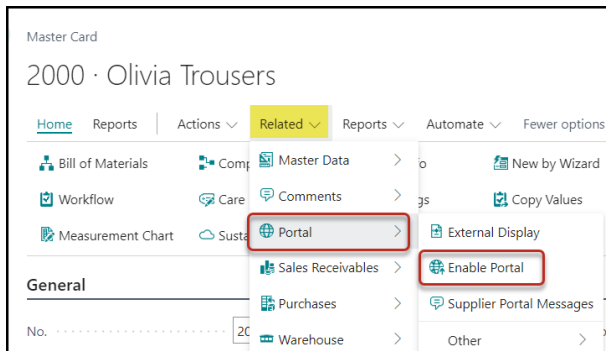
This action will show **all** Category Lines without any Filters.

This enables the user to easily change data over all the Category Lines.

Category Lines Work Date: 9/6/2020										
Search Edit List Delete More options										
Parent No. ↑	Parent Type ↑	Type	No.	Matrix Limitation	Description	Logo Placement	Visual Configurati...	Configurati... filters Y-axis	Allow Bulk Sale on	Filter Delivery Period
→ AGENT	Category	Category	AGENT_FASHION		Fashion	No	No	Yes	☐	
AGENT	Category	Category	AGENT_FURNITURE		Furniture	No	No	Yes	☐	
AGENT_F_CABINETS	Category	Item	3300		Storage Cabinet Nemesis	No	Yes	Yes	☐	
AGENT_F_CHAIRS	Category	Item	3000		Chair Zeus	No	Yes	Yes	☐	
AGENT_F_CHAIRS	Category	Item	3010		Chair Hades	No	Yes	Yes	☐	
AGENT_F_CHAIRS	Category	Item	3020		Chair Poseidon	No	Yes	Yes	☐	
AGENT_F_SOFAS	Category	Item	3200		Sofa Helios 2 Seater	No	Yes	Yes	☐	
AGENT_F_SOFAS	Category	Item	3210		Sofa Helios 3 Seater	No	Yes	Yes	☐	
AGENT_F_SOFAS	Category	Item	3220		Sofa Apollo 2.5 Seater	No	Yes	Yes	☐	
AGENT_F_SOFAS	Category	Item	3230		Sofa Apollo 3 Seater	No	Yes	Yes	☐	
AGENT_F_TABLES	Category	Item	3100		Dining Table Artemis	No	Yes	Yes	☐	
AGENT_F_TABLES	Category	Item	3110		Side Table Hera	No	Yes	Yes	☐	
AGENT_F_TABLES	Category	Item	3120		Coffee Table Athena	No	Yes	Yes	☐	
AGENT_FASHION	Category	Category	AGENT_W_TROUSERS		Trousers	No	No	Yes	☐	
AGENT_FASHION	Category	Category	AGENT_W_TOPS		Tops	No	No	Yes	☐	
AGENT_FASHION	Category	Category	AGENT_W_JACKETS		Blazers	No	No	Yes	☐	

Enable Portal from Master

In the **Master Card/List**, there is an action **Enable Portal** under **Related, Portal**.



This action allows attaching a Master to a portal Category through **Attach to Category** window:

Edit - Attach 2000 to Category - AGENT

Item to Attach

Item(s) to Attach: 2000

Select Type

Item: ☐ Matrix with Configuration: ☐ Create Variant Combinations: ☐

Item with Configuration: ☐ Assortment Matrix: ☐

Matrix: ☐ Assortment Matrix with Configuration: ☐

Dates

Effective Date: Expiry Date:

Choose Category

Exist in Category	Attach	No. ↑	Description	Description 2
☐	☐	AGENT_W_TOPS	Tops	
☒	☐	AGENT_W_TROUSERS	Trousers	
☐	☐	B2B	B2B Toplevel	
☐	☐	B2B_F_CABINETS	Cabinets	
☐	☐	B2B_F_CHAIRS	Chairs	
☐	☐	B2B_F_SOFAS	Sofas	

OK Cancel

Description of the Fields

Items(s) to attach

Current Master number will be filled automatically.

It can also have the text *MULTIPLE*, if this page is used to connect multiple Items/Masters at the same time.

Select Type

Fields in this area define the Category Line **Handle Item as** which is suitable for the Item or Master. Available options are *Item*, *Item with Configuration*, *Matrix*, *Matrix with Configuration*, *Assortment Matrix*, *Assortment Matrix with Configuration* and *Create Variant Combinations*.

System automatically determines appropriate options.

It is mandatory to choose one of the **Types**.

Effective Date

This Date specifies from when the Item/Master or bundle should be visible in the Category.

Expiry Date

This Date specifies when the Item/Master or bundle should stop showing in the Category.

Choose Category area contains a list of all portal Categories.

Description of the Fields

Exist in Category

Shows if Item or Master is attached to the **No.** Category. Does not have values when attaching multiple Lines at once.

Attach

This Field is a selection on which Category the Item/Master or multiple Items/Masters should be attached to. You can choose one Category or multiple Categories.

No.

This is the unique Category Code.

Description, Description 2

These Fields show the **Description** and **Description 2** of the Category.

Note

Items without a Master are not supported by TRIMIT B2C Webshop.

This is also possible on individual Item List/Cards via:

Item Card

22000108 · Grace Bomber

Home Item Prices & Discounts Actions Related Reports Fewer options

Composition Sustainability Addition History Adjust Inventory Apply Template

Care Label Additional Info Addition Item Identifiers Product Information (PIR)

Item

No. 22000108 Availability Item References

Description Grace Bomber Purchases Units of Measure

Description 2 White,8 Sales Pictures Mixed (5)

Blocked ☐ Production Item Charge Jackets (140)

Type Inventory Warehouse Pop-up Women (110)

Base Unit of Measure PCS Portal External Display

Item Category Code Extended Texts Enable Portal

Item/Master Translation Supplier Portal Messages

Other Other

Enable Portal from Item

In the **Item Card/List**, there is also an action **Enable Portal** under **Related, Item, Portal**. This works the same way as described in [Enable Portal from Master](#), but of course the options for **Select Type** are now limited to **Item**.

Item Card

20002036 · Olivia Trousers

Home

Item

Prices & Discounts

Actions

Related

Reports

Automate

Fewer options

Composition

Additional Info

Care Label

Additional Tags

Sustainability

Additional Comments

History

Item

Availability

Purchases

Sales

Production

Warehouse

Stockkeeping Unit

Identifiers

Item References

Units of Measure

Pictures

Item Charge

Pop-up

Portal

Extended Texts

Item/Master Translation

Other

Image Management

Item Profile

Materials

External Display

Enable Portal

Supplier Portal Messages

Other

Item

No.20002036

DescriptionOlivia Trousers

Description 2Royal Blue,36

Blocked

TypeInventory

Base Unit of MeasurePCS

Item Category Code

Gender

Item Statistics Group

Item Statistics Group

Exclude from Collection

Details

Attachments (0)

Marketing Text

Edit

Select Edit to add text

Product Information (PIR)

Image Management

Forecast

AI generated

Use short menu

Inventory

Show more

Attach 20002036 to Category - AGENT

Item to Attach

Item(s) to Attach20002036

Select Type

Item

Item with Configuration

Matrix

Matrix with Configuratio...

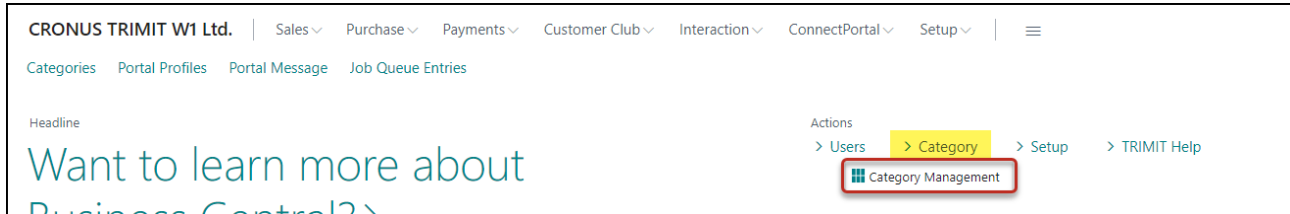
Assortment Matrix

Assortment Matrix wit...

Create Variant Combin...

Category Management Tool

To make setup of the Category Structure easier, we also provide a Tool called **Category Management**. In the Role Center **Portal Administrator**, it can be found via **Category, Category Management**. Otherwise via **Tell me Category Management**.



This Tool helps creating an overview seen from Item level. It is an effortless way to see which Items are related and which are not. It inserts filtered bulk Items into Categories.

Item Type	No.	Attached to Category	Master No.	Master Attached to Category	Description	Description 2	Brand Code	Season Code	Item Category Code	Design	Item Group	Gender	Item Statistics Group 4	Item Statistics Group 5
Finished Goods	21009903		2100	3	Lily Blouse	Black,M	FASHION	02-SUMMER		1	110	110	0	20
Finished Goods	21009904		2100	3	Lily Blouse	Black,L	FASHION	02-SUMMER		1	110	110	0	20
Finished Goods	21009905		2100	3	Lily Blouse	Black,XL	FASHION	02-SUMMER		1	110	110	0	20
Finished Goods	21009906		2100	3	Lily Blouse	Black,XXL	FASHION	02-SUMMER		1	110	110	0	20
Finished Goods	21009907		2100	3	Lily Blouse	Black,3XL	FASHION	02-SUMMER		1	110	110	0	20
Master Item	2100	3	2100	3	Lily Blouse		FASHION	02-SUMMER		1	110	110	0	20
Finished Goods	21103001		2110	4	Mia Blouse	Yellow,XS	FASHION	02-SUMMER		5	110	110	0	20
Finished Goods	21103002		2110	4	Mia Blouse	Yellow,S	FASHION	02-SUMMER		5	110	110	0	20
Finished Goods	21103003		2110	4	Mia Blouse	Yellow,M	FASHION	02-SUMMER		5	110	110	0	20

Parent No.	Type	No.	Description	Description 2	Effective Date	Expiry Date	Alternative Sorting	Category Lines
ASSET_WL_TOPS	Matrix	2100	Lily Blouse				0	☐
82B_W_TOPS	Matrix	2100	Lily Blouse				0	☐
82C_W_TOPS	Matrix	2100	Lily Blouse				0	☐

The Main list shows all Items in the Company. The list is non-editable.

Description of the Fields

Item Type

This Field shows the **Item Type** value.

Values can be: *Finished Goods, Semi-Finished Goods, Raw Materials, Master Item.*

No.

This is the Item number.

Attached to Category

This is a Flow Field which is system updated. It shows the number of Categories in which the Item is directly represented. Note that Structures in which the Item is indirectly represented are not counted. If an item is attached accessories, then the parent Item Level will be listed as well.

Master No.

This shows the Master of the Item.

Master Attached to Category

This Field is a Flow Field which is system updated. It shows the number of Categories in which the Master of the Item is in.

The rest of the Fields are inherited from the **Item** card.

The FastTab **Lines** shows the Categories in which a specific Item (or Master) can be found. The Fields in the list are inherited from the Category Lines and are described previously in this document.

Lines		Manage							
Parent No.	Type	No. ↑	Description	Description 2	Effective Date	Expiry Date	Alternative Sorting	Category Lines	
AGENT_W_TOPS	Matrix	2100	Lily Blouse				0	☐	
B2B_W_TOPS	Matrix	2100	Lily Blouse				0	☐	
B2C_W_TOPS	Matrix	2100	Lily Blouse				0	☐	

Actions on Category Management

Search

Attach Line to Category

Attach Selected Lines to Category

Actions

Related

Fewer options

Attach Line to Category

Attach Selected Lines to Category

Attach Line to Category

Use this function to attach a specific Item to a Category the same way as in [Enable Portal from Master](#). If the Item is of **Item Type Master Item**, it means that the Master will be attached to the Category.

Attach Selected Lines to Category

This function will insert all Items or Masters that have been selected to a given Category the same way as in [Enable Portal from Master](#).

Related on Category Management

Search

Attach Line to Category

Attach Selected Lines to Category

Actions

Related

Fewer options

Selected Category Lines

Category List

Selected Category Lines

Shows the **Category Lines** to which the Item (or Master) is connected directly. Here it is possible to Manage the Item occurrences in Category Structure by deleting Lines. If there are no Category Lines connected directly, you will get a Message. I.e.:

The field No. of table Category Line contains a value (2330) that cannot be found in the related table (Category).

Was this information helpful?

☐ Yes

☐ No

OK

Category List

This will open the **Category List**. For information on this page see [Category](#).

Attach Multiple Lines to a Category

As described previously the Main list in **Category Management** page shows all Items/Masters. The Fields are inherited from the Item card and are the most used Fields to classify and group Items. To bundle multiple Items and attach them to a specific Category in one go, you can set filters as follows and view lines in Item list, after which you can easily select them via **Select more**.

Category Management | Work Date: 9/6/2020

Search Attach Line to Category Attach Selected Lines to Category Actions Related Fewer options

Views **All**

Filter list by:

- Item Type: Master Item
- Season Code: 02-SUMMER
- Item Group: 110

+ Filter... Reset filters

Item Type	No. ↑	Attached to Category	Master No. ↑	Master Attached to Category	Description	Description 2	Brand Code	Season Code	Item Category Code	Design	Item Group	Gen
Master Item	2100	3	2100	3	Lily Blouse	—	FASHION	02-SUMMER		.1	.110	.1
Master Item	2110	4	2110	4	Mia Blouse	—	FASHION	02-SUMMER		.5	.110	.1
Master Item	2120	3	2120	3	Sophia Shirt	—	FASHION	02-SUMMER		.5	.110	.1
Master Item	2600	4	2600	4	Helen Blouse	—	FASHION	02-SUMMER		.1	.110	.1
Master Item	2610	3	2610	3	Hope Shirt	—	FASHION	02-SUMMER		.5	.110	.1
Master Item	2620	3	2620	3	Hazel Shirt	—	FASHION	02-SUMMER		.5	.110	.1
Master Item	2640	3	2640	3	Heaven Shirt	—	FASHION	02-SUMMER		.5	.110	.1

After you have selected multiple Items, you can use the action **Attach Selected Lines to Category** in the same way as in [Enable Portal from Master](#) but on the Field **Item(s) to Attach** you will see **MULTIPLE ITEMS**.

Edit - Attach 2000 to Category - AGENT

Item to Attach

Item(s) to Attach: **MULTIPLE ITEMS**

Select Type

Item: ☐ Matrix with Configuration: ☐ Create Variant Combinations: ☐

Item with Configuration: ☐ Assortment Matrix: ☐

Matrix: ☐ Assortment Matrix with Configuration: ☐

Dates

Effective Date: Expiry Date:

Choose Category

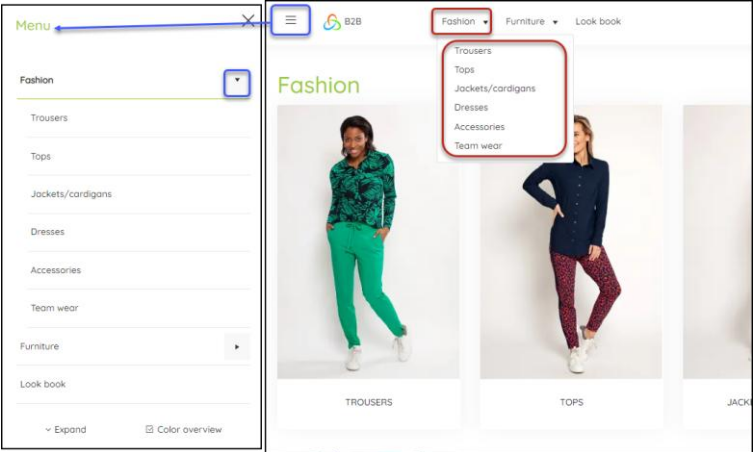
Exist in Category	Attach	No. ↑	Description	Description 2
☐	☐	AGENT_W_TOPS	Tops	
☒	☐	AGENT_W_TROUSERS	Trousers	
☐	☐	B2B	B2B Toplevel	
☐	☐	B2B_F_CABINETS	Cabinets	
☐	☐	B2B_F_CHAIRS	Chairs	
☐	☐	B2B_F_SOFAS	Sofas	

OK Cancel

Attaching a Structure to Users

Setting up Category Structure for Portals

On standard TRIMIT Portals it is possible to show Categories as a drop-down menu or as a tree menu. This chapter will go through the basic steps for setting this up.



Any Category Structure used on a standard TRIMIT Portal has one important condition that the Top Level (also often called the Root) is not shown. The Top Level is only used for reference when a Structure is attached in various contexts. Consider that if you want to build a specific Category Structure for a Sales Agent Group the Top-Level Category would express the entity relationship rather than the content.

Categories: All Search + New Delete Edit List Category Lines Show Category Copy Wizard Card Comments											
No.	Description	Matrix Limitation	Do not show on	Accessories	Complementary Items	Relat. Bought Items	Altern. Sorting ↑	Customer Club Level	Collecti...	Google Product Taxonomy ID	Category Lines Attached
AGENT	Sales Agent Toplevel		☐	☐	☐	☐		0 Level 0		0	☒
AGENT_F_CABINETS	Cabinets		☐	☐	☐	☐		0 Level 0		0	☒
AGENT_F_CHAIRS	Chairs		☐	☐	☐	☐		0 Level 0		0	☒
AGENT_F_SOFAS	Sofas		☐	☐	☐	☐		0 Level 0		0	☒
AGENT_F_TABLES	Tables		☐	☐	☐	☐		0 Level 0		0	☒
AGENT_FASHION	Fashion		☐	☐	☐	☐		0 Level 0		0	☒
AGENT_FURNITURE	Furniture		☐	☐	☐	☐		0 Level 0		0	☒

Sales Agent Top Level on **Category Tree View** (click **Show Category** in the Categories List)

Edit - Category Tree View						
Related Record Category Line More options						
Category Type	No.	Description	Description 2	Matrix Limitation	Alternati- Sortir	
Category	AGENT					
Category	AGENT_FASHION	Fashion				
Category	AGENT_W_TROUSERS	Trousers				
Master	2000	Olivia Trousers				
Master	2010	Amelia Trousers				
Master	2020	Isla Trousers				
Master	2030	Ella Trousers				
Category	AGENT_W_TOPS	Tops				
Category	AGENT_W_JACKETS	Jackets/Cardigans				
Category	AGENT_W_DRESSES	Dresses				
Category	AGENT_W_ACCESS	Accessories				
Category	AGENT_TEAM	Team Wear				
Category	AGENT_FURNITURE	Furniture				
Category	AGENT_F_CHAIRS	Chairs				

Attaching a Structure in the Portal Profile

In the **Portal Profile** you can enter a **Category Structure**. This is the Top Level for you Category Structure.

You can find the **Portal Profiles** in the Role Center *Portal Administrator* or via **Tell me Portal Profiles**.

CRONUS TRIMIT W1 Ltd.

SalesPurchasePaymentsCustomer ClubInteractionConnectPortalSetup

CategoriesPortal ProfilesPortal MessageJob Queue Entries

Portal Profiles: All			Search	New	Delete	Edit List	More options
Code	Type	Description					
AGENT	SalesAgent	Sales Agent Basic Setup					
AGENT_FASH	SalesAgent	Sales Agent Fashion Setup					
AGENT_FURN	SalesAgent	Sales Agent Furniture Setup					
B2B	BusinessToBusiness	B2B Basic Setup					
B2B_FASH	BusinessToBusiness	B2B Fashion Setup					
B2B_FURN	BusinessToBusiness	B2B Furniture Setup					
B2C	BusinessToConsumer	Webshop Basic Setup					

On the **Portal Profile** card set the needed Root Category into **Category Structure** Field under FastTab *Item*.

EditSales Agent Portal Profile - AGENT

ManageOrder Type SetupCustomer Templates SetupPageRelatedFewer options

Item

Category StructureAGENT

Calculate Prices in Item Menu

Availability Check MethodNo

Inventory Profile SetupSALESAGENT

Hide Available Qty.

Hide Availability Markers

Show Available Dates asDate

Set Item Shipment Date

Allow Change of Shipment Date on Sales...

Allow Change of Delivery Period

Price Info on MatrixNone

Campaign Calc. LevelModel

Setting up a **Category Structure** relationship on the Portal Profile means that all users who are connected to this Portal Profile will have this specific Category Structure for navigation.

Attaching a Structure in the Portal User

By attaching a **Portal Profile** to a Portal User, you also determine the **Category Structure** that is applicable for the Portal User.

You can find the **Portal Users** via the Role Center *Portal Administrator* or via **Tell me Portal Users**.

CRONUS TRIMIT W1 Ltd.

SalesPurchasePaymentsCustomer ClubInteractionConnectPortalSetup

CategoriesPortal ProfilesPortal MessageJob Queue Entries

Headline

This is Business Central running with the TRIMIT App

Actions

UsersCategorySetupTRIMIT Help

Portal UsersB2B Relationship AuthorizationCreate B2B Authorization Code

kbi@trimit.com | Work Date: 9/6/2020 ✓ Saved

User Relationship Management Search Edit List Delete Actions Related Fewer options

Relationships

General

Status Filter Related

Status	User information	Relationships	Profile	Last Login	Last Synchronized	ConnectPortal Domain
→ Related		7	B2B B2C B2C-INSTORE SUPPLIER AGENT_FASH INSITE	6/23/2022 2:51 PM	4/8/2022 3:09 PM	

Via **Related, Relationships** you can determine the applicable **Portal Profile** for a Portal User, and therefore the **Category Structure** of the **Portal Profile** will determine the Category Structure this specific Portal User will see in the Portal.

Edit - User Relationship List - Customer 2000 ↗ ✕

Search + New Edit List Delete More options

Type ↑	No.	Name	Profile ↑	Creation Date	Token Avail...	Token Created Date
→ Customer ▾	2000	Customer 2000	B2B	4/8/2022 3:09 PM	☐	
Customer	CW00041	Kitty Bisseling	B2C	4/8/2022 3:09 PM	☐	
Customer	2000	InstoreCustomer	B2C-INSTORE	4/8/2022 3:09 PM	☐	
Vendor	2300	Vendor 2300	SUPPLIER	4/8/2022 3:09 PM	☐	
Salesperso...	JR	John Roberts	AGENT_FASH	4/8/2022 3:09 PM	☐	
Business C...	KBI@TRIMIT....	kbi@trimit.com		4/8/2022 3:09 PM	☒	4/8/2022
Business C...	KBI@TRIMIT....	InSite User	INSITE	4/8/2022 3:09 PM	☒	4/8/2022

Attaching a Structure in the Order Type

To increase the dynamic use of Categories it is possible to attach a Category Structure not only to the Portal Profile itself but also to a specific **Order Type**.

The Order Type **Category** (Structure) Field will override the one set on the Portal Profile.

You can find the **Order Types** via **Tell me Order Types**.

On the **Order Type** card, you can set a specific **Category** relationship on FastTab **Portal**

Order Type Card | Work Date: 9/6/2020 ✎ ↗ + ✕ ✓ Saved

SA

Related

Portal

Category AGENT	Instant ASI Posting ☐
Show on Web ☒	Posting Lines Threshold
CPO Availability Check Method Available	Disable Signature in Checkout ☐
Create Web Orders as Order	Skip Credit Card Payment ☒

Appendix

Here you can find examples of using Category Management features.

Filter Items in Portals Categories

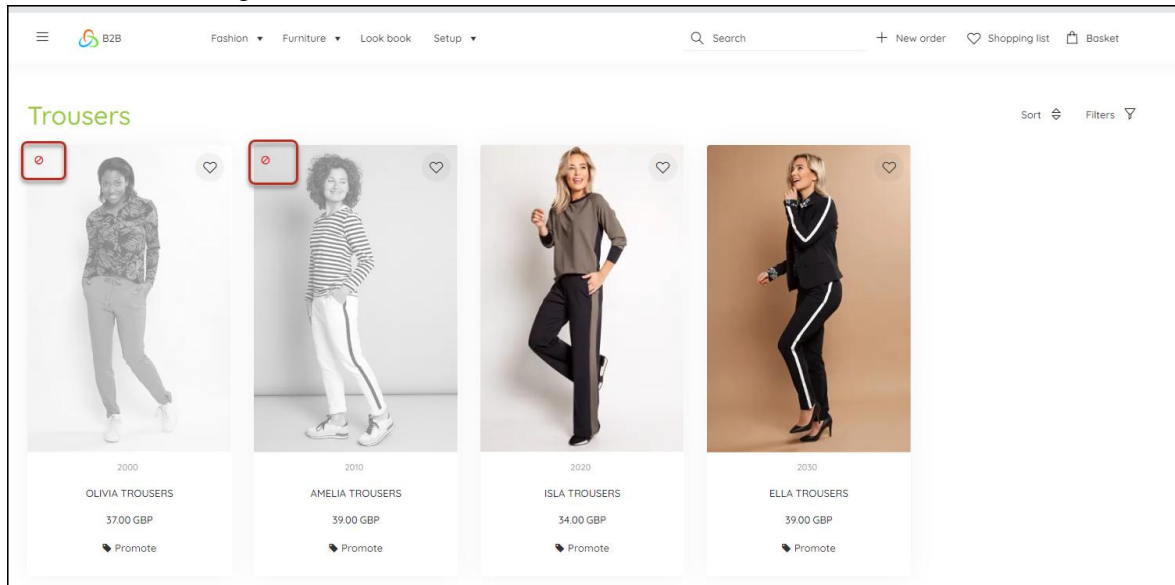
Here is described a way to set a Filter on Items being synchronized with the TRIMIT Portals. If an admin user needs to work with Items on Portal, but these Items should be hidden from ordinary Portal Users, then here is how this can be done in TRIMIT (use one of the approaches):

- Create a new Portal Profile in TRIMIT and attach a new Category Structure to it. The Category Structure should contain Items which must be hidden from ordinary Portal Users. Assign this new Portal Profile to an admin user. Now only admin user will be able to view and work with these specific Items.
- Make needed Masters/Items published or unpublished in Product Information Repository (PIR), in this way they are only visible for admin users.

The top screenshot shows the PIR Dashboard with the 'Products' menu. The 'Publish/Unpublish Masters' option is highlighted with a red box. The bottom screenshot shows the 'Publish/Unpublish Masters' page. It features a search bar and a table with columns for 'External', 'B2C', 'B2B', and 'SA'. The 'B2B' column is highlighted with a red box, and the 'SA' column is highlighted with a blue box. The table lists items with IDs 2000, 2010, 2020, 2030, and 2100, each with checkboxes for the four categories.

	External	B2C	B2B	SA
2000	☒	☒	☐	☒
2010	☒	☒	☐	☒
2020	☒	☒	☒	☒
2030	☒	☒	☒	☒
2100	☒	☒	☒	☒

- The admin user might see it as follows:



2000 and 2010 are not Published, 2020 and 2030 are published.

- A regular user might see it as follows: he will only see 2020 and 2030.

