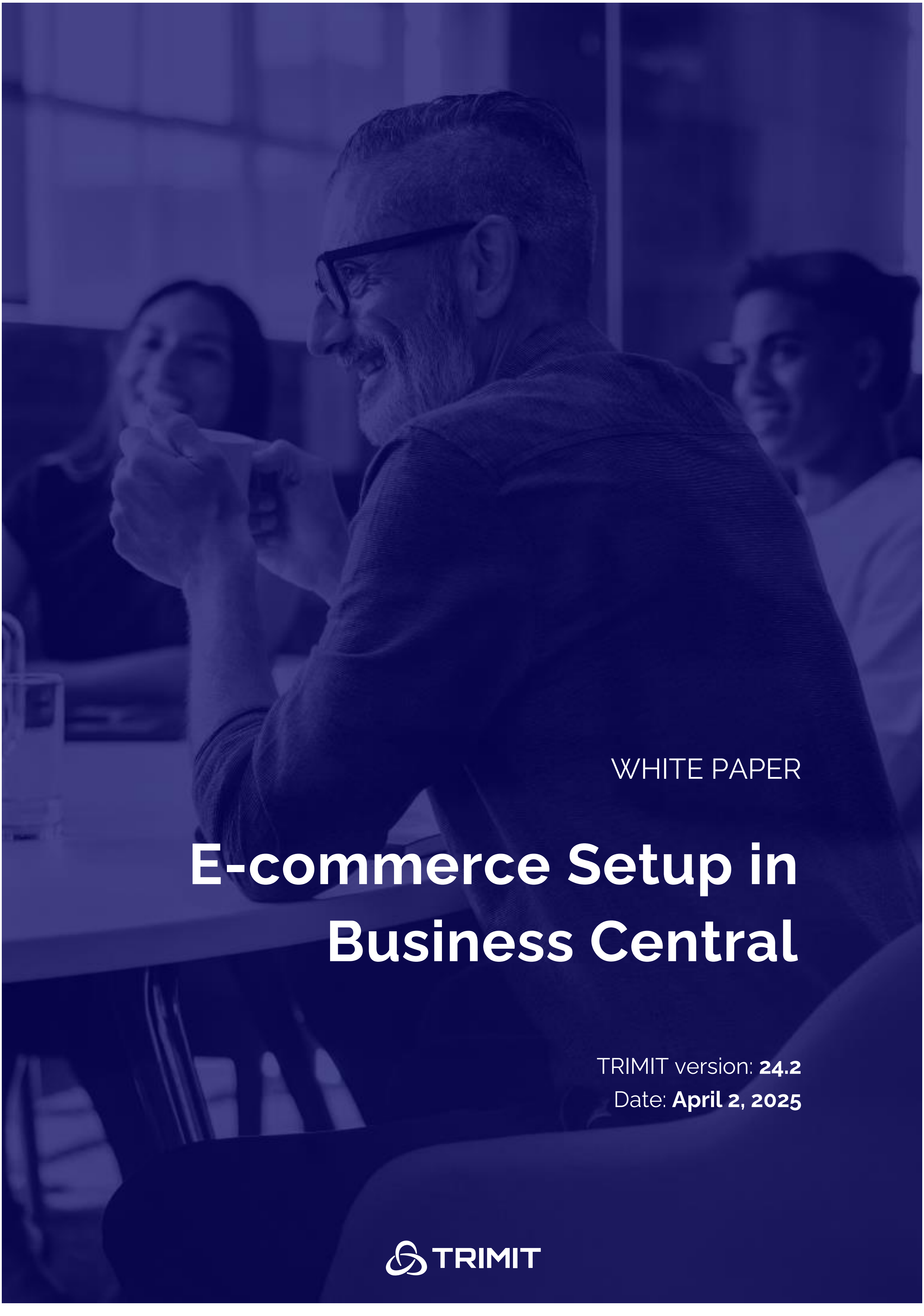


WHITE PAPER

E-commerce Setup in Business Central

TRIMIT version: **24.2**
Date: **April 2, 2025**

TRIMIT

Table of Contents

Introduction

This document contains information regarding the Setups for TRIMIT e-commerce in **TRIMIT 24.2** for Microsoft Dynamics 365 Business Central 2024 Wave 2 (W1) in combination with
TRIMIT e-commerce Package DEC24.

This document contains information regarding the Setups in TRIMIT ERP (TRIMIT) for TRIMIT e-commerce: **Sales Agent** (SA), **B2B Webshop** (B2B) and **Web Supplier** (SUP).
The Setups in TRIMIT for the **B2C Webshop** are described in a separate document:
White Paper - TRIMIT B2C Webshop Setups in Business Central

This document is based on the released version of TRIMIT 24.2 and will only discuss the functionality and fields in standard TRIMIT.
For information regarding standard Business Central fields, please see the documentation from Microsoft.

In this document, you will be guided through the Setups, which are needed in TRIMIT to start using the out-of-the-box e-commerce solutions of TRIMIT.
Our starting point for most of the actions will be the **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator*.

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 24.2 for Business Central W1 BC25.X**.
The pictures in this White Paper are based on the demo data for **TRIMIT 24.2,** which is based on Microsoft Dynamics 365 Business Central 2024 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

Note
Layout in pictures of e-commerce pages might differ based on Theming selections and version of the installed e-commerce package.

Components

TRIMIT e-commerce Setup in Business Central contains the following objects:

The tables

6036327	*trm Temp Category Management*
6036856	*trm Statistics Overview Header*
6037028	*trm Sales Import Journal Line*
6037029	*trm Sales Import Jnl Header*
6038101	*trm User Relationship Mgt*
6038103	*trm User Relationship*
6038108	*trm Web Transaction Log*
6038109	*trm File Repository*
6038110	*trm Portal Control Setup*
6038117	*trm Portal Activity log*
6038118	*trm Portal Message*
6038120	*trm Category*
6038121	*trm Category Line*
6038122	*trm Category Buffer*
6038123	*trm Portal Action Setup*
6038124	*trm Instance Mapping*
6038125	*trm Portal Profile*
6038126	*trm Portal Newsletter*
6038127	*trm Portal News Recipient*
6038128	*trm Profile Order Type Relat*
6038129	*trm Portal Customer Template*
6038169	*trm B2B Relation Authorization*
6036190	*trm Portals Setup*

The pages

6036865	*trm Statistics Overview*
6036867	*trm Statistics Overview List*
6037018	*trm Portal Sales Document*
6037019	*trm Portal Sales Doc Subpage*
6038101	*trm User Relationship Man.*
6038103	*trm User Relationship List*
6038116	*trm Web Transaction Log*
6038118	*trm Portal File Repository*
6038119	*trm Category Line Card*
6038120	*trm Category Card*
6038121	*trm Category List*
6038122	*trm Category Lines*
6038123	*trm Content Buffer*
6038124	*trm Category Management*
6038125	*trm Category Man Subform*
6038126	*trm Portal Newsletter*
6038127	*trm Portal Newsletter Recip*
6038128	*trm Profile Order Type Relat*
6038129	*trm Portal Customer Templates*
6038130	*trm Portal Profiles List*
6038131	*trm B2B Portal Profile*
6038133	*trm SalesAgent Portal Profile*
6038134	*trm Supplier Portal Profile*
6038135	*trm Attach to Category*
6038136	*trm Category TreeView*
6038137	*trm Instore Portal Profile*

The Pages

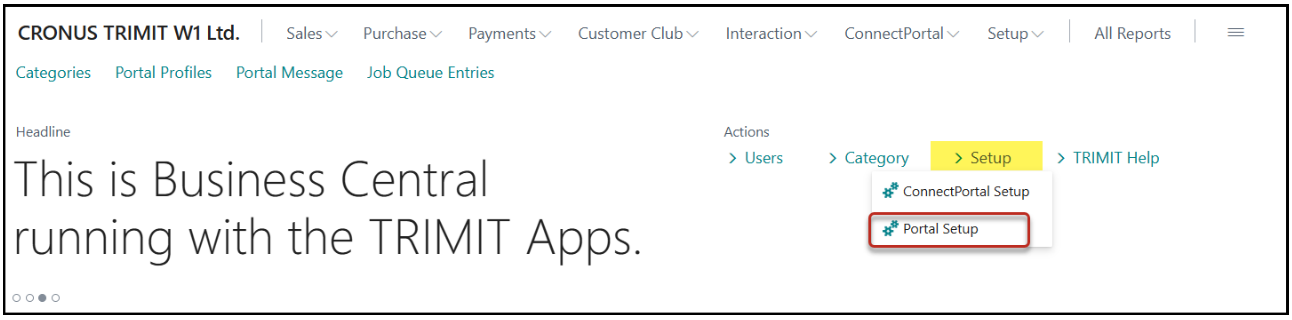
6038138	*trm Portal Action Setup*
6038139	*trm PIR Portal Profile*
6038140	*trm Portal Control Setup*
6038146	*trm Insite Portal Profile*
6038154	*trm Category Copy Wizard*
6038162	*trm Portal Activity Log*
6038163	*trm Portal Message List*
6038164	*trm Portal Message Card*
6038167	*trm Portal Document Overdue*
6038168	*trm Portal Document Templates*
6038169	*trm B2B Relation Authorization*
6038190	*trm Portal Setup*

The reports

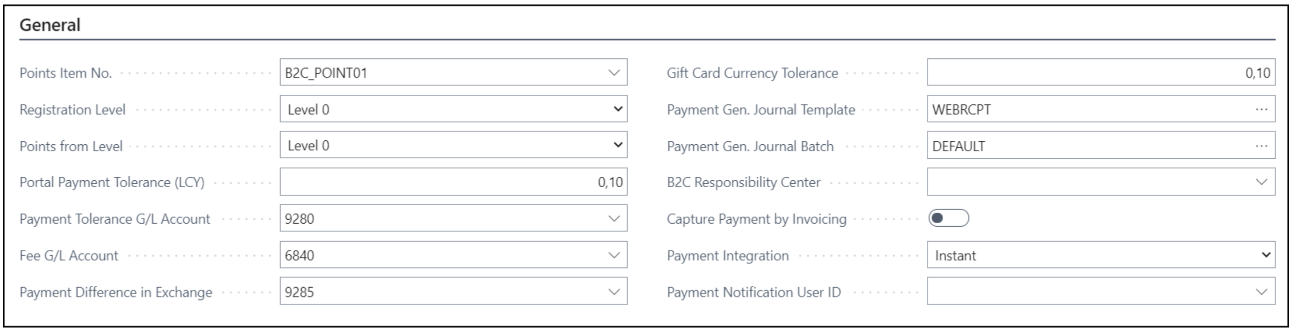
6038101	*trm Create B2B Author. Code*
6038129	*trm Batch Delete ASI Document*

Portal Setup

Portal Setup page allows setting up such Parameters as: Points applied on B2C Webshop as well as Payment and Gift Card Currency Tolerance and others, which are described below.
You can find the ***Portal Setup*** in the **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator*, Actions ***Setup, Portal Setup*** or via **Search** *Portal Setup.*



FastTab General



Description of the Fields

Points Item No.

This is the **Item No.** that will be used when creating the deduction Sale Line on a Sales Order where Customer Club Points are used to reduce the Order Amount

Registration Level

When a user registers (signs in) on the B2C Webshop the Customer will get this **Customer Club Level** assigned.
Options are *Level 0, Level 1, Level 2, Level 3, Level 4, Level 5*

Points From Level

This field specifies from which **Customer Club Level** users begin to earn Customer Club Points and can use Customer Club Points.
Options are *Level 0, Level 1, Level 2, Level 3, Level 4, Level 5*

Portal Payment Tolerance (LCY)

Specify the Sales Order Amount which will be dismissed in case the Portal Payment Provider Fee is larger than the Sales Order Amount or similar.

Payment Tolerance G/L Account

This field is used in cooperation with the **Portal Payment Tolerance (LCY)**. Here you specify the **G/L Account** to be used for posting of Discount given to reduce Order Total to zero when the Order Total is smaller than the **Portal Payment Tolerance (LCY).**

Fee G/L Account
This field specifies the **G/L Account** to use for posting of the Portal Payment **Fee** Amount.

Payment Difference in Exchange
This field specifies the **G/L Account** to use for posting the Difference in Exchange caused by trade in Currencies differing from the Settlement Currency. The Settlement Currency is a Currency the sale has been created in or the Currency in which money coming on the Bank Account.

Gift Card Currency Tolerance
When a Gift Card in one Currency is used to reduce a Sales Order in another Currency, a small Rounding Difference may remain on the Gift Card.
This field specifies the maximum Rounding Difference allowed to be considered as Currency Exchange Deviation in Local Currency.

Payment Gen. Journal Template
This field specifies the **Name** of the **General Journal Template** to be used for the **Portal Payment Receipt** posting.

Payment Gen. Journal Batch
This field specifies the **Name** of the **General Journal Batch** of the **Payment Gen. Journal Template** to be used for the **Portal Payment Receipt** posting.

B2C Responsibility Center
Orders created will be "tagged" with the stated Responsibility Center. This enables an easy filtering of orders from the B2C Webshop appose to other orders.

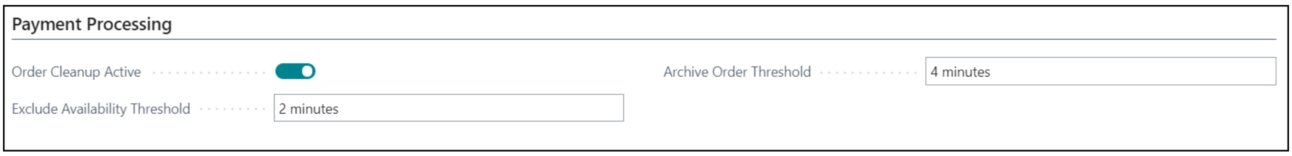
Capture Payment by Invoicing
This option indicates whether to capture the Payment from the Payment Provider when invoicing a Sales Order.

Payment Integration
This field indicates how the payment capture is executed.
You can choose the following two options:

<empty>	No automatic Payment Integration. Payments needs to be handled manually based a bank mutation.
Instant	Capture of the funds from the Payment Provider is done instantly. This is handled in Codeunit ***80 Sales-Post***. This method is the only preferable as it allows detecting potential issues in capturing process and rolling the sales order posting process to initial state.

Payment Notification User ID
You can choose a **User ID** for the user that will get a notification (on all Role Center Home page) if a Payment has been done.

FastTab Payment Processing



Description of the Fields

Order Cleanup Active

When a B2C Customer goes to Payment but never finishes it, the Sales Order created in the BC backend remains and takes Product Availability. Setting this option to *TRUE* cleans those “dead” Sales Orders (gone to Payment but never finished) after certain time and releases the Item Availability.

Exclude Availability Threshold

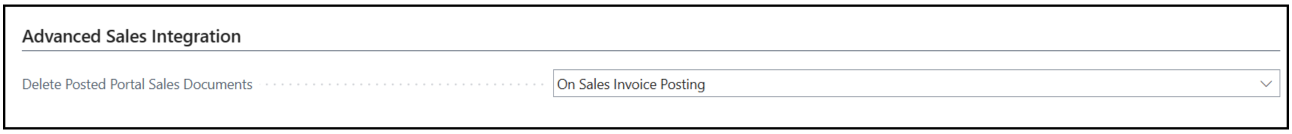
If the Base Threshold (calculated: Work Date minus Payment creation DateTime) is greater than **Exclude Availability Threshold**, then this Sales Order will be set to **Exclude Availability Check** = *TRUE* (field in the Sales Header and in the Sales Lines). And **Processing Status** = *Exclude Availability* for the Payment Entry.
In this case Availability Check will be excluded.
The entry of the **Exclude Availability Threshold** is a Duration: a Quantity and then “minutes”, “hours”, etc. depending on the Language in **My Settings**.

Archive Order Threshold

If the Base Threshold (calculated: Work Date minus Payment creation DateTime) is greater than **Archive Order Threshold,** then Sales Order will be deleted. At the same time, the corresponding Sales Order will be archived and in Payment list **Payment Service Provider** = *ORDER CANCELLED*. If the payment is created (Pending), but there is no Sales Order, then **Payment Service Provider** = *CANCELLED* for the corresponding Payment.
The entry of the **Archive Order Threshold** is a Duration: a Quantity and then “minutes”, “hours”, etc. depending on the Language in **My Settings**.

If the Sales Order is archived, then the Availability Schedule should run to release the Item Availability on B2C Webshop. Therefore, Availability Schedule should run often (up to several times per day).

FastTab Advanced Sales Integration

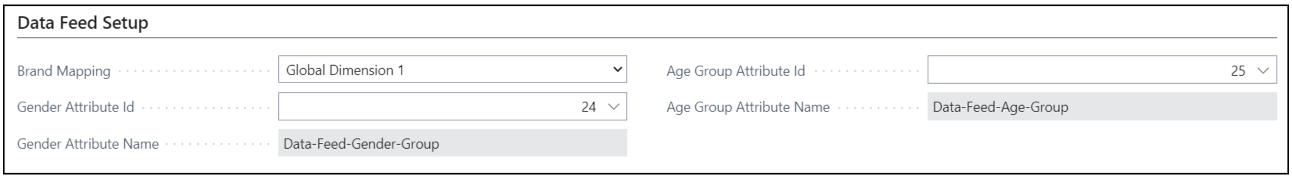


Delete Posted Portal Sales Documents.

Delete Posted Portal Sales Documents determines when the records will be deleted.
You can choose between the following two options:

On Sales Invoice Posting	When a Sales Order is Posted or removed, the **Advanced Sales Integration Document** is also deleted if it is posted and not in error state.
Batch	You need to setup a **Job Queue** for Report ***6038102 trm Batch Delete ASI Document***, which could be run daily or weekly.

FastTab Data Feed Setup



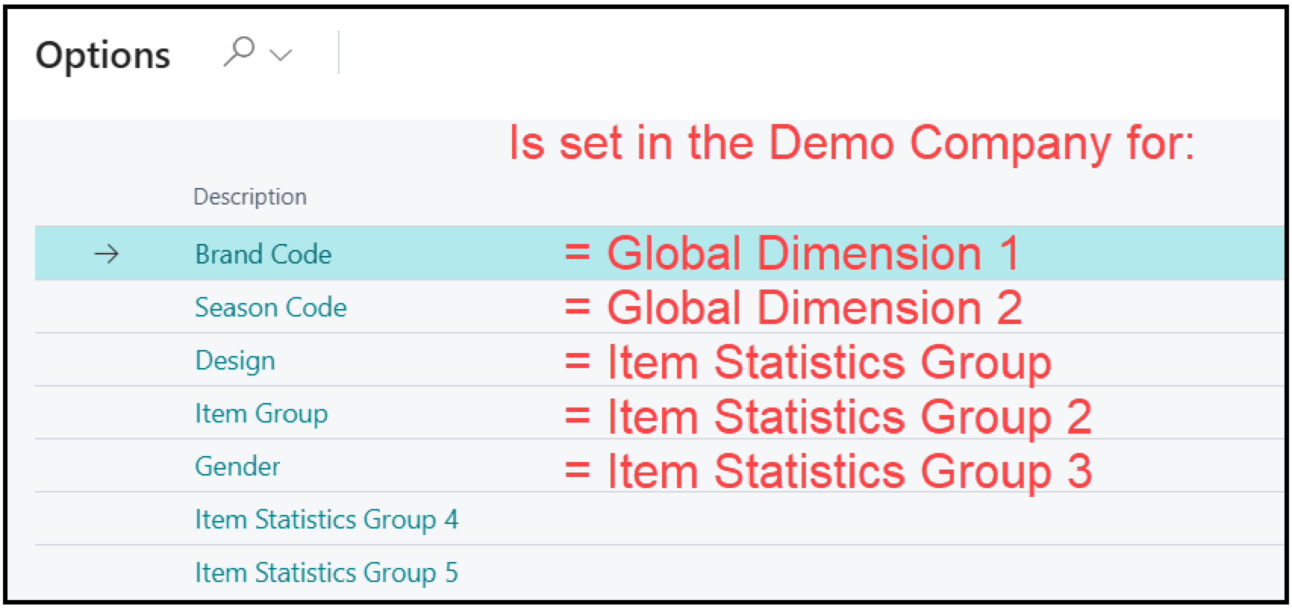
The fields in this FastTab can be used for Google Analytics.

The **Attribute Id's**, **Attribute Names** and their options can be created via the [Actions, Create Data Feed Attributes]

Description of the Fields

Brand Mapping

You can choose the subject that represents the **Brand**.
You can choose the following options:



Gender Attribute Id

You can choose the **Item Attribute** that represents the **Gender.**

Gender Attribute Name

After choosing a **Gender Attribute ID**, the Name will be displayed automatically.

Age Group Attribute Id

You can choose the **Item Attribute** that represents the **Age Group.**

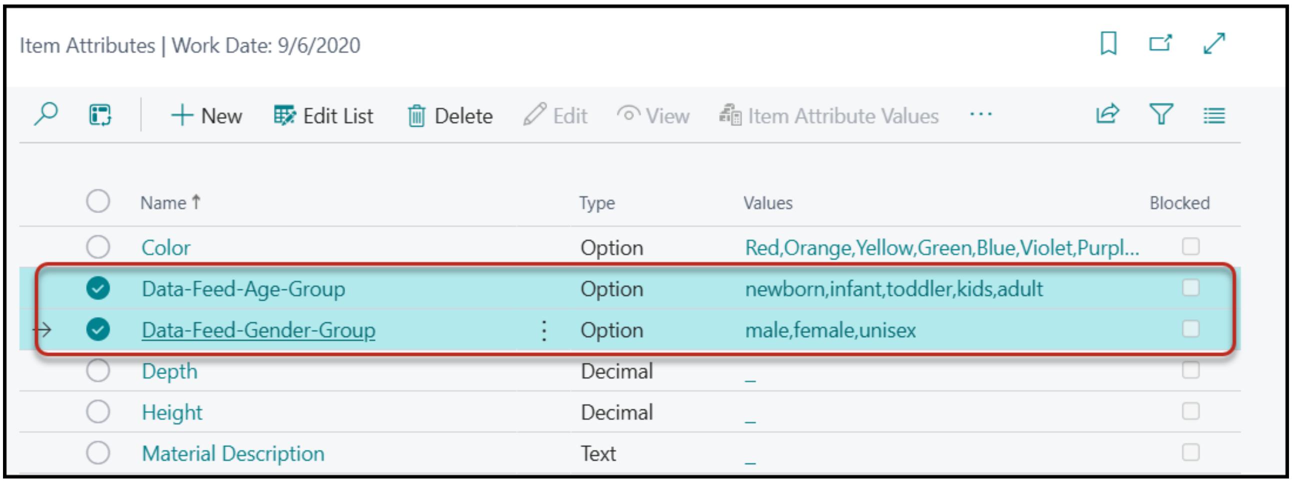
Age Group Attribute Name

After choosing an **Age Group Attribute ID**, the Name will be displayed automatically.

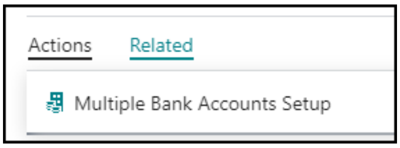
Note
Of course, this also means that you need to add the right Item Attribute/Option to your Masters/Items to make use of it with Google Analytics.

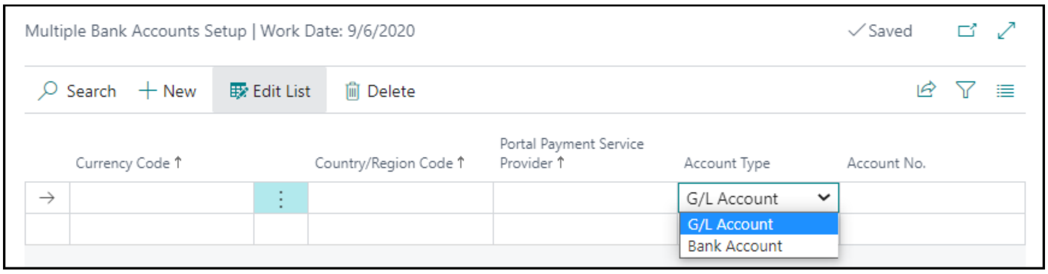
Actions, Create Data Feed Attributes

This action will create for you the option **Item Attribute** *Data-Feed-Age-Group* with the options: *newborn, infant, toddler, kids, adult.*
This action will also create for you the option **Item Attribute** *Data-Feed-Gender-Group* with the options: *male, female, unisex.*



Related, Multiple Bank Accounts Setup



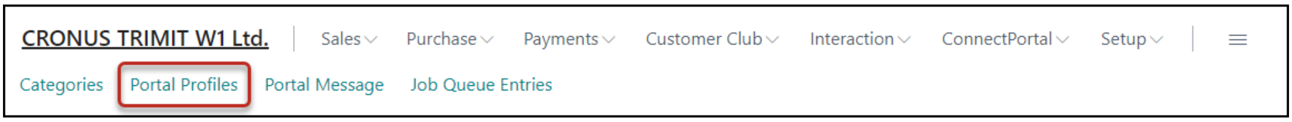


Per **Currency Code, Country/Region Code** and **Portal Payment Service Provider** you can enter a **G/L Account** or a **Bank Account** for the Payments.

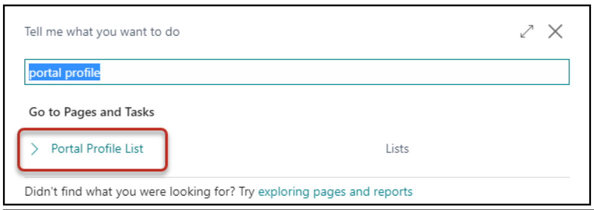
Portal Profiles

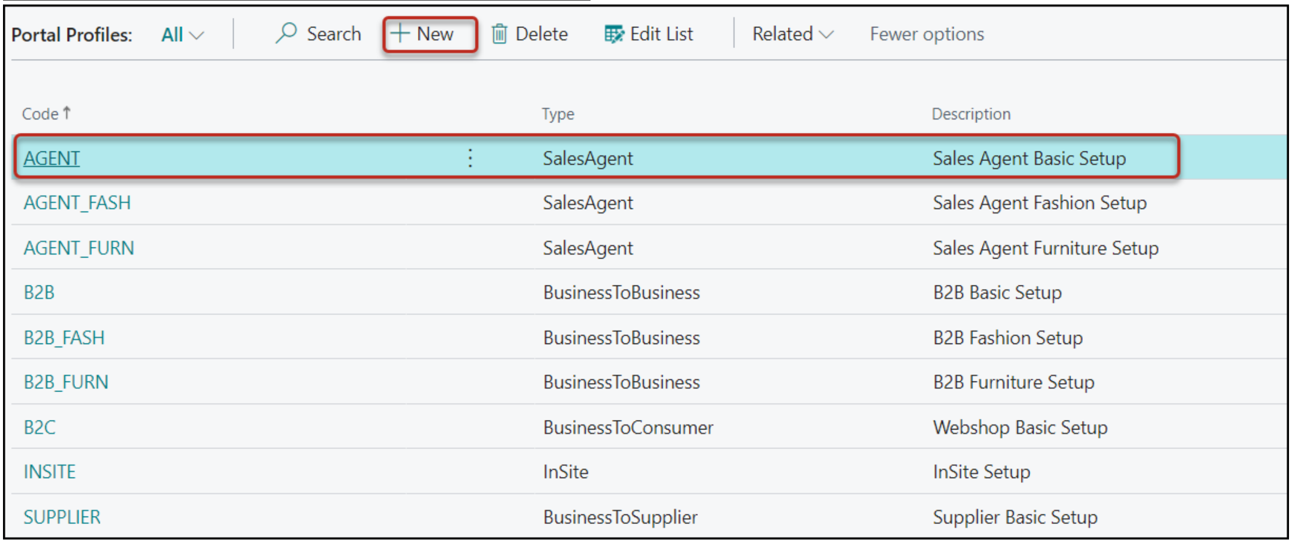
When Modelyn is used with the TRIMIT Sales Agent (SA), TRIMIT B2B Webshop (B2B) or TRIMIT Web Supplier (SUP), a specific setup of fields needs to be filled.
The **B2C Webshop Profile** is described in document ***White Paper - TRIMIT B2C Webshop Setups in Business Central*.**
The fields in the Portal Profiles are different for SA, B2B and SUP.

If you have opened the **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator* (via **My Settings**) , you can find the ***Portal Profiles*** via:



Otherwise, you can find it via **Search** *Portal Profile:*

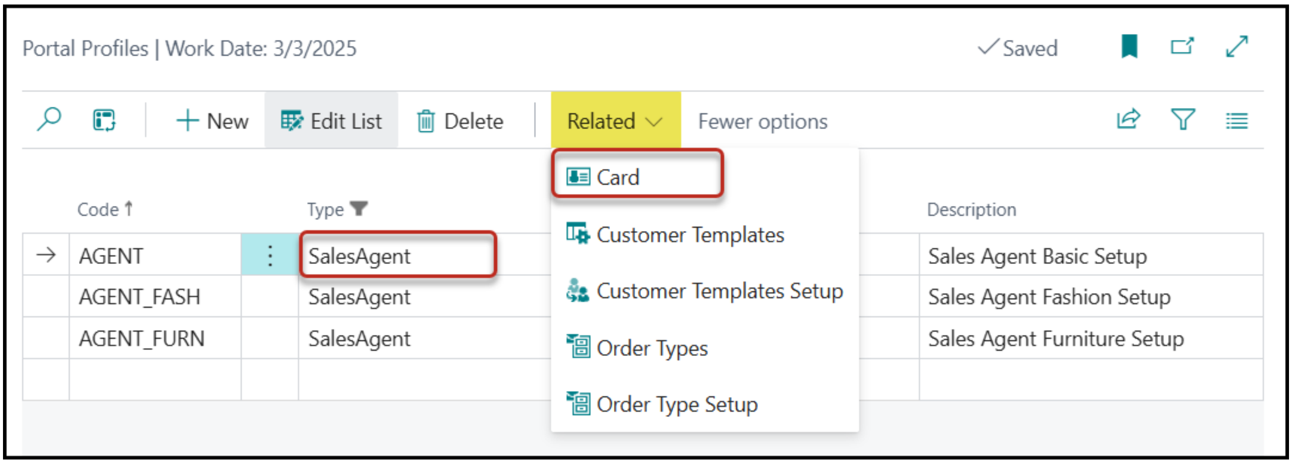




Click **+ *New*** to create a new Portal Profile, or click on the **Code** of an existing Portal Profile to open Portal Profile Card.

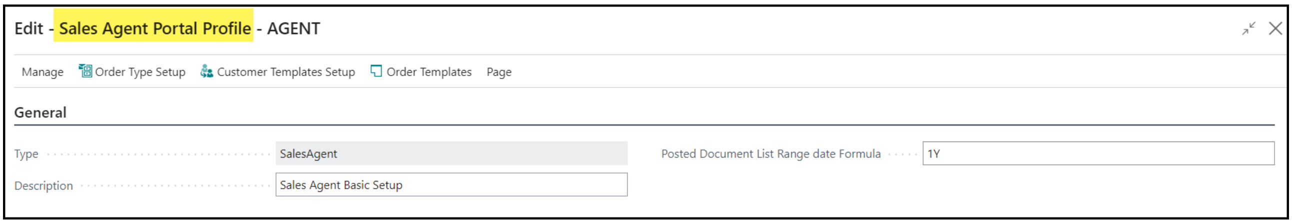
Sales Agent Portal Profile

To open the Sales Agent Portal Profile (called *AGENT* in our Demo Company) page click on **Code** *AGENT.*
Or click ***+ New*** to create a new Portal Profile with **Type** *SalesAgent* in the list, after which you can open the underlying Card by clicking ***Related, Card***.



The **Type** and **Description** were already filled in the **Portal Profiles** List.
Based on the **Type** *SalesAgent* the page ***Sales Agent Portal Profile*** will open.

FastTab General



Type

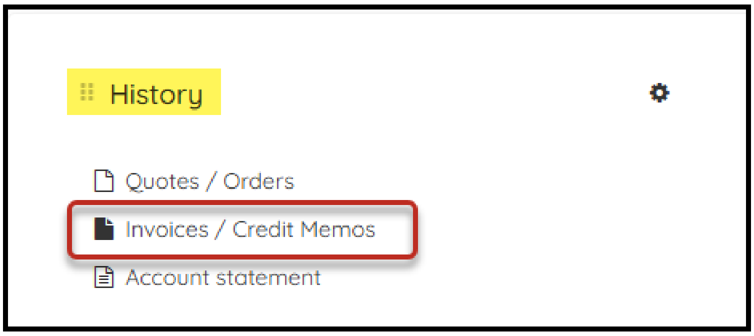
Select Portal Profile Type.
Available options are *BusinessToBusiness, BusinessToConsumer, SalesAgent, BusinessToSupplier, InstoreB2C, PIR, InSite.*

Description

Enter a Portal Profile Description.

Posted Document List Range Date Formula

On the Dashboard of a Customer, in the **Dock** *History*, under **Invoices/Credit Memos,** you can see all the Posted Sales Invoices and Posted Credit Memos of the Customer.
With the **Posted Document List Range Date Formula**, you can enter a **Date Formula** to limit the list of the Posted Documents based on the **Posting Date** of the Documents. I.e., *-1Y* to show all the Posted Sales Invoices and -Credit Memos of the past year – calculated from the Todays Date.

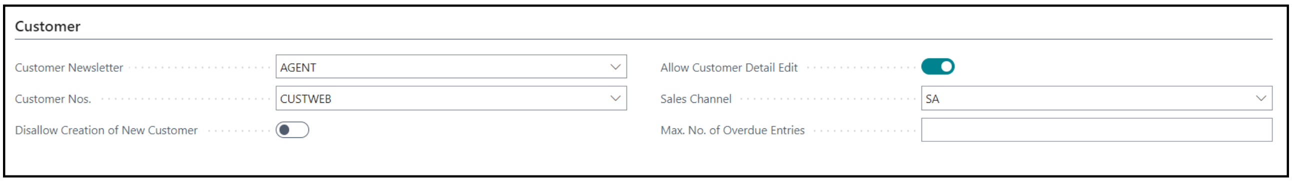


We also added an extra event in Table ***6038134 trm Portal SalesDoc Hand Temp*** that can be used for extra customization of this filtering:

```
AL PortalSalesDocHandTemp.Table.al ×
TRIMIT Development AS_TRIMIT_24.2.20.93 > src > src > AL PortalSalesDocHandTemp.Table.al
#endif
        {
            begin
                if not skipPostingDateFilter_loc then begin
                    if format(portalProfile_loc."Posted Doc. List Date Formula") = '' then
                    else
                        dateRange_loc := CalcDate(portalProfile_loc."Posted Doc. List Date Formula", Today);
                    salesInvHeader_loc.setfilter("Posting Date", '%1..', dateRange_loc);
                end;
                Pf_SetPostedInvoiceFilters(salesInvHeader_loc);
                salesInvHeader_loc.SetAutocalcFields("Amount Including VAT", "Remaining Amount");
                if salesInvHeader_loc.FindSet then
                    repeat
                        Clear(salesDocumentTemp_loc);
                        salesDocumentTemp_loc.TransferFields(salesInvHeader_loc);

    /// <summary>
    /// This publisher will allow a more specific filter on the Sales Invoice Header eg. a filter on posting date -Y1 or like
    /// minimizing the set will create a better performance on portals.
    /// </summary>
    /// <param name="salesInvHeader_loc"></param>
    [IntegrationEvent(false, false)]
    local procedure Pf_SetPostedInvoiceFilters(var salesInvHeader_loc: Record "Sales Invoice Header")
    begin
    end;
```

FastTab Customer

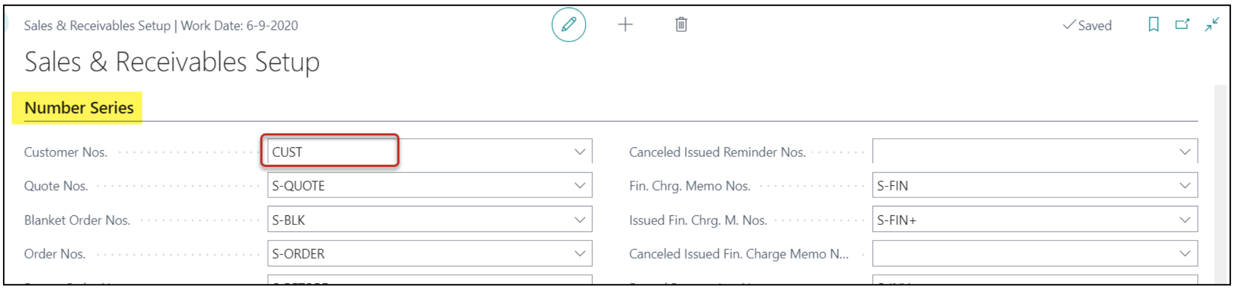


Customer Newsletter

Select Customer Newsletter group.
For more information about **Customer Newsletter** – see chapter [Portals Newsletter.]

Customer Nos.

Specify a **No. Series** to be used when creating new Customers on SA.
If this field is left blank, then the **No. Series** is taken from the field **Customer Nos**. in ***Sales & Receivables Setup*** (via **Search**)



Disallow Creation of New Customer

If this field is set to *TRUE*, it will not be possible to create a new Customer on SA.

Allow Customer Detail Edit

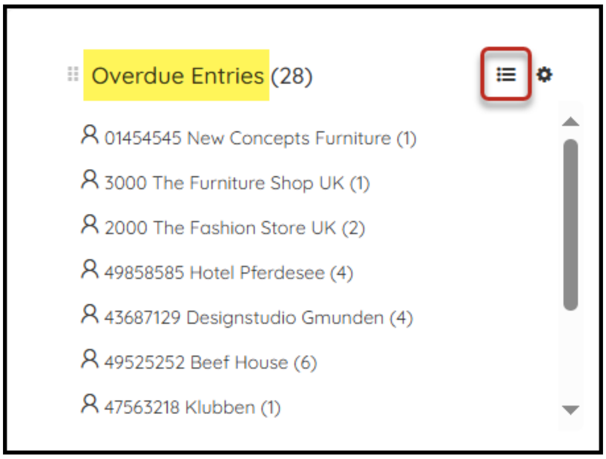
If the **Salesperson** that logged in to SA should be able to change the Customer Details (like Name, Address, E-Mail, etc.) you need to set this field to *Yes.*

Sales Channel

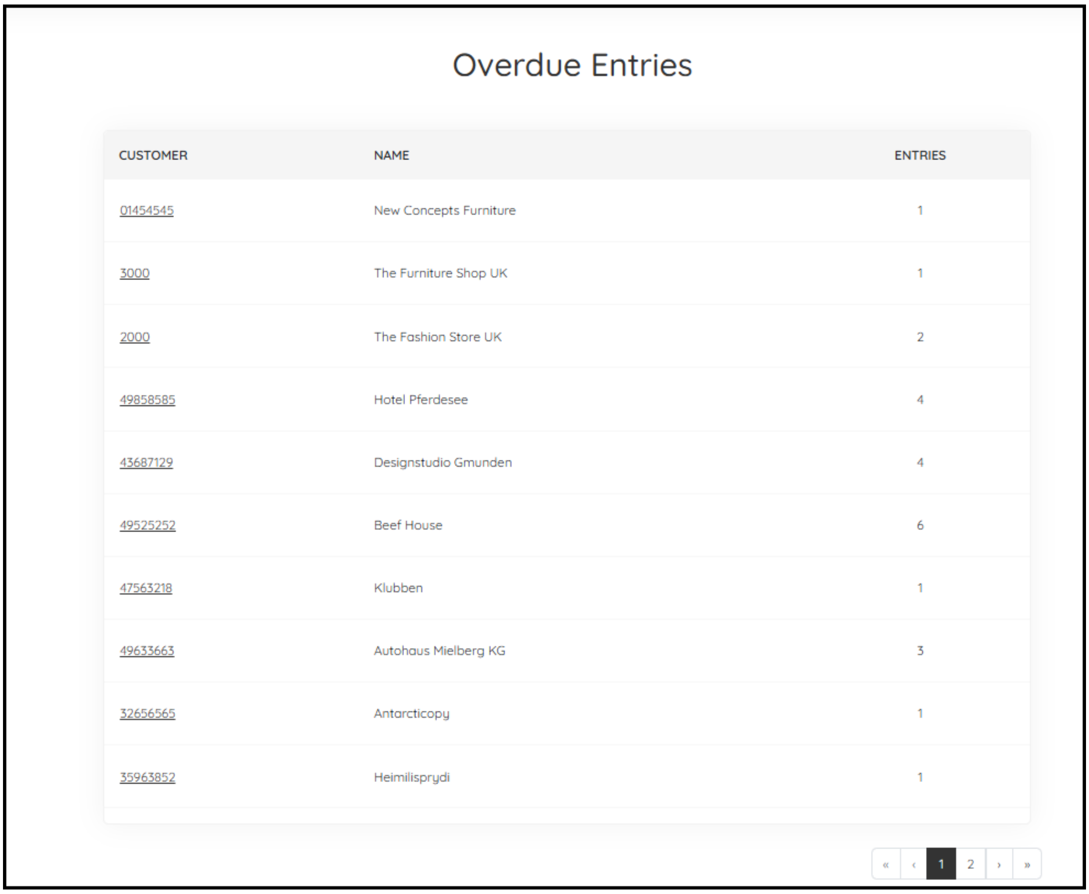
Here it is possible to enter a Sales Channel Code (i.e., SA-DE for SA Orders in Germany) which will be transferred to the Sales Header.
Different Portal Profiles can have different Sales Channel Codes and, in this way, can be differentiated. This could also influence Campaign Prices; for more details see ***White Paper – TRIMIT Price Group Parameters and Campaigns.***

Max. No. of Overdue Entries

In this field you can determine the maximum number of Customers for which you want to see that they have **Overdue Entries** in the Dock on the Sales Agent Dashboard.
The default will be *7.*
It will then show this number of Customers with the highest Overdue Amount.



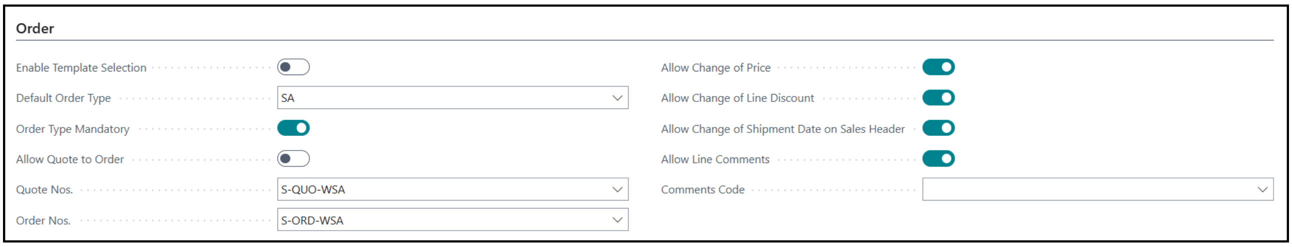
If you then click on **See all overdue entries** a new page will open will all the Customers with Overdue Entries. The sorting of the Customers is based on the total Overdue Amount.



Overdue Entries

CUSTOMER	NAME	ENTRIES
01454545	New Concepts Furniture	1
3000	The Furniture Shop UK	1
2000	The Fashion Store UK	2
49858585	Hotel Pferdesee	4
43687129	Designstudio Gmunden	4
49525252	Beef House	6
47563218	Klubben	1
49633663	Autohaus Mielberg KG	3
32656565	Antarcticopy	1
35963852	Heimilisprydi	1

FastTab Order



Enable Template Selection

Setting this field to *TRUE* enables showing link to **Order Templates** on Customer dashboard, if there are any. Read more about this functionality in chapter **Order Template on SA**

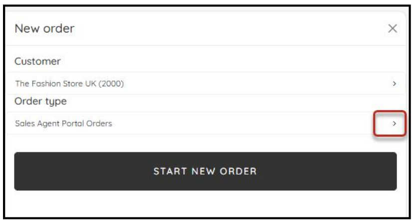
Default Order Type

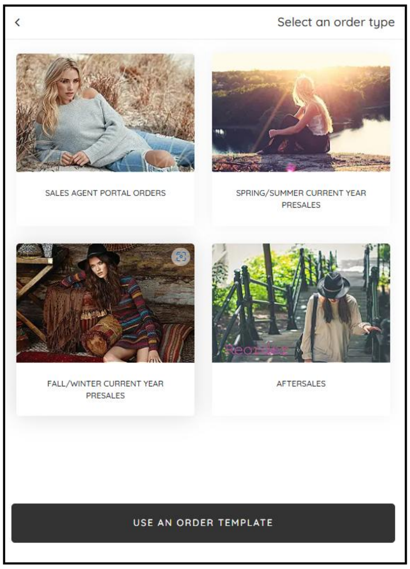
Appose to having the Salesperson selecting the **Order Type** for an Order in the SA**,** you can set a default Order Type, which will be forced for any new Order created by Salespersons attached to this Portal Profile.

Note
This functionality is available for B2B as well.

Order Type Mandatory

Setting this field to *TRUE* will force the Salesperson to select an **Order Type** code when starting a new Order (on the TRIMIT Sales Order – see picture below) if no **Default Order Type** has been entered.



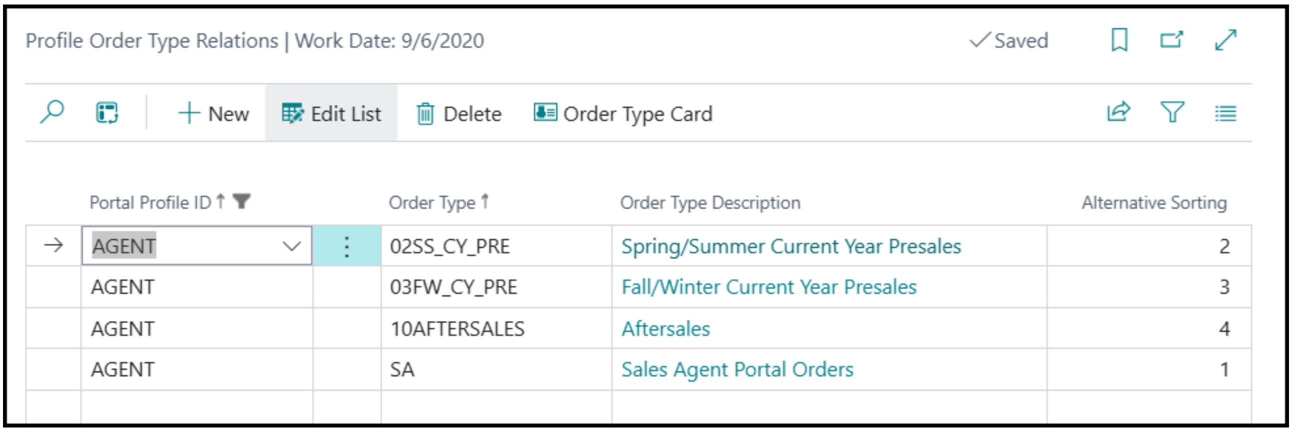


Order Type is an entity setting various default values; please see TRIMIT documentation ***White Paper – TRIMIT Collection Management*** for further information on **Order Type** functionality.
When setting this field to *TRUE* you will have to go to the **Order Type** card in TRIMIT and under FastTab ***Portal*** set the field **Show on Web** = *TRUE*.
Only Order Types set to **Show on Web** will turn up in the selection list on the SA.

Concerning **Order Type Mandatory**, there is an additional setup in the Portal Profiles itself.
If **Order Type Mandatory** is marked, then all the Order Types which have **Show on Web** = *TRUE* will be shown on the Portal.

To assign dedicated Order Types to a Sales Agent Profile: click ***Order Type Setup.***

In the **Profile Order Type Relations** select the Order Types, which must be shown on the SA in connection to a specified Profile.

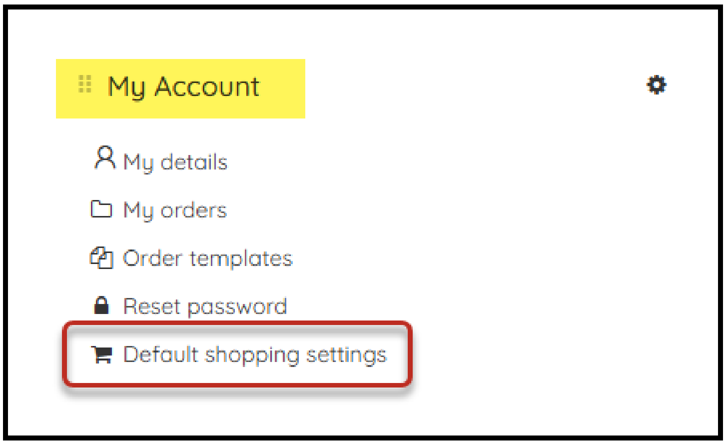


This functionality overrides **Show on Web** option on the Order Types itself.
In other words: if the Order Type has been added to the **Profile Order Type Relations** it will be shown on the SA under a specific Portal Profile no matter if field **Show on Web** in the Order Type is set to *TRUE* or *FALSE*.

If field **Order Type Mandatory** on Sales Agent profile is set to *TRUE*, then Order list on SA will be filtered to show only Orders where Order Type applied.
If this field is set to *FALSE*, then the filter will be removed and both Orders with and without Order Type will be shown.

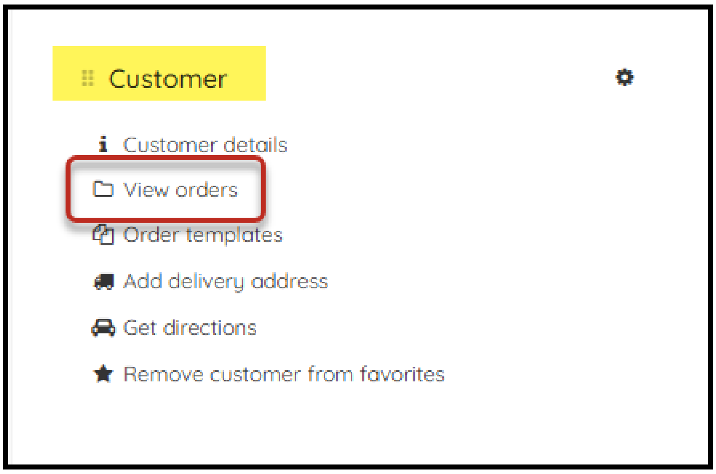
Note
If **Default Order Type** is <empty> and **Order Type Mandatory** is *TRUE*, the SA will nevertheless show an **Order Type** when creating a new order: the Order Type from the **Profile Order Type Relations** with the lowest **Alternative Sorting.**
This functionality is also available for the **B2B**.

It is also possible to set the default **Order Type** via the **Default shopping settings** of the SA, which can be found in the dock **My Account**:

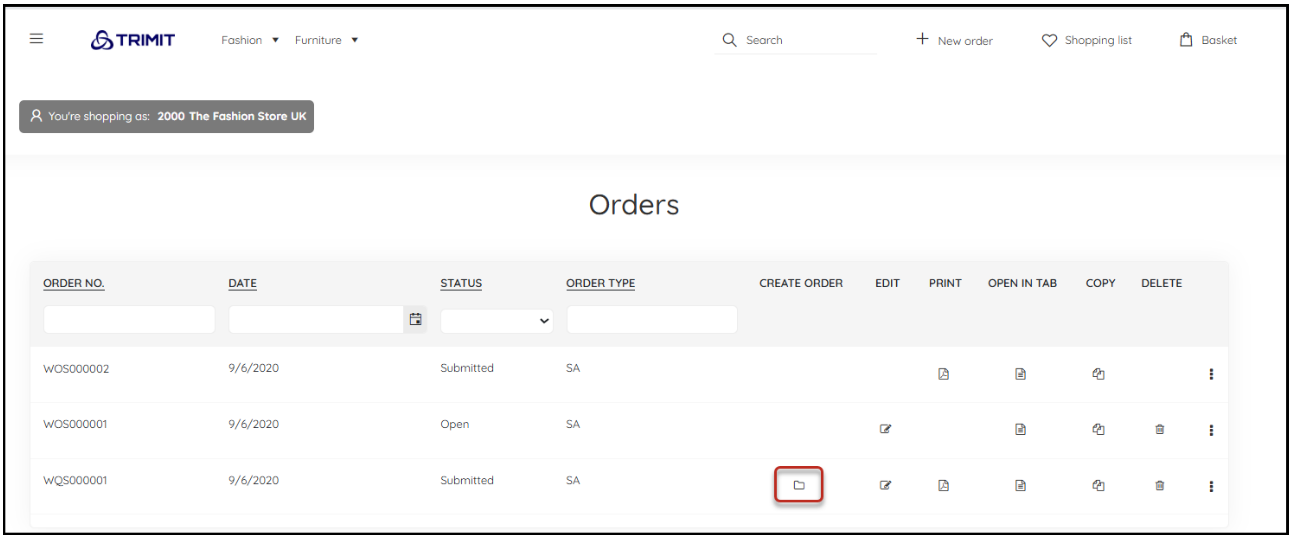


Allow Quote to Order

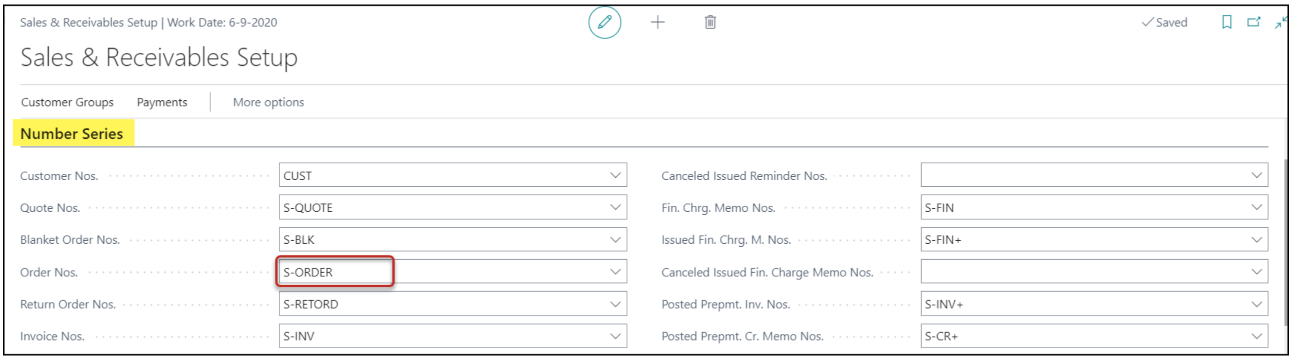
If this option is set to *TRUE*, then the Sales Agent will be able to create a Sales Order from the Sales Quote directly on the SA ***View orders*** page.
This is only possible for Sales Quotes that have been created before through the SA.



The Sales Quote document in the **Orders** list on SA looks as follows:



Clicking an icon in ***CREATE ORDER*** column will initiate Sales Order creation in TRIMIT ERP.
No confirmation or other actions are necessary. Sales Order number will be assigned according to **Order Nos.** parameter in Sales & Receivables Setup in TRIMIT.
The Sales Order can be found in Orders list page on SA and in TRIMIT ERP.



Quote Nos.

Specify Sales Quote **No. Series** for Sales Documents created on SA. This field works in combination with field **Create Web Order as** (described further in this document).

Order Nos.

Specify Sales Order **No. Series** for Sales Documents created on portal. This field works in combination with field **Create Web Order as** (described further in this document).

Allow Change of Price

Setting this field to *TRUE* will allow the Sales Agent to override **Unit Price** given through the regular price search in TRIMIT.

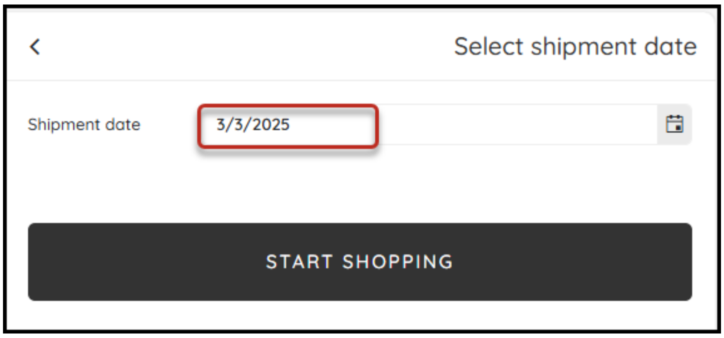
> **Note**
>
> Keep in mind, that the Unit Price will then always override the different Unit Prices based on Search Tables or Formulas in case of a Matrix; the Unit Price you have on the record in the Table 7002 will then become the price for all the Colors/Sizes/Variants.

Allow Change of Line Discount

Setting this field to *TRUE* will allow the Sales Agent to enter a **Discount %** on a specific product.

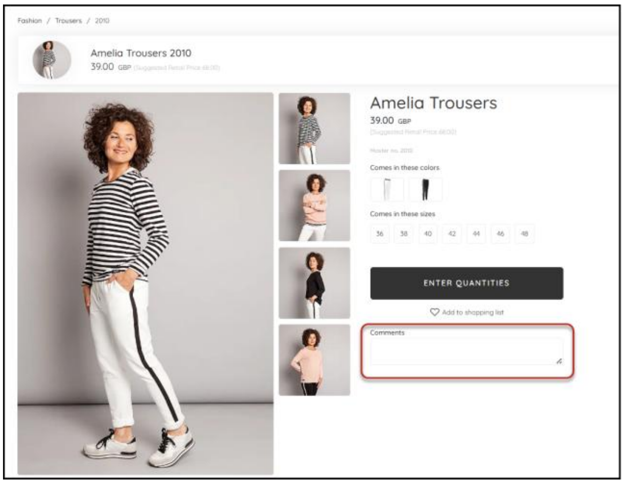
Allow Change of Shipment Date on Sales Header

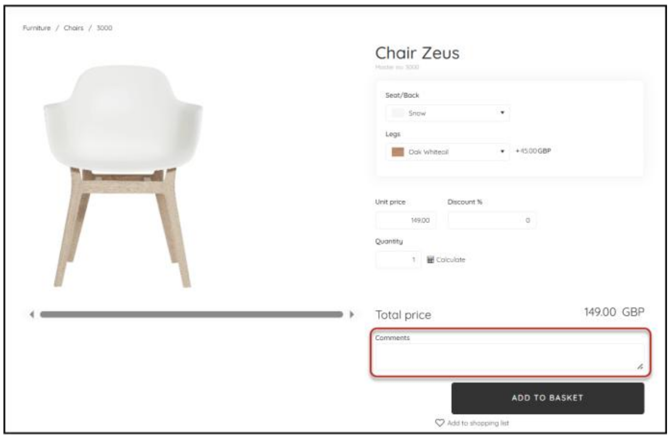
If this field is set to *TRUE,* it allows the Sales Agent to set a general **Shipment date** for the Sales Header when initiating a new Order.



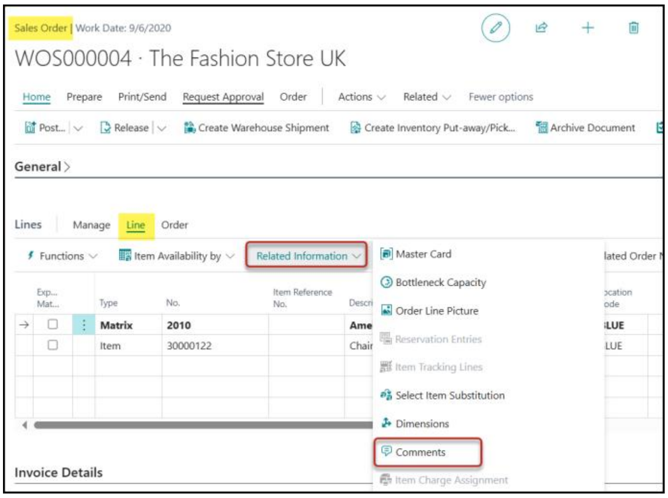
Allow Line Comment

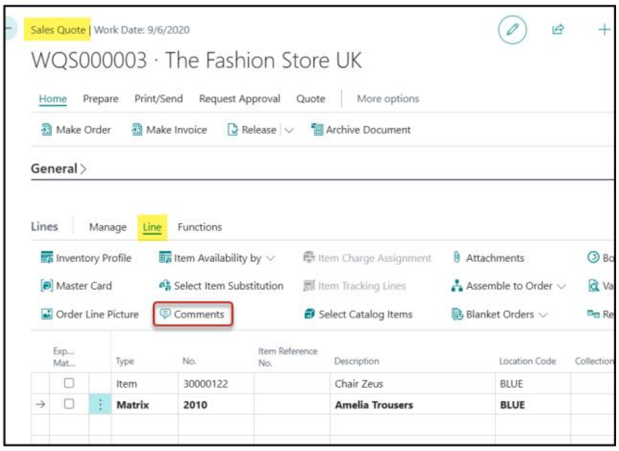
If this option is set to *TRUE,* then there will be shown a **Comments** box on Product page as follows:





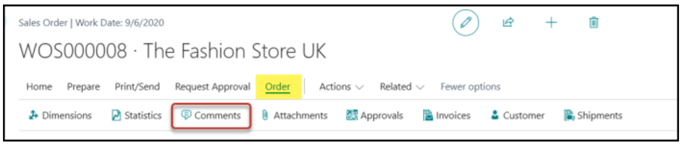
Entered Product Comments will then be available under Sales Line Comments in TRIMIT:

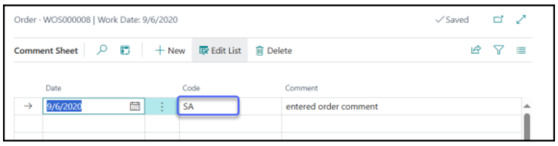


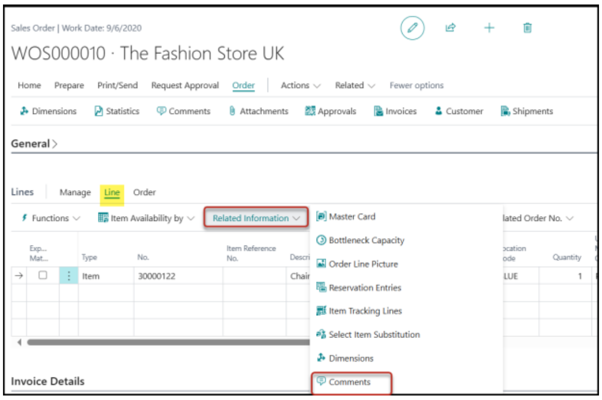


Comment Code

If a **Comment** is created on the **Product** page (Sales Line) or on **Order details** page (Sales Header) then it is possible to provide this entered Comment a **Comment Code**, which will be reflected on the Comment Line in TRIMIT ERP.
This **Comment Code** allows distinguishing i.e., the origin of the Comment.
Any comments entered on this specific **Comment Code** will however be neglected. It is only to fill eh **Code** field in the Order or Line Comments.
B2C, B2B and Sales Agent Portal Profiles have the possibility to provide this **Comment Code**.

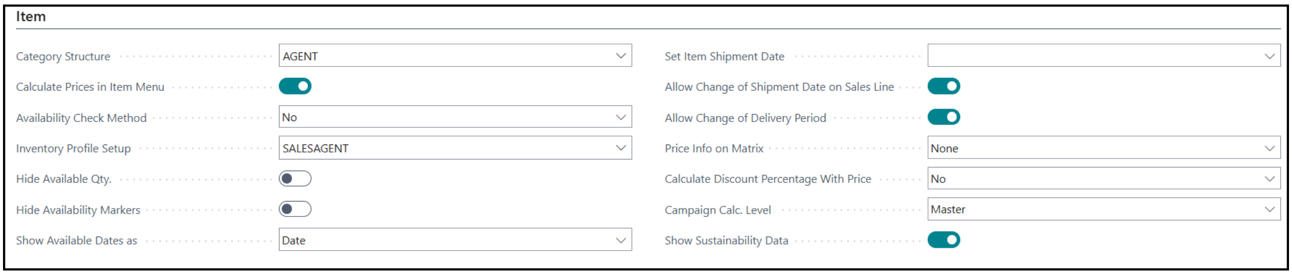






Code** is not by default visible in the **Comment Sheet**; you need to add it with **Personalize

FastTab Item



Category Structure

This field is mandatory. Select the root Category Structure.
For more information see chapter [Categories.]

Calculate Prices in Item Menu

If set to *TRUE,* it enables showing the Price Tag on Category page

TRUE

FALSE

Availability Check Method

This field is mandatory.
Option in this field defines a way the **Item Availability** is calculated in the SA.
You can choose between the following three options:

No	No availability method is used. All items will be set to unavailable.
Inventory	The Item Availability is calculated in accordance with the Inventory Profile Setup which is specified in field **Inventory Profile Setup** The system calculates Inventory "–" Deductions (1) "+" Increase (2) *(1) All deductions are Sales Orders, Transfer Orders, Production Orders (depending on what has been chosen in the Inventory Profile Setup) – and is calculated with a date filter "… Horizon Date". Horizon date is calculated from today (Work Date) based on the date formula in the field* ***Horizon Availability Check*** *from the Inventory Profile Setup.* *(2) Increase is Purchase Orders, Transfer Orders, Production Orders (depending on what has been chosen in the Inventory Profile Setup)– and is calculated with a date filter "… Requested Date". Requested date is the date stamped on the relevant document (Shipment Date on a Sales Order etc.)* It is a static picture and only one calculation.
Available	This is a more dynamic method. The system creates a timeline with a date mark on **Requested Date**, and **Horizon Date** and on each date for an increase. On each of the dates, the above calculation (of the option Inventory) is done, and the one with the lowest Available Quantity is set as Available Quantity. By this, the system makes sure that every order is fulfilled taking in consideration whether there is an increase coming in that can fulfill some deductions from a later date. Note, that this option is also based on the **Inventory Profile Setup** so only the processes marked will be taken into consideration. This option should be used for B2C Portal Profile.

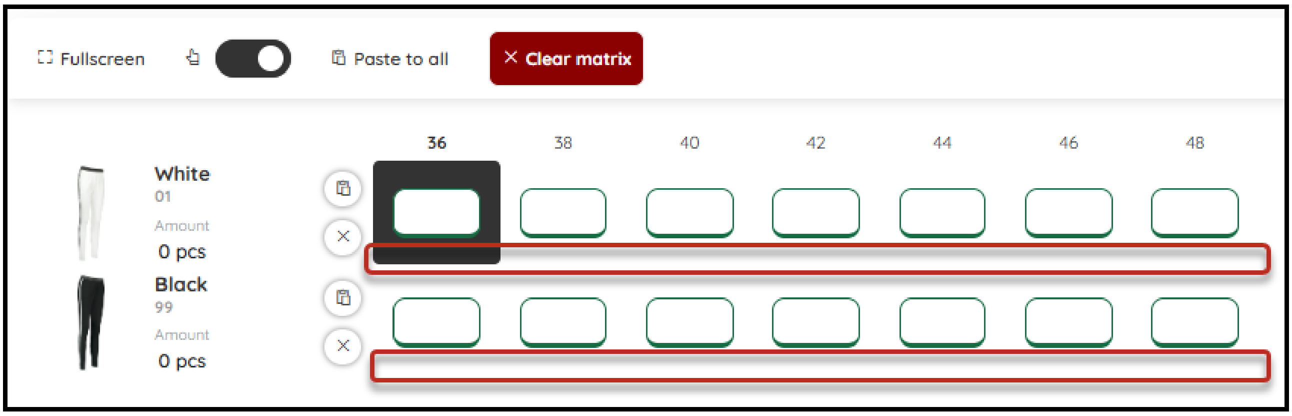
After changing a value in this field, it is required to run schedules to synchronize data in SA Soft Admin.
This field will be overwritten by the setting of the field **Availability Check** in the Order Type, which will be chosen for the Order.

Inventory Profile Setup

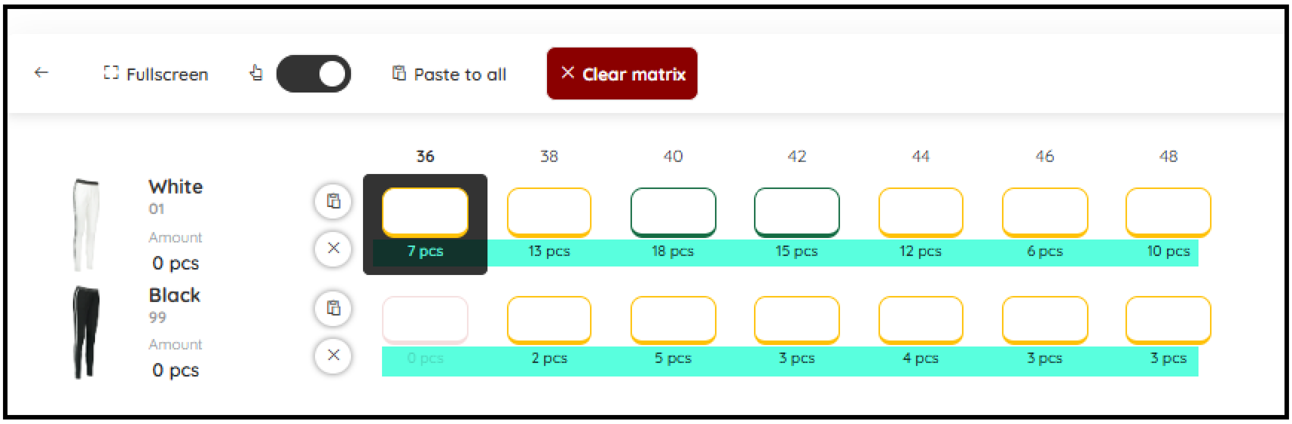
This field is mandatory if field **Available Method** is set to *Inventory* or *Available*.
Select required **Inventory Profile Setup.**
See ***White Paper – TRIMIT Inventory Profile*** for more information regarding the **Inventory Profile Setup**.

Hide Available Qty.

If this field is set to *TRUE*, then there will be no Item **Available Quantity** shown on **Product details** page.



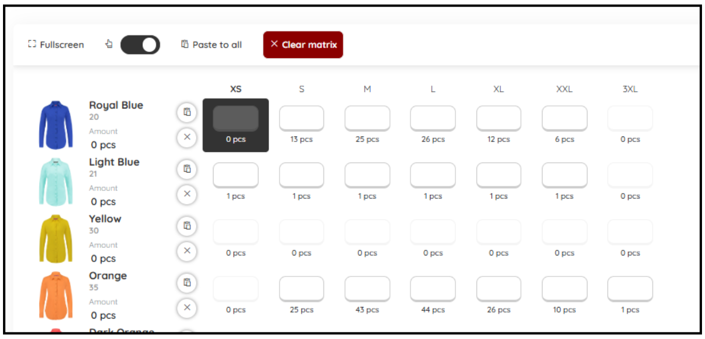
If set to *FALSE*, it will show the Available Quantities based on **Availability Check Method**.
This can however be overruled by the field **Availability Check** in an chosen Order Type.



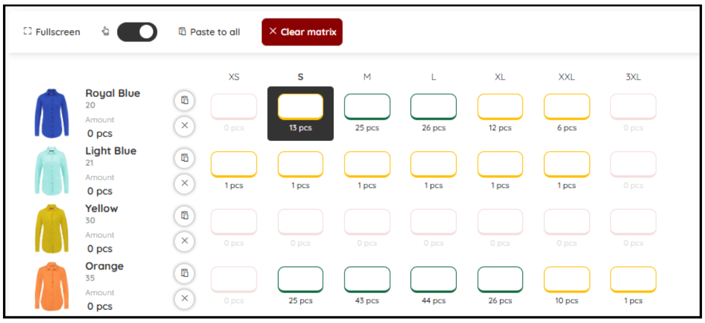
Hide Availability Markers

If this field is set to *TRUE*, the squares in the Matrix for entering Quantity will not have a specific color reflecting Availability.

If set to *TRUE*:



If set to *FALSE:*



Show Available Dates as

Available options are *Date* and *Week*.
It will only show these *Dates* or *Weeks* if there are increases (Purchase Lines or Production Orders) to be expected after the **Shipment Date** of the Order Line and after you clicked **Show cell details**.
If set to *Date:*

If set to *Week*:

See Item Availability and Sales Import Lines for more details regarding Availability.

Set Item Shipment Date

Available options are *blank* and *Earliest Possible*.
If set to *Earliest Possible* then the Sales Line **Shipment Date** will be set to the date when the full desired availability is provided (this depends on **Inventory Profile Setup** and what is selected there, i.e., Purchase Orders, Sales Orders etc.).
The **Shipment Date** depending on Item Availability will be reflected in **Earliest Shipment Date** field on the Sales Line.
Therefore, it is possible to add Item to Basket based on availability and not on actual stock.
I.e., to buy more than in stock but the Shipment Date will be set to the date when the desired availability is in stock.

Note

If the **Availability Check Method** is set to *Available* and **Availability Check on Submit** is set to *TRUE*, then it is important that **Set Item Shipment Date** is set to *Earliest Possible*. The checkout verification will use the Shipment Date on the Basket Line as reference point and if that is set to *Work Date* - a buy into the future is not possible.

Examples of available quantities on Stock and two Purchase Orders:

1. Available in Stock is **2** pieces, Quantity on Purchase Orders in TRIMIT with **Expected Receipt Date** April 15, 2025, **10** pieces and on May 20, 2025, **15** pieces.

When ordering **1** piece, the **Shipment Date** will become the Work Date (March 3, 2025).

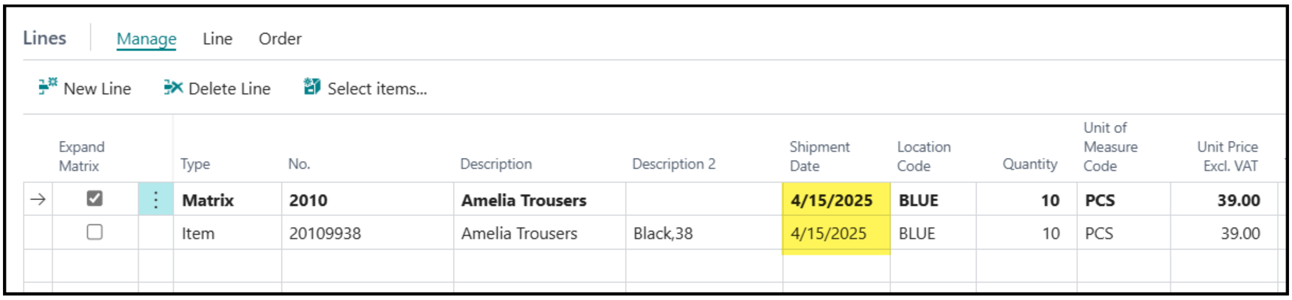
Lines | Manage | Line | Order

New Line | Delete Line | Select items...

Expand Matrix		Type	No.	Description	Description 2	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Tax
☑	⋮	**Matrix**	**2010**	**Amelia Trousers**		**3/3/2025**	**BLUE**	**1**	**PCS**	**39.00**	
☐		Item	20109938	Amelia Trousers	Black,38	3/3/2025	BLUE	1	PCS	39.00	

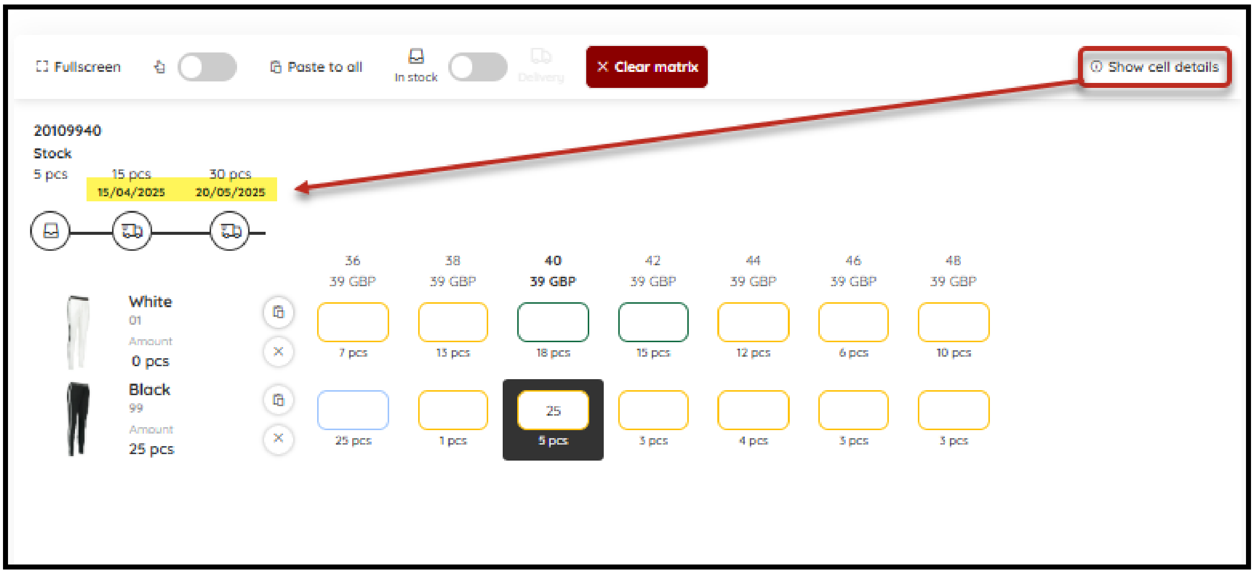
2. Available in stock is **1** piece, Quantity on Purchase Orders in TRIMIT with **Expected Receipt Date** April 15, 2025, **10** pieces and on May 20, 2025, **15** pieces.

When ordering **10** pieces, the **Shipment Date** will become April 15, 2025.



Expand Matrix		Type	No.	Description	Description 2	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT
☑	⋮	**Matrix**	**2010**	**Amelia Trousers**		**4/15/2025**	**BLUE**	**10**	**PCS**	**39.00**
☐		Item	20109938	Amelia Trousers	Black,38	4/15/2025	BLUE	10	PCS	39.00

3. Available in stock is **5** pieces, Quantity on Purchase Orders in TRIMIT with **Expected Receipt Date** April 15, 2025, **10** pieces and on May 20, 2025, **15** pieces.



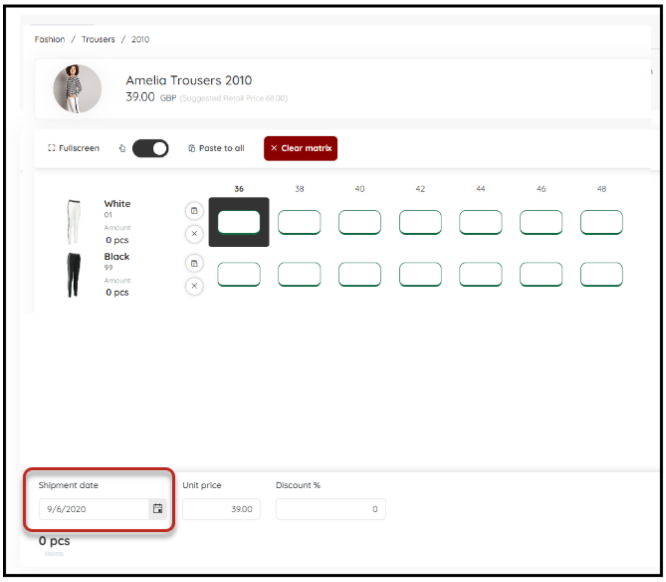
When ordering **25** pieces, the **Shipment Date** will become May 20, 2025.

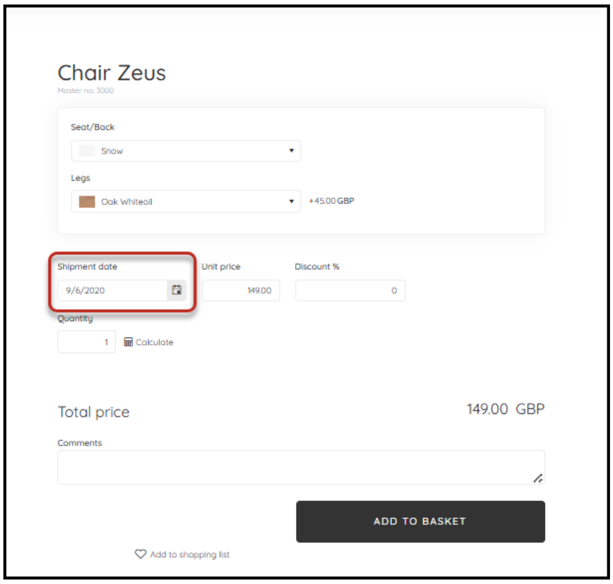
Expand Matrix		Type	No.	Description	Description 2	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT
☑	⋮	**Matrix**	**2010**	**Amelia Trousers**		**5/20/2025**	**BLUE**	**25**	**PCS**	**39.00**
☐		Item	20109940	Amelia Trousers	Black,40	5/20/2025	BLUE	25	PCS	39.00

If **Set Item Shipment Date** is set to *blank*, then the Shipment Date of the new Sales Order will be handled according to the normal rules (i.e., Set to Order Date).

Allow Change of Shipment Date on Sales Line

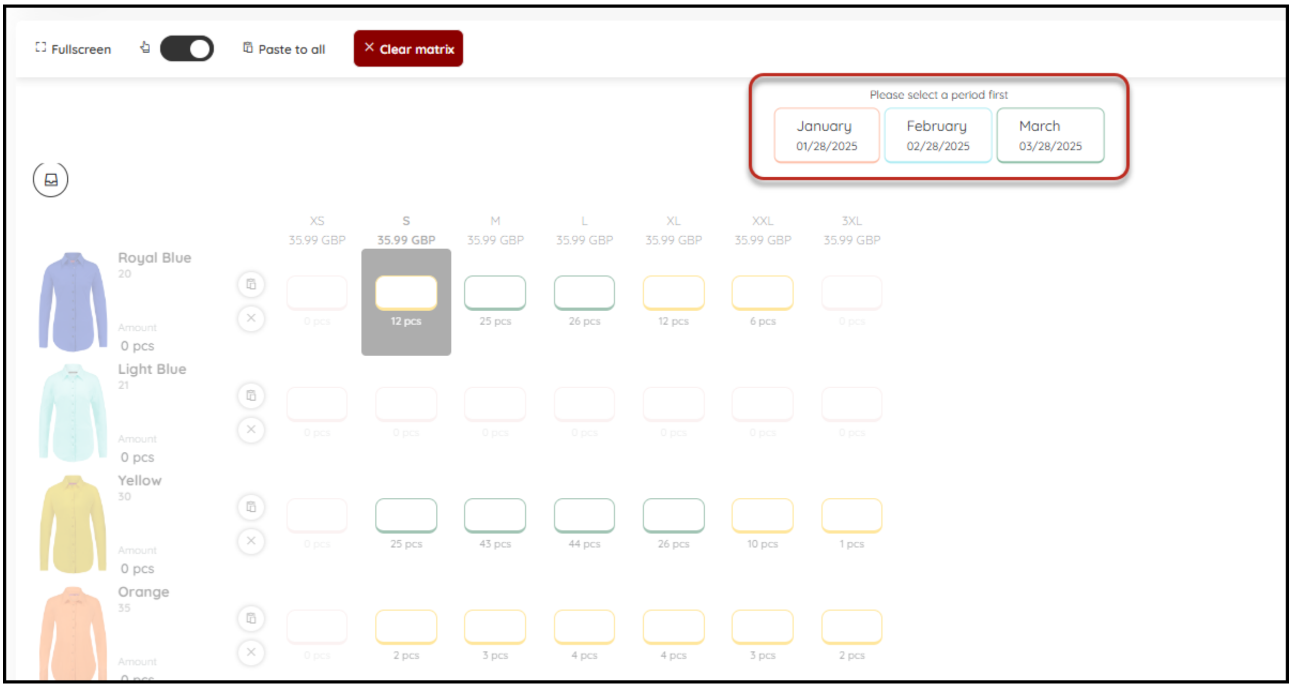
Allows the Sales Agent to set free of choice **Shipment date** that will be applied to the Sales Lines of a Matrix or for a Sales Line of a Configurable Item.





Allow Change of Delivery Period

If this field is set to *TRUE*, the Sales Agent can select from the list of **Shipment Group Code** (Shipment Groups or Collection Delivery Periods) that the product is attached to in the Product page.
This is however only possible if the Sales Agent has chosen an **Order Type** with field **Delivery Period Handling** set to *Specify Delivery Periods.*

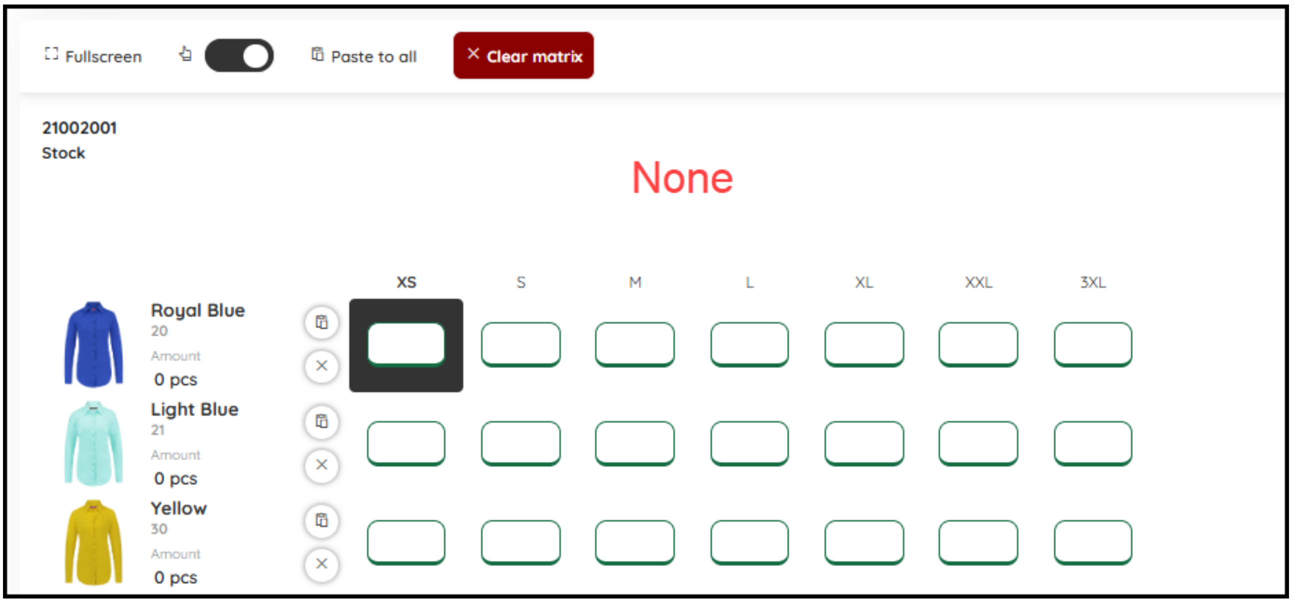


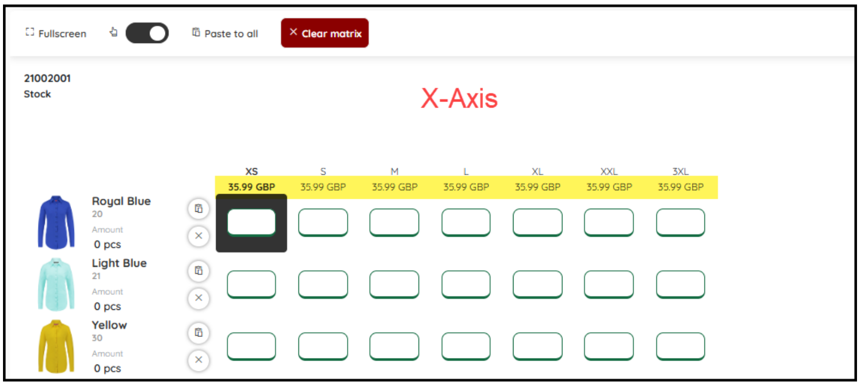
Based on the chosen **Period** the Matrix can change as well and only show the Colors available for the chosen **Period**.

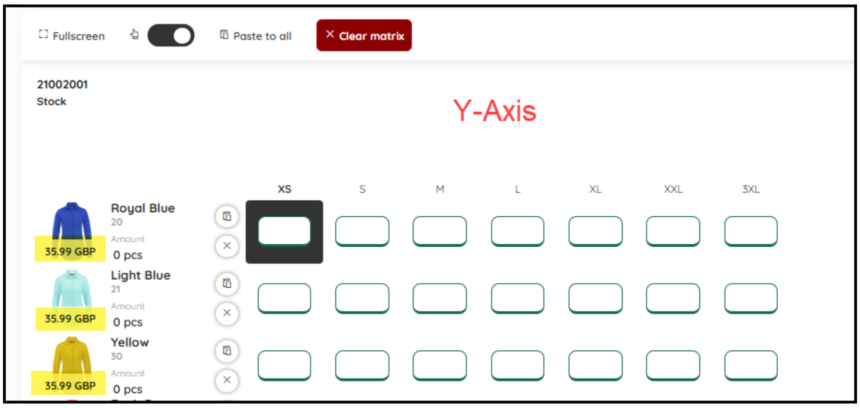
Price Info on Matrix

This field determines is you want to see Sales Prices in the lines or columns of a Matrix on a Product Page in the B2B/SA.
You can choose between the following three options:

None	You do not want to see Sales Prices in the Matrix
X-Axis	You want to see the Sales Price in the header of every column (Sizes) of your Matrix.
Y-Axis	You want to see the Sales Price in the lines (Colors) of your Matrix.







Note
The content of this field will overwrite the general parameter in the Sales & Receivables Setup called **Info on Matrix X-Axis** with the options *None* and *Price*.

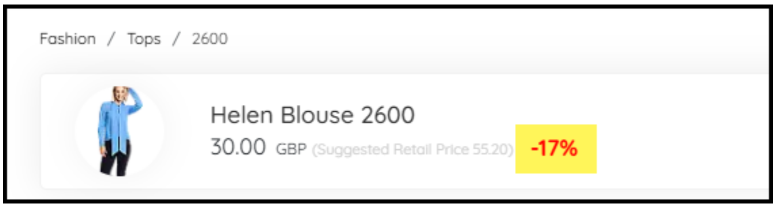
Campaign Calc. Level

This field determines on which Level the Campaign Prices should be evaluated to determine if there are Campaign Prices, and then it can be shown at the Master or in the Matrix on the Product Page that there is a Campaign Price. The various Levels are mainly for performance reason.
You can choose between the following four options:

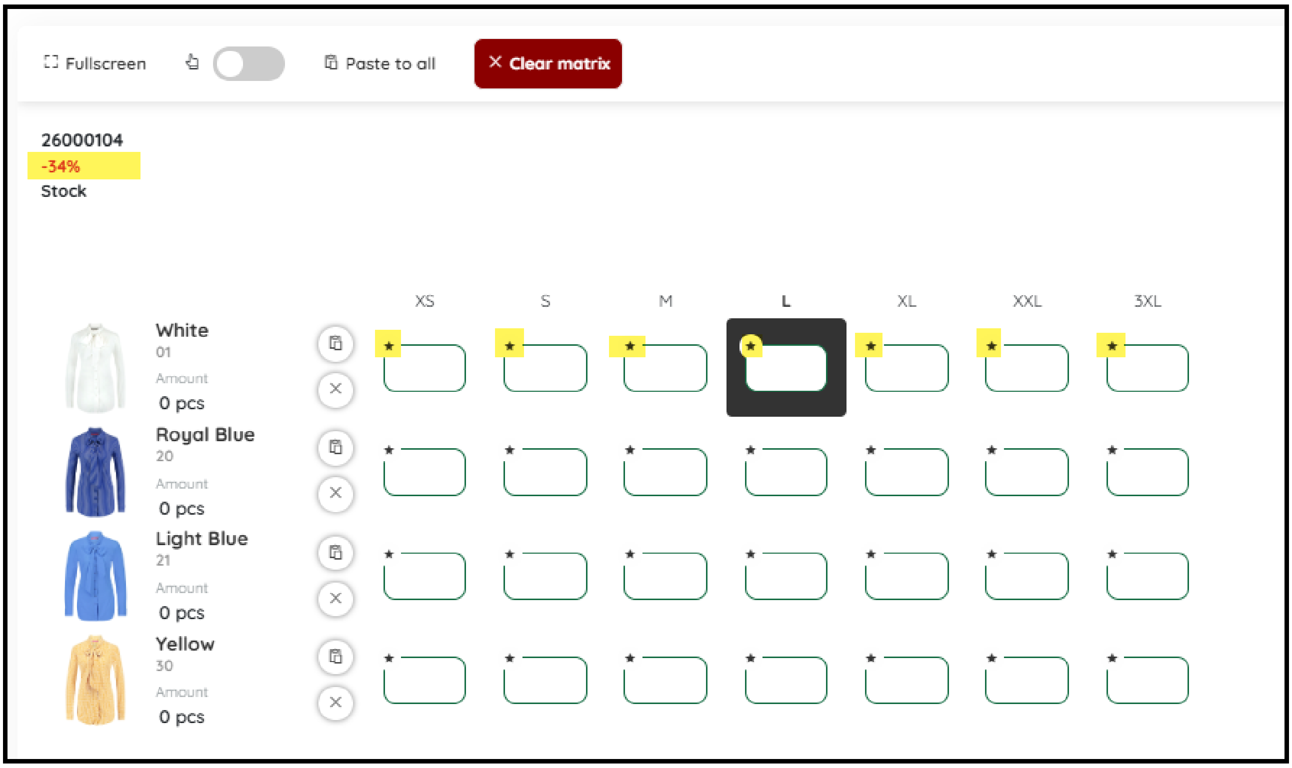
Master	This option will only test on Master Level if there is a Campaign Price. In that case, on the Product Page, you will only see a % or remark behind the Master Prices.

Y-Axis	This option will evaluate for every Y-Axis (typically a Color) if there is a Campaign Price. In that case, on the Product Page, all the Columns in the Matrix (typically the Sizes) for that Y-Axis will get an icon above the cell of the Matrix to indicate there is a Campaign Price.
X-Axis	This option will evaluate for every X-Axis (typically a Size) if there is a Campaign Price. In that case, on the Product Page, all the Lines in the Matrix (typically the Color) for that X-Axis will get an icon above the cell of the Matrix to indicate there is a Campaign Price.
Cell	This option will evaluate every Item of a Master if there is a Campaign Price. In that case, on the Product Page, the cell that represents that Item will get an icon above the cell of the Matrix to indicate there is a Campaign Price.

If the **Campaign Calc. Level** is set to *Master*, then you will not see any icons in the Matrix but only see it at the Master.



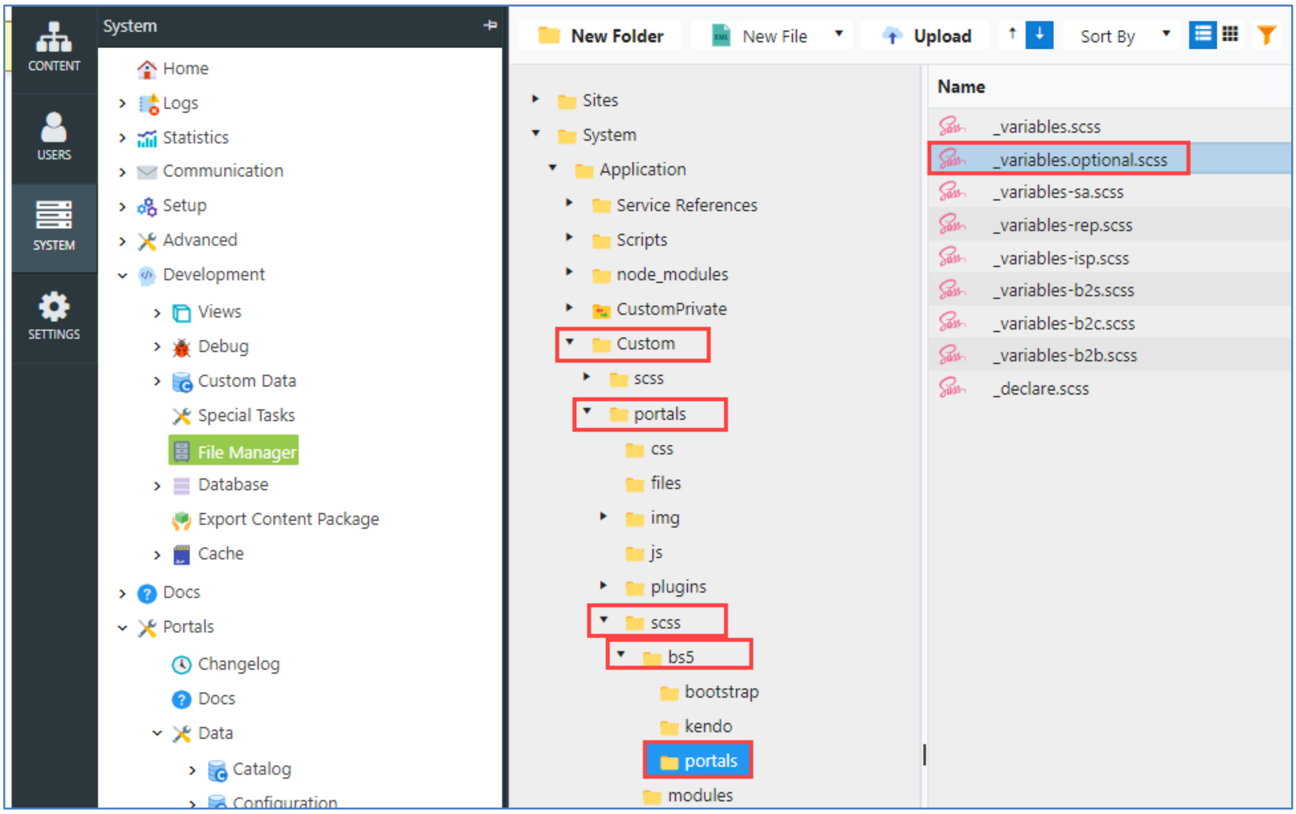
If **Campaign Calc. Level** is not set to *Master*, then an Asterix (*) icon will be displayed for each Cell (on Product Page) which has a different Variant Campaign Price.
I.e., if you have different Campaign Prices for some Colors, you will see an Asterix in every Matrix Cell with a Campaign Price:

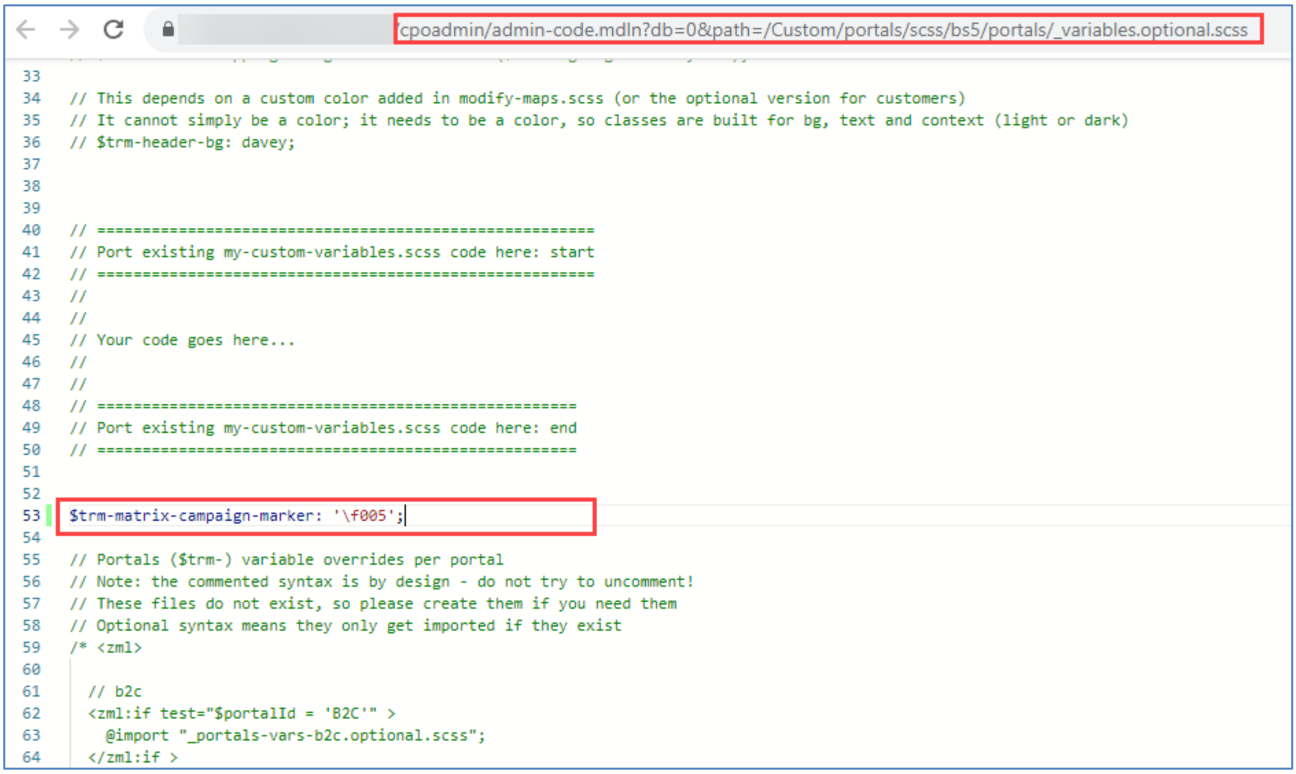


This Asterix (*) icon is shipped with the standard TRIMIT Portal package and is from “Font-awesome”-pack which we also ship standard.
The standard Asterix (*) icon can be replaced with a different icon.
If this has been done, this new theme value needs to be applied to the portal:

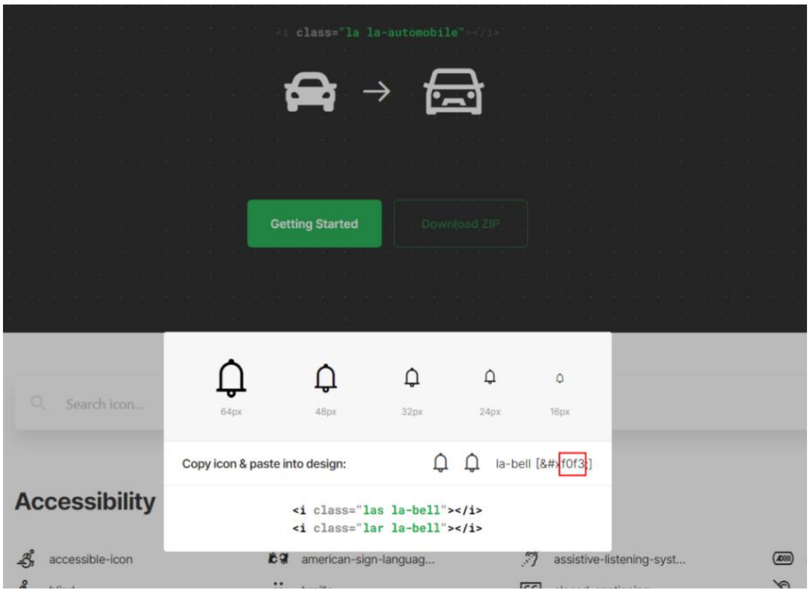
<value id="LineAwesomeIcons">true</value>

Then the new icon code must be placed in ***/Custom/portals/scss/bs5/portals/_variables.optional.scss*** in the variable **$trm-matrix-campaign-marker:**





E.g., change this variable value to '\f0f3' – this code is obtained by clicking on the needed icon on the following page: https://icons8.com/line-awesome , see screen shot below:

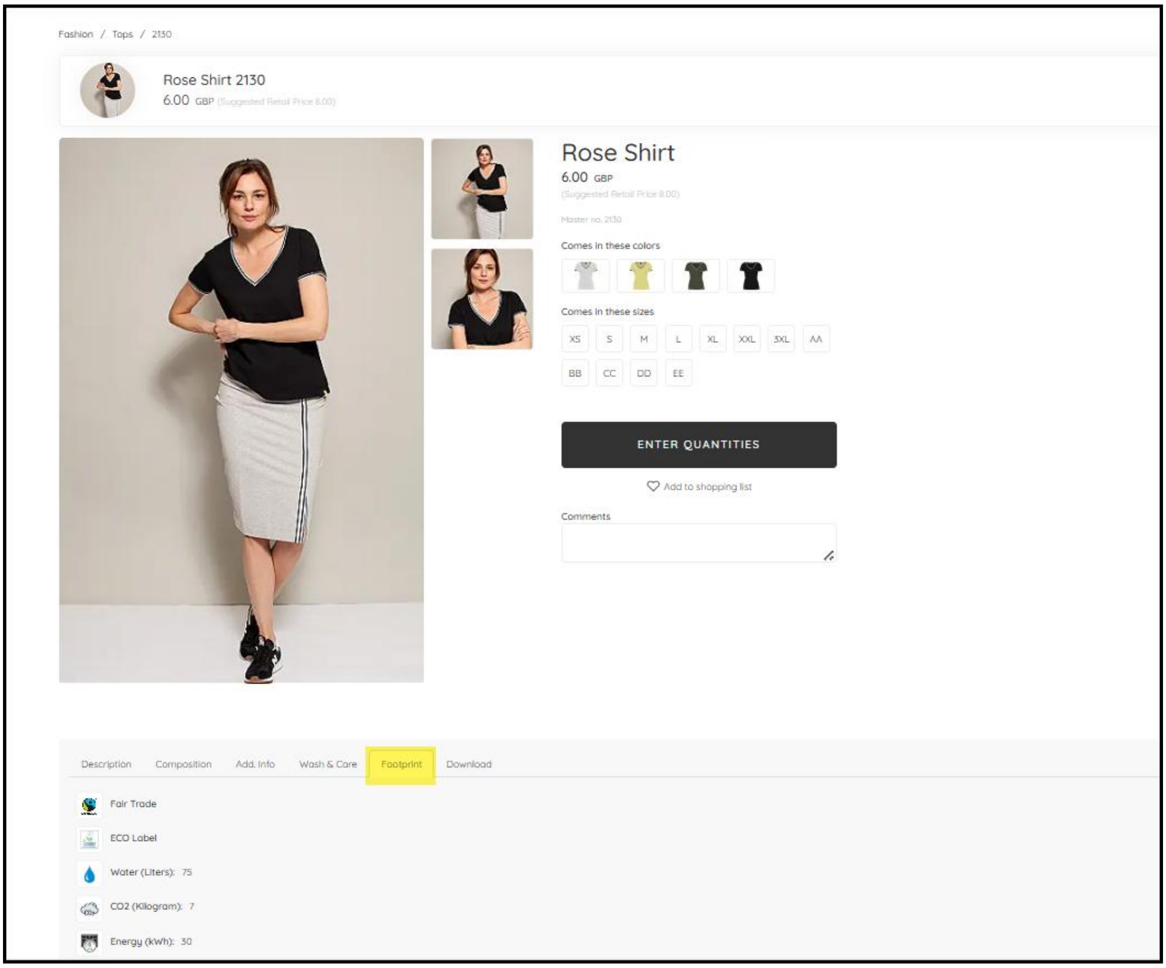


On a brand new TRIMIT Portals installation, the small Asterix (*) icons are present by default. Make sure to put and save new theme value, so the small Asterix (*) icon appears in the Matrix on Product page on SA and B2B:

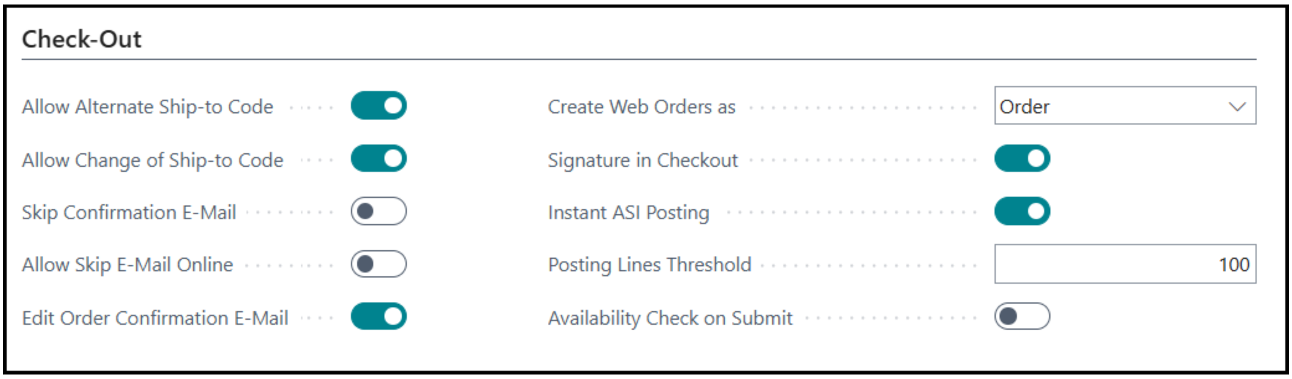
<value id="LineAwesomeIcons">true</value>

Show Sustainability Data

When setting this field to *Yes,* on the Product pages, you are able to see the Sustainability information of the Master under *Footprint.*



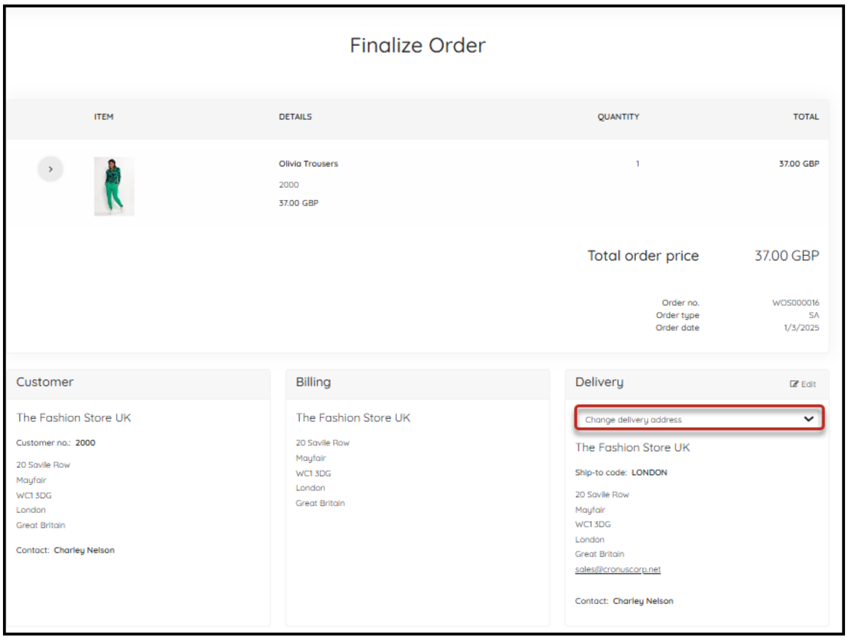
FastTab Check-Out



Allow alternate Ship-To Code

SA Portal Profile.

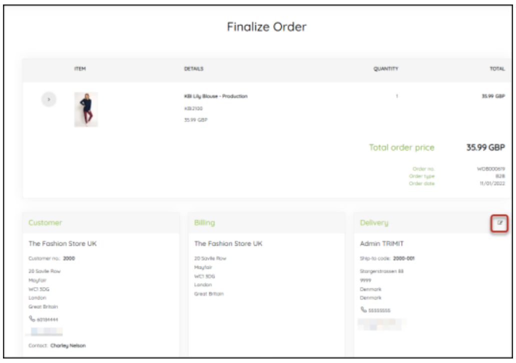
This is a Boolean field. Setting this field to *TRUE* activates **Select shipment date and delivery address** page after initializing a new Order in which the Salesperson/Agent can choose a **Ship-to Code**.
This may be important if **Choose Address** (Ship-to Code) has a **Location Code** value assigned, which affects Item Availability.
If set to *TRUE*, then default **Ship-to Code** of the Customer will be shown on Order start even if Customer has only one **Ship-to Code**, and the salesperson/agent is even able to change the details of a chosen **Ship-to Code** for this specific Order**.**



Setting this field to *TRUE* also enables ability of changing **Ship-to Code** on **Finalize Order** page, i.e., final stage in order creation process.

B2B Webshop profile.

If this field is set to *TRUE*, then it will be possible to select a different **Delivery Address** (Ship-to Code) on Order start (from drop down field) or on **Finalize Order** page if alternative Ship-to Codes are available in TRIMIT for the Customer.
If this field is set to *FALSE*, then **Delivery Address** page will not be shown on Order start on B2B even if **Ship-to Code by Order Start** field is set to *TRUE*.



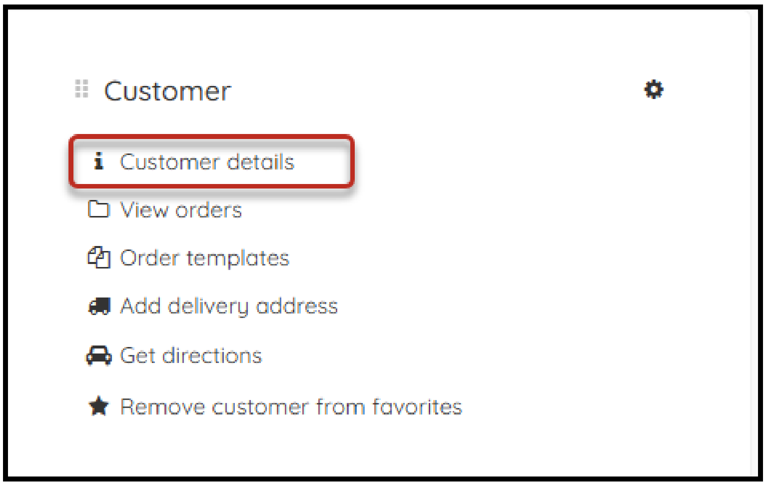
Considerations regarding Location Code. Depending on the fields in the ***Portal Profile*** Card, the Location Code can be taken from various places in the system.
Following table describes the different combinations:

Mandatory Change of Order Type	*Allow Alternate Ship-to Code*	*Location Code from*
+	*+ (default +/-)*	*Order Type*
+	*- (default +/-)*	*Order Type*
-	*+ (default +)*	*Ship-to Code Card*
-	*+ (default -)*	*Customer*
-	*- (default +)*	*Ship-to Code Card*
-	*- (default -)*	*Customer*
-	*- (default -)*	*Extended location search*

(default +/-) is value in ***Default Ship-to Code*** field on ***Ship-to Address*** *Card: + = TRUE, - = FALSE*

Allow Change of Ship-To Code

If this field is set to *TRUE*, then it is possible to edit the Customer's Ship-to Address on SA Customer dashboard under ***Customer/Customer details***

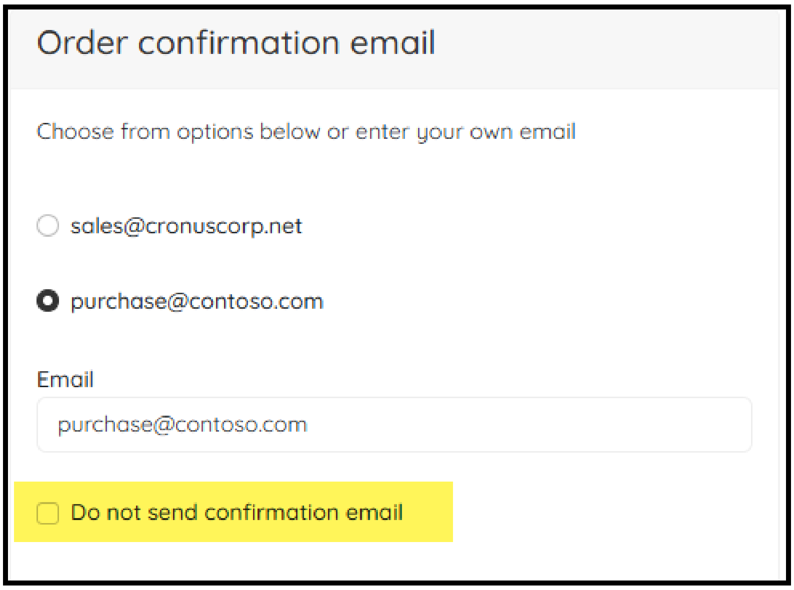


Skip Confirmation E-mail

If set to *TRUE*, then it will be possible to submit Order without sending the Order Confirmation E-Mail to the Customer.

Allow Skip E-Mail Online

If set to *TRUE*, then there will be an option to **Do not send confirmation email** on **Finalize Order** page.



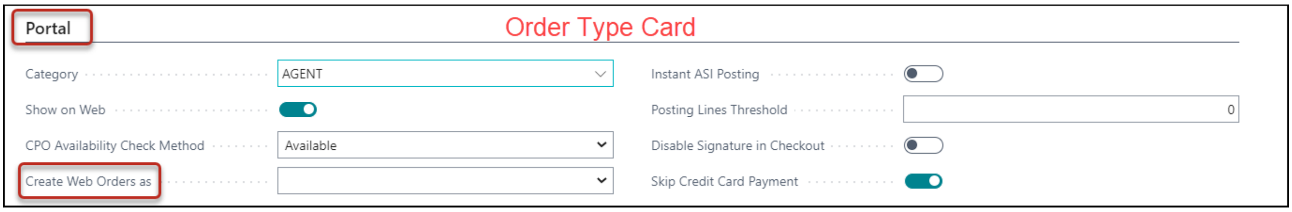
Setting **Do not send confirmation email** field to *TRUE* will disable sending any Order Confirmation E-Mails to recipients. If the Order is reopened for editing, then the value is not persisted, i.e., if originally was set to *TRUE* then on reopen will be set to *FALSE* again.

Edit Order Confirmation E-Mail

This option is common to SA and B2B. If the value is set to *TRUE*, then it is possible to manually type an E-Mail Address to which Order Confirmation will be sent to. If set to *FALSE*, then it will only be possible to select an E-Mail Address from available options.
It is possible to select a needed E-Mail Address on **Finalize Order** page – the last page in order creation process on SA and B2B.

Create Web Orders as

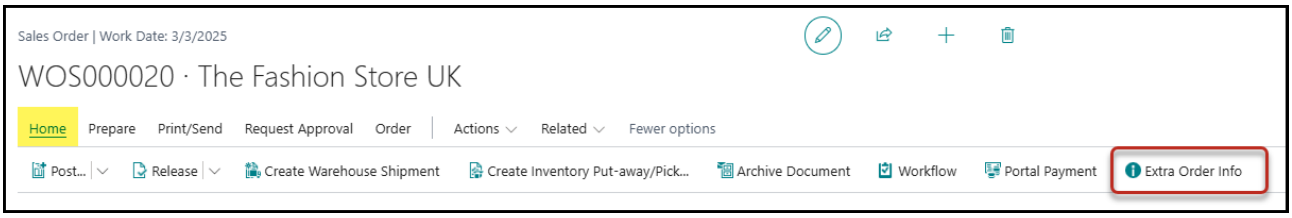
Select Document Type that should be created when submitting the Order from the Portal.
Values that can be chosen are *Order* and *Quote.*
The SA and B2B have an option to choose which Document Type is created, Sales Order or Sales Quote, when the Order is submitted.
After submitting on the Portal, the Sales Document can be landing in the **Advanced Sales Integration** table, after posting from which the document appears whether as a Sales Order or a Sales Quote or the Sales Document will be created directly based on the **Instant ASI Posting**.
This field is also available on **Order Type** Card, FastTab ***Portal***, which will – if filled - overrule the content of this field in the Portal Profile.



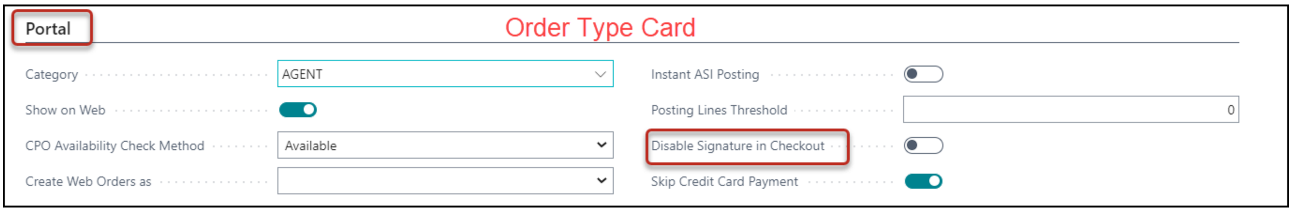
Signature in Checkout

If set to *TRUE*, then new fields for **Signature name** and **Signature** will be shown on **Finalize Order** page.

And submitting an Order will not be possible without filling these fields.
This field is also available on **Order Type** Card as field **Disable Signature in Checkout**, which will overrule the content of this field in the Portal Profile.
Signature name and **Signature** can then be seen in ***Extra Order Info*** page in TRIMIT, which can be opened from ***Sales Order*** card, ***Home, Extra Order Info***.



Signature functionality on Portals can be disabled per Order Type. This can be done by setting value *TRUE* in field **Disable Signature in Checkout** on ***Order Type*** card:



Instant ASI Posting

Setting this field to *TRUE* activates Instant Posting of Portals Sales Documents in ASI – meaning that an Order on the Portal will immediately be created as a Sales Quote or Sales Order when finalizing the Order on the Portal.
Read more information about this field in ***White Paper – TRIMIT Portals Advanced Sales Integration***.
This field can also be overruled by the corresponding field in the Order Type (see picture above).

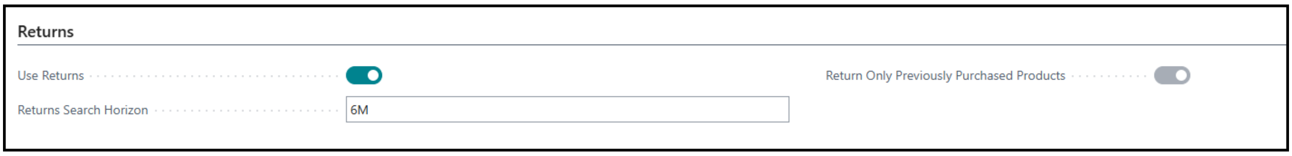
Posting Lines Threshold

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**. Read more information about this field in ***White Paper – TRIMIT Portals Advanced Sales Integration***.
This field can also be overruled by the corresponding field in the Order Type (see picture above).

Availability Check on Submit

Usually, an **Inventory Profile Setup** uses **Include Sales Import Documents** = *TRUE* – in this way Availability is checked as soon as Item being added to basket. And oversell is impossible for two simultaneous users which are trying to add the same Item with the same last available quantity to basket.
Some Customers though do not to use **Include Sales Import Documents** on Inventory Profile Setup. That is why there is another option in Portal Profile – **Availability Check on Submit**. This option allows adding to basket the last available quantity for two different users and first check the Item Availability on order submit. So, two different users cannot submit order with last available quantity – only one of them can, the first who clicked **Finalize Order** button.
This though will not work if **Replenishment Policy** on the Item Card is set to *Order* (the availability will not be checked) but will work if it is set to *Inventory*.

FastTab Returns



Use Returns

If you want to be able to enter **Web Returns** on the SA and B2B, this field needs to be set to *TRUE*.
The **Web Return** will be submitted to the ERP as a **Complaint.**
See ***White Paper – TRIMIT Web Returns*** and ***White Paper – TRIMIT Complaints*** for more information.

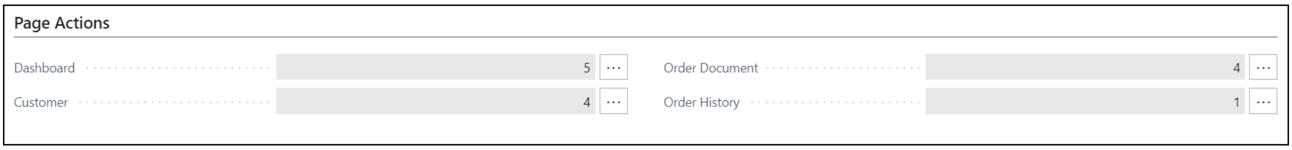
Returns Search Horizon

The **Returns Search Horizon** is a Date Formula for the Period for which customers can register a Web Return based on the Posting Date of an existing Posted Sales Invoice.
This field will overrule the [Horizon, Invoice No. Search] of the Sales & Receivables Setup and will determine if a user can register a Web Return for very old, purchased Items.

Return only Previously Purchased Products

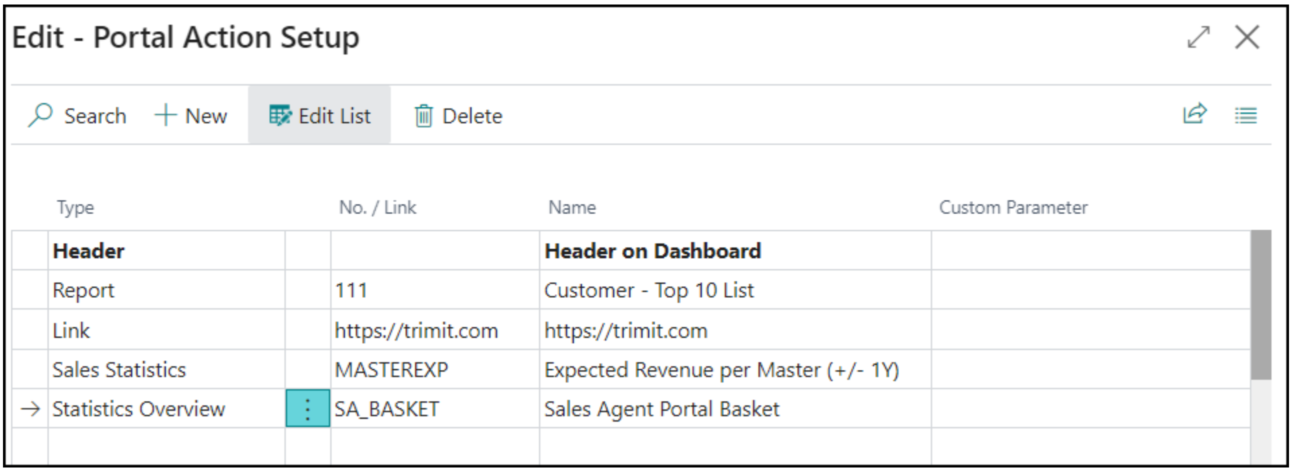
This field is currently noneditable, but that can be subject to change in the future, where it could be controlled by the **Invoice Reference Mandatory** in the Sales & Receivables Setup.
It determines that a user can only register a Web Return based on previously purchased products.

FastTab Page Actions



Dashboard

You can determine which **Actions** should be shown on the **Sales Agent Dashboard** of the SA (or **Customer Dashboard** of the B2B) in the dock ***Actions.***
Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.


Edit - Portal Action Setup

Search | New | Edit List | Delete

Type	No. / Link	Name	Custom Parameter
Header		**Header on Dashboard**	
Report	111	Customer - Top 10 List	
Link	https://trimit.com	https://trimit.com	
Sales Statistics	MASTEREXP	Expected Revenue per Master (+/- 1Y)	
Statistics Overview	SA_BASKET	Sales Agent Portal Basket	

Type

You can choose the Types *Report, Link, Sales Statistic* or *Statistics Overview*.
The other available options *XMLport* and *Page* are not applicable and will not be shown in the dock ***Actions*** on the Portal.

No./Link

Based on the **Type** you can choose a *Report, Website, Extended Sales Statistics Setup* or *Extended Statistics Overview.*
For setting up the *Extended Sales Statistics Setup* or *Extended Statistics Overview:*
see details in ***White Paper – TRIMIT Extended Sales Statistics***

Name

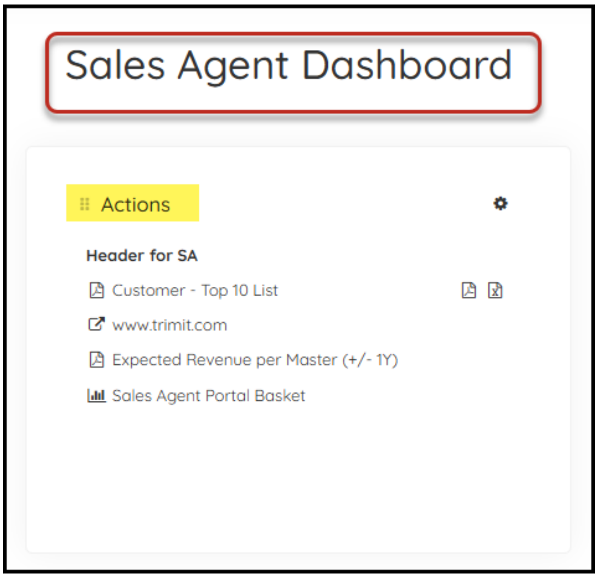
The name of the **No./Link** will be shown automatically, but you can change it.
Then this will become the Name that will be shown in the dock ***Actions*** on the Portal.

Custom Parameter

Especially for customized Reports, you could enter the Parameters needed for this Report.

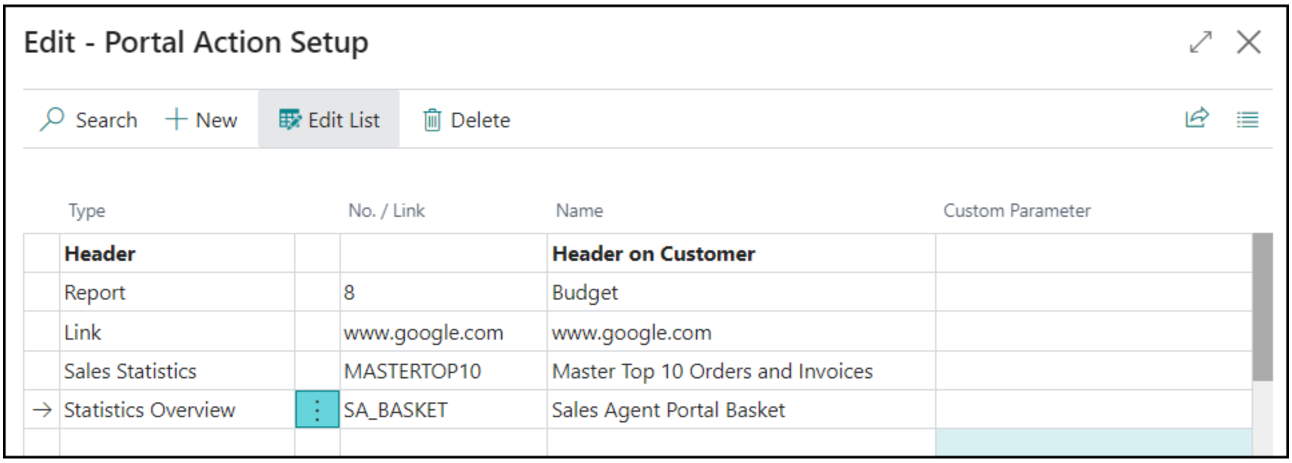
Type *Report* and *Sales Statistics* will result in a pdf-file of the Report/Sales Statistic if you click on the **Name** in the dock ***Actions.***
Type *Link* will open the website of the **No./Link** if you click on the **Name** in the dock ***Actions.***

Type *Statistics Overview* will show a webpage with the individual Sales Statistics that are connected to the Statistics Overview if you click on the **Name** in the dock ***Actions.***

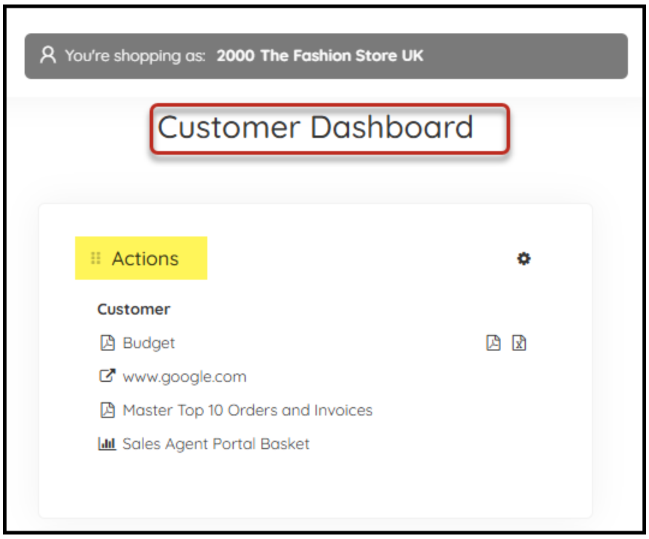


Customer

You can determine which **Actions** should be shown on the **Customer Dashboard** of the SA – after you have chosen the Customer for which you want to see/create Orders/History - in the dock ***Actions.*** Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

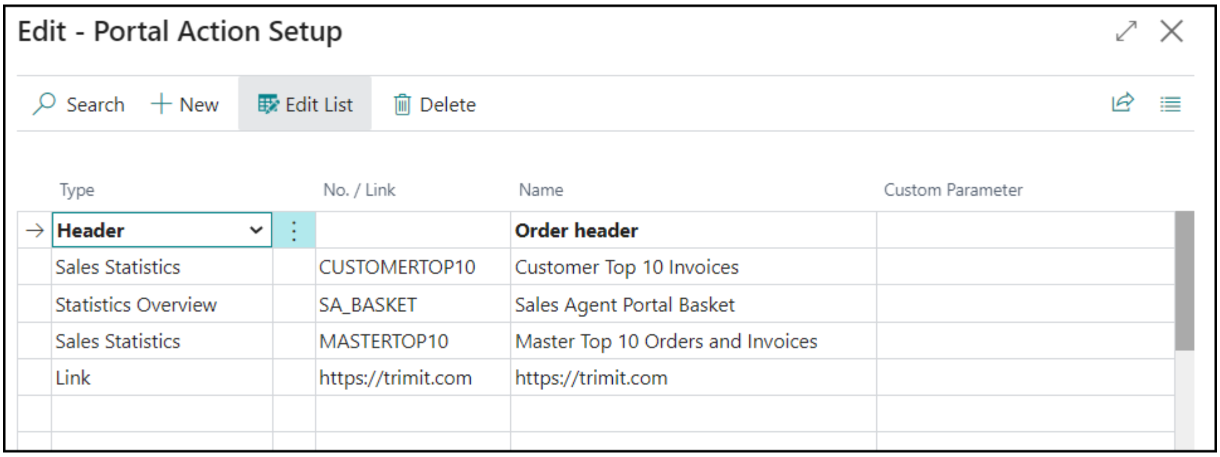


For details of the fields see Dashboard.

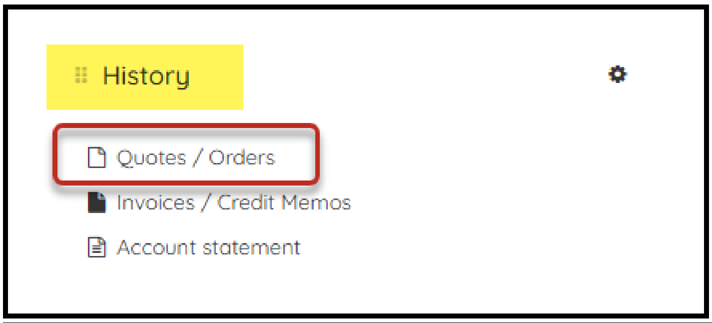


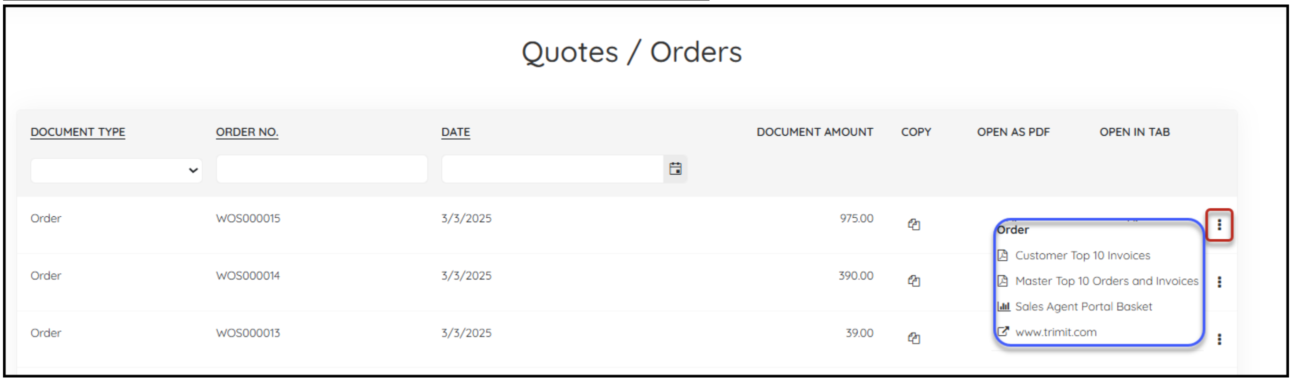
Order Document

You can determine which **Actions** should be shown on the **Orders/Quote** page of a Customer (which can be found in dock ***History***) in the SA (or B2B) Customer Dashboard – after you have chosen the Customer for which you want to see the Orders/Quotes.
Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.



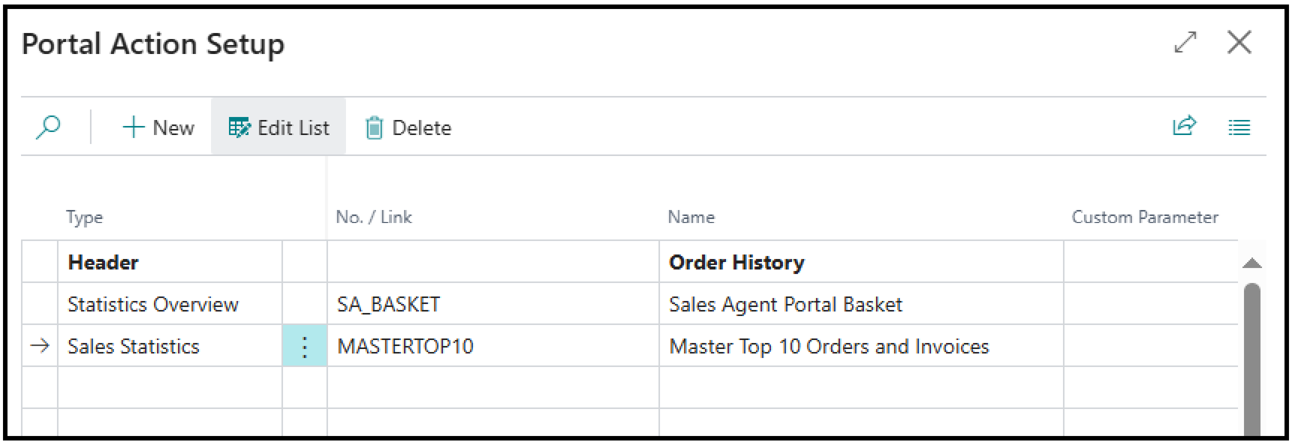
For details of the fields see Dashboard.



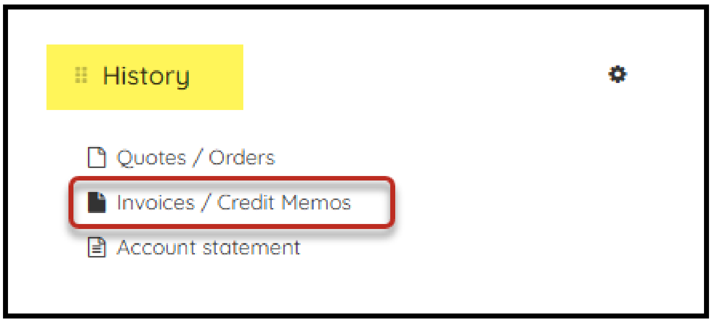


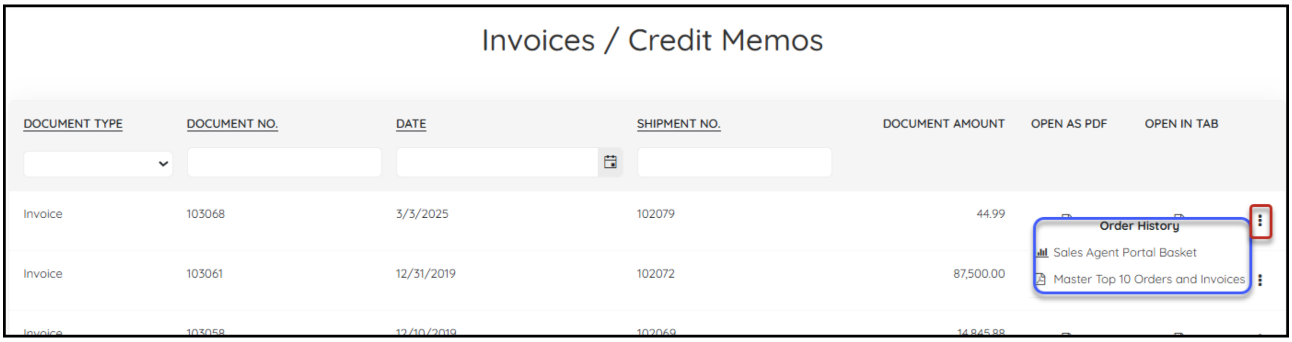
Order History

You can determine which **Actions** should be shown on the **Invoices/Credit Memos** page of a Customer (which can be found in dock ***History***) in the SA (or B2B) – after you have chosen the Customer for which you want to see the Invoices/Credit Memos.
Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

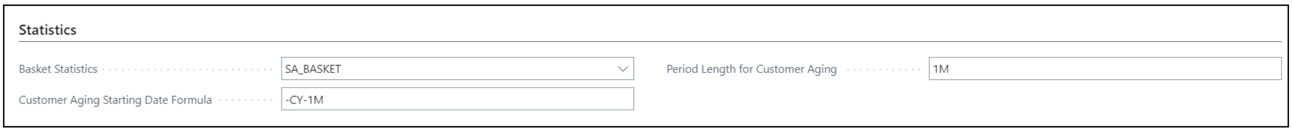


For details of the fields see Dashboard.



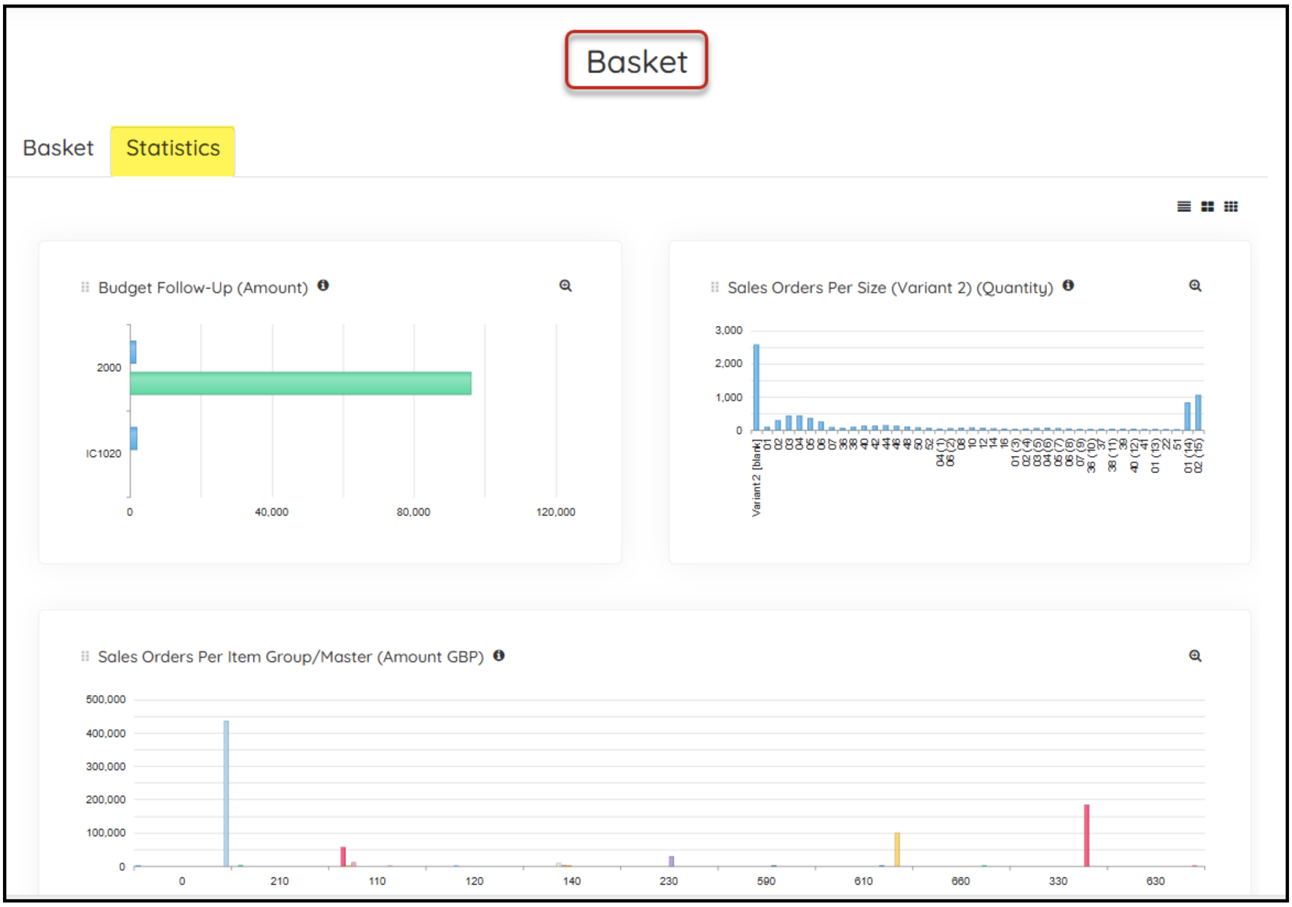


FastTab Statistics



Basket Statistics

You can choose a **Statistics Overview** that will be shown in the Basket page of the SA (or B2B).

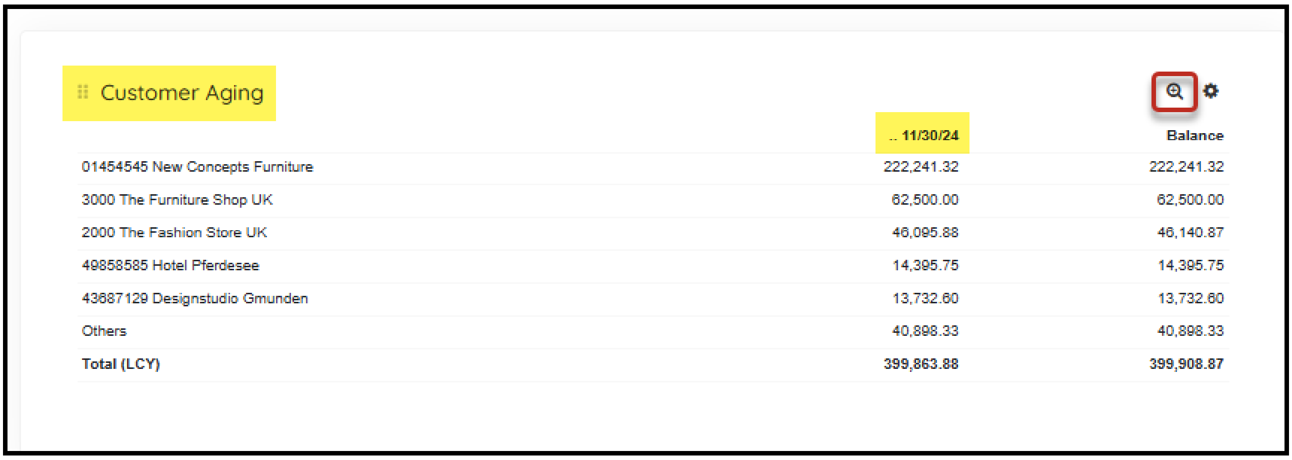


Customer Aging Starting Date Formula

In this field, you can enter a Date Formula for the Starting Date of the Customer Aging that can be shown on the SA.

I.e., if today is *March 3, 2025*, and this field is *-CY-1M*, that the Starting Date will be *December 1st, 2024*.

In the dock **Customer Aging** you will then see a column with *..November 30th, 2024*.



Customer Aging

	.. 11/30/24	Balance
01454545 New Concepts Furniture	222,241.32	222,241.32
3000 The Furniture Shop UK	62,500.00	62,500.00
2000 The Fashion Store UK	46,095.88	46,140.87
49858585 Hotel Pferdesee	14,395.75	14,395.75
43687129 Designstudio Gmunden	13,732.60	13,732.60
Others	40,898.33	40,898.33
Total (LCY)	**399,863.88**	**399,908.87**

And if you click the Magnifying Glass:

Customer Aging

	...before	12/01/24.. 12/31/24	01/01/25.. 01/31/25	02/01/25.. 02/28/25	After...	Balance
01454545 New Concepts Furniture	222,241.32	0.00	0.00	0.00	0.00	222,241.32
3000 The Furniture Shop UK	62,500.00	0.00	0.00	0.00	0.00	62,500.00
2000 The Fashion Store UK	46,095.88	0.00	0.00	0.00	44.99	46,140.87
49858585 Hotel Pferdesee	14,395.75	0.00	0.00	0.00	0.00	14,395.75
43687129 Designstudio Gmunden	13,732.60	0.00	0.00	0.00	0.00	13,732.60
49525252 Beef House	11,941.36	0.00	0.00	0.00	0.00	11,941.36
47563218 Klubben	11,772.20	0.00	0.00	0.00	0.00	11,772.20
49633663 Autohaus Mielberg KG	7,924.80	0.00	0.00	0.00	0.00	7,924.80
32656565 Antarcticopy	2,582.80	0.00	0.00	0.00	0.00	2,582.80
35963852 Heimilisprydi	2,024.21	0.00	0.00	0.00	0.00	2,024.21
42147258 BYT-KOMPLET s.r.o.	1,602.90	0.00	0.00	0.00	0.00	1,602.90
01445544 Progressive Home Furnishings	1,499.03	0.00	0.00	0.00	0.00	1,499.03
35451236 Gagn & Gaman	877.32	0.00	0.00	0.00	0.00	877.32
46897889 Englunds Kontorsmöbler AB	673.71	0.00	0.00	0.00	0.00	673.71
Total (LCY)	**399,863.88**	**0.00**	**0.00**	**0.00**	**44.99**	**399,908.87**

Period Length for Customer Aging

The content of this field (a Date Formula) determines the **Period** between the columns in the details Customer Aging; see picture above.

FastTab Report

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.	0

In this FastTab you need to enter the relevant Report Nos. that will be used in the SA.
If no **Customer Aging Report No.** is entered, report ***105 Customer - Summary Aging*** will be used.

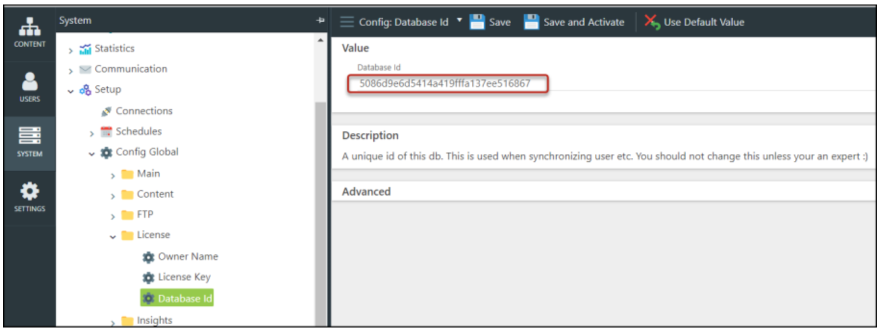
FastTab Advanced

Advanced

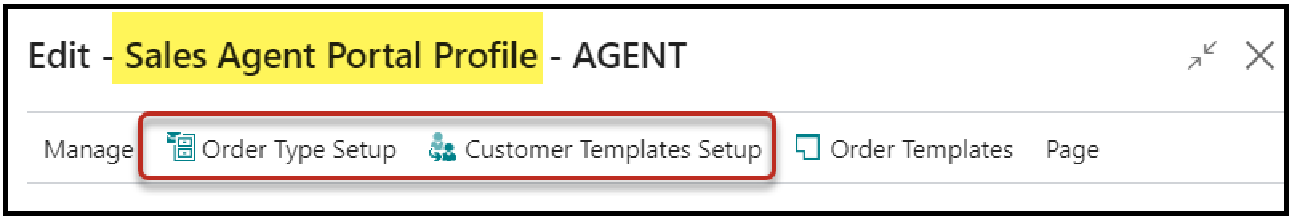
Portal Database Id	

Portal Database Id

If you only have 2 SA (or B2B or SUP), this field is not mandatory.
However, if you have several SA (or B2B or SUP) this field is mandatory to identify the right Portal Database with its unique **Database Id**. The Portal Database Id can be taken from Modelyn ***System/Setup/Config Global/License/Database Id:***

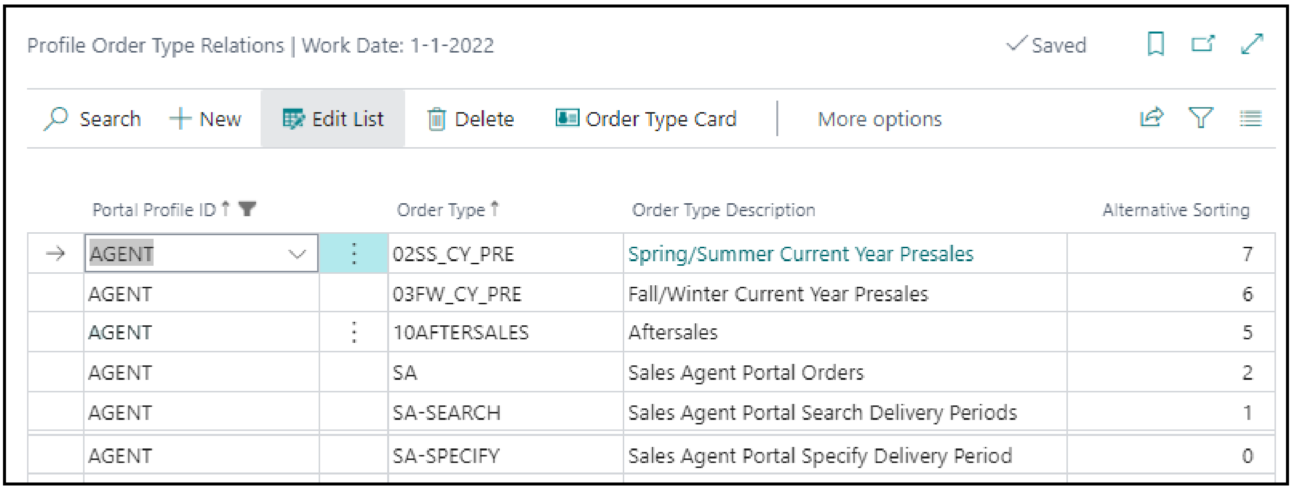


Actions in SA Portal Profile



Order Type Setup

Via **Order Type Setup**, you can choose the **Order Types** that can be selected in the SA (or B2B).

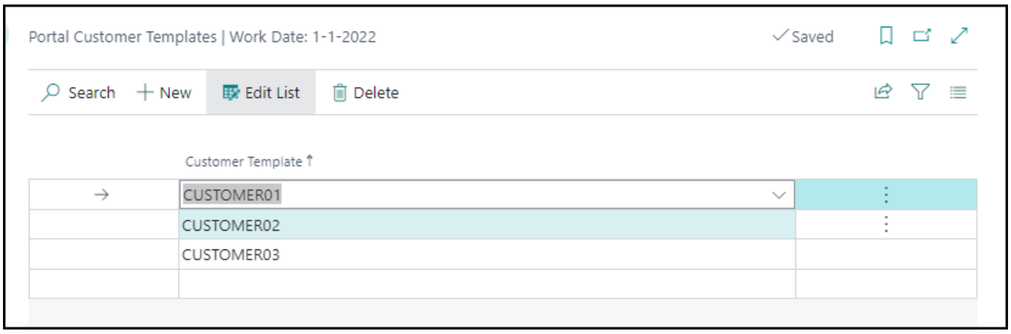


Portal Profile ID	Order Type	Order Type Description	Alternative Sorting
AGENT	02SS_CY_PRE	Spring/Summer Current Year Presales	7
AGENT	03FW_CY_PRE	Fall/Winter Current Year Presales	6
AGENT	10AFTERSALES	Aftersales	5
AGENT	SA	Sales Agent Portal Orders	2
AGENT	SA-SEARCH	Sales Agent Portal Search Delivery Periods	1
AGENT	SA-SPECIFY	Sales Agent Portal Specify Delivery Period	0

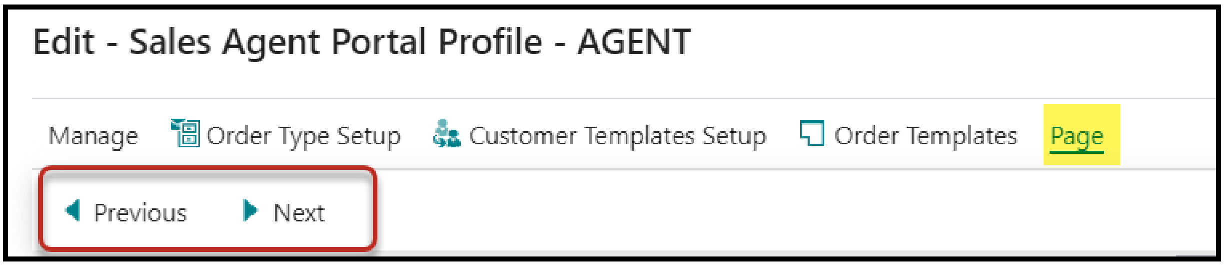
The **Alternative Sorting** determines in which sorting the Order Types will be shown when creating a new Order on the SA (or B2B).

Customer Templates Setup

Via **Customer Templates Setup**, you can select the Configuration Templates that are related to Table ***18 Customer***. The Sales Agent can then select these Customer Templates when creating a new Customer via the SA.

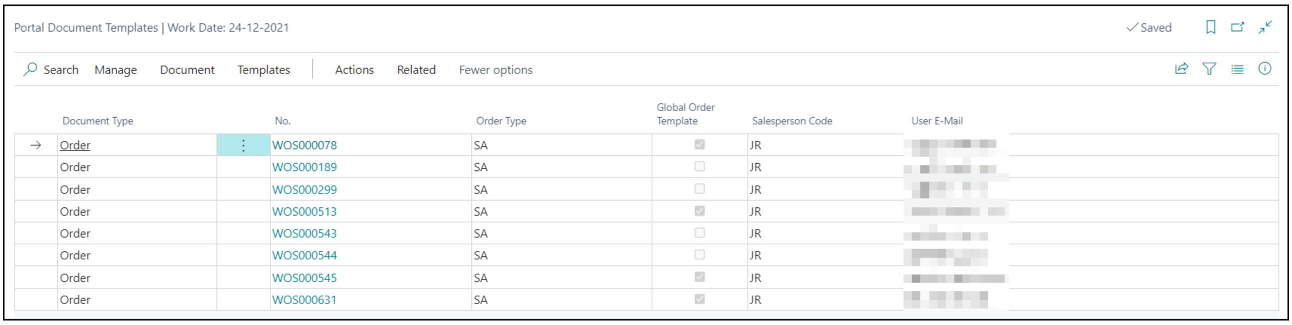


Page



If there are several **Portal Profiles** of the same **Type** *SalesAgent*, you can see the *Next* Portal Profile Card and/or the *Previous* Portal Profile Card.

Order Templates



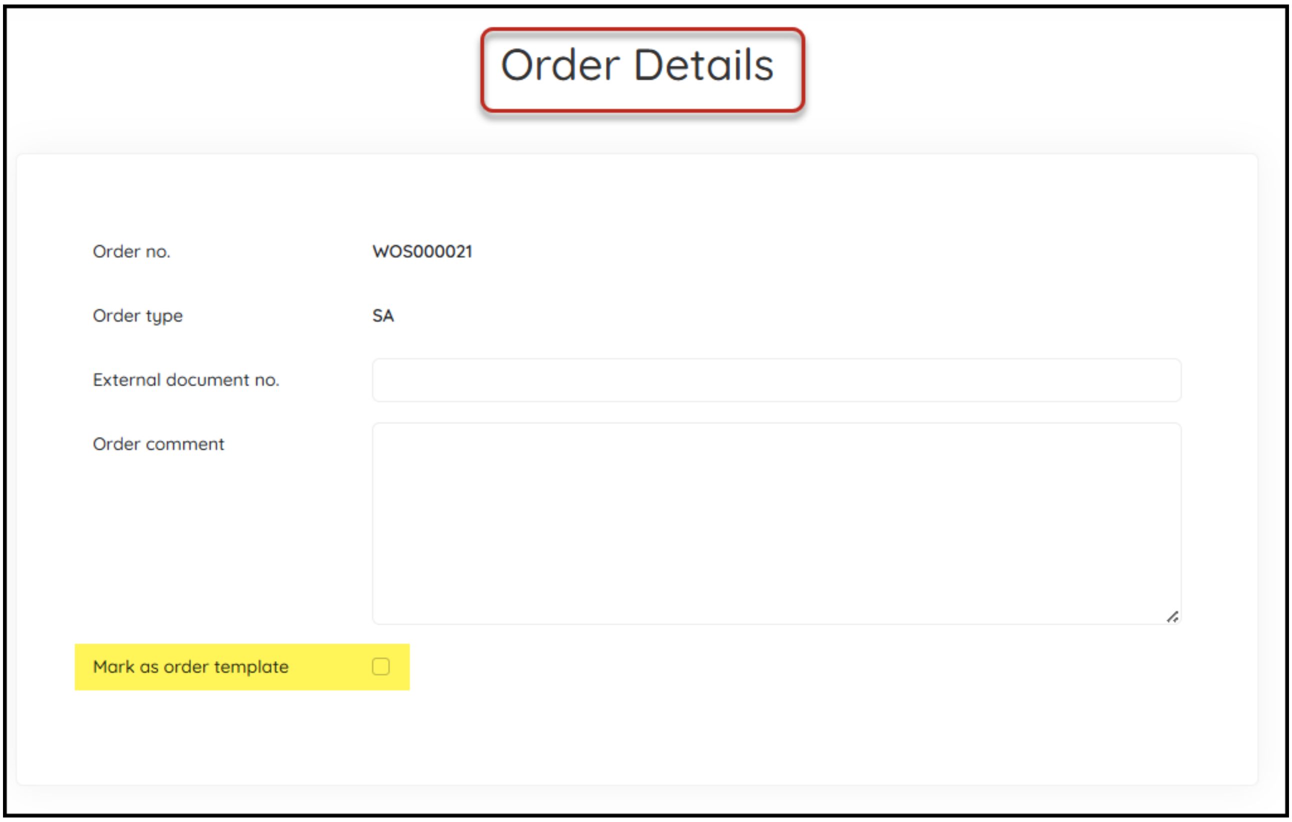
Portal Document Templates | Work Date: 24-12-2021

Document Type	No.	Order Type	Global Order Template	Salesperson Code	User E-Mail
Order	WOS000078	SA	☑	JR	
Order	WOS000189	SA	☐	JR	
Order	WOS000299	SA	☐	JR	
Order	WOS000513	SA	☑	JR	
Order	WOS000543	SA	☐	JR	
Order	WOS000544	SA	☐	JR	
Order	WOS000545	SA	☑	JR	
Order	WOS000631	SA	☑	JR	

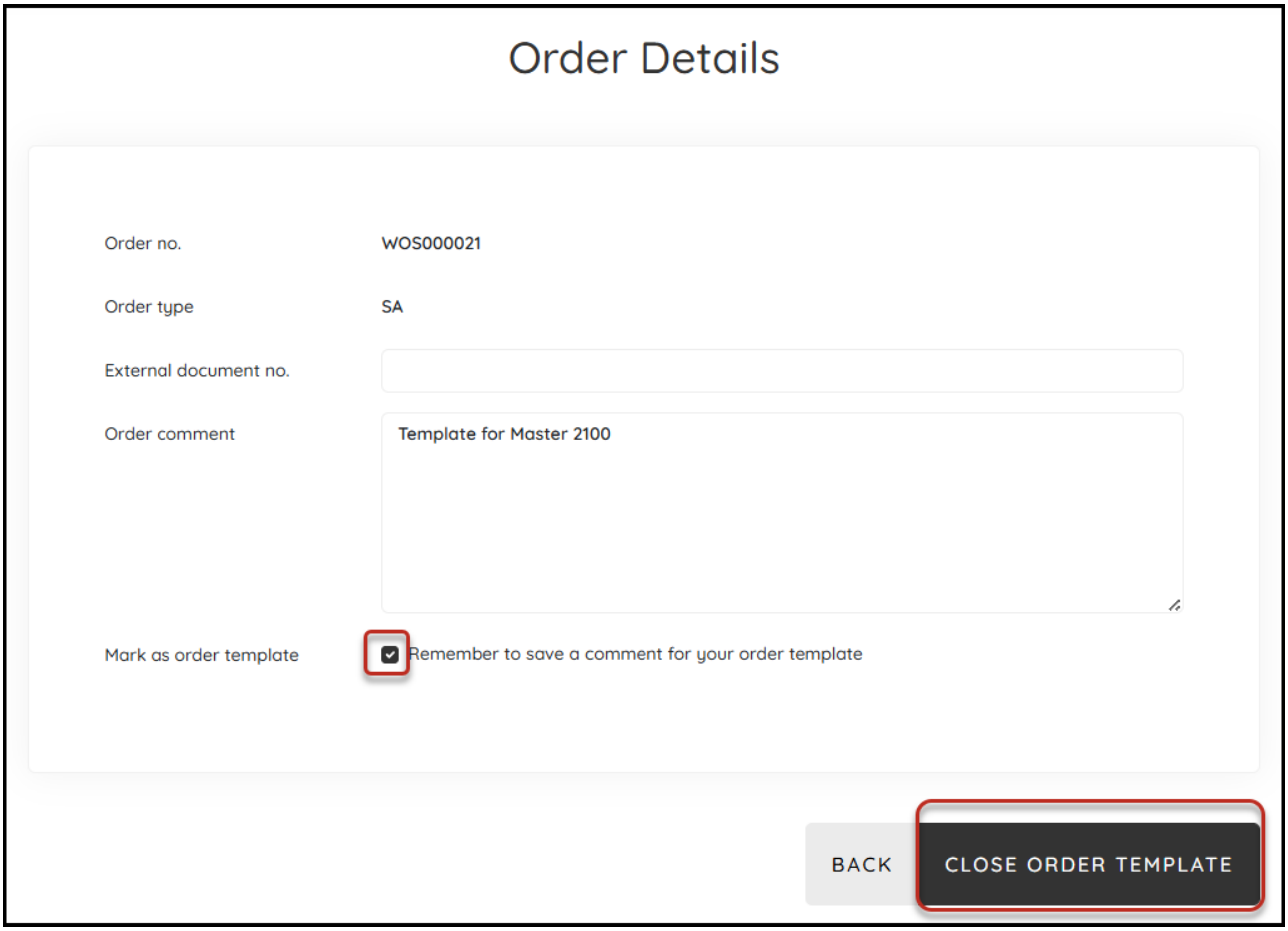
See next paragraph for more details.

Order Template on SA

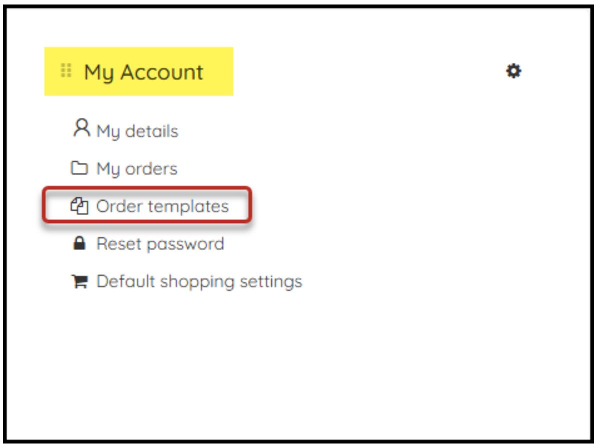
When creating an Order on SA, it is possible to mark this Order (on **Order Details** page) as *Order Template*.

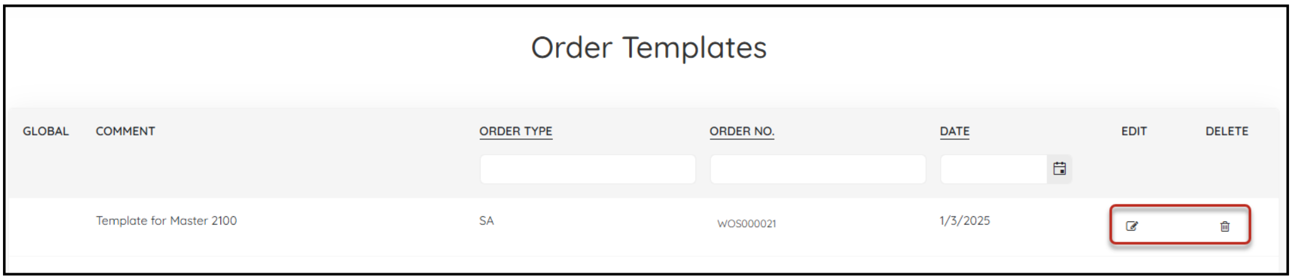


It is a clever idea to add an **Order comment**, which becomes an Order Template Description and makes it easier to differentiate between Order Templates. If a portal order is marked as *Template* – it can only be closed by clicking **Close order template** button. This saves the Template.

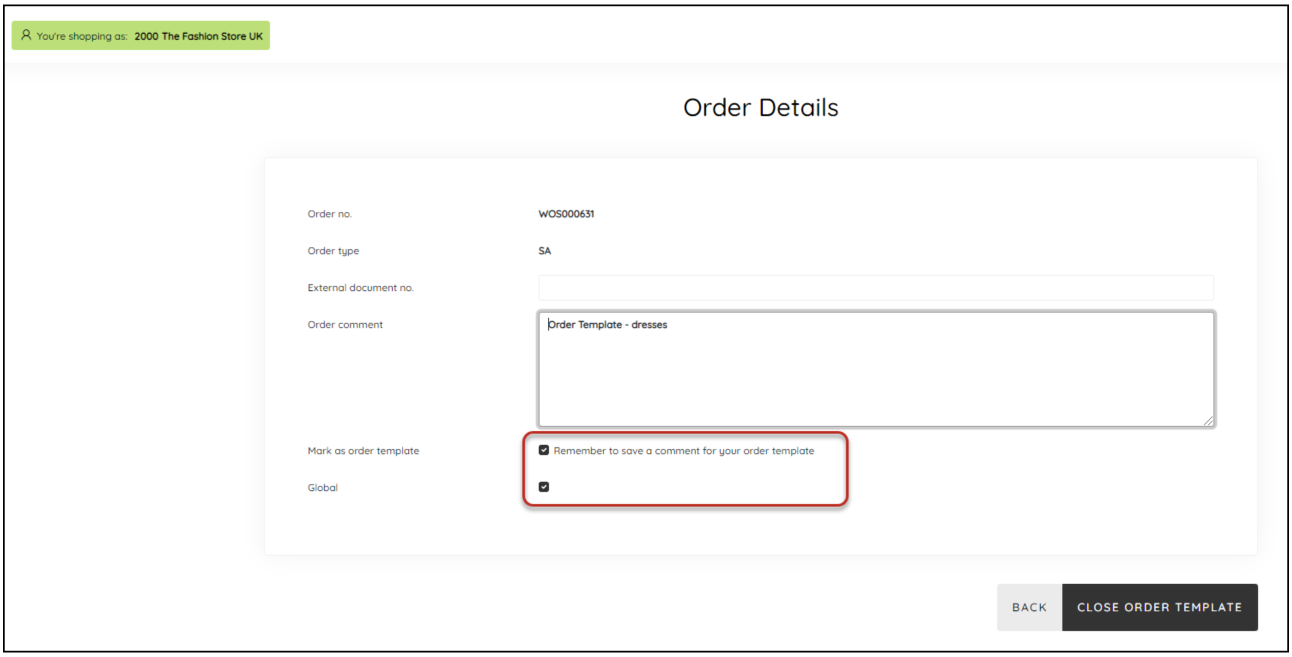


To locate the created Templates - navigate to **Sales Agent Dashboard**, click **Order templates** (within ***My account*** dock). Here it is possible to Edit or Delete the Order Template.
A Sales Agent can only see his own and *Global* Order Templates from other Sales Agents, but he can only Edit or Delete his own Order Templates.



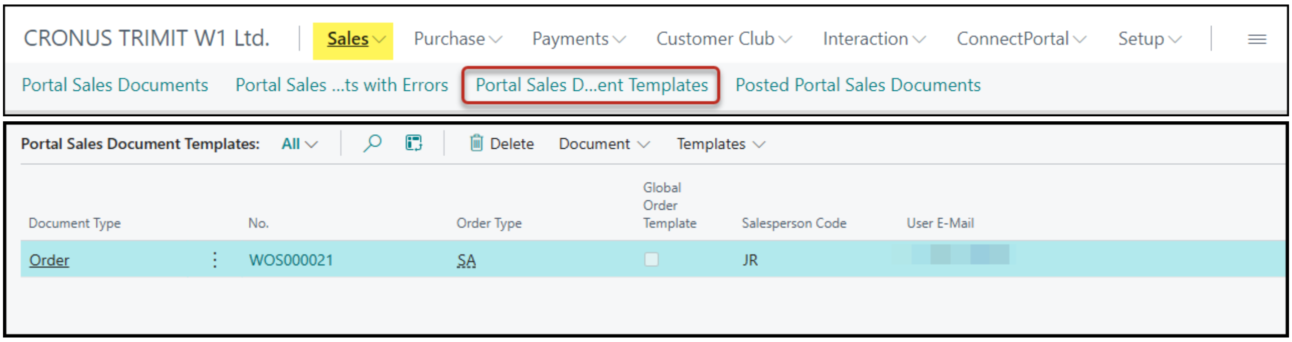


Global Templates are available for all Sales Agents. Sales Agents with administrative privileges can mark an Order Template to be *Global* (on **Order Details** page). The actions like Edit and Delete Global Order Template are only available for the Sales Agent who created it.



It is possible to choose whether to show Order Templates on start new Order or not. There is a field **Enable Template Selection** in the Portal Profile**.** If this field is set to *TRUE* then Order Templates, if there are any, will be shown on start new Order. If this option is set to *FALSE,* then Order Templates will not be shown on Order start.
Order Templates are filtered out and not shown on ***Advanced Sales Documents*** page in TRIMIT. Therefore, they cannot be posted from ASI.

To see Order Templates in TRIMIT, if using the **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator*, ***Sales, Portals Sales Document Templates,*** or use **Search** *Portal Sales Document Templates*:



Document Type

Type of the Order Template document. Available values are *Order* and *Quote.* These values depend on **Create Web Order as** field on Portal Profile Setup page.

No.

Number of the Order Template document.

Order Type

Order Type used on the Template.

Global Order Template

This Boolean field indicates whether the Template is set to be *Global*. This value can only be changed by creator Sales Agent on SA.

Salesperson Code

Code of creator Sales Agent.

User E-mail

E-Mail of creator Sales Agent.

Hidden fields

Sell-to Customer No.

Sell-to Customer Number used on Order Template.

Location Code

Location Code used on Order Template.

Sell-to Customer Name

Sell-to Customer name used on Order Template.

Creation Date

Date of Order Template creation.

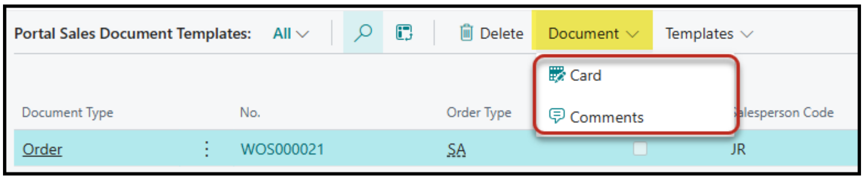
Modified Date

Date the Order Template was last modified on.

Import Status

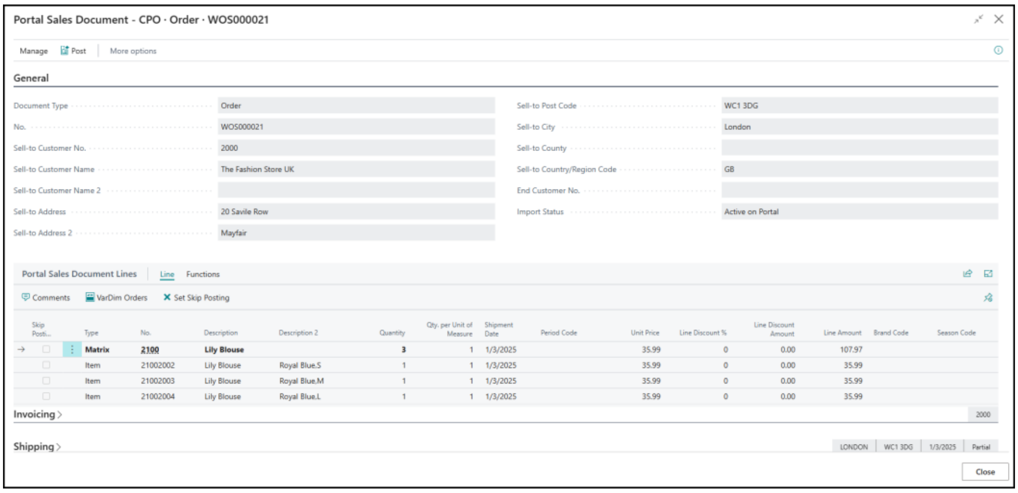
Advanced Sales Integration status.

Document



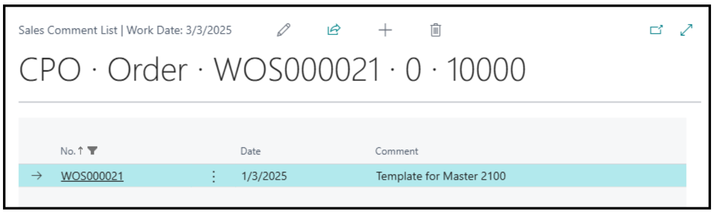
Card

This will open the **Portal Sales Document** page with the details of the Template Order.

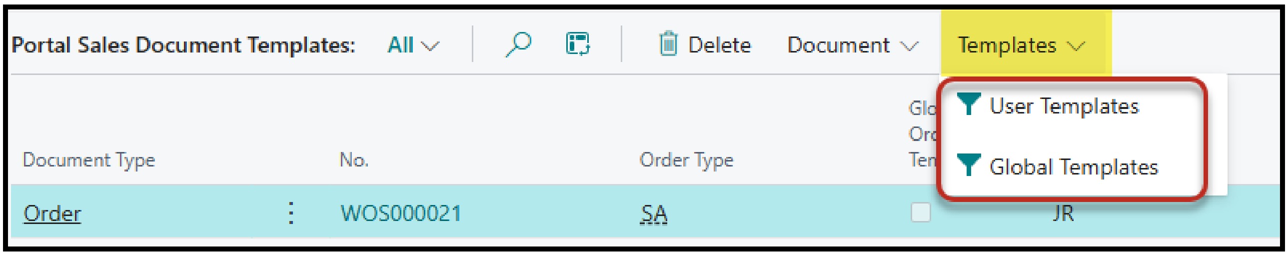


Comments

This will show the **Order Comment**, which has been entered on the SA.



Templates



User Templates

This will filter the Template Orders and show only the Template Orders in the list that do not have a checkmark in **Global Order Template.**

Global Templates

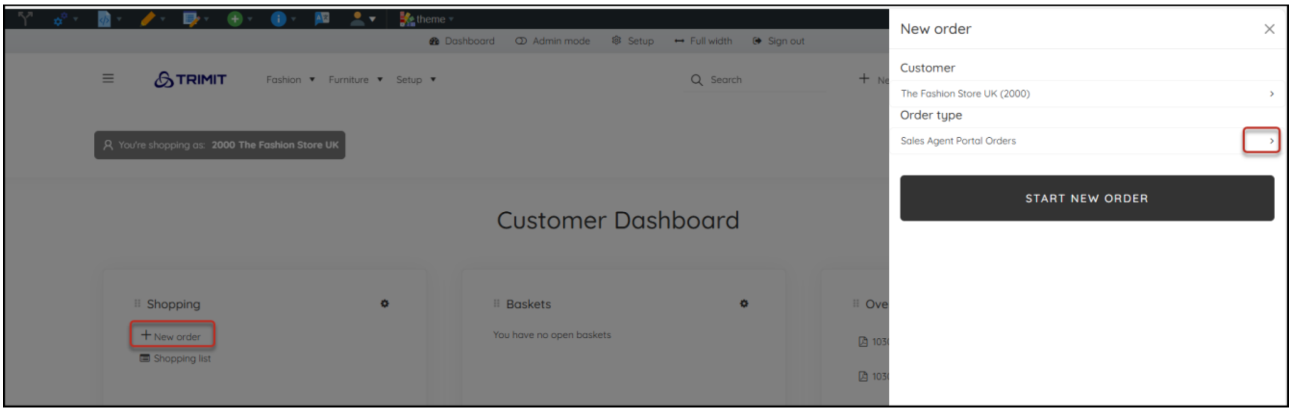
This will filter the Template Orders and show only the Template Orders in the list that have a checkmark in **Global Order Template.**

Closing Order Template on SA

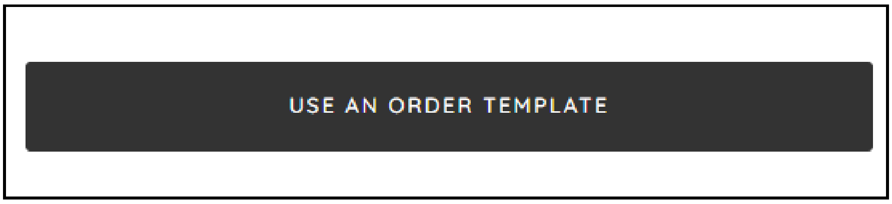
If Sales Agent wants to create an Order Template, it is needed to create an Order with required Items and proceed from **Basket** page to **Order Details** page.
Here it is necessary to set field **Mark as order template** to *TRUE*. Then it is also possible to mark Template as *Global* by setting checkmark in field **Global** (after **Mark as order template** is set to *TRUE*). This action is only available for Sales Agent admin users.
If this is done – then button **Close order template** is shown instead of **Next** button.
Close order template button is also shown on the **Edit order** page. Clicking this button finalizes the Template, i.e., this Order Template can be found on **Order type selection** page when starting a new order.

Create Order based on Template Order

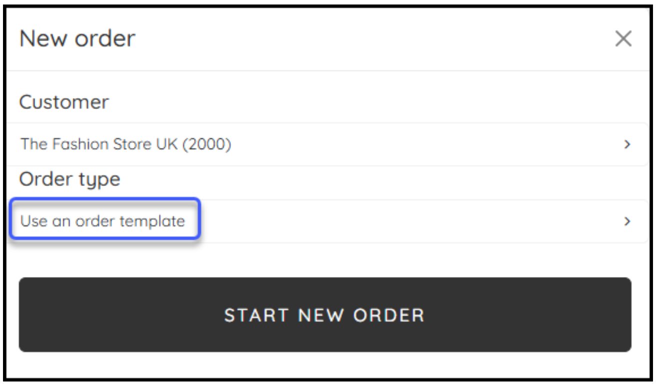
After Order Templates have been created, they can be used to create new Orders on the SA.
After a Customer has been chosen, and you clicked ***New order***, you need to click on the **>** of the Order Types:



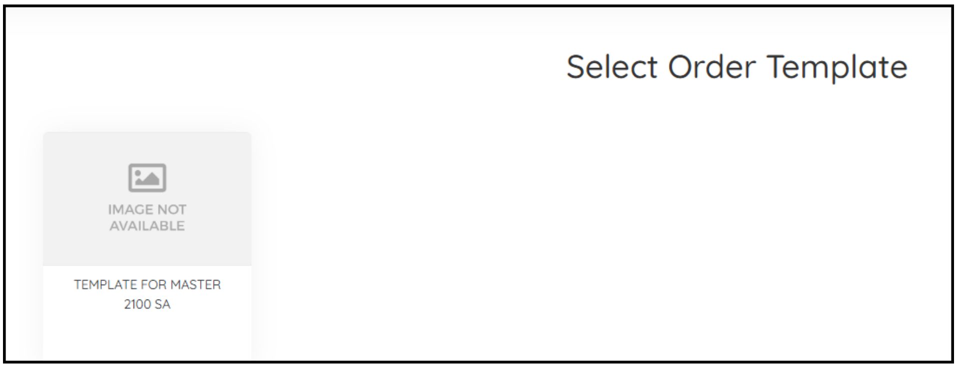
In the bottom of the list with Order **Types**, you will now see:



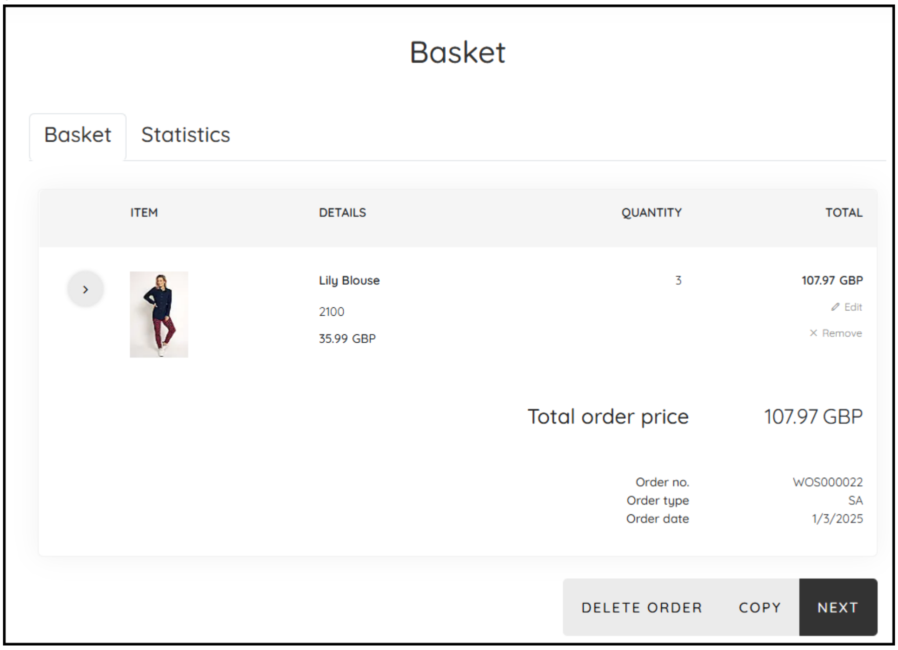
If you click on this, **Use an Order Template**, you can see the Order Templates after clicking **Start New Order:**



The only Order Templates that will be shown, are the Order Templates created by the current Sales Agent, and the Order Templates with checkmark in **Global Order Template.**



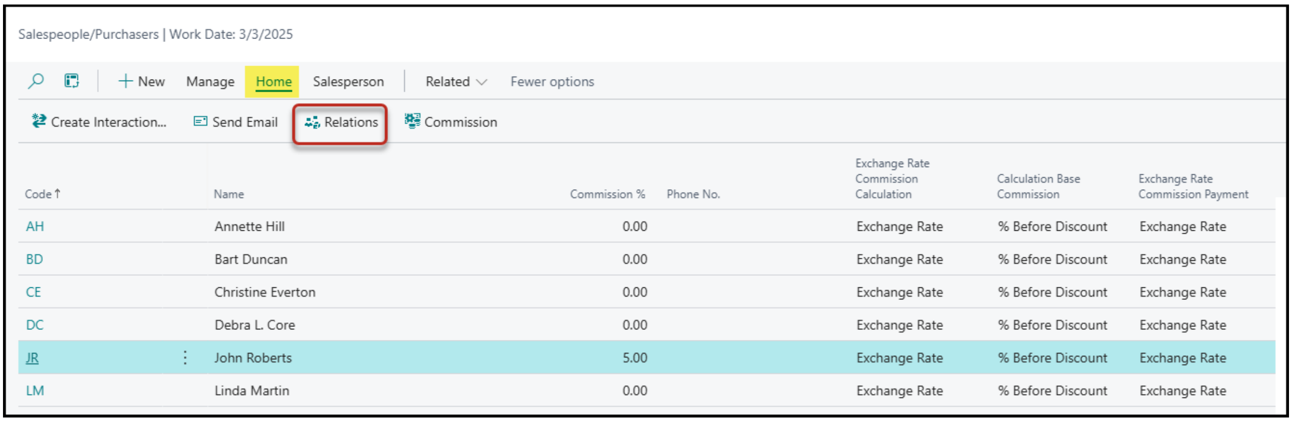
After choosing an **Order Template**, the order lines will automatically be copied into a new Order, and you are able to edit them or add new lines to it.



Salespersons and Customers

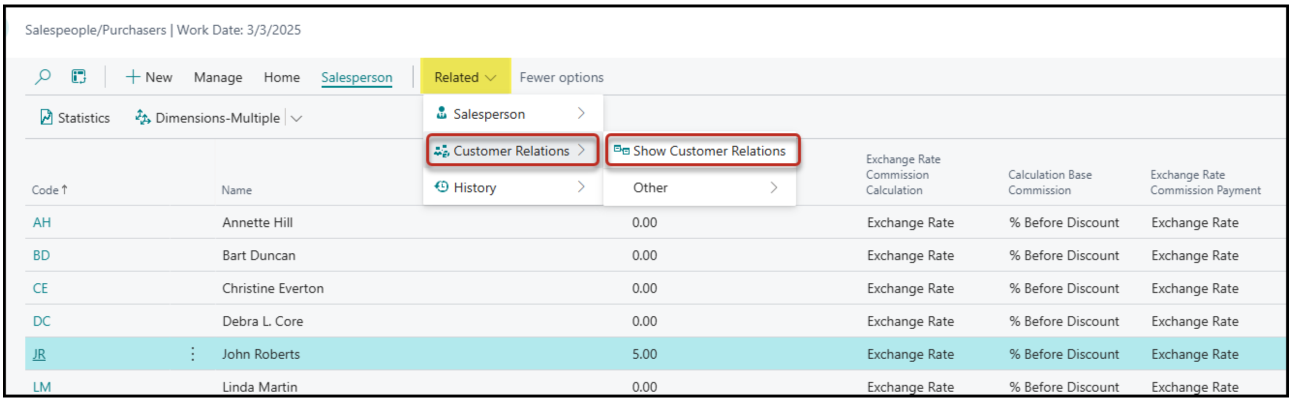
To determine for which Customers a Salesperson is able to see the Documents or to create Orders on the SA, there are two methods:

1. A Salesperson is set as **Salesperson Code** in the Customer Card.
2. You create the **Customer Relations** in the Salesperson/Purchaser List/Card



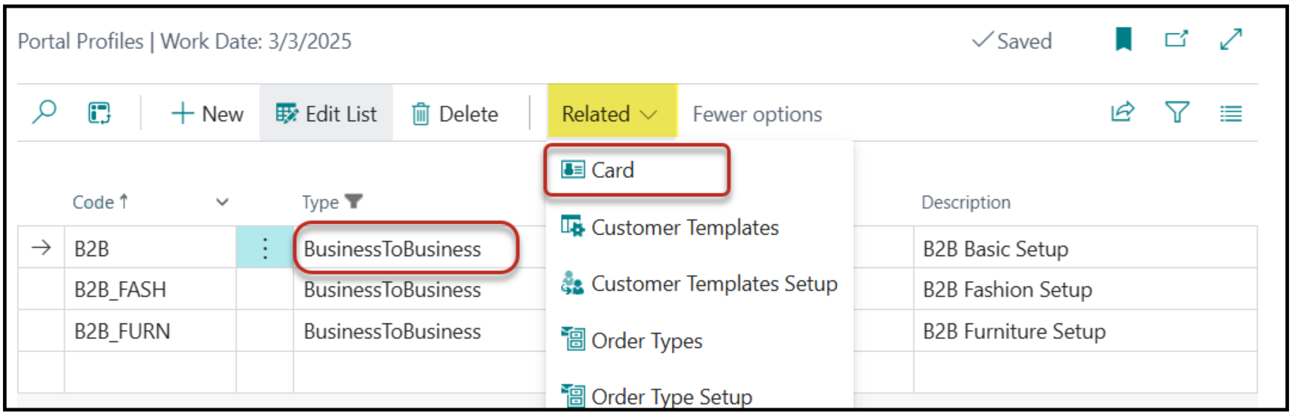
For more details how to set it up: See ***White Paper – TRIMIT Multiple Salesperson Relations.***

Via ***Related, Customer Relations, Show Customer Relations***, you can see all the Customers for which the Salesperson Code is the current Salesperson, and the Customers based on the **Relations**.



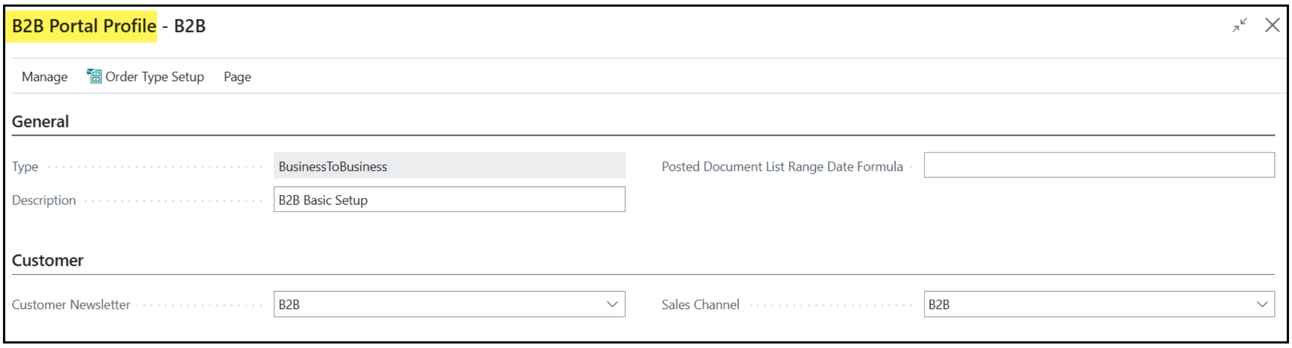
B2B Portal Profile

To open the B2B Portal Profile (called *B2B* in our Demo Company) page click on **Code** *B2B*.
Or click **+ *New*** to create a new Portal Profile with **Type** *BusinessToBusiness* in the list, after which you can open the underlying Card by clicking ***Related, Card***.



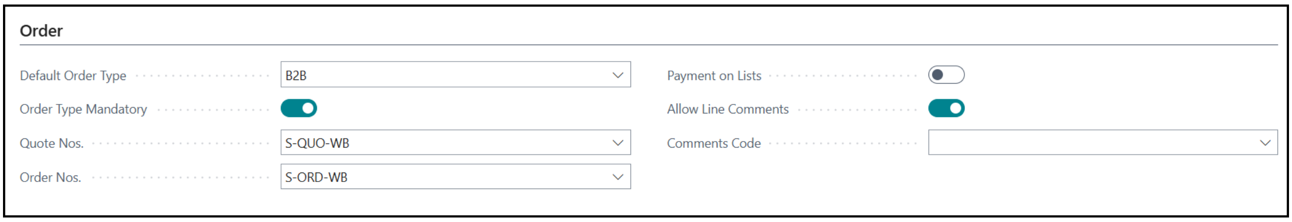
The **Type** and **Description** were already filled in the **Portal Profiles** List.
Based on the **Type** *BusinessToBusiness* the page ***B2B Portal Profile*** will open.
Most of the Fields and Actions are the same as in SA Profile and will not be described again.
Only new Fields will be described below.

FastTabs General and Customer



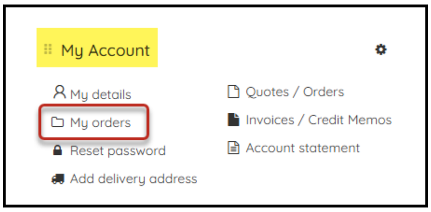
Type needs to be *BusinessToBusiness* for the Portal Profiles that are applicable for **B2B(s).**

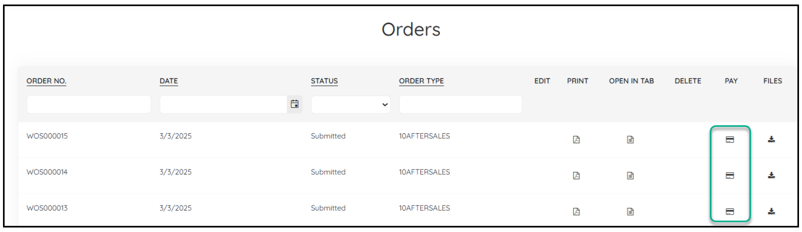
FastTab Order

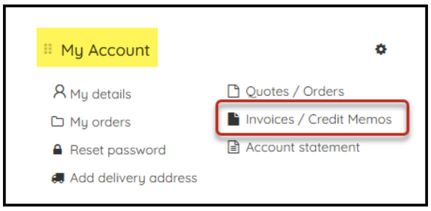


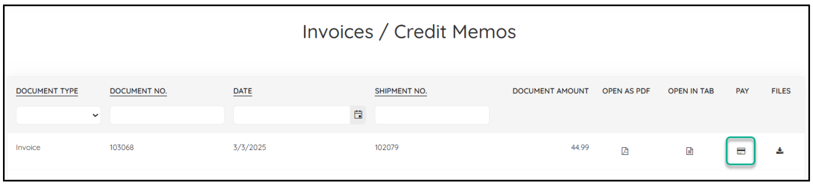
Payment on Lists

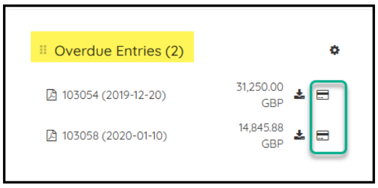
If this field is set to *TRUE*, then Payment-icon will be shown for the relevant Sales Documents in the ***My Orders*** and ***Invoices/Credit Memos*** pages (in the ***My Account*** dock) and in dock ***Overdue Entries*** on B2B dashboard. Clicking on this Payment-icon will open Payment pop up window. Read more about Payment in chapter *B2B Webshop Payment*.



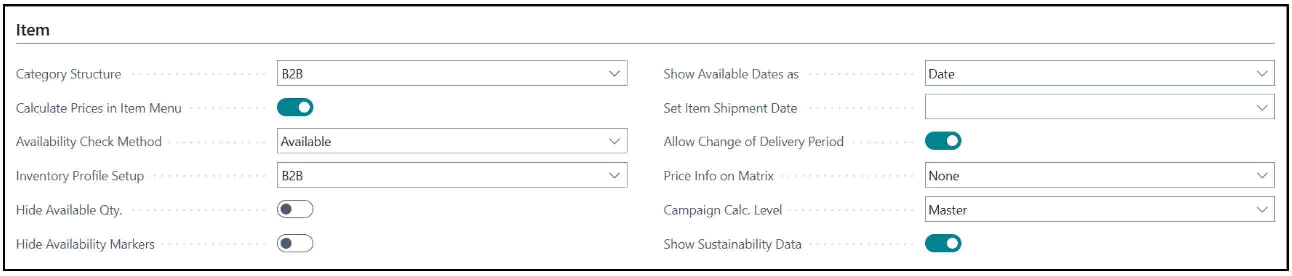








FastTab Item



Availability Check Method

This field is mandatory. Option in this field defines a way the **Item Availability** is calculated in the B2B. You can choose between the following three options:

No	No availability method is used. All items will be set to unavailable.
Inventory	The Item Availability is calculated in accordance with the Inventory Profile Setup which is specified in field **Inventory Profile Setup** The system calculates Inventory "–" Deductions (1) "+" Increase (2) *(1) All deductions are Sales Orders, Transfer Orders, Production Orders (depending on what has been chosen in the Inventory Profile Setup) – and is calculated with a date filter "… Horizon Date". Horizon date is calculated from today (Work Date) based on the date formula in the field **Horizon Availability Check** from the Inventory Profile Setup.* *(2) Increase is Purchase Orders, Transfer Orders, Production Orders (depending on what has been chosen in the Inventory Profile Setup)– and is calculated with a date filter "… Requested Date". Requested date is the date stamped on the relevant document (Shipment Date on a Sales Order etc.)* It is a static picture and only one calculation.
Available	This is a more dynamic method. The system creates a timeline with a date mark on **Requested Date**, and **Horizon Date** and on each date for an increase. On each of the dates, the above calculation (of the option Inventory) is done, and the one with the lowest Available Quantity is set as Available Quantity. By this, the system makes sure that every order is fulfilled taking in consideration whether there is an increase coming in that can fulfill some deductions from a later date.

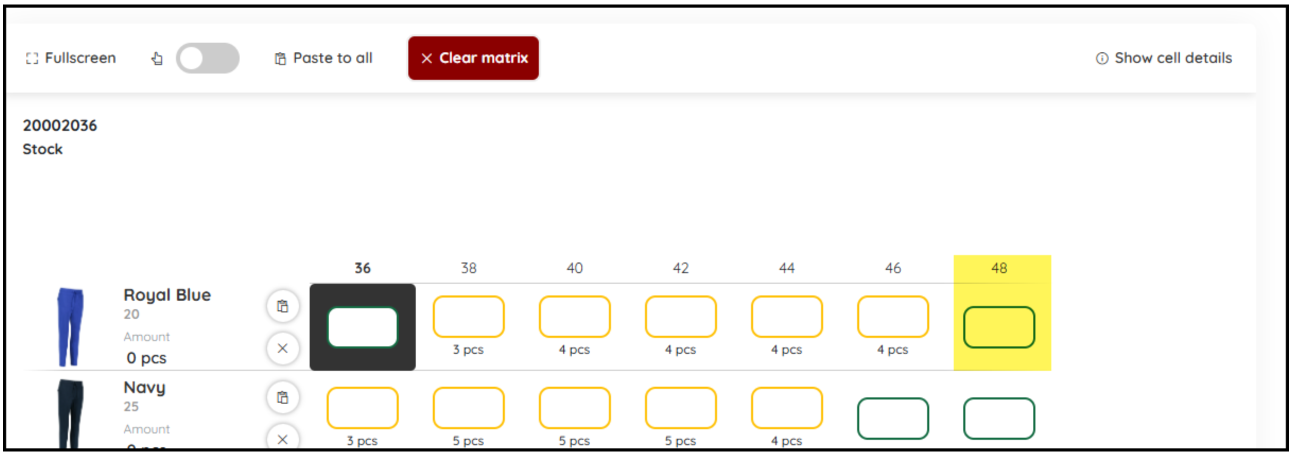
	Note, that this option is also based on the **Inventory Profile Setup** so only the processes marked will be taken into consideration. This option should be used for B2C Portal Profile.

After changing a value in this field, it is required to run schedules to synchronize data in B2B Soft Admin.

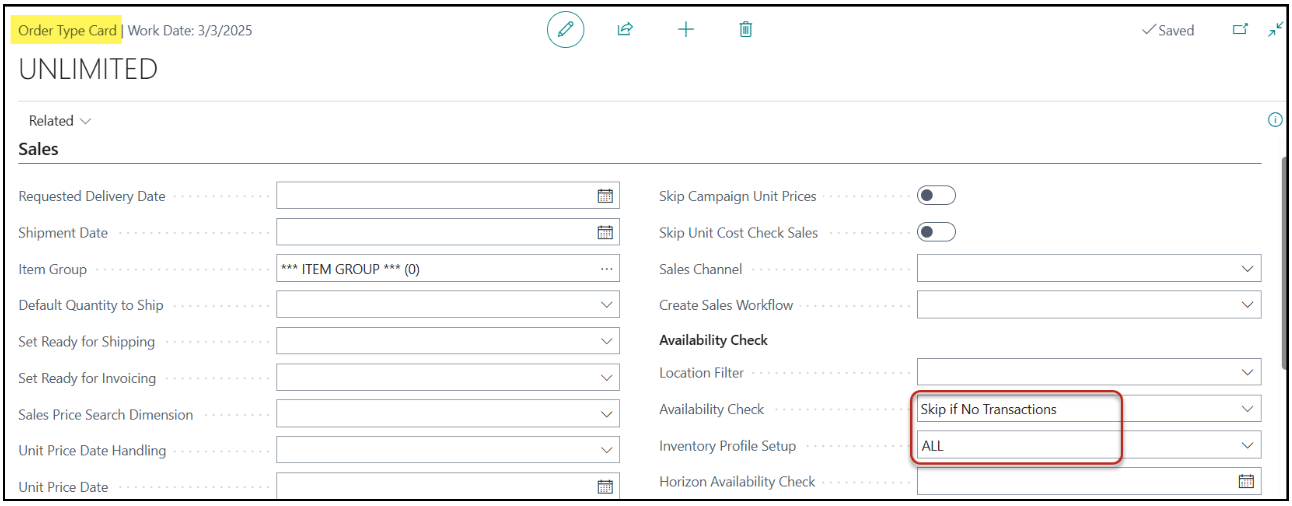
This field will be overwritten by the setting of the field **Availability Check** in the Order Type, which will be chosen for the Order.

Unlimited Sales Setup

Items can also be sold in unlimited Quantity; this means that some of the variants of a Master can have limited stock (based on the **Availability Check Method**), and other variants of the same Master can have unlimited stock and TRIMIT e-commerce will support this.
Below is an example of the unlimited Sales Quantities on the B2B: the Cell is shown Green, but no Stock Quantities are shown beneath the Cell.

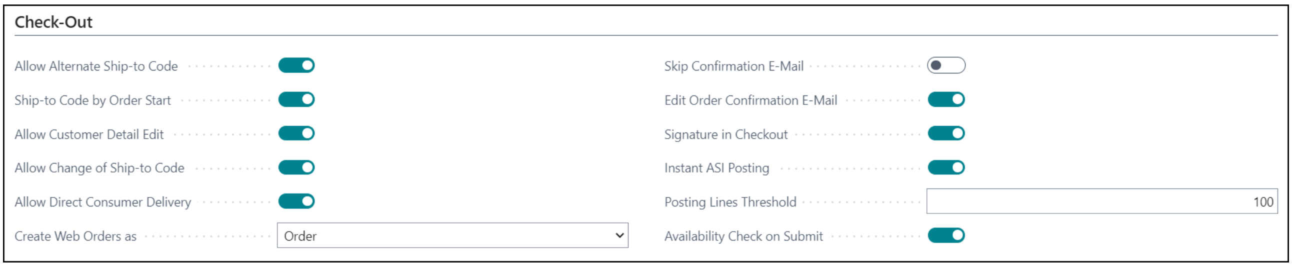


To set this up in TRIMIT BC you need to set the field **Availability Check** in the Order Type to *Skip if No Transactions* and field **Inventory Profile Setup** to the Profile with Inventory settings which match your needs. This Order Type should then be added to the corresponding Portal Profile.
Below is an example of the Order Type setup:



When **Availability Check** field in the Order Type is set to *Skip if No Transaction* this means that if there are no Item Ledger Entries like posted Sales- or Purchase Orders, etc. –the Items will have an unlimited Sale Quantity option.

FastTab Check-Out

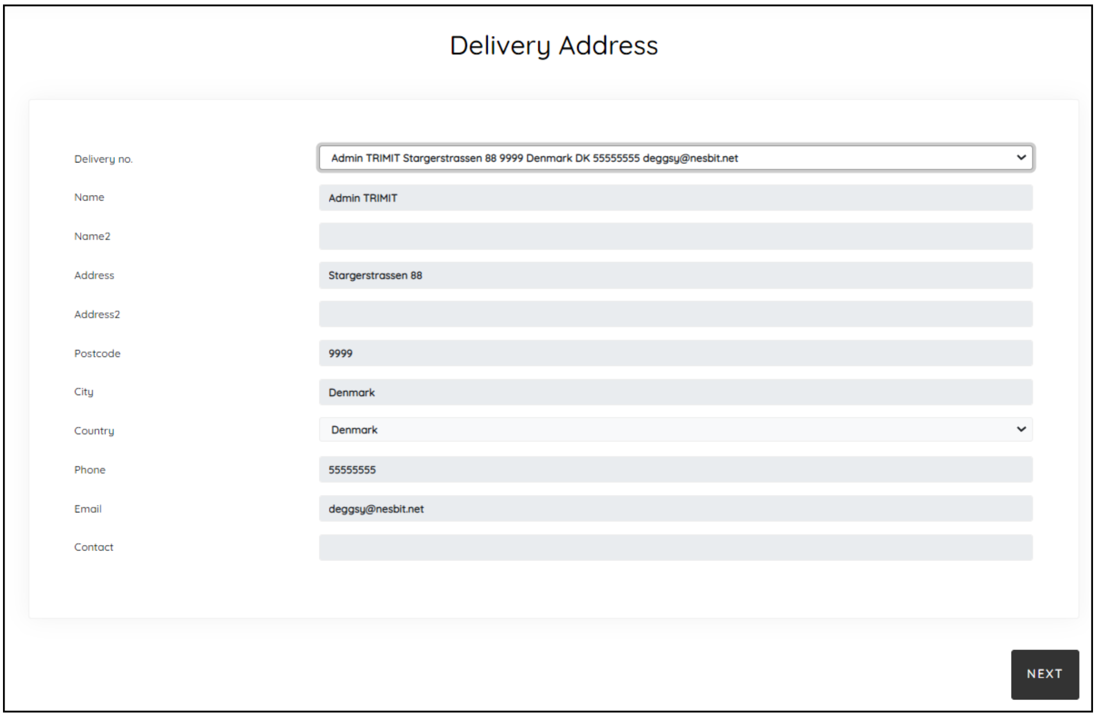


Ship-To Code by Order Start

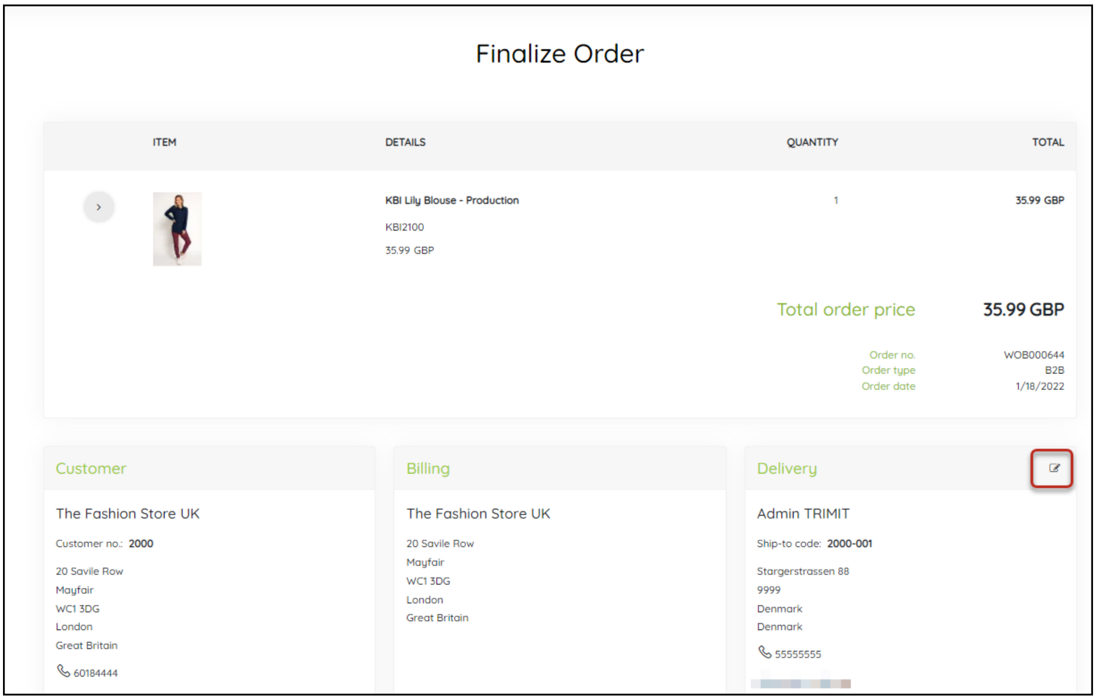
This is a Boolean field. Allows whether to set or not set **Delivery Address** page right after initiating a new Order on B2B.

If value in this field is set to *FALSE*, then **Delivery Address** page will not be shown right after initiating the Order. Selecting a different Delivery Address in this case is possible on the **Finalize Order** page, i.e., on the last stage of the Order creation process.

Setting value of this field to *TRUE* requires setting the value of the field **Allow Alternate Ship-To Code** to *TRUE*.



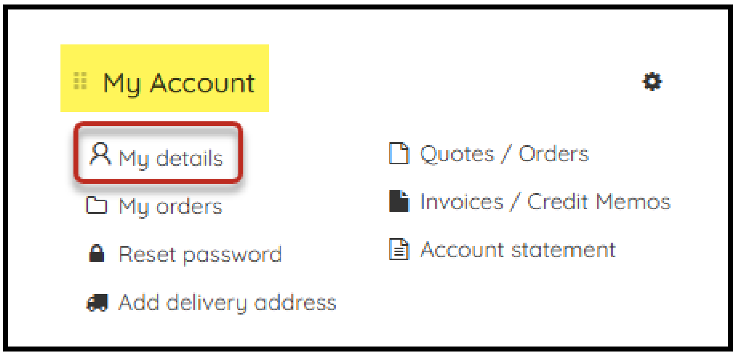
After initiating Order

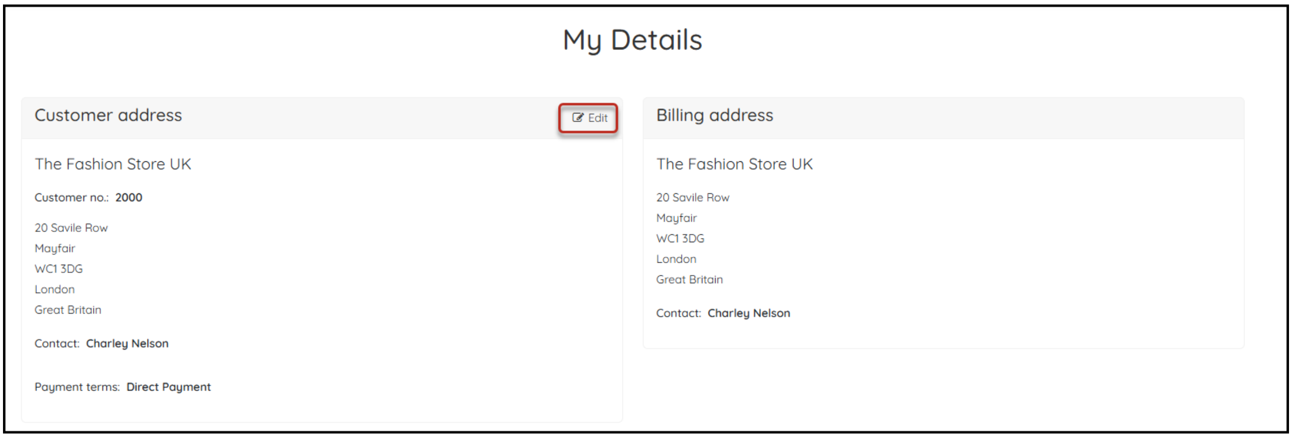


When finalizing the Order.

Allow Customer Detail Edit

This is a Boolean field. If the value is *TRUE*, then it is possible to edit Customer data on **My details** page of the B2B. If the value is set to *FALSE*, then Customer data editing will be disabled.

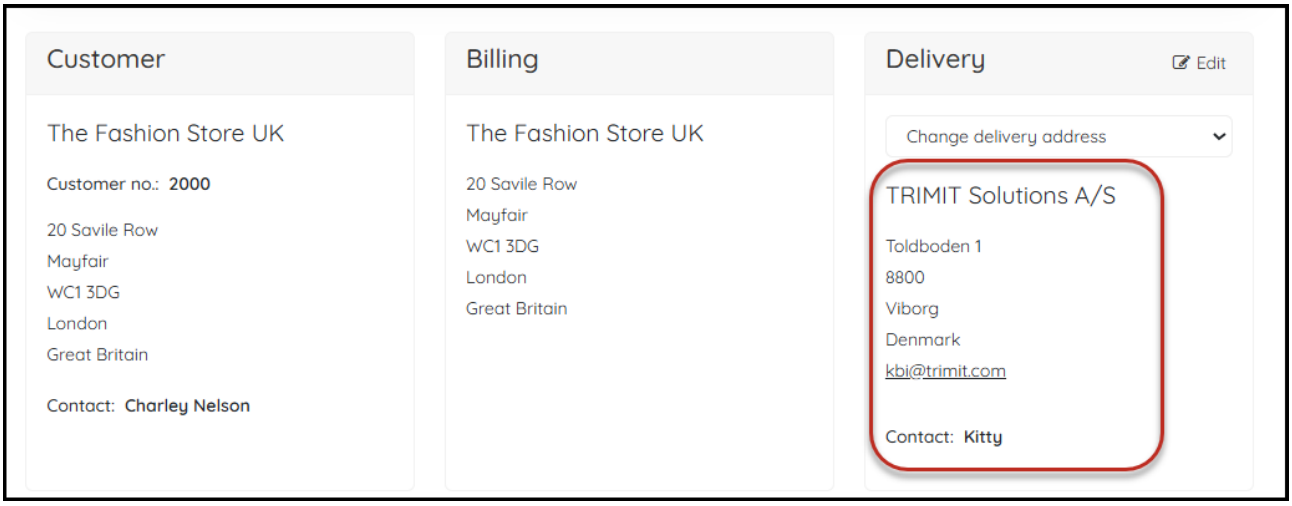




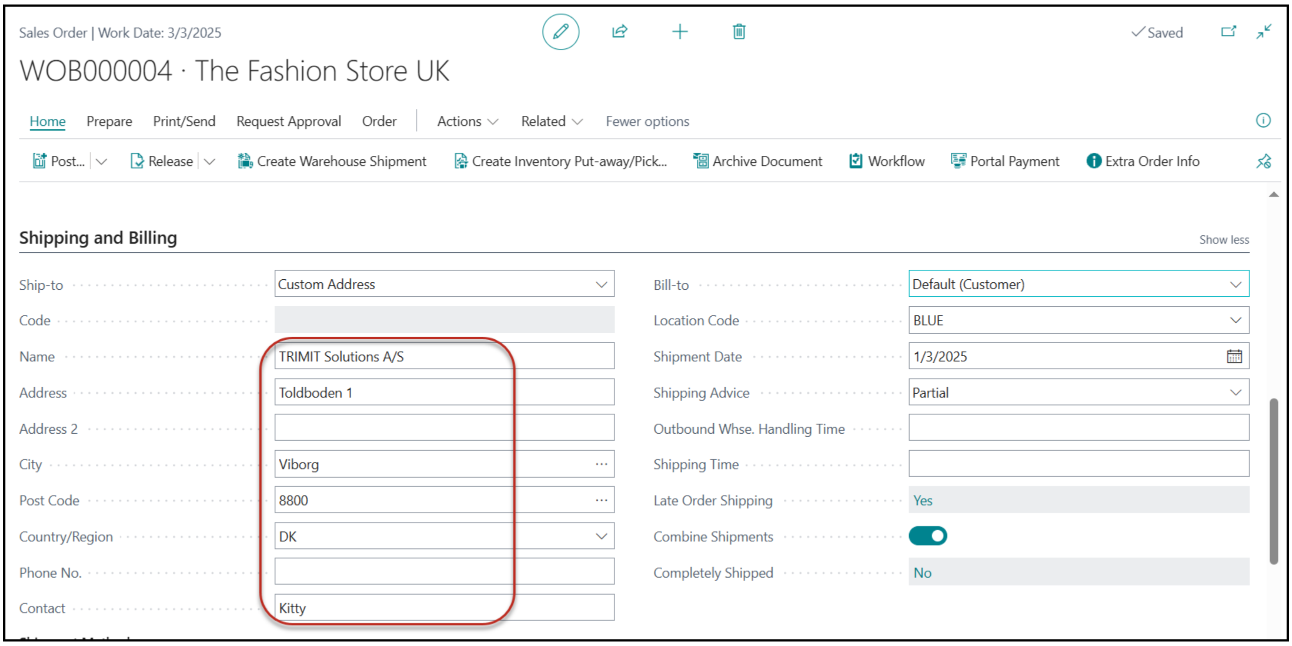
Allow Direct Consumer Delivery

This is a Boolean field. If the value is set to *TRUE*, then it will be possible to insert a Consumer Delivery Address on **Delivery Address** page (after starting a new Order)

After entering a checkmark in **Direct consumer delivery**, you can enter the details of the Consumer Delivery Address. This will also be shown on **Finalize Order** page in **Delivery**:



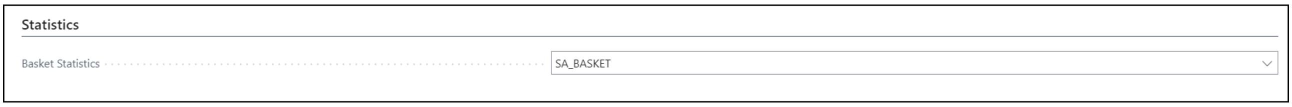
After the Order has been submitted to TRIMIT, this Address will be shown as **Ship-to Address** in the Sales Order.



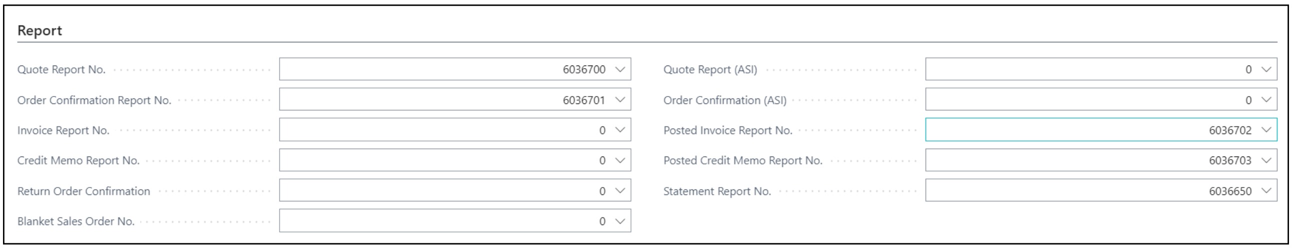
FastTab Actions

See [FastTab Page Actions] for more details, but the **Customer** of this FastTab in the SA Portal Profile is the **Dashboard** field in this FastTab in the B2B.

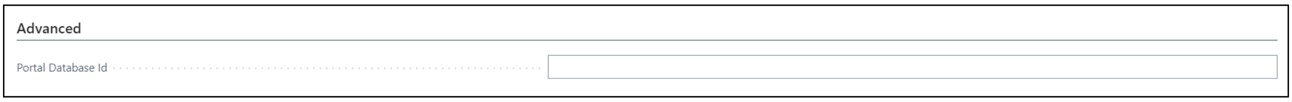
FastTab Statistics



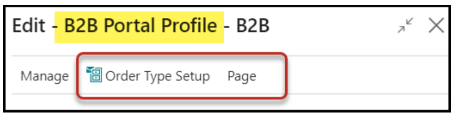
FastTab Report



FastTab Advanced



Actions in B2B Portal Profile



Delivery Address on B2B

When a new Order is created on B2B then Customer has a possibility to select **Order delivery address**. The prerequisite is as follows:

- *Customer has created one or more Delivery Addresses (Ship-to Codes) in advance (this can be done from the B2B Shop Dashboard or in TRIMIT)*
- ***Allow alternate Ship-To Code** field on FastTab **Check-Out** in **B2B Portal Profile** is set to TRUE.*

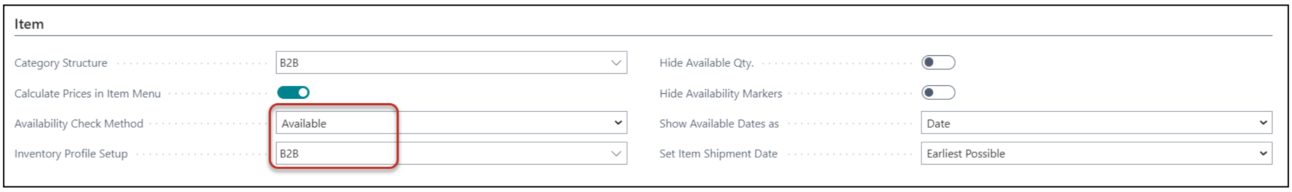
If Customer has one or more Delivery Addresses but none of them is set as default (field **Default Ship-to Code** is set to *TRUE* in TRIMIT) then, when entering **Delivery Address** page, it displays Customer address data by default.
Different Delivery Address can be selected from **Delivery no.** drop-down field on **Delivery Address** page. Selecting blank value in **Delivery no.** drop-down allows sending to a free Address.
If Customer does not have a separate Delivery Address, then fields on the **Delivery Address** page will display Customer Address. If Customer has several Delivery Addresses and one of them is set as default, then this Address will be displayed.
It is not possible to edit the date of a Ship-To Address on **Delivery Address** page - the details fields are non-editable. To edit Ship-To Address user must visit **My details** page.

Direct consumer delivery is possible as well. This can be useful in cases when i.e., needed Item is out of stock and shop assistant can order this Item directly from supplier delivered directly to the end consumer. To enable **Direct consumer delivery** option on **Delivery Address** on B2B it is required to set both fields **Allow Alternate Ship-To Code** and **Allow Direct Consumer Delivery** on FastTab ***Check-Out*** in ***B2B Portal Profile*** to *TRUE*. On **Delivery Address** web page in Order creation process the **Direct consumer delivery** field is placed on the top of the page. Set this field to *TRUE* and **Delivery Address** fields below are ready to be filed in. This direct consumer delivery address is specific only for this Order and will not be saved in any place else but only on current Order.

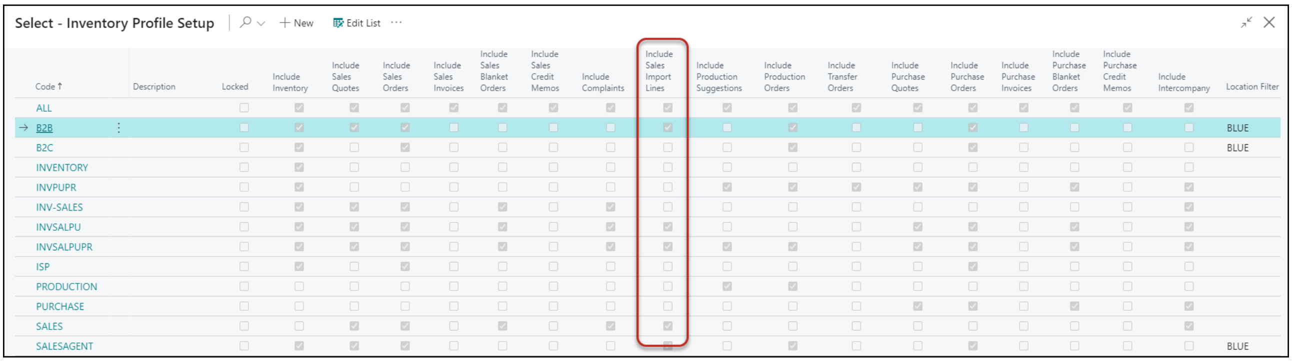
It is also possible to make changes to Delivery Address on the **Finalize Order** page, i.e., the final page of the Order creation process. Here it is also possible to set **Direct consumer delivery address**. The precondition is that both fields **Allow Alternate Ship-To Code** and **Allow Direct Consumer Delivery** on FastTab ***Check-Out*** in ***B2B Portal Profile*** are set to *TRUE.* Changes made to Delivery Address on this page will be relevant only for current Order and will not be reflected in other places.

Item Availability and Sales Import Lines

Inventory Profile Setup page (via **Search** *Inventory Profile Setup*) has an additional field called **Include Sales Import Lines**. Setting this field to *TRUE* includes Advanced Sales Integration Orders to the calculation of Item Availability. Item Availability setup on ***B2B Portal Profile:***



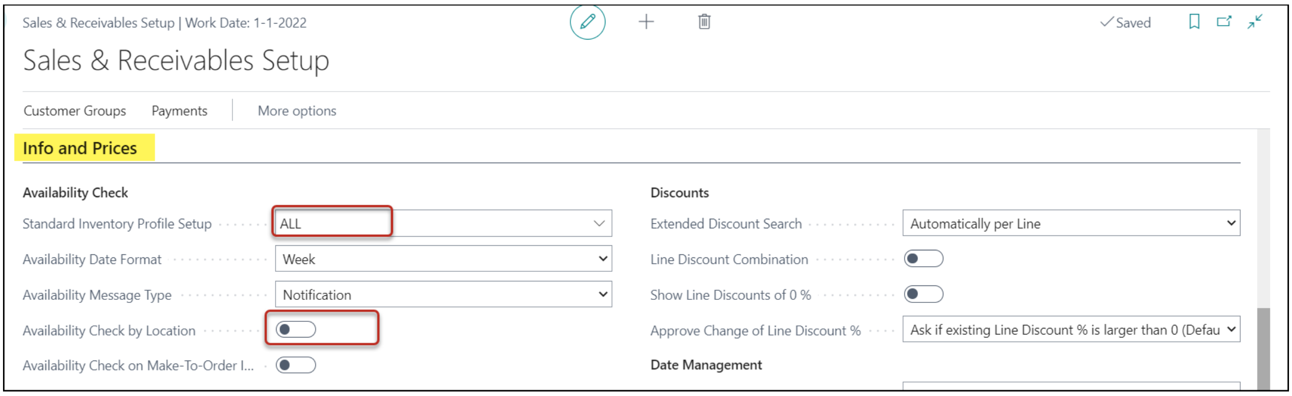
Inventory Profile Setup page:



Note

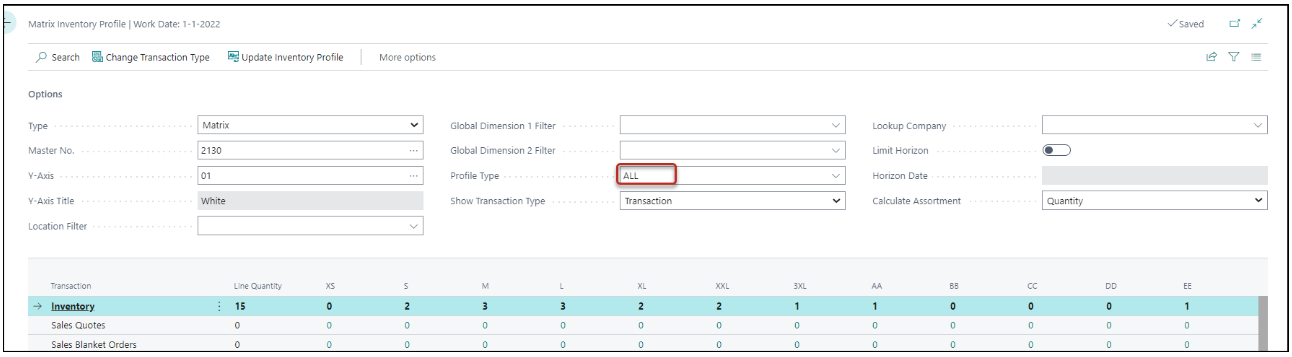
To compare the Availability shown on Matrices in B2B and the Availability in TRIMIT (via a Master or Order Line), following fields in TRIMIT need to have the same value, i.e., *ALL*.

Fields **Standard Inventory Profile Setup** and **Availability Check by Location** in ***Sales & Receivables Setup*** (via **Search** *Sales & Receivables Setup*)

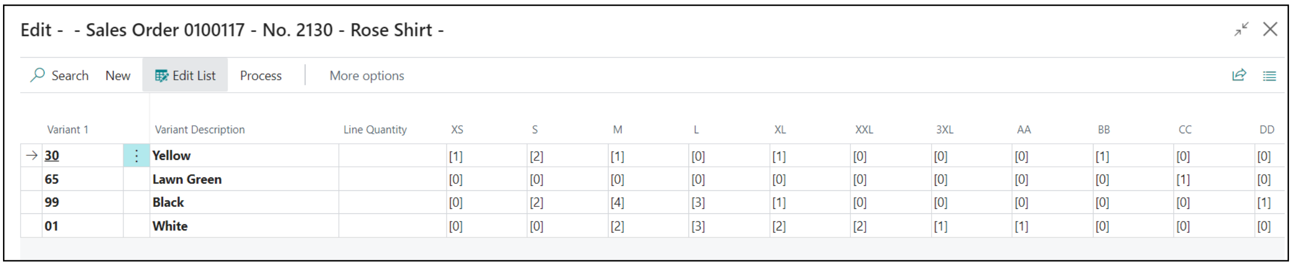


Field **Profile Type** in ***Matrix Inventory Profile***

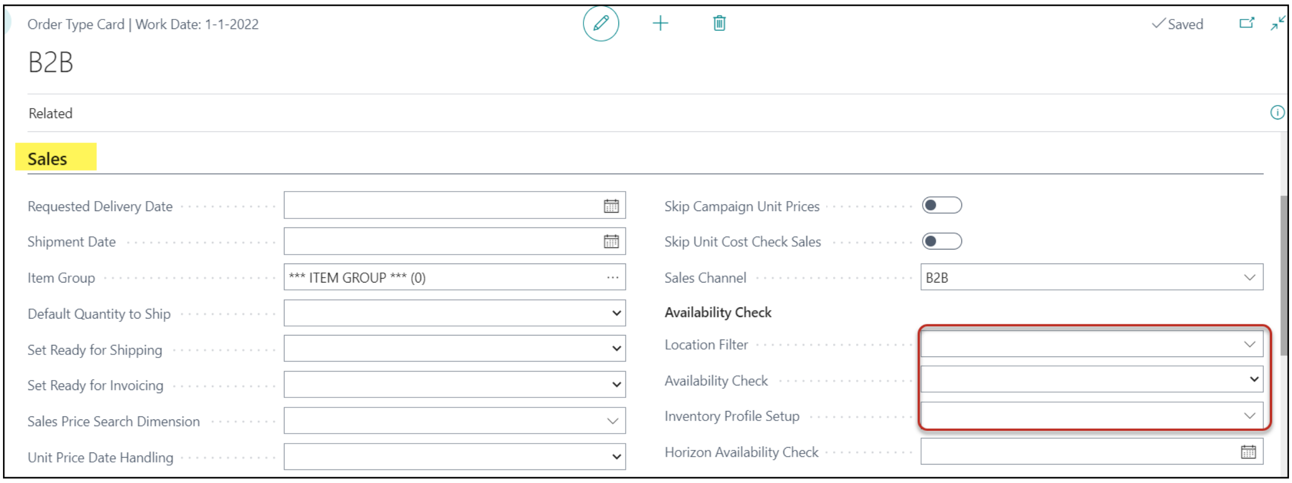
(I.e., via Master Card of *2130*, click ***Process, Inventory Profile***)



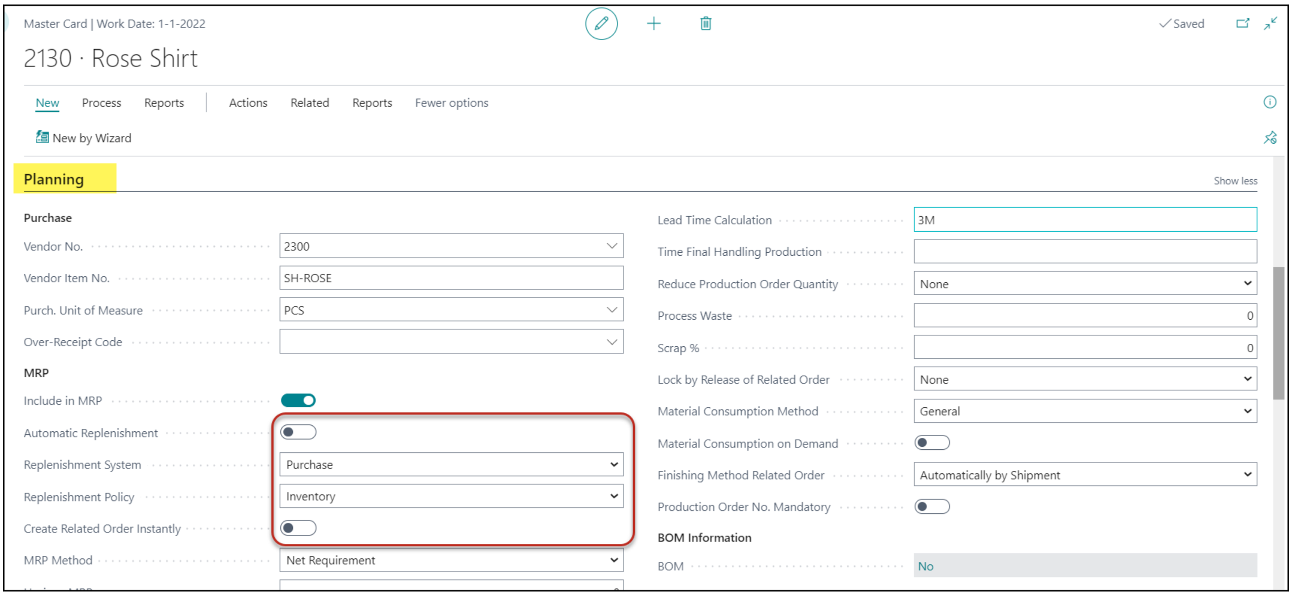
Then Item Availability corresponds (on page **Sales Order** while adding new Item to a Sales Line):



Fields **Location Filter, Availability Check,** and **Inventory Profile Setup** in ***Order Type*** (**Search** *Order Type*):



Availability in TRIMIT and e-commerce can also depend on the fields regarding **Replenishment** in the Master/Item Card:



Item Reservation and Availability on Portals

Product related data is synchronized between TRIMIT and SA and B2B (read more about this in ***White Paper – TRIMIT Portals Schedules***).

It is also possible to 'reserve' Items on B2B and SA. Item is included in Availability when placed into Basket, under condition that the appropriate **Inventory Profile Setup** has a checkmark in **Include Sales Import Lines**.

Here is described a scenario to illustrate how the Item Availability is affected on e-commerce when **Include Sales Import Lines** is set to *Yes*:

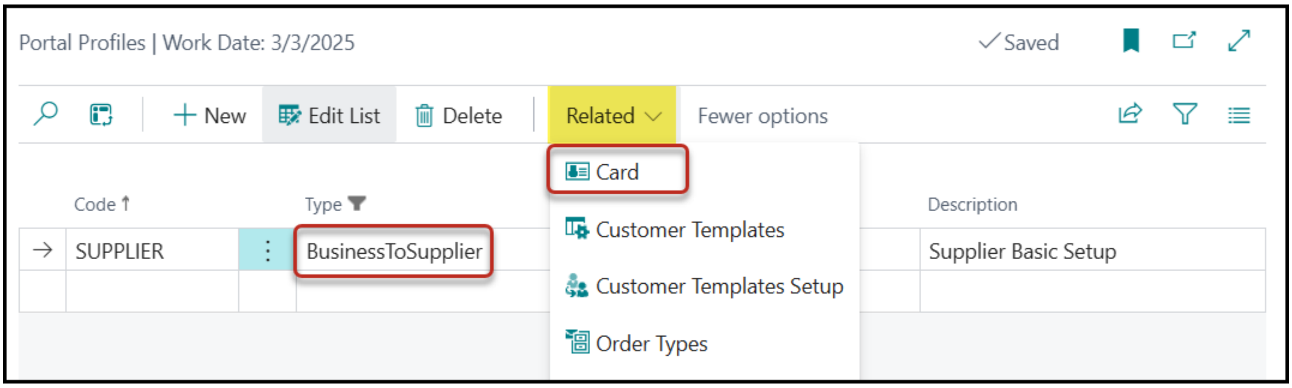
User logged in to SA or B2B. Opening **Product** page shows availability for each variant (i.e., 10).

User adds some quantity to the basket (i.e., 8). Here is what happens afterwards to Item variant Availability:

- *If user goes to basket and edits the product – remaining variant availability would still be 10.*
- *If user opens the same product in Category Structure – remaining variant availability would be 2 (the 8 in the Basket would not be available anymore).*
- *If another user opens the same product in category structure - remaining variant availability would also be 2.*

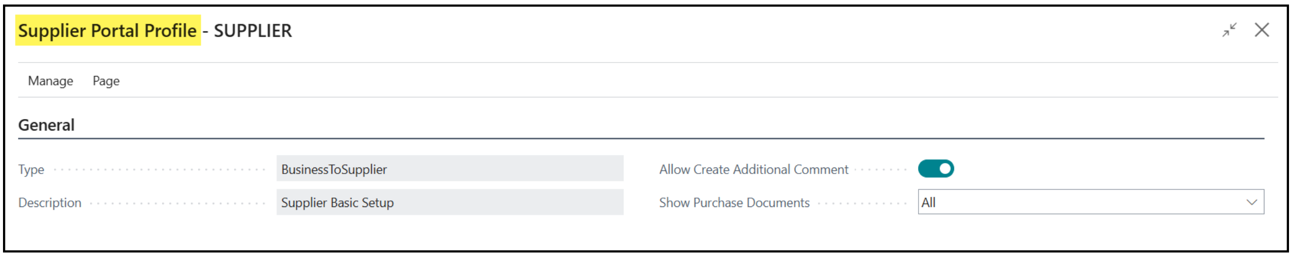
Supplier Portal Profile

To open the Supplier Portal Profile, you can create a new Portal Profile by clicking ***+ New*** to create a new Portal Profile with **Type** *BusinessToSupplier* in the list, after which you can open the underlying Card by clicking ***Related, Card.***



The **Type** and **Description** were already filled in the **Portal Profiles** List.
Based on the **Type** *BusinessToSupplier* the page ***Supplier Portal Profile*** will open.

FastTab General



Type

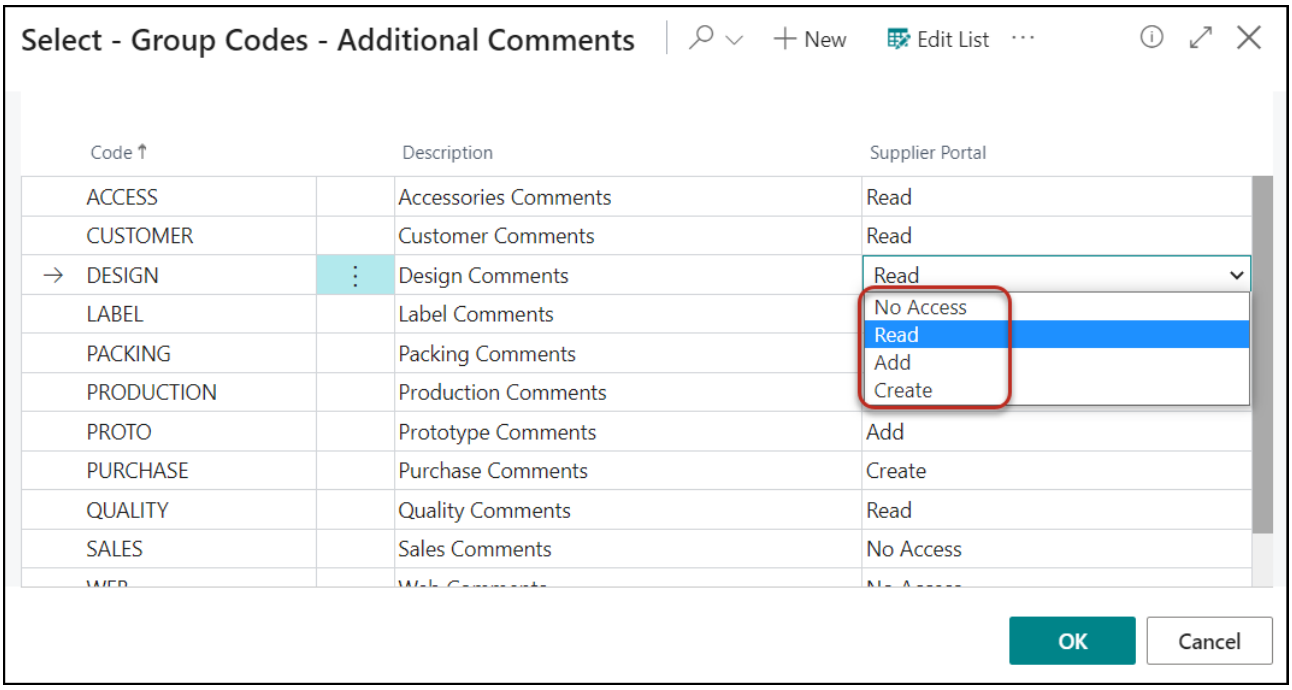
Select Portal Profile Type.
Available options are *BusinessToBusiness, BusinessToConsumer, SalesAgent, BusinessToSupplier, InstoreB2C, PIR, InSite.*

Description

Enter a Portal Profile Description.

Allow Create Additional Comments

A checkmark in this field allows a Supplier to create **Additional Comments** for a product (Master) on the SUP which will be submitted directly to the ERP.
However, if the field **SupplierPortal** of the specific **Additional Comment Code** is not set to *Add* or *Create* the Supplier will not be able to create **Additional Comments.**



*Via Master List, click Home, Additional Comments. Press Alt+Arrow Down in field Code and click Select from full list. The field **Supplier Portal** is not visible by default; you need to add it via **Personalize**.*

Show Purchase Document

This field determines which Purchase Document (Quotes and/or Orders) will be shown on the SUP. You can choose between the following three options:

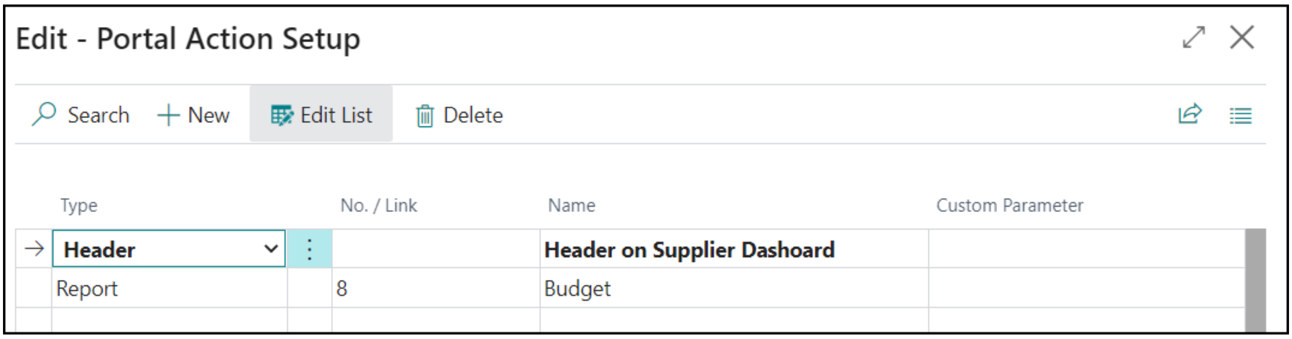
All	All Purchase Quotes and Purchase Orders will be shown.
Only Open	Only Purchase Quotes and Purchase Orders with **Status** = *Open* will be shown.
Only Released	Only Purchase Quotes and Purchase Orders with **Status** = *Released* will be shown.

FastTab Actions

Dashboard

You can determine which **Actions** should be shown on the **Supplier Dashboard** of the SUP (or **Customer Dashboard** of the B2B) in the dock ***Actions.***

Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

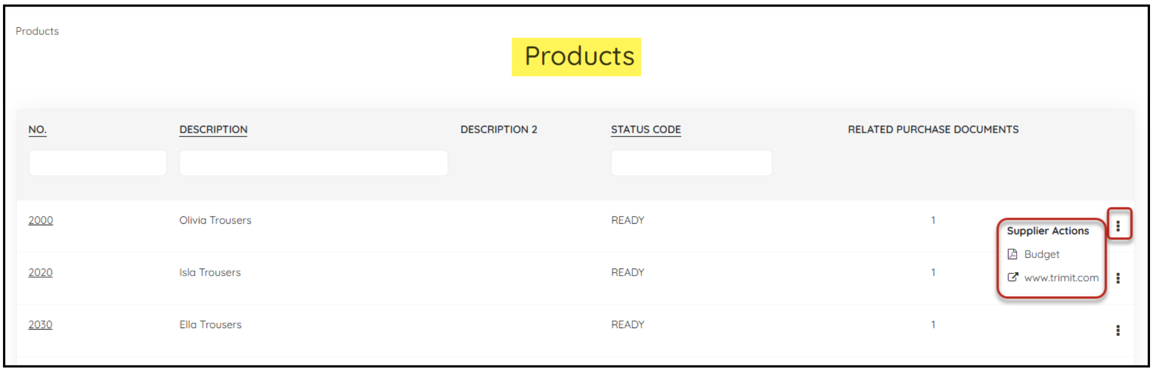


See [FastTab Page Actions] for more details.

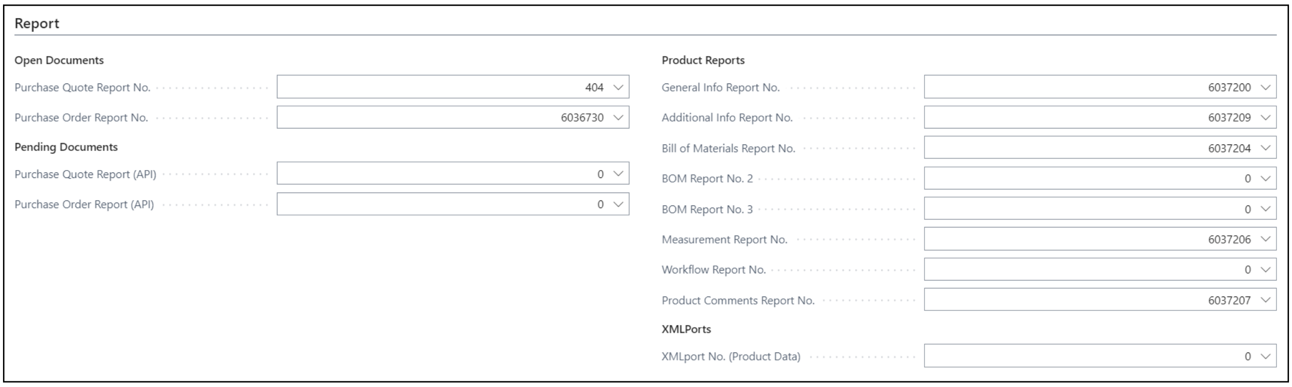
Master

You can determine which **Actions** should be shown on the **Products** page of a SUP.
Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

See [FastTab Page Actions](#) for more details.

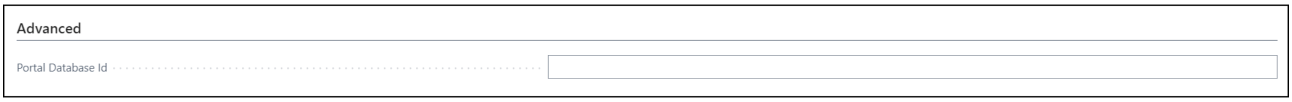


FastTab Report



You can have customized Reports for the Supplier, so in that case you need to fill in other Report Nos. as the ones shown in the figure above.

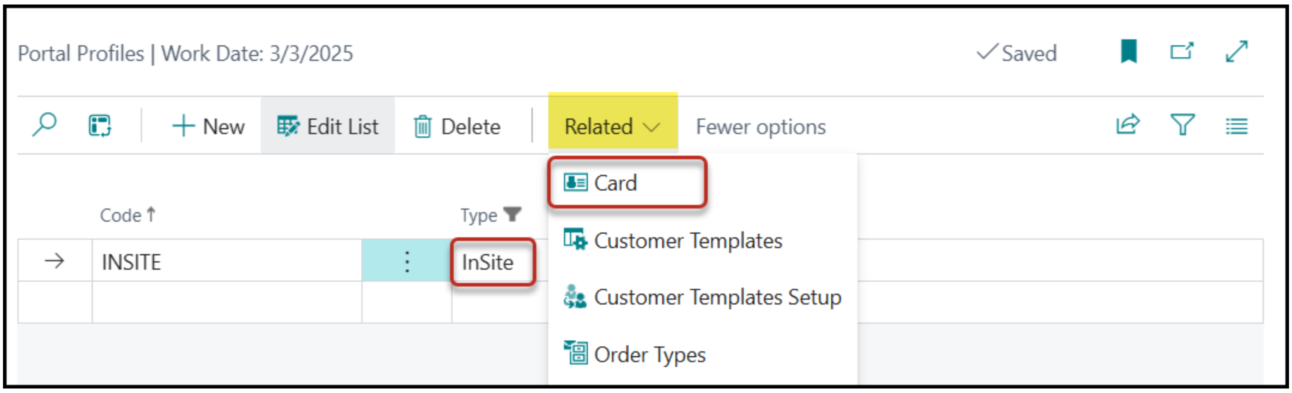
FastTab Advanced



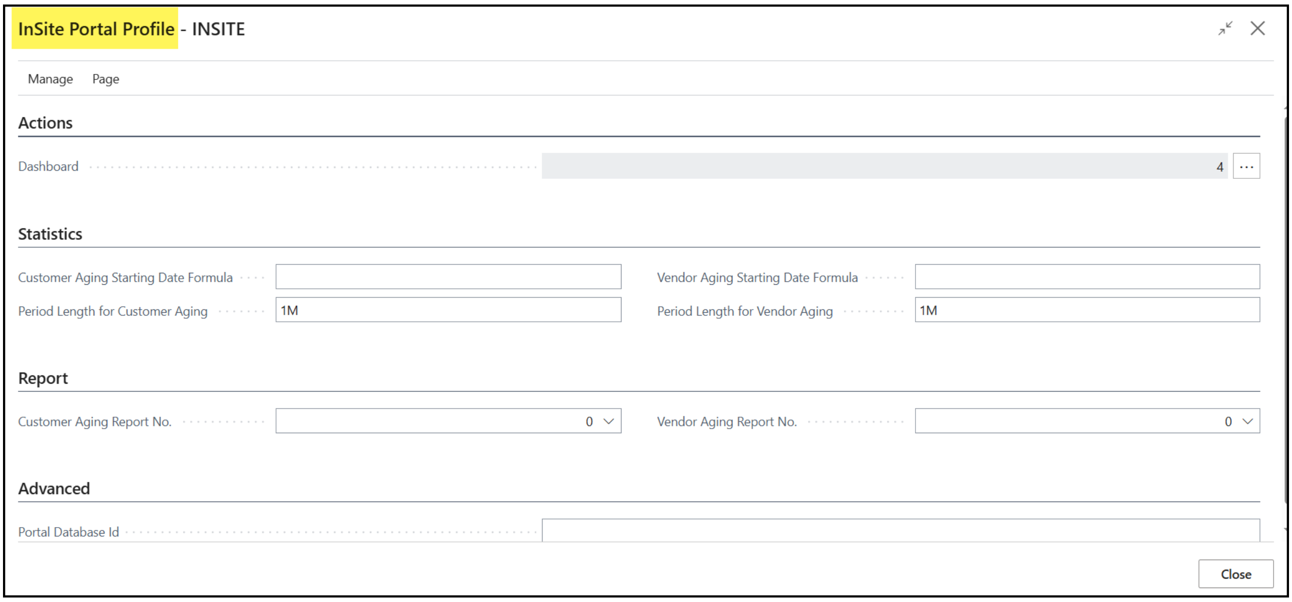
See [FastTab Advanced](#) for the details.

InSite Portal Profile

To open the InSite Portal Profile you can create a new Portal Profile by clicking **+ *New*** to create a new Portal Profile with **Type** *InSite* in the list, after which you can open the underlying Card by clicking ***Related, Card.***



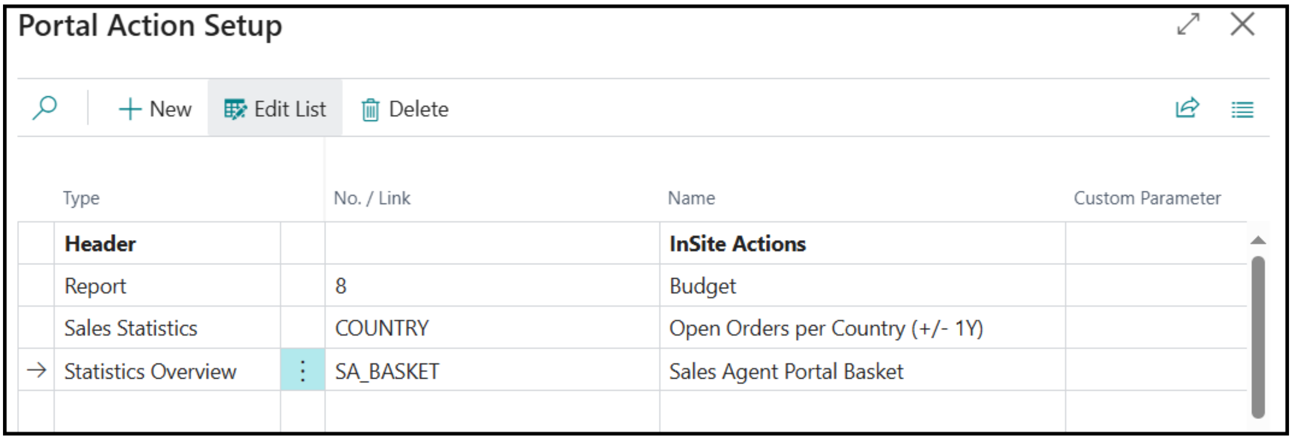
The **Type** and **Description** were already filled in the **Portal Profiles** List.
Based on the **Type** *InSite* the page ***InSite Portal Profile*** will open.



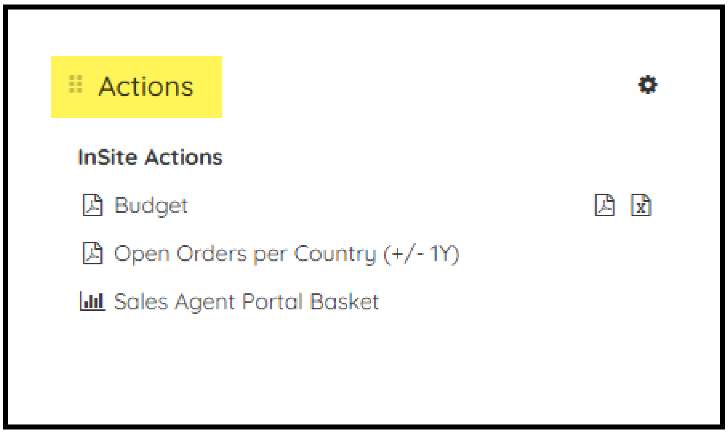
FastTab Actions

Dashboard

You can determine which **Actions** should be shown on the **InSite Portal** in the dock ***Actions.*** Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.



See [FastTab Page Actions] for more details.



FastTab Statistics

Customer Aging starting Date Formula

If no **Date Formula** is entered the current Date will be used when showing the **Customer Aging**

Length of Period for Customer Aging

If no **Length of Period** is entered, it will be set to *1M*.

Vendor Aging starting Date Formula

If no **Date Formula** is entered the current Date will be used when showing the **Vendor Aging**

Length of Period for Vendor Aging

If no **Length of Period** is entered, it will be set to *1M*.

FastTab Report

Customer Aging Report No.

If no **Customer Aging Report No.** is entered, report ***105 Customer - Summary Aging*** will be used.

Vendor Aging Report No.

If no **Vendor Aging Report No.** is entered, report ***305 Vendor - Summary Aging*** will be used.

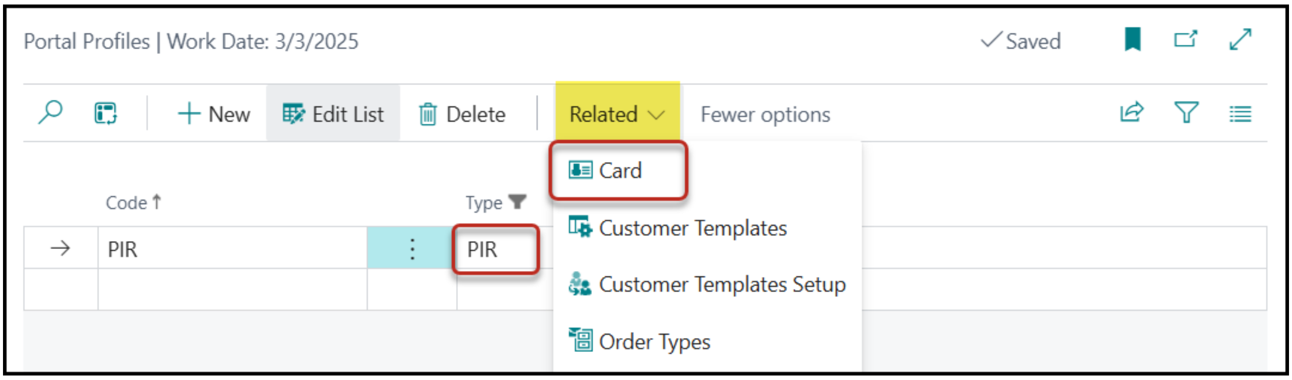
FastTab Advanced

Portal Database Id

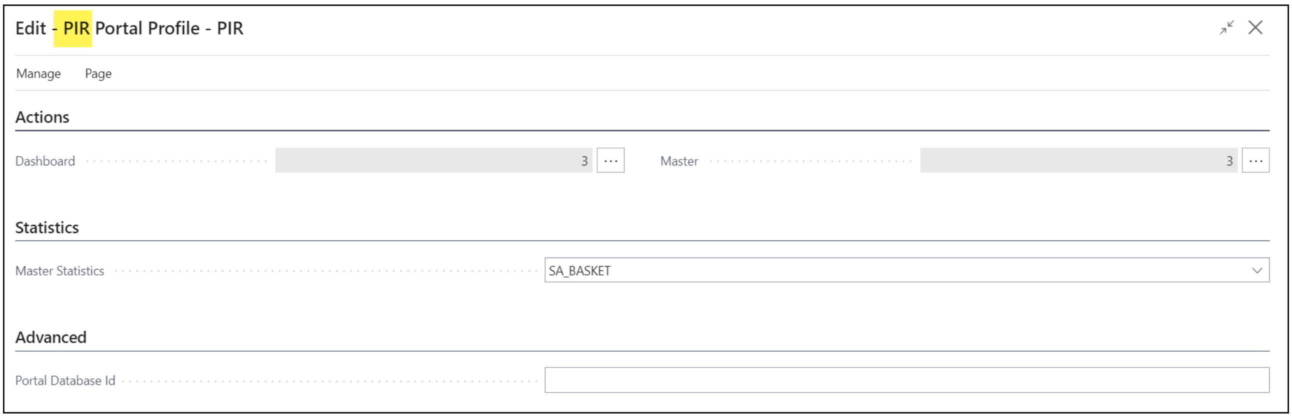
See [Portal Database Id] for details.

PIR Portal Profile

To open the PIR Portal Profile, you can create a new Portal Profile by clicking **+ *New*** to create a new Portal Profile with **Type** *PIR* in the list, after which you can open the underlying Card by clicking ***Related, Card.***



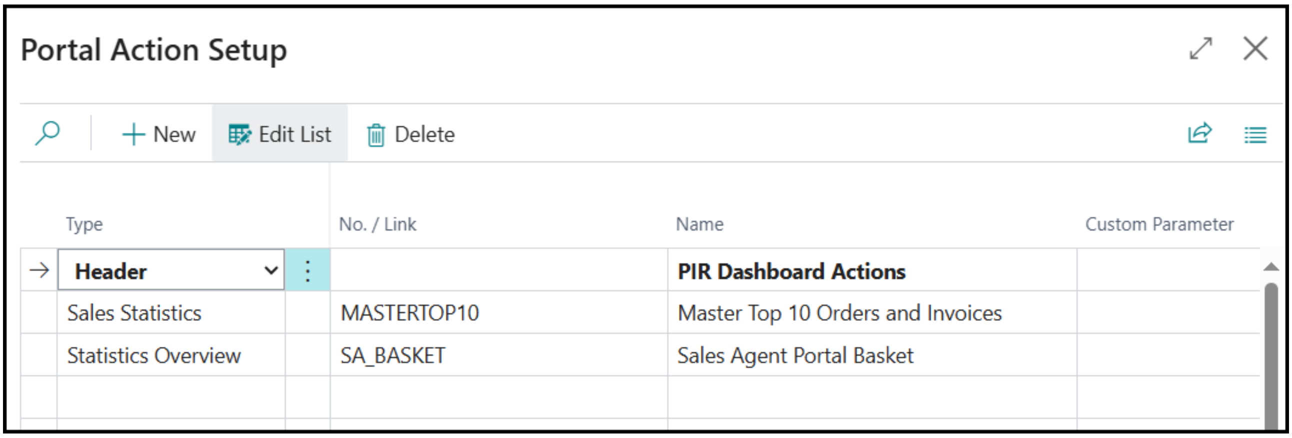
The **Type** and **Description** were already filled in the **Portal Profiles** List.
Based on the **Type** *PIR* the page ***PIR Portal Profile*** will open.



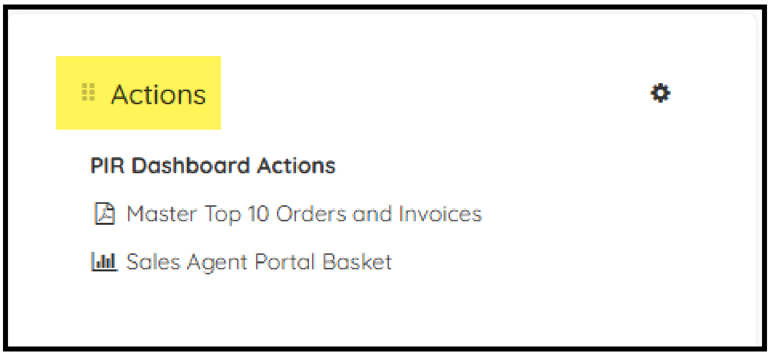
FastTab Actions

Dashboard

You can determine which **Actions** should be shown on the **PIR Dashboard** in the dock ***Actions.*** Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

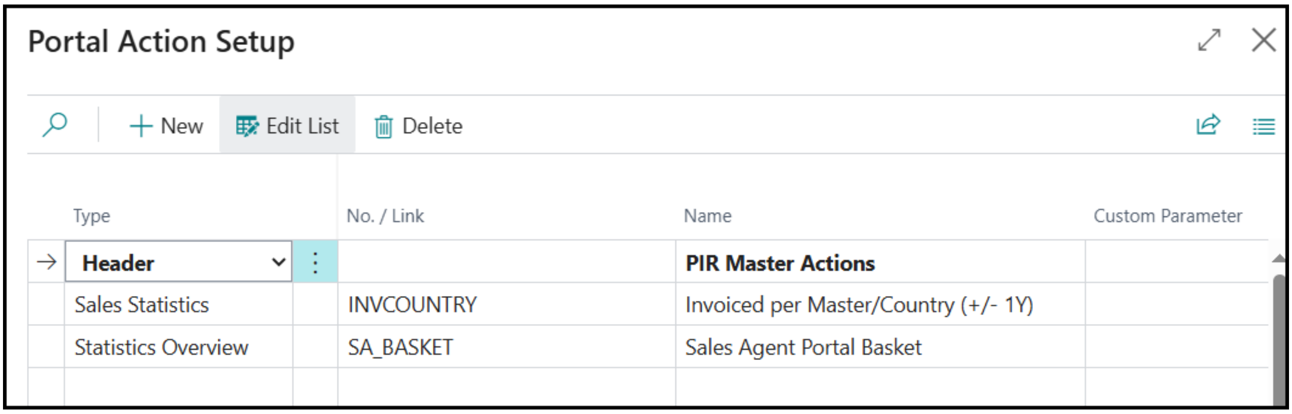


See [FastTab Page Actions]() for more details.

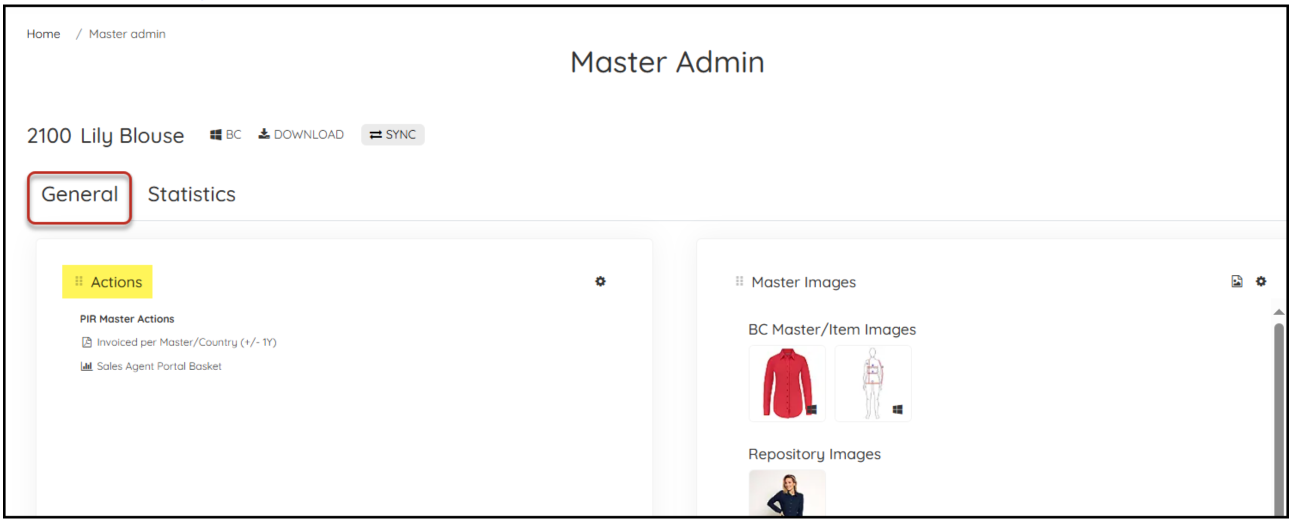


Master

You can determine which **Actions** should be shown on the **Master Admin** page of a Product on the PIR. Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.



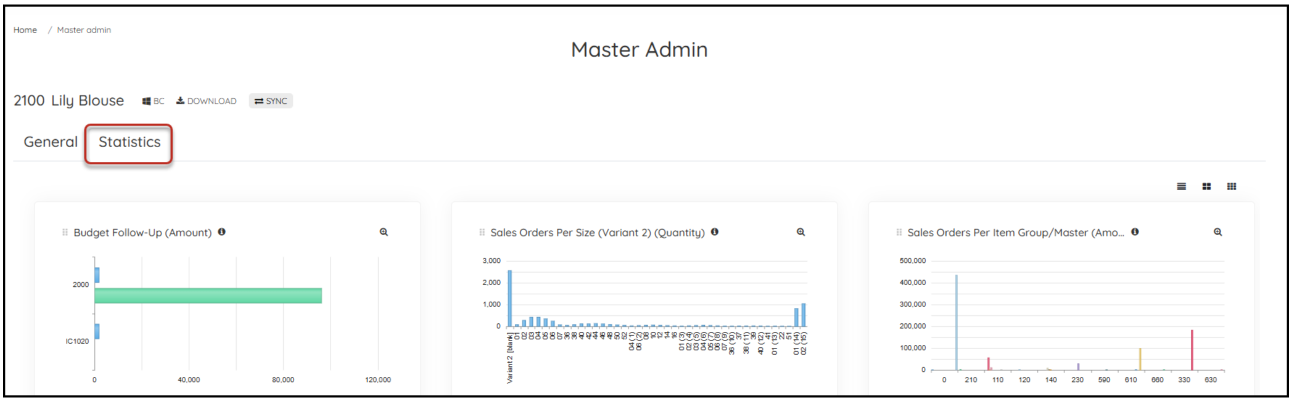
See [FastTab Page Actions](#) for more details.



FastTab Statistics

Master Statistics

You can choose a **Statistics Overview** that will be shown in the **Master Admin** page on Tab **Statistics** of the **Master Admin** page.



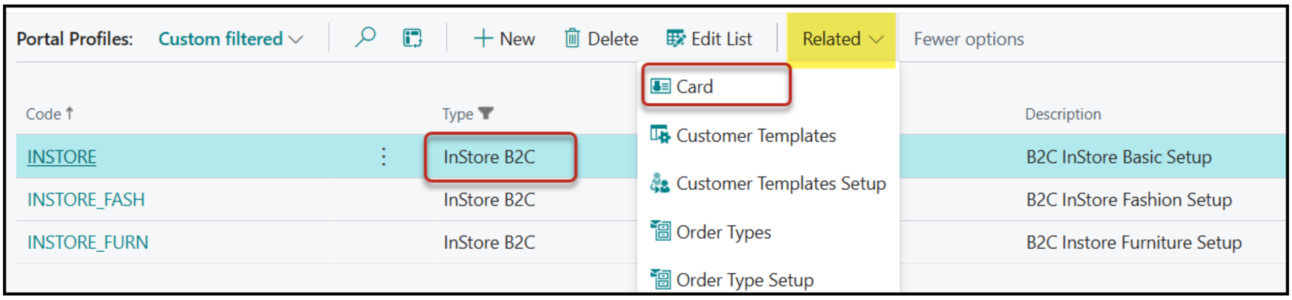
FastTab Advanced

Portal Database Id

See [Portal Database Id](#) for details.

InStore B2C Profile

InStore B2C can be used by an employee in a Store that will enter a Sales Order for a Consumer for products that might not be available in the physical Store.
To open the InStore B2C Portal Profile you can create a new Portal Profile by clicking **+ *New*** to create a new Portal Profile with **Type** *InStore B2C* in the list, after which you can open the underlying Card by clicking ***Related, Card.***



The **Type** and **Description** were already filled in the **Portal Profiles** List.
Based on the **Type** *InStore B2C* the page ***InStore Profile*** will open.

Most of the Fields on the ***InStore Profile*** page are comparable with the fields in the Portal Profile of **Type** = *BusinessToConsumer* (B2C) which is described in detail in ***White Paper – TRIMIT B2C Setups in Business Central.*** There are some extra fields:

FastTab Check-Out

Disable Online Payment

In case the Consumer would usually always pay via the Till of the Shop instead of via the Instore B2C Webshop, it might be necessary to put this field to *TRUE;* otherwise, the Consumer might pay twice.

Disable Voucher/Gift Card

In case Vouchers and/or Gift Cards would always already be reducing the payment that takes place via the Till of the Shop, it might be necessary to put this field to *TRUE;* otherwise, the Voucher/Gift Card would be posted twice.

Users

Information on setup and maintenance of Users for Modelyn is described in the ***White Paper – TRIMIT Portals User Setup***.

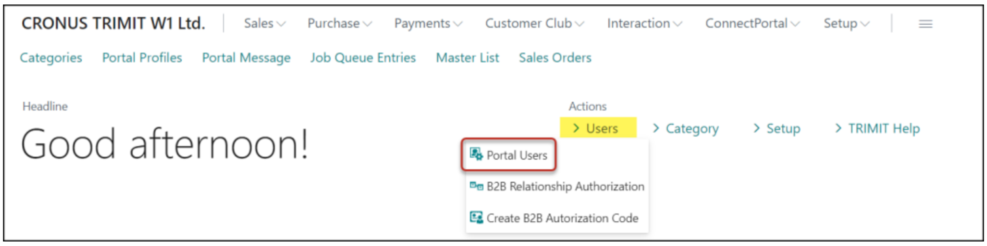
User Relationship Management

User Relationship connects a Portal User to a Customer, Vendor, Salesperson/Purchaser, etc. in TRIMIT.

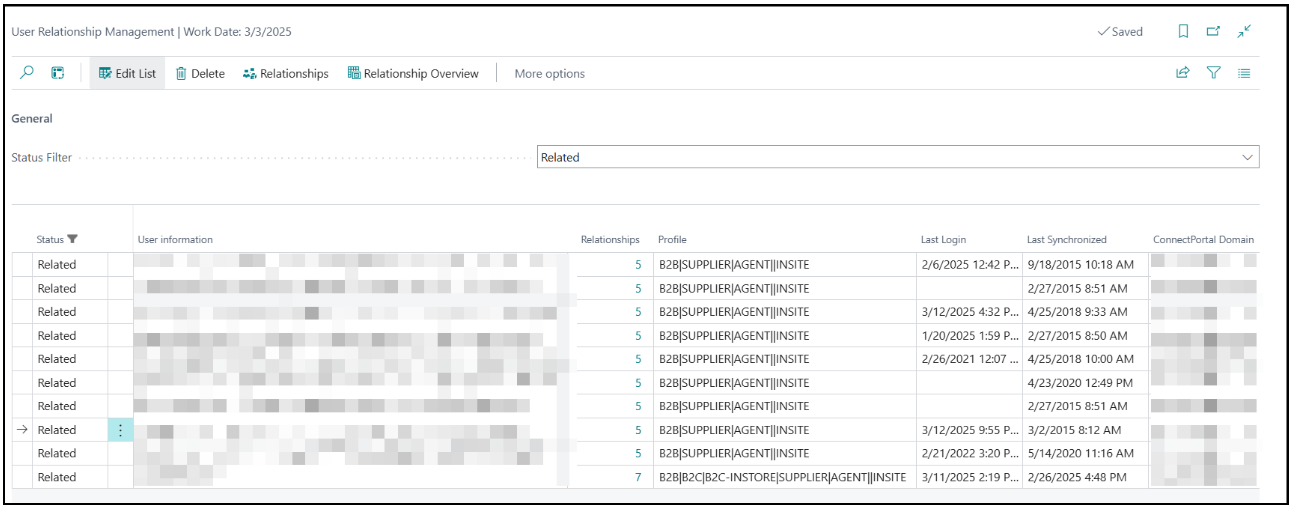
Example:
Andy Teal is an employee working for Customer *The Cannon Group PLC* and he is the person going to do the purchase through the B2B. Then you must go through three steps:

1. *Andy must get a Portal User Login to the B2B (via **Modelyn**).*
2. *His Portal User Login must be synchronized to the **User Relationship** table in TRIMIT.*
3. *Andy's Portal User Login must be related to the **Customer No**. that The Cannon Group PLC already has in TRIMIT. That Relationship is created in the **User Relationships**.*

This chapter shows how to create the User Relationships.
In the **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator***,** you can click ***Users, Portal Users*** or you can use **Search** *User Relationship Management* to open the ***User Relationship Management** page*.



This page will show the Users created in Modelyn which have been synchronized to TRIMIT from the Portal.



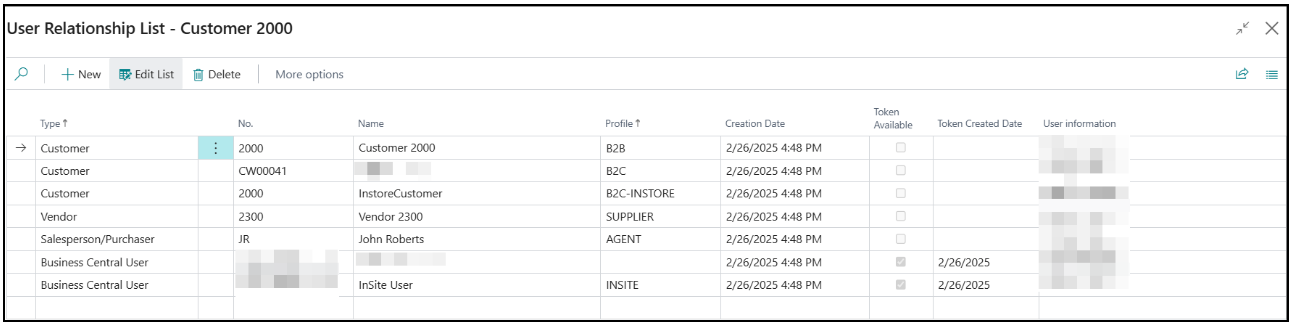
Change the **Status Filter** to see different filters on the synchronized Users.
You can choose between the following four options for the **Status Filter:**

New	The synchronization sets this as the default value, when creating new users for the Portals
No Relation	Shows all users that are not related to a table in TRIMIT
Related	Shows all users who are already related to a table in TRIMIT
All	Shows all users of the above three options

User Relationships

To create/maintain a new Relationship click ***Relationships*** in the **User Relationship Management** page.

This will open the ***User Relationship List*** page, where it is possible to create multiple Relationships per Portal user:



Description of the Fields

Type

To create a relationship, start by selecting **Type;** the options are:

Employee	The portal user will be related to the **Employee** table (5200) in TRIMIT
Contact Company	The portal user will be related to the **Contact** table (5050) in TRIMIT, where **Type** is *Company*
Contact Person	The portal user will be related to the **Contact** table (5050) in TRIMIT, where **Type** is *Person*
Customer	The portal user will be related to the **Customer** table (18) in TRIMIT
Vendor	The portal user will be related to the **Vendor** table (23) in TRIMIT
Resource	The portal user will be related to the **Resource** table (156) in TRIMIT
Salesperson/Purchaser	The portal user will be related to the **Salesperson/Purchaser** table (13) in TRIMIT
Business Central User	The portal user will be related to the **User Setup** table (91) in TRIMIT

No.

Enter the **No.** related to the **Type** field.
Lookup in this field will open the relevant list, depending on the **Type** field.

Name

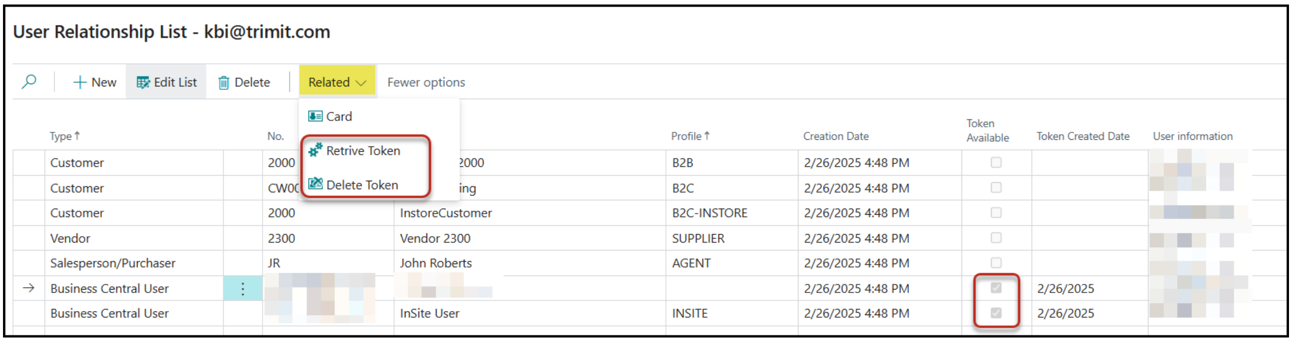
Name of the **No.** will be shown based on the **Type** field.

Profile

Enter the **Portal Profile** for which the **No.** is applicable.
Lookup in this field will open the **Portal Profile List**. This field defines if the User will have access to the Portal related to the **Portal Profile** and as which User (Customer, Vendor, Salesperson).

Creation Date
This field will be filled automatically with the Date and Time of creation.

Token Available
Related to a feature which allows opening Portal pages from TRIMIT. If **Type** field is set to *Business Central User,* then under ***Related,*** it is possible to ***Retrieve Token*** or ***Delete Token***.
After clicking ***Retrieve Token***, if succeeded, field **Token Available** will be set to *TRUE*.
After clicking ***Delete Token*** this field will be set to *FALSE*.
Read more about this functionality in chapter *User Mapping and Token Authentication*.

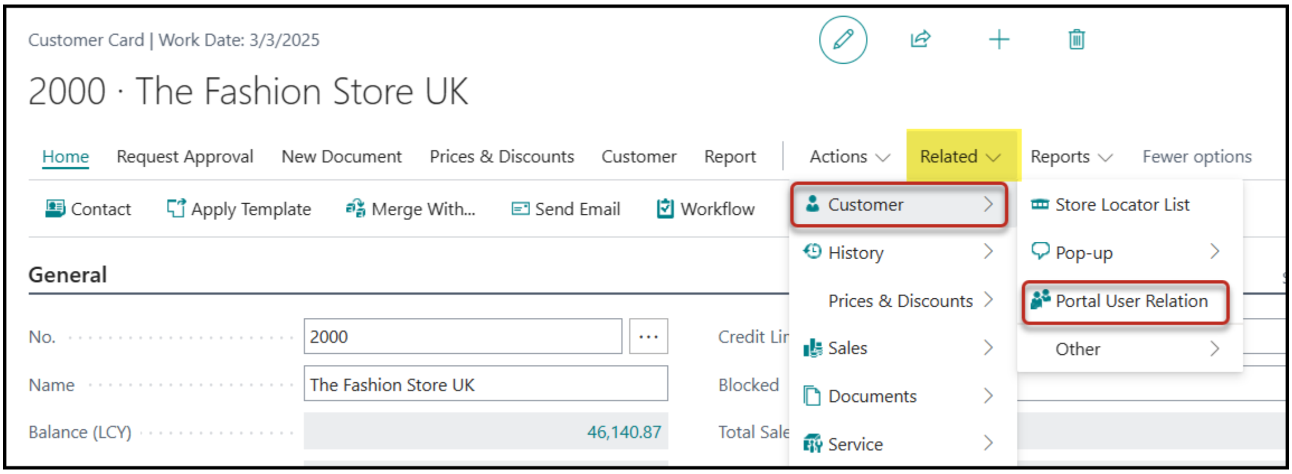


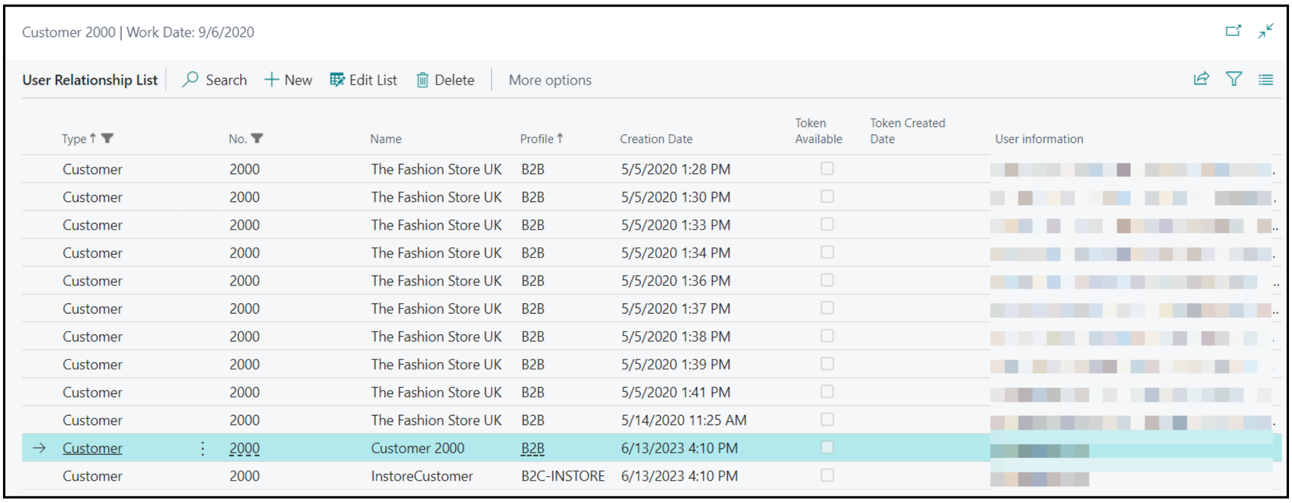
Token Created Date
After clicking ***Retrieve Token***, if succeeded, field ***Token Created Date*** will contain the current date.
After clicking ***Delete Token*** this field will be set to blank.
Read more about this functionality in chapter *User Mapping and Token Authentication*.

User Information
The details of the Portal User that you were coming from when clicking ***Related, Relationships.***

Portal User Relation
You are also able to see the **Portal User Relationships** via the Customer, Vendor and User:

Via the Customer List/Card

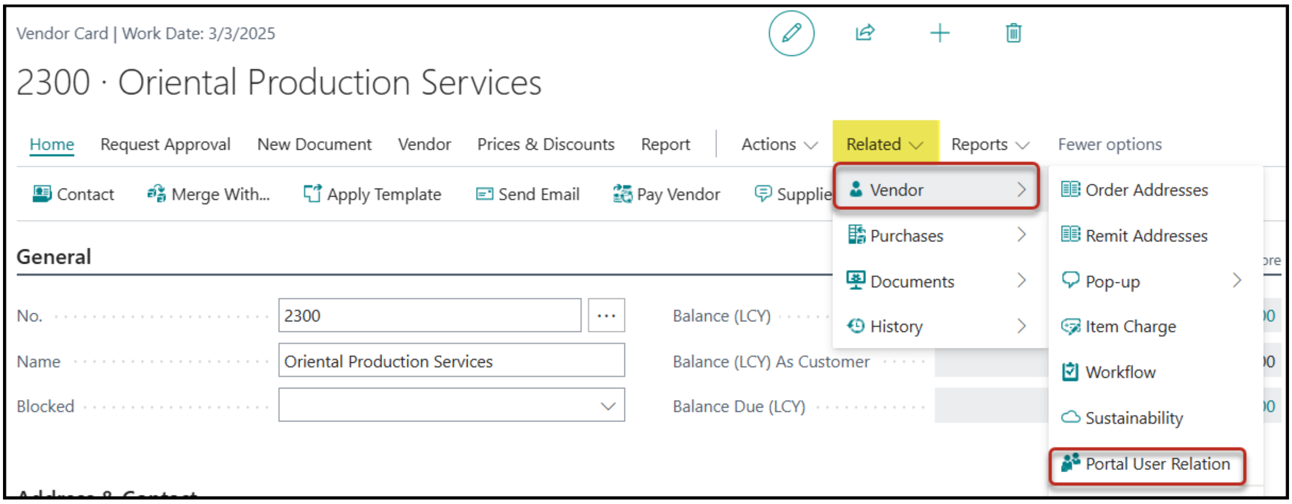



Customer 2000 | Work Date: 9/6/2020

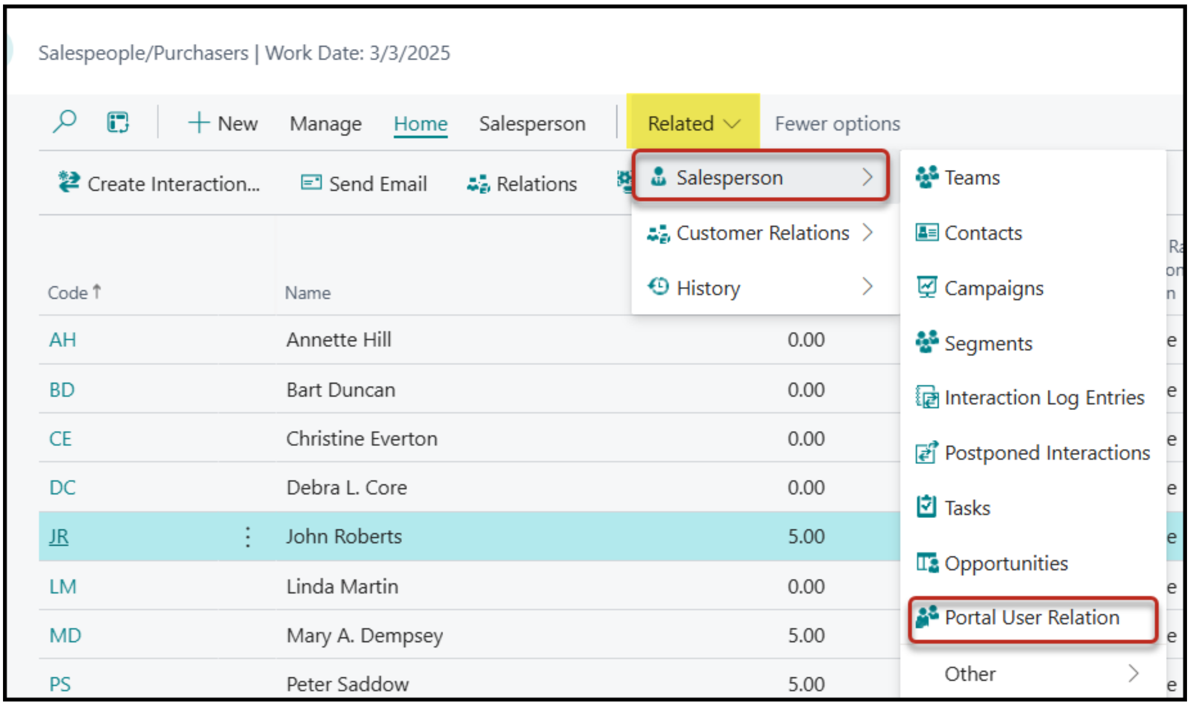
User Relationship List | Search | New | Edit List | Delete | More options

Type ↑	No.	Name	Profile ↑	Creation Date	Token Available	Token Created Date	User information
Customer	2000	The Fashion Store UK	B2B	5/5/2020 1:28 PM			
Customer	2000	The Fashion Store UK	B2B	5/5/2020 1:30 PM			
Customer	2000	The Fashion Store UK	B2B	5/5/2020 1:33 PM			
Customer	2000	The Fashion Store UK	B2B	5/5/2020 1:34 PM			
Customer	2000	The Fashion Store UK	B2B	5/5/2020 1:36 PM			
Customer	2000	The Fashion Store UK	B2B	5/5/2020 1:37 PM			
Customer	2000	The Fashion Store UK	B2B	5/5/2020 1:38 PM			
Customer	2000	The Fashion Store UK	B2B	5/5/2020 1:39 PM			
Customer	2000	The Fashion Store UK	B2B	5/5/2020 1:41 PM			
Customer	2000	The Fashion Store UK	B2B	5/14/2020 11:25 AM			
Customer	2000	Customer 2000	B2B	6/13/2023 4:10 PM			
Customer	2000	InstoreCustomer	B2C-INSTORE	6/13/2023 4:10 PM			

Via the Vendor List/Card

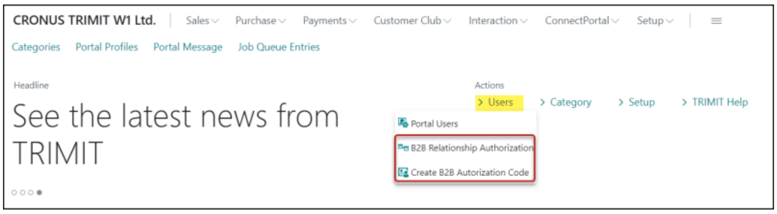


Via the Salespeople/Purchasers list



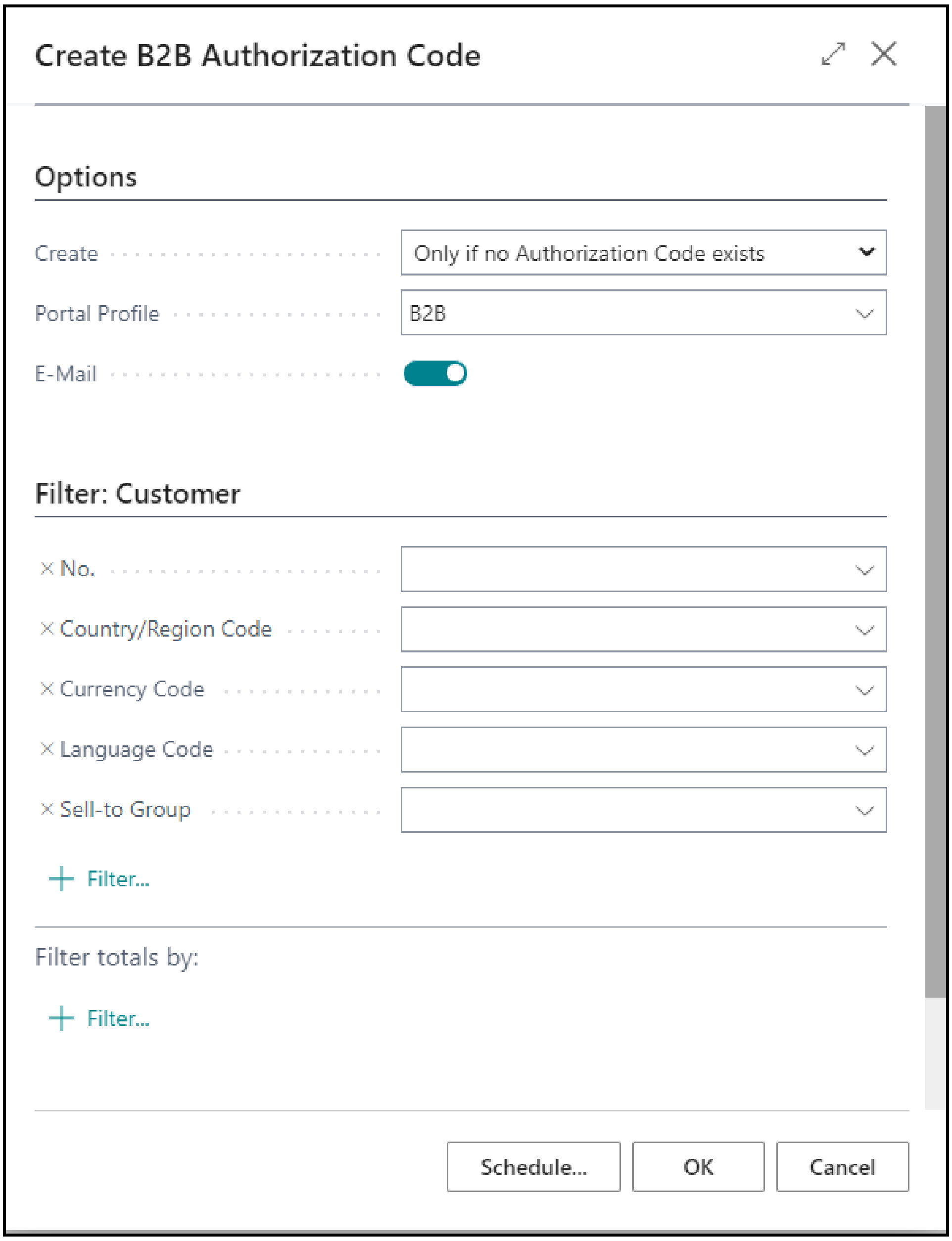
Create new Customer on B2B

It is possible for a User to register on B2B (see Registration on the B2B).
To do this, it is also needed to get a **Customer No.** and **Authorization Code** from TRIMIT ERP.
This can be done in two ways:
Via ***Create B2B Authorization Code*** or via ***B2B Relation Authorization.***
Both can be found in the **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator* or via **Search**:



Create B2B Authorization Code

This is a batch job/report creating several Authorization Codes for Customers within the filter specified (i.e., for all Customers in DK).



Create

You can select *Only if no Authorization Code exists* or *Also if an Authorization Code exists*.
The first option will only create Authorization Codes for Customers for which no Authorization Codes have been created before.
The second option will create Authorization Codes for all filtered Customers, regardless if an Authorization Code has been created before.

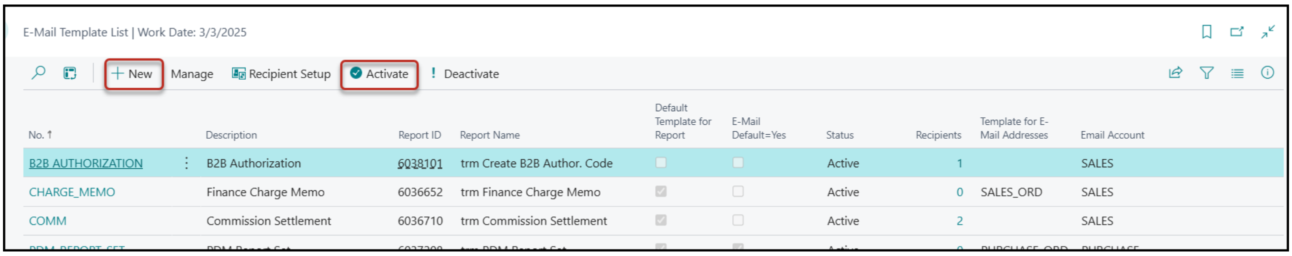
Portal Profile

You need to select the Portal Profile for your B2B or B2C InStore Shop.

E-Mail

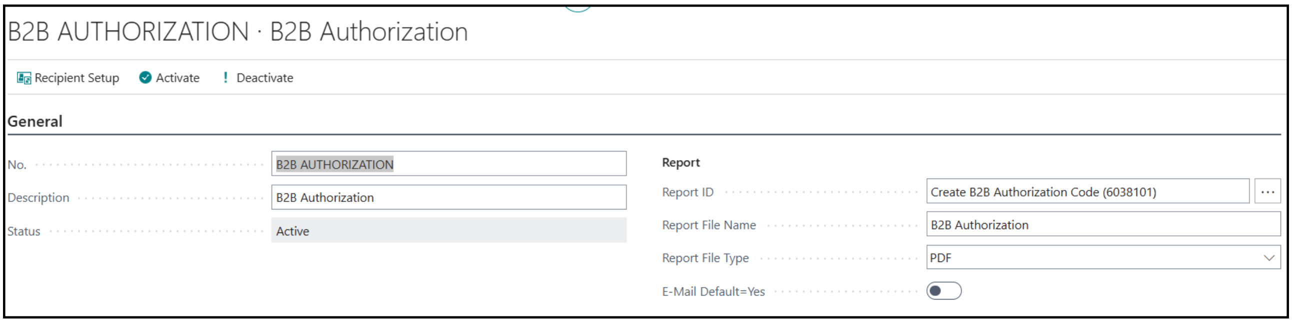
If set to *TRUE*, then an E-Mail with the Authorization Code will be sent to Customer(s) based on the TRIMIT E-Mail Template that has been setup for report ***6038101 trm Create B2B Author. Code***.

Here is a description on how to setup sending E-Mail with Authorization Code to a Customer.
To be able to send an E-Mail, it is required to create an **E-Mail Template** for sending Authorization Codes. E-Mail Template can be created via **Search** *E-Mail Template*.



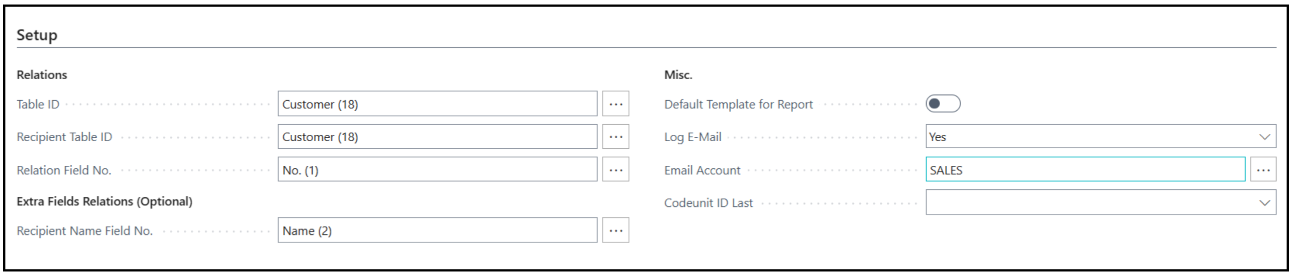
To see the E-Mail Template Card, click **No.** *B2B Authorization*, to create new E-Mail Template, click ***+ New.*** Here set a **No.** and **Description** to your Template.
Click **Activate** to change the **Status** of the Template to *Active*.

FastTab General



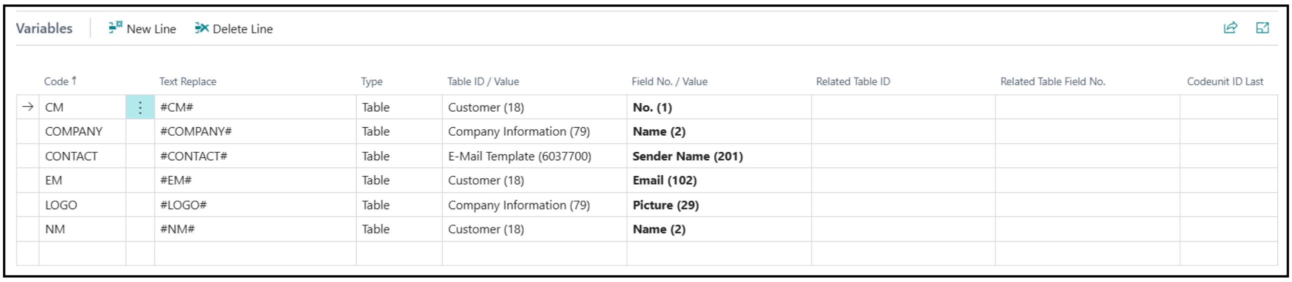
In FastTab ***General*** specify the **Report ID**, in this case *6038101*. This report will be used to generate Authorization Codes and sending E-Mails to Recipients if required.
Set **Report File Name** and select **Report File Type** if required.

FastTab Setup



In FastTab ***Setup*** connect the right Tables based on the chosen **Report ID.** Set field **Table ID** to *Customer (18)*. Set **Recipient Table ID** to *Customer (18)*. Set Relation **Field No.** to *No. (1)*. Set Recipient **Name Field No.** to *Name (2)*.

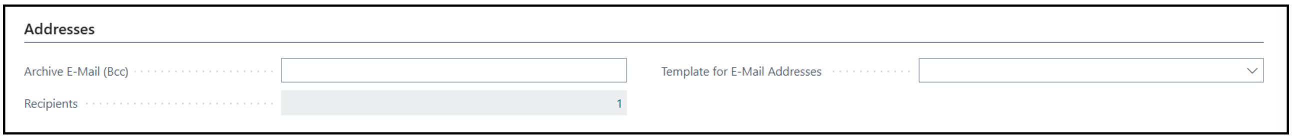
FastTab Variables



Code	Text Replace	Type	Table ID / Value	Field No. / Value	Related Table ID	Related Table Field No.	Codeunit ID Last
CM	#CM#	Table	Customer (18)	**No. (1)**			
COMPANY	#COMPANY#	Table	Company Information (79)	**Name (2)**			
CONTACT	#CONTACT#	Table	E-Mail Template (6037700)	**Sender Name (201)**			
EM	#EM#	Table	Customer (18)	**Email (102)**			
LOGO	#LOGO#	Table	Company Information (79)	**Picture (29)**			
NM	#NM#	Table	Customer (18)	**Name (2)**			

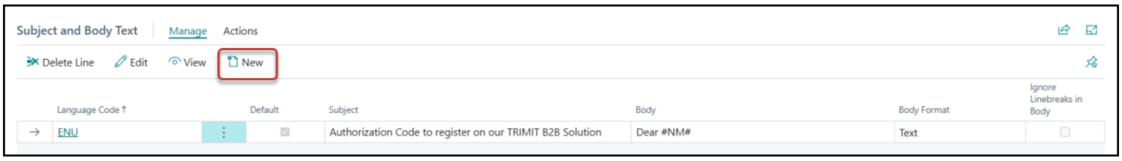
In FastTab ***Variables,*** create required Variables. Variables are used the Body Text of the E-Mail.
In this case Variables are used for Customer No., Company Name, Sender Name, Customer E-Mail Address, Company Picture, and Customer Name.
Variable *AUTHCODE* is predefined in the AL Code of the Report itself by default. Fill the other Variables as shown in the picture above (these Variables are also used in the example of the Body Text).

FastTab Addresses

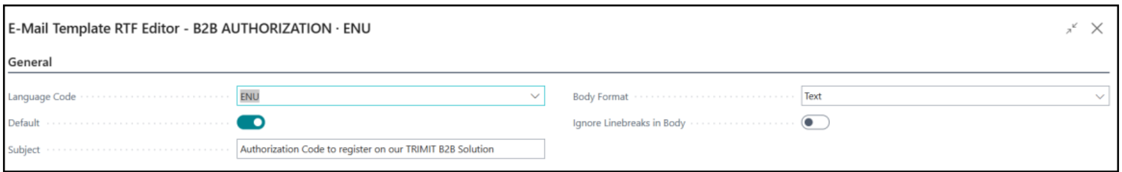


In FastTab ***Addresses,*** you can specify a “Bcc E-Mail Address”**.**

FastTab Subject and Body Text



Click ***Manage, New*** under ***Subject- / Body Text***. And create your E-Mail template text, i.e.:



The total **Body** could look as follows – based on the Variables defined and the **XXXXXXXXXX** being the domain of your portals:

Dear #NM#

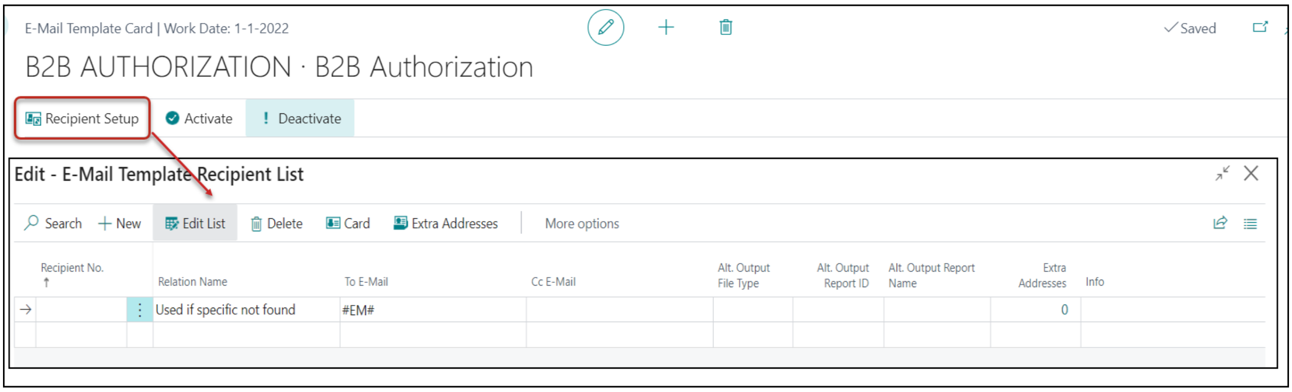
You can register an InStore user here:
InStore Portal User Registration

You can register a B2B user here:
B2B Portal User Registration

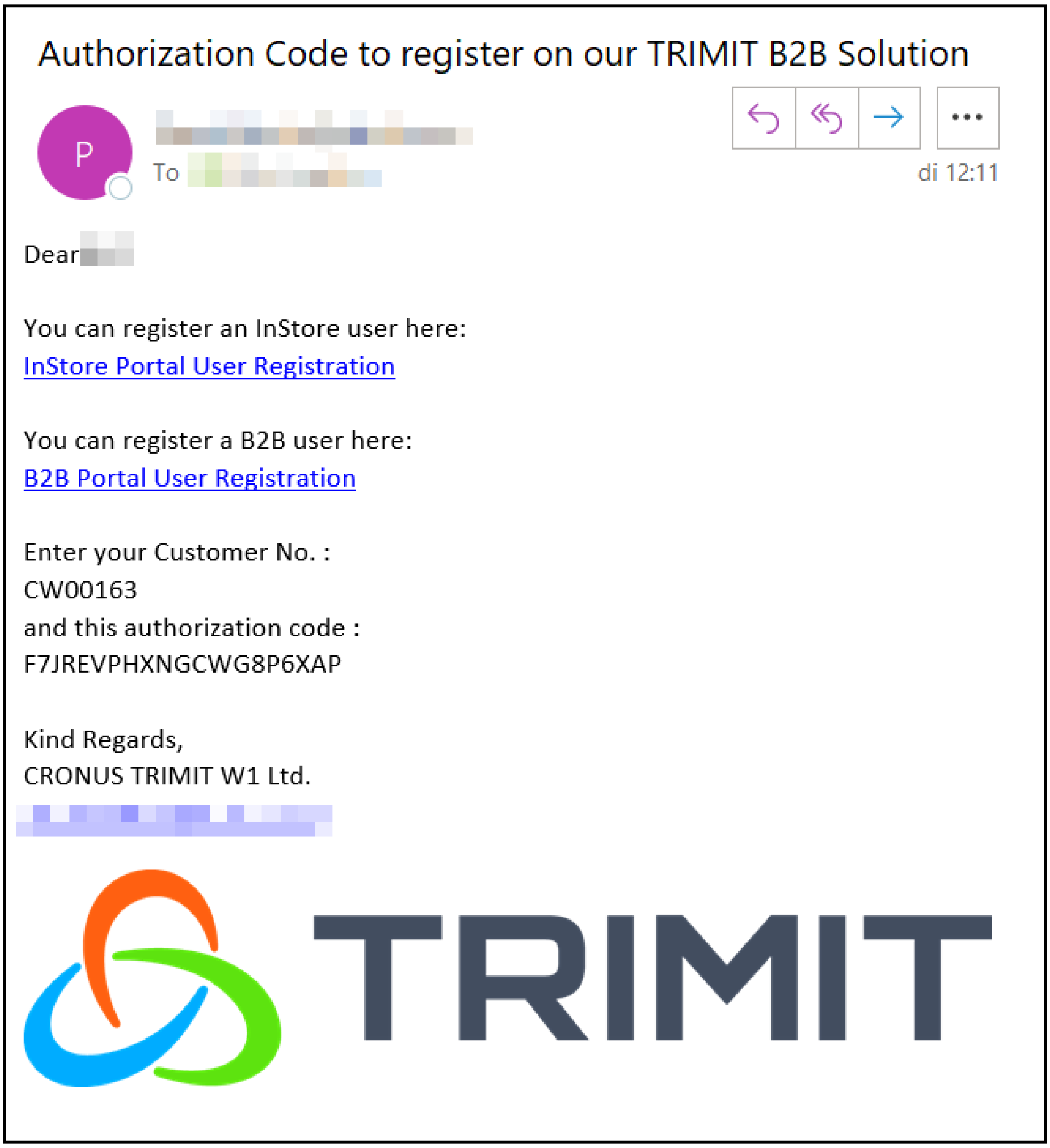
Enter your Customer No. :
#CN#
and this authorization code :
#AUTHCODE#

Kind Regards,
#COMPANY#
#CONTACT#
<img src=cid:#LOGO#>

Click ***Recipient Setup*** to open ***E-Mail Template Recipient List***. Add a line as shown on picture below.

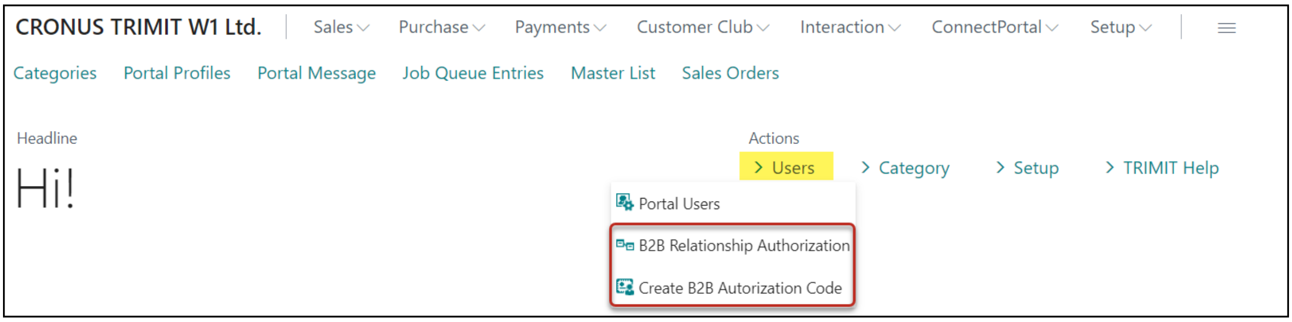


After the setup is done it is possible to create Authorization Codes and send them by E-Mail to Customers The E-Mail received by the Customer (based on the above Template) will then look as follows:

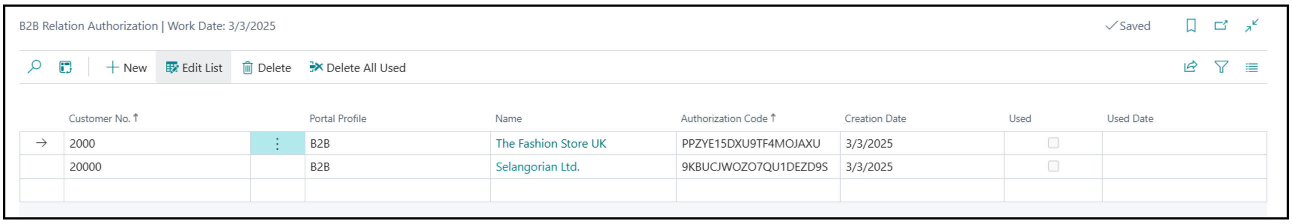


For more information regarding E-Mail Templates refer to ***White Paper – TRIMIT E-Mail***.

You can see the result of this report batch in page ***B2B Relation Authorization*** via **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator.*



B2B Relation Authorization



In this page you will see the Authorization Codes that have been created via the ***Create B2B Authorization Code*** report, but you are also able to create new Authorization Codes for Customers.

Customer No.

You can select a **Customer** for which you want an **Authorization Code** to be created.

Portal Profile

Select the **Portal Profile**.

Name

Will be filled with the Name of the **Customer No.**

Authorization Code

This Code will be created automatically for the entered **Customer No./Portal Profile**.

Creation Date

Date on which the **Authorization Code** has been created.

Used

This field is automatically set to *TRUE* when the Customer has registered himself on the B2B or on the InStore B2C Webshop.
It is possible to relate one B2B User to several B2B Customers using this methodology.

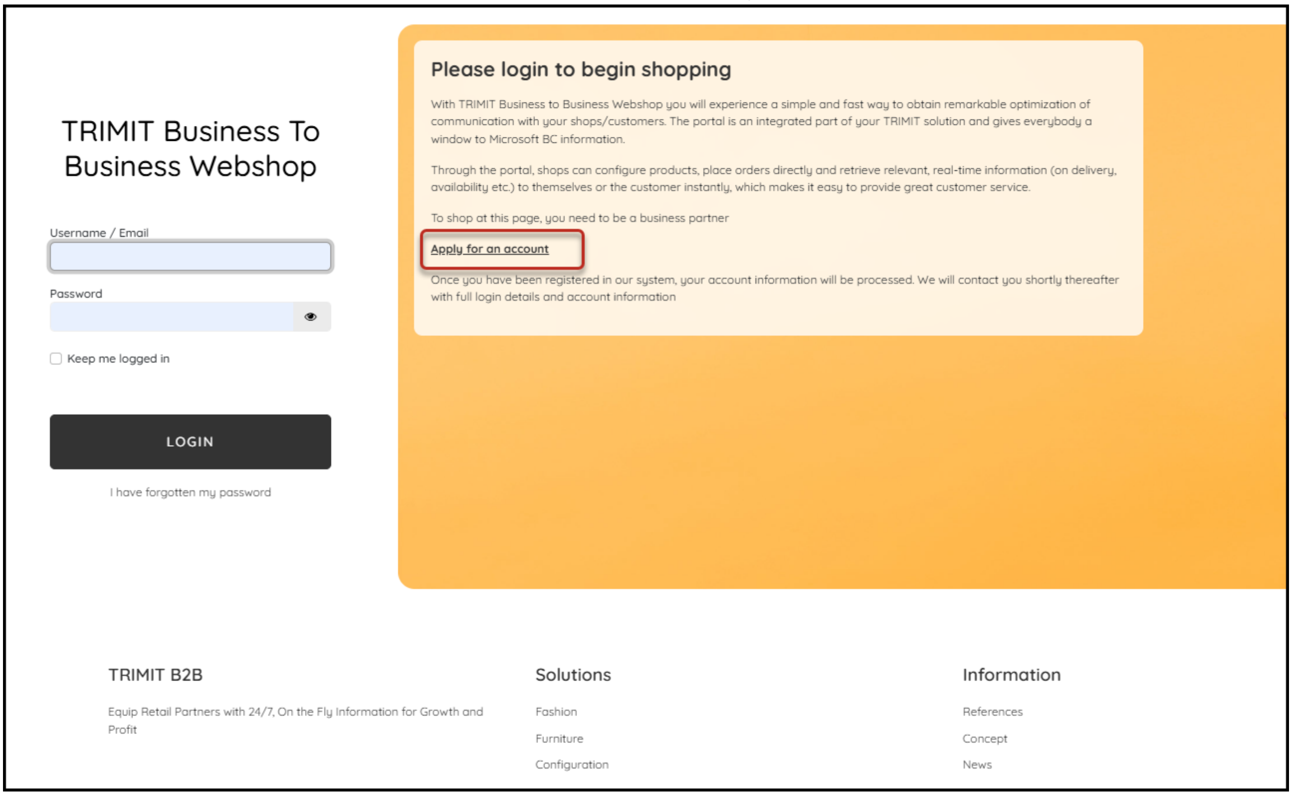
Used Date

This field is automatically set to Date when the Customer has registered himself on the B2B Shop or on the InStore B2C Webshop.

After the new **Authorization Code** is created, it can be handed out to the Customer together with **Customer No.** to use for registration on B2B or on the InStore B2C Webshop.

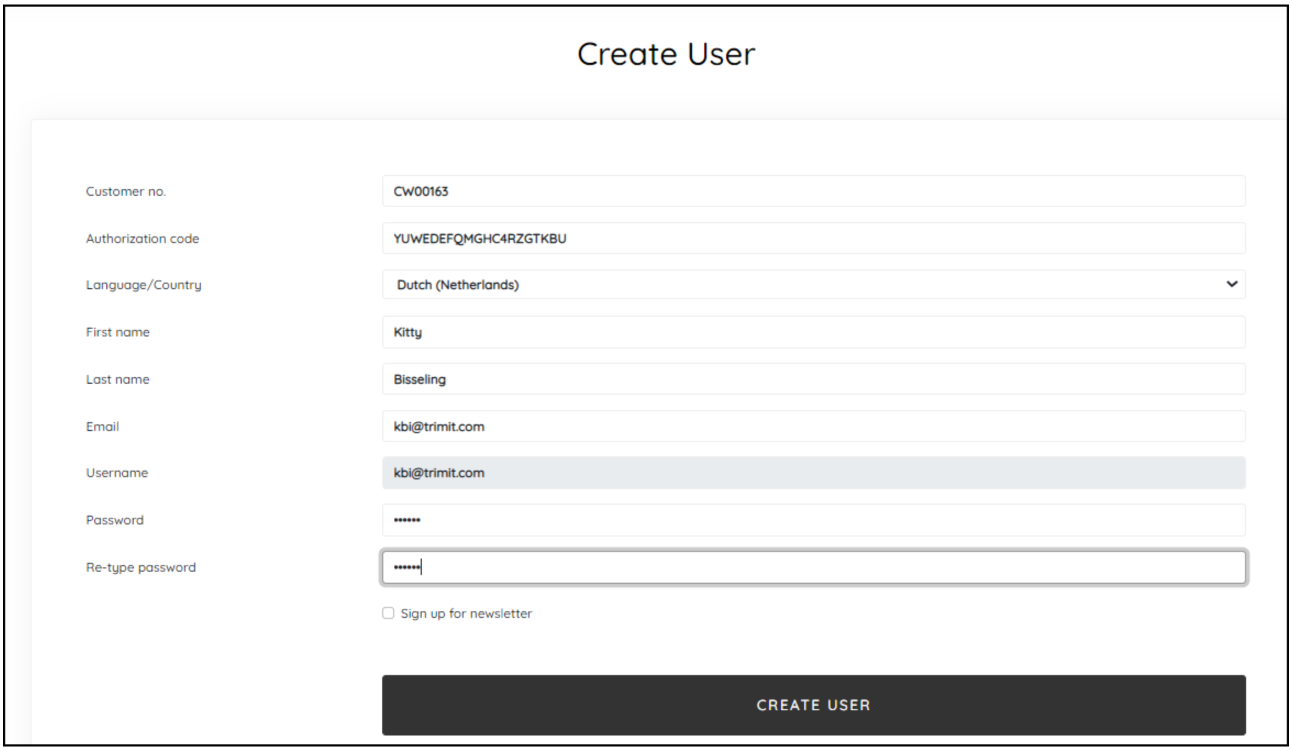
Registration on the B2B

To register, User must open B2B login page. Then click **Apply for an account:**



Note: Showing ***Apply for an account*** link on the login page is optional and relays on a theme value "***B2BSignUpButton***". Read more information about this topic in ***White Paper – TRIMIT Portals Soft Admin***.

Clicking ***Apply for an account*** opens **Create user** page. Here it is needed to enter the following fields after which the User needs to press **Create user**:



Customer no.
Customer Number taken from TRIMIT or received in the E-Mail.

Authorization code
Authorization Code taken from TRIMIT or received in the E-Mail.

Language/Country
User's Language

First name
User's First Name

Last name
User's Last Name

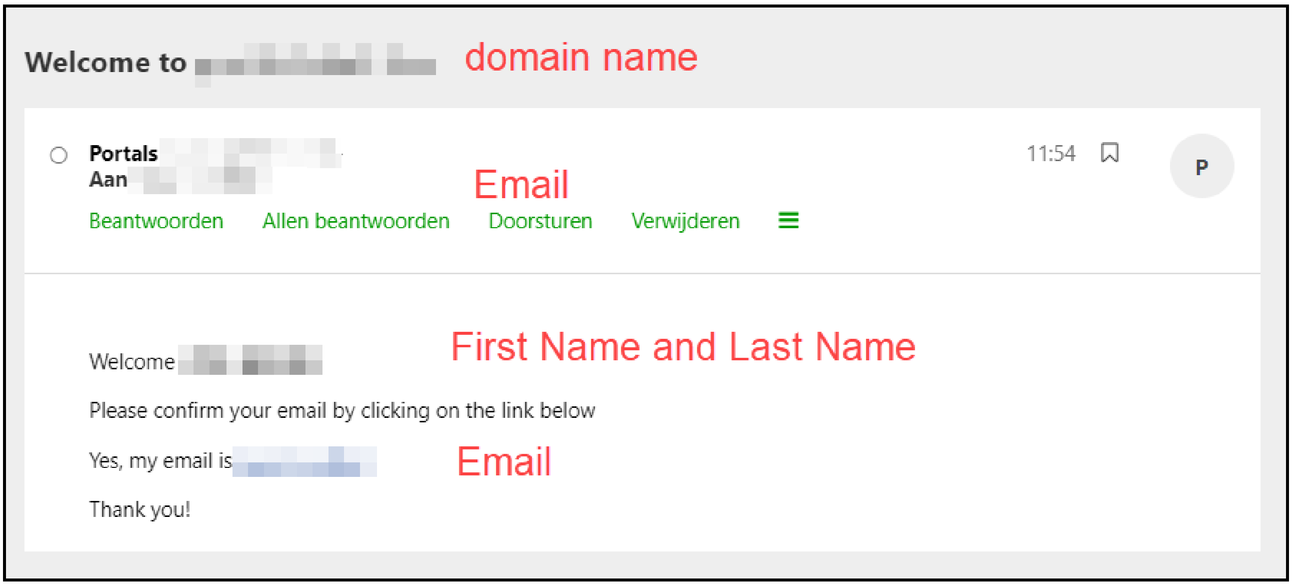
Email
User's E-Mail Address

Username
User Id is set by default to user's E-Mail and cannot be changed.

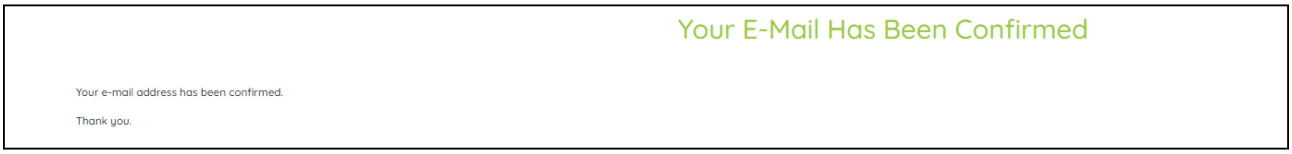
Password
User's Password

Re-type password
User's Password retyped

After the **CREATE USER** button has been pressed, the User gets Registration Confirmation E-Mail.



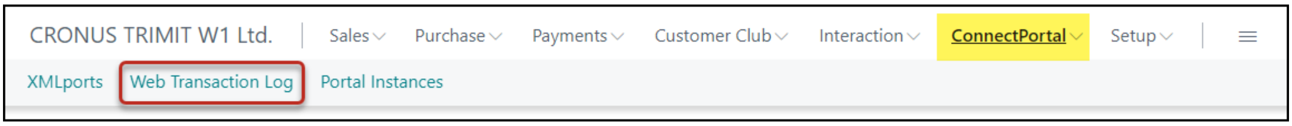
The user needs to confirm his email after which he will see:



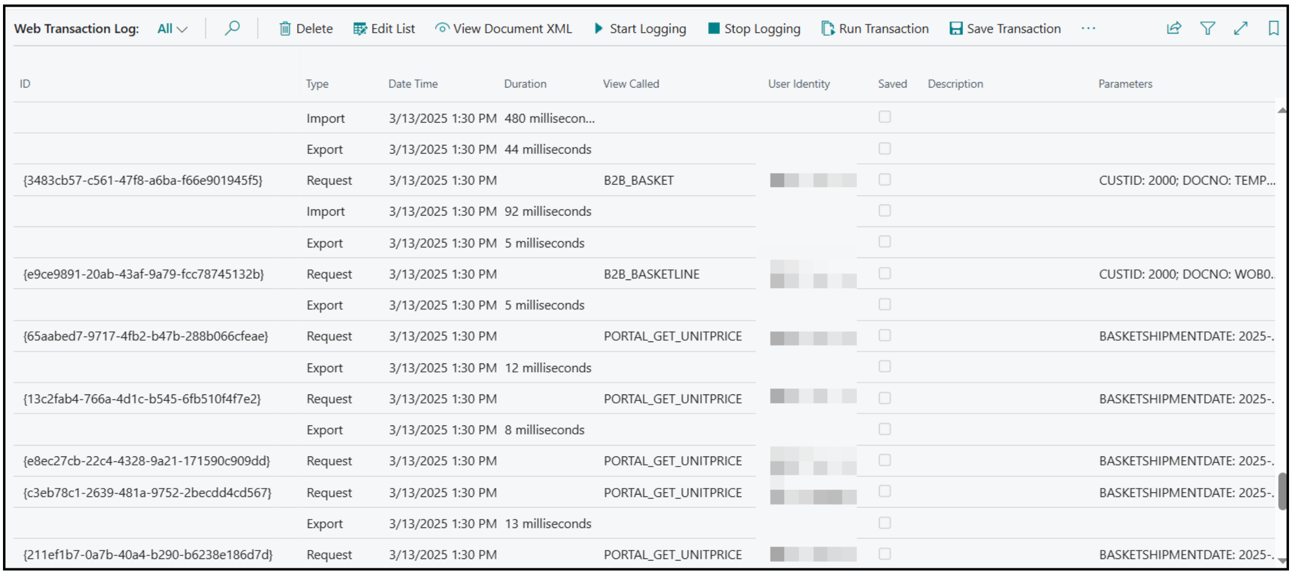
Web Transaction Log

One of the most important tools when developing is the **Web Transaction Log**. It has proven to be essential in development for debugging, performance measurement and more.
The idea is that the **Web Transaction Log** records all incoming requests, which allows the developer to inspect performance, request volume and even do playback on requests. This section will go through the log and explain the different developer tools embedded.

Web Transaction Log allows recording Requests from Portals to TRIMIT and responses from TRIMIT to e-commerce. You can open the page in the **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator* via ***ConnectPortal*, *Web Transaction Log*** or use **Search** *Web Transaction Log*.
How to work with the **Web Translation Log** and how it can help you solve issues in the Requests from e-commerce to TRIMIT and vice versa is explained in detail during the **TRIMIT Portal Developers** training.



Stored transactions can be run within TRIMIT and debugged for errors if needed.



ID	Type	Date Time	Duration	View Called	User Identity	Saved	Description	Parameters
	Import	3/13/2025 1:30 PM	480 millisecon...					
	Export	3/13/2025 1:30 PM	44 milliseconds					
{3483cb57-c561-47f8-a6ba-f66e901945f5}	Request	3/13/2025 1:30 PM		B2B_BASKET				CUSTID: 2000; DOCNO: TEMP...
	Import	3/13/2025 1:30 PM	92 milliseconds					
	Export	3/13/2025 1:30 PM	5 milliseconds					
{e9ce9891-20ab-43af-9a79-fcc78745132b}	Request	3/13/2025 1:30 PM		B2B_BASKETLINE				CUSTID: 2000; DOCNO: WOB0.
	Export	3/13/2025 1:30 PM	5 milliseconds					
{65aabed7-9717-4fb2-b47b-288b066cfeae}	Request	3/13/2025 1:30 PM		PORTAL_GET_UNITPRICE				BASKETSHIPMENTDATE: 2025-.
	Export	3/13/2025 1:30 PM	12 milliseconds					
{13c2fab4-766a-4d1c-b545-6fb510f4f7e2}	Request	3/13/2025 1:30 PM		PORTAL_GET_UNITPRICE				BASKETSHIPMENTDATE: 2025-.
	Export	3/13/2025 1:30 PM	8 milliseconds					
{e8ec27cb-22c4-4328-9a21-171590c909dd}	Request	3/13/2025 1:30 PM		PORTAL_GET_UNITPRICE				BASKETSHIPMENTDATE: 2025-.
{c3eb78c1-2639-481a-9752-2becdd4cd567}	Request	3/13/2025 1:30 PM		PORTAL_GET_UNITPRICE				BASKETSHIPMENTDATE: 2025-.
	Export	3/13/2025 1:30 PM	13 milliseconds					
{211ef1b7-0a7b-40a4-b290-b6238e186d7d}	Request	3/13/2025 1:30 PM		PORTAL_GET_UNITPRICE				BASKETSHIPMENTDATE: 2025-.

Description of the Fields

ID

This field is a unique Identifier for a request. The type is a GUID.

Type

There are three Types:

- *Request*
  *This **Type** holds an XML document with all sorts of information about the call e.g., specifies parameters, commands, user information.*
- *Import*
  *This **Type** holds an XML document with the data received from the portal.*
- *Export*
  *This **Type** holds an XML document with the data the request generated and sent to the web page.*

Date Time

Shows the execution Date and Time.

Duration
Shows how long the request type took including all code execution and generating the data XML document.

View Called
Specifies the View called. If the view has a “$” at start it indicates a system call e.g., “$IMAGE” which is a call to fetch an image from the database, otherwise it can also be an **XMLPort Header** Code that has been called during the Transaction.

User Identity
Specifies the User that generated the request, but only if the request was generated by a logged in User.
It is blank for all system calls.

Saved
This will be set to *TRUE,* if you have saved the Transaction by clicking ***Save Transaction***.

Description
This is a free text area in which the administrator i.e., can explain more about a particular request.

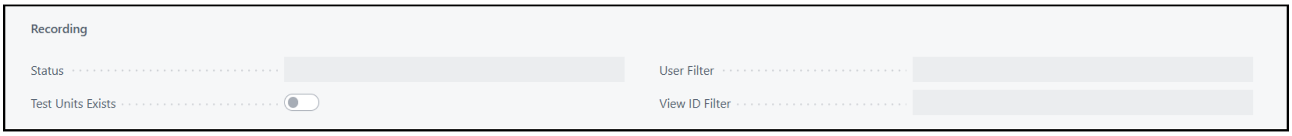
Parameters
Parameters used for this request.

Command
Command for this request. I.e., *INSERT, EXEC* or *GET*.

Command Argument
Command Arguments for this request. I.e., *SUBMIT, AGENT, B2B, or UPDATE*.

Page URL
The URL of the page where the request took place.

Recording



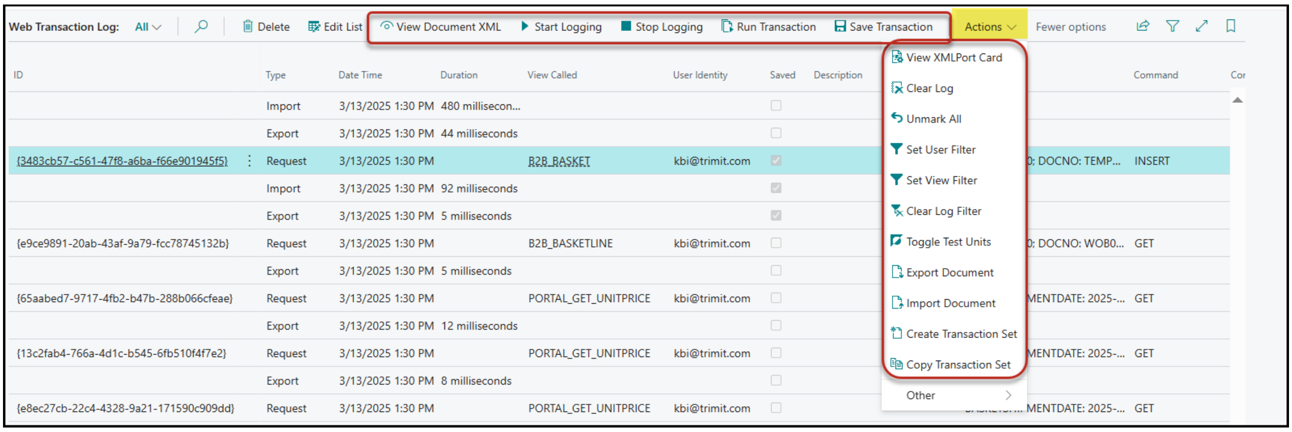
Status
After you clicked ***Start Logging***, this field will be set to *Recording*, so you know that the Logging is started.

Test Units Exist
Test units just shows if such are present in the list (field **Test Function** is set to *Yes*).
A recording can be flagged as a test unit.

User Filter
You can fill it with a User, or it can be filled automatically when clicking ***Actions, Set User Filter***.

View ID Filter
You can fill it with a **View Called**, or it can be filled automatically when clicking ***Actions, Set View Filter***.

Actions



View Document XML

This will show the XML File with data which is sent on request or response.

Start Logging

Start the recording of request/response Transactions.

Stop Logging

Stop the recording of request/response Transactions.

Run Transaction (Ctrl+R)

Simulates running request Transaction within TRIMIT.

Save Transaction

This will put a checkmark in **Saved**, which prevent deleting the Transaction when you use ***Actions, Clear Log.***

View XMLPort Card

If the **View Called** is an XMLPort Header, it will show the Card of this XMLPort Header.

Clear Log (Ctrl+D)

Clears all the Transaction Log Lines except the Transactions with **Saved** is *TRUE.*

Unmark All (Ctrl+Shift+D)

Unmark all Transaction Log Lines marked for **Do not Delete**.

Set User Filter

You can set a User Filter (based on the **User Identity** of the record you are standing on) , so only the requests of that specific User will be logged.
If you click *Edit List* in the **Web Transaction Log** page, you can fill the field **User Filter** in the bottom of the page itself.

Set View Filter

You can set a View Filter (based on the **View Called** of the record you are standing on) , so only the requests of that specific View will be logged.
If you click *Edit List* in the **Web Transaction Log** page, you can fill the field **View Filter** in the bottom of the page itself.

Clear Log Filter

This action will clear the **User Filter** and the **View Filter**.

Toggle Test Units

Switch between showing or not **test** unit transaction lines.
Lines can be marked as test units with field **Test Function**, which is not shown in the page by default, but you can add it by using ***Personalize.***

Export Document

Export XML data which is sent on request or response.

Import Document

Import XML data.

Create Transaction Set

Creates empty lines for request, import and export transactions.

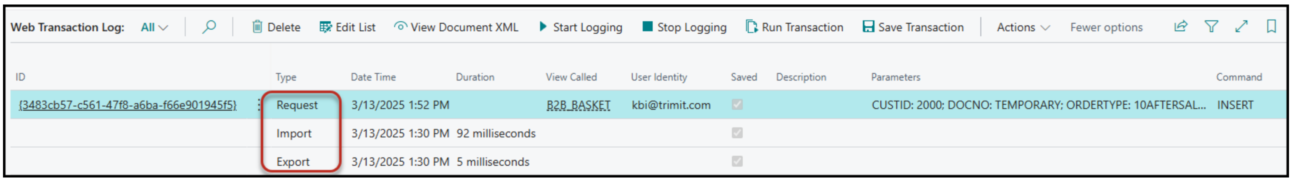
Copy Transaction Set

Copies the transaction set.

Create a Web Transaction Log

To start logging incoming request from **Modelyn** (admin layer of the TRIMIT e-commerce) simply click ***Start Logging***. Go to your web site call a page with Business Central integration.
Return to the **Web Transaction Log** page and click ***Stop Logging*.**
The page now shows all the requests that were logged (you might have to press **F5**).

A request is often a set of records. The largest set is when a view is called with "insert, get" or "update, get". In such a set you find a Request record, Import Record and finally an Export record.



What can you learn from the Web Transaction Log?

If you filter on *Request* in the field **Type,** you will get a nice indication on what Requests were fired from the web site. If you find that a particular **View Called** is called frequently, you should consider performance and the possibilities for caching the view data on **Modelyn**.

Take a good look at the individual Requests and consider the **Duration**. If for instance the Import/Export on a Request takes notably longer than others, it might indicate poor performance.

You can examine the data in the Request lines, validating that the input or output data is as expected.
Simply go to a particular line and click ***Actions, View XML of Document***.
This will open your default XML browser (typically your internet browser) and allow you to see data.

```xml
<request url="http://127.0.0.1/portals/b2c/systempages/schedules/pricelist-sync.html" httpMethod="GET" pagenumber="0" pagesize="0" skipschema="true" userguid="7dc3774f-bc97-43e9-9368-78714b660b76" userip="127.0.0.1" userlcid="1030" LCID="1030" enabledLCID="1033" languageId="9" dbId="5086d9e6d5414a419fffa137ee516867">
    <command>get</command>
    <viewid>B2C-PRICELIST</viewid>
    <parameters>
        <parameter id="PORTALID" type="String">
            <value>B2C</value>
        </parameter>
        <parameter id="CURRENCY" type="String">
            <value>CHF</value>
        </parameter>
    </parameters>
</request>
```

Copy

Close

Replay a Request

When developing or debugging the records are valuable since you can replay them. Also, you can now activate the **Business Central** debugger before replaying and debug in the familiar development environment. It is not recommended to replay (imports) in a live scenario, since a request could be saving a Sales Order or doing other write transactions. So, you must make sure you know what the Requests do in order not to create “bad” data.

To replay a Request, you simply mark the Request you want to execute and click ***Action, Run Transaction (Ctrl + R)***. The Request is processed, and the result is a new Request set.

Advanced Features

In some cases, a **Business Central** developer is depending on some Requests to do his development in **Business Central**. But being in the process of development the web site is also being worked on. So, to simulate different Requests, you can work with and create your own Request directly in the page.

As an advanced feature you can alter the data documents – this makes sense for the *Request* and *Import* Document. For editing the XML document, you must have **Visual Studio** present on your computer. The advantage is that you can alter the content in the Request and test different data scenarios etc.

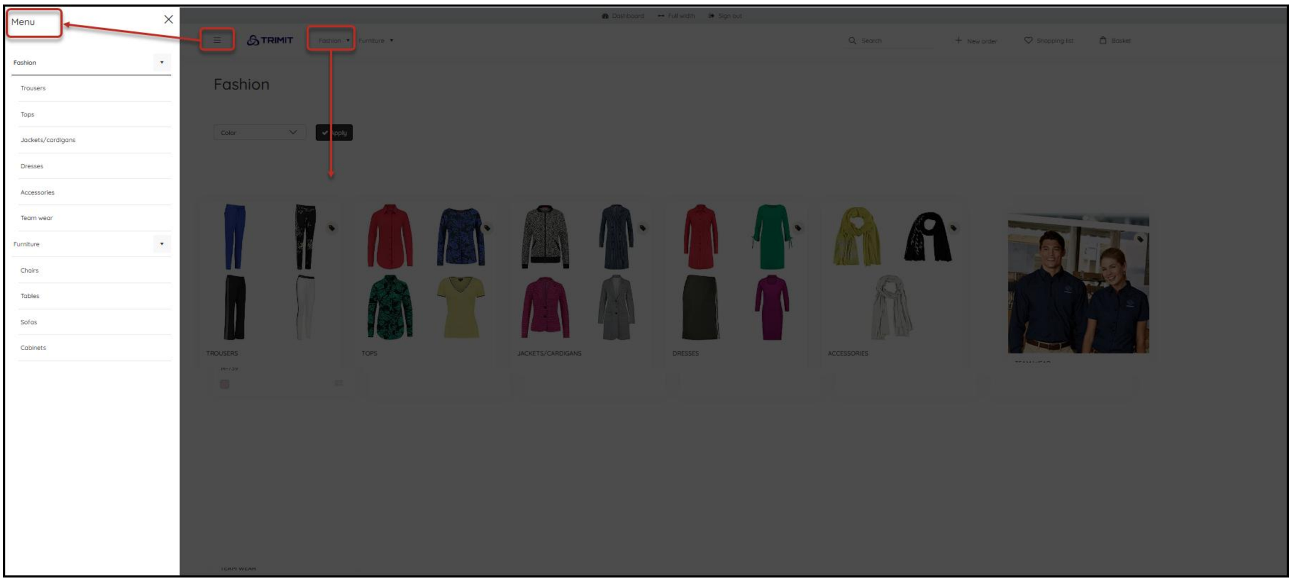
You can export the content of a document to disk by clicking ***Actions, Export Document***. This comes in handy if you want to send the XML data to another person for inspection.
But remember that if you import content, the content still needs to match the Business Central View definition. If the content does not match the View, you will in most cases get a runtime error when running the Request.

Create a new Transaction Set by clicking ***Actions, Create Transaction Set***. You now have a Transaction set with all 3 Types of Requests. It does not contain any data so you can import XML from disk to populate it.

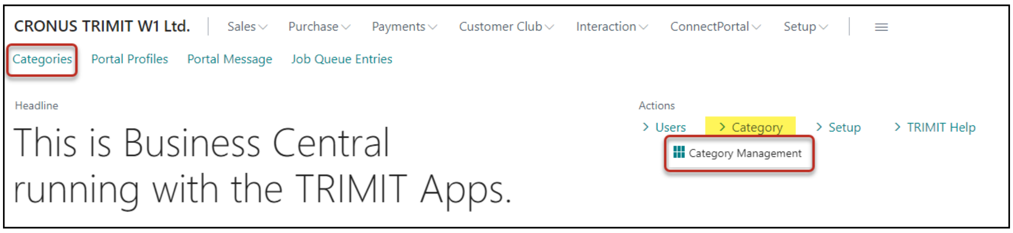
Copy a Transaction Set by selecting an existing Request set by clicking ***Actions, Copy Transaction Set***. This can be used if you want to keep the original set and want to create a new one in which you alter data.

Categories

The Categories are used to select Items that are available in TRIMIT e-commerce. The Categories are also the easy guide for the User to find an Item.
The Categories are shown on the portal in the left menu as a tree-view and in the content area drill-down menus and pictures:

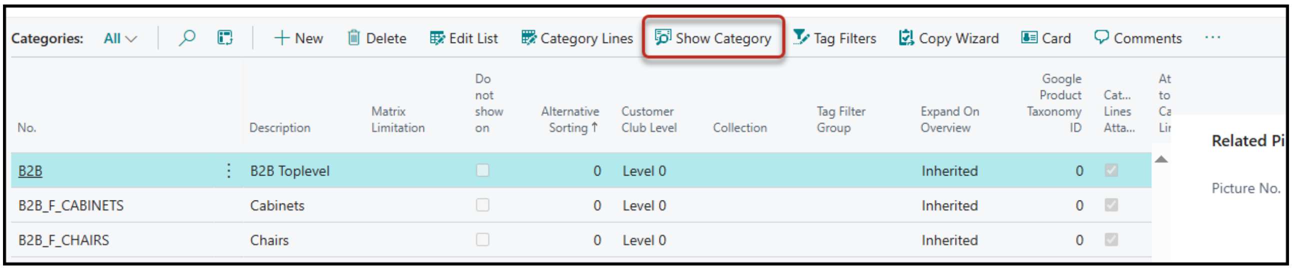


Via the **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator* you can create and maintain the Categories via ***Categories,*** and you can attach many Items to a Category in a simply step via ***Category, Category Management.***

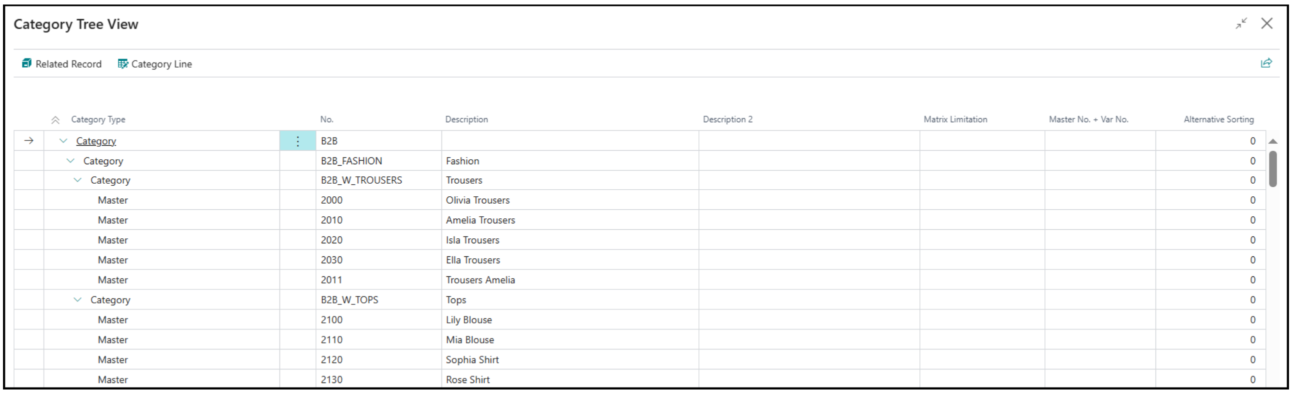


Creating the Category tree-view is like creating BOM's in TRIMIT. First, create the Categories, and then attach them to each other to build a structure.

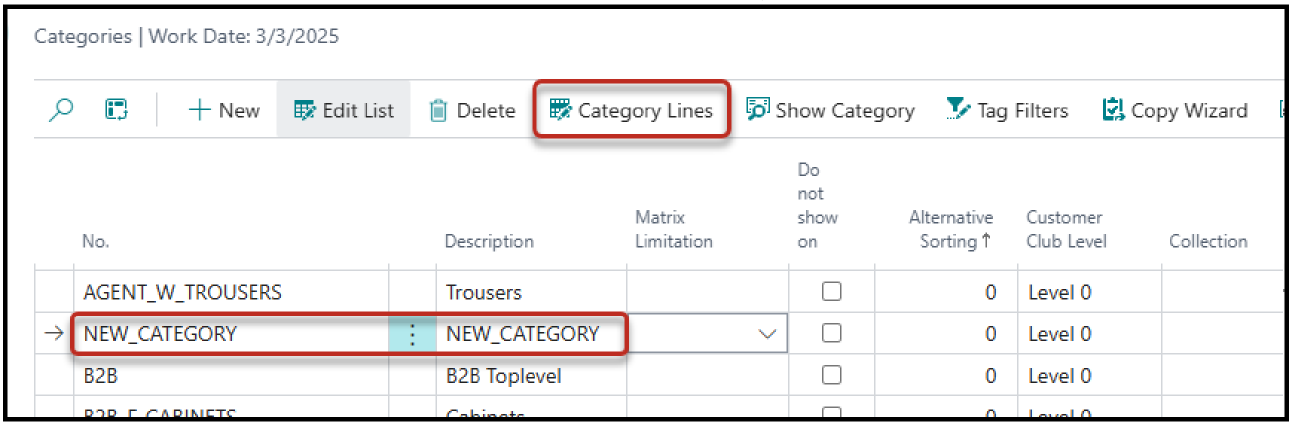
To see the whole Category Structure of a Portal you need to select a Top-Level Category (i.e., *B2B*) in the ***Categories*** and click ***Show Category***.



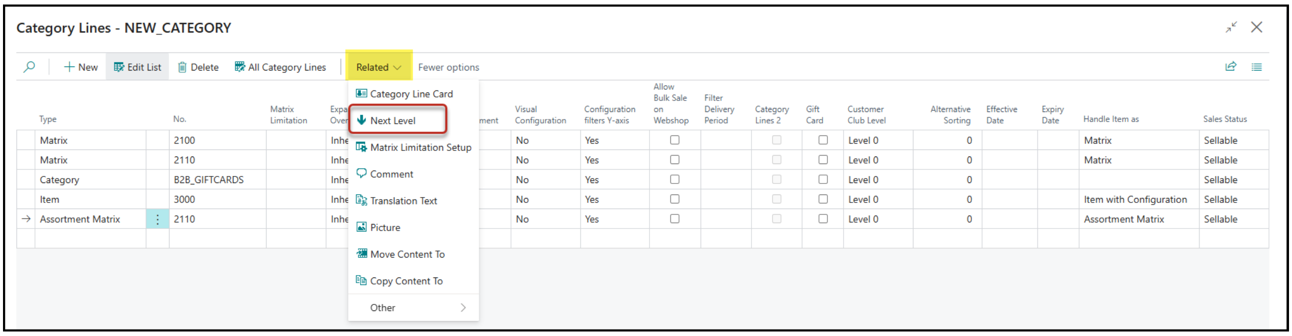
Now you can see the whole Category Structure. I.e.:



To create a new Category, simply click **+ *New*** in the ***Categories*** page and enter the new **No.** and **Description**. To attach Categories in a structure, click ***Category Lines***:

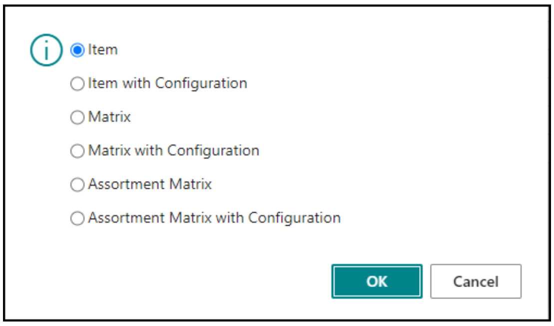
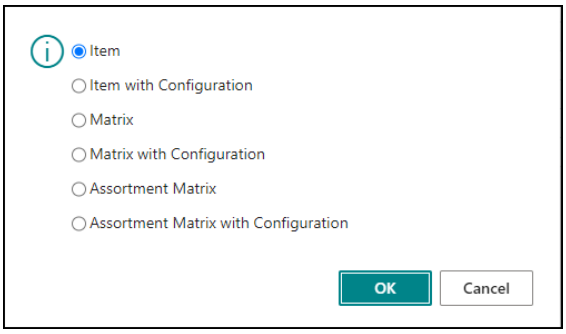


This will open the ***Category Lines*** page as shown below:



First, fill out the field **Type**. You can choose between the following sixteen options:

User Defined Category	Category or Subcategory created by user, and which is not defined under the Category List
Category	The selected Category (**No.**) becomes a Subcategory
Item	The selected Item number (**No.**) will be shown under the Category
Matrix	The selected Item (**No.**) is a Master Item setup as Matrix. Example: Master *2100 Lily Blouse* in the demo company
Assortment Matrix	The selected Item (**No.**) is a Master Item setup as an Assortment Matrix. Example: Master *2110 Mia Blouse* in the demo company
Create Variant Combinations	The selected Item (**No.**) is a Master Item setup for Inventory Configuration. All the possible variant combinations will be created and shown

Collection	This **Type** allows you to select a Collection. 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. 
Global Dimension 1 -2	The selected **Global Dimension** 1 – 2 (**No.**) becomes a Category
Statistics Group 1 - 5	The selected **Item Statistic Group** 1 – 5 (**No.**) becomes a Category
Period Code	The selected **Shipment Group** (**No.**) becomes a Category
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*. 
Items Filtered	This will filter Items based on the filled Filters in the **Category Line Card** (via ***Related***), FastTab ***General Master/Item Filters.***
Masters Filtered	This will filter Masters based on the filled Filters in the **Category Line Card** (via ***Related***), FastTab ***General Master/Item Filters.***

Then choose value in **No.** field by look-up the relevant list, depending on the **Type** field.

Read more information about the Categories in document ***White Paper – TRIMIT Category Management***.

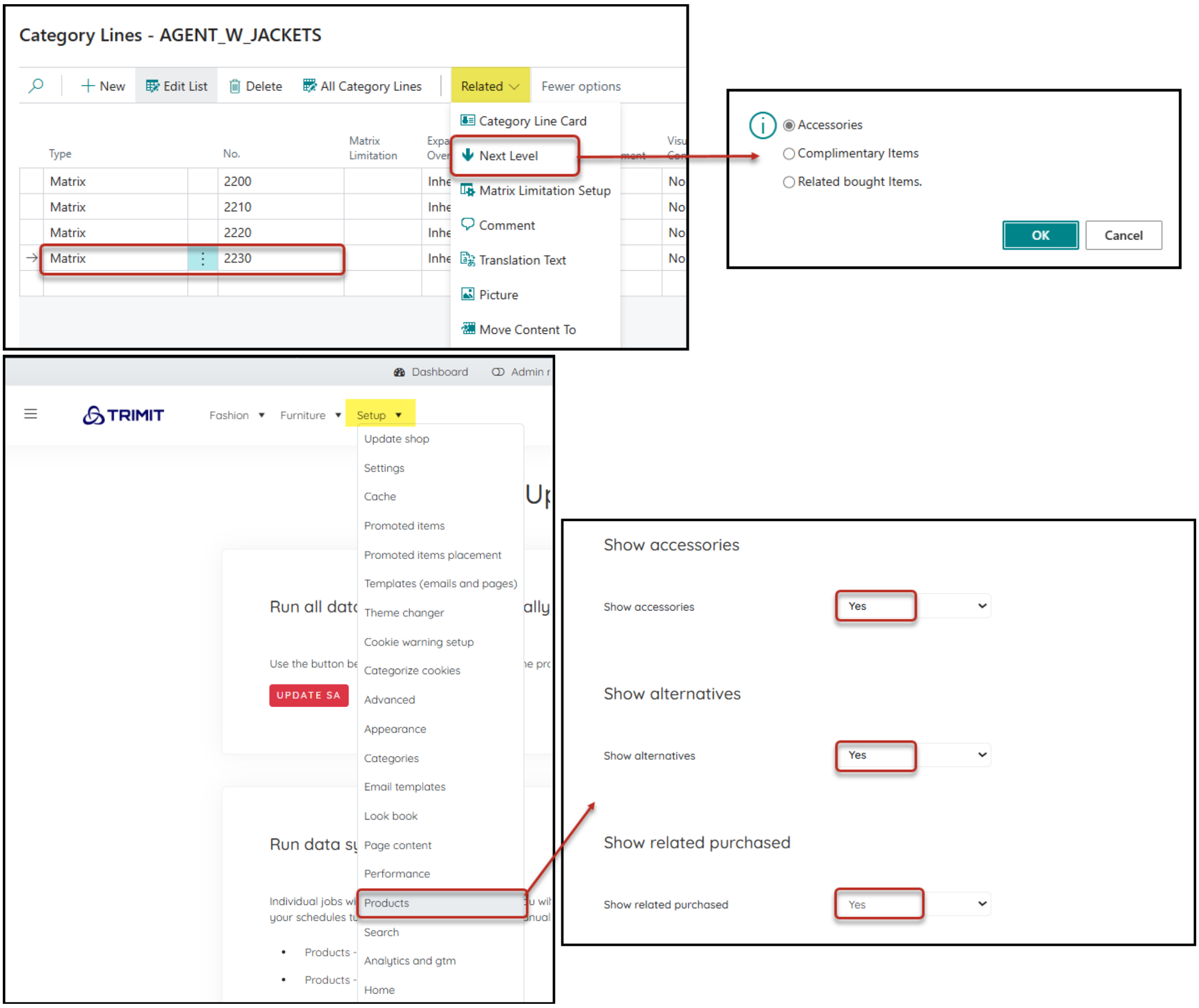
Note 1
Be aware that TRIMIT e-commerce does not support Items without related Masters.
That means, that a flat Item should always have a Master.

Note 2
B2C Webshop does not support the following **Handle Item as** : *Assortment Matrix, Matrix with Configuration* and *Assortment with Configuration.*

Related, Next Level

Clicking ***Related, Next Level*** on a Category Line with **Type** = *Master* or *Item*, the Next Level can only be *Accessories*, *Complementary Items* or *Related bought Items*.

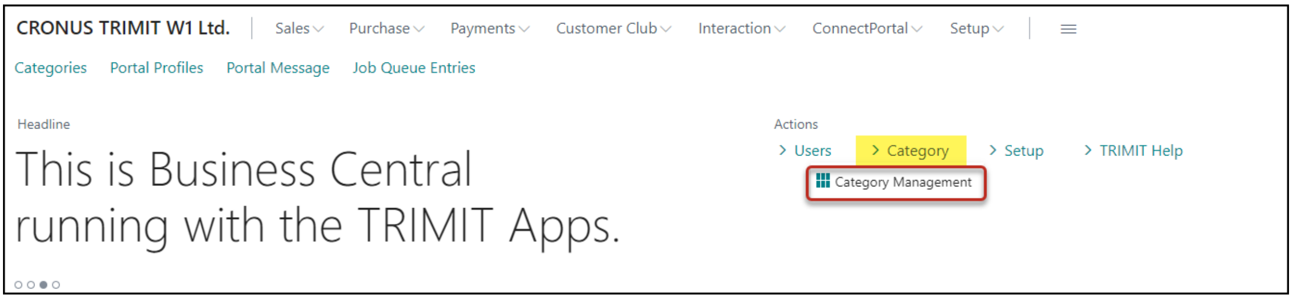
If those are chosen then to make them visible on TRIMIT e-commerce it is needed to set the following fields on Soft Admin's **Product details** page to *TRUE*: **Show accessories, Show alternatives, Show related purchased.**



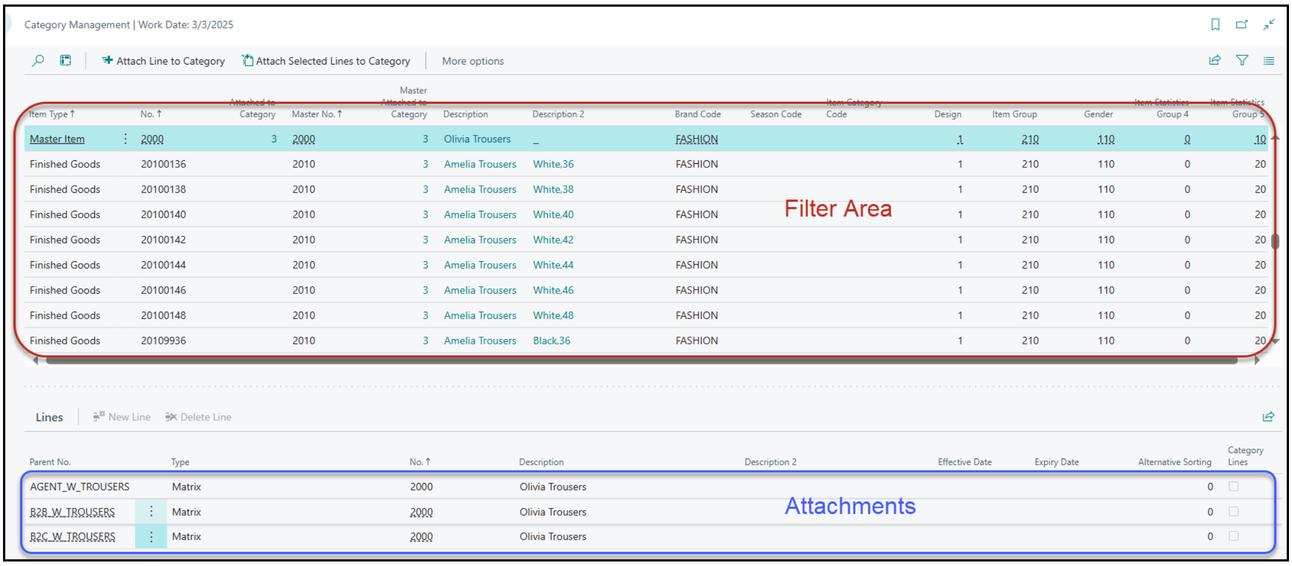
For more details regarding Categories, see ***White Paper – TRIMIT Category Management.***

Category Management

Via the **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator* you can attach many Items to a Category in a simply step via ***Category, Category Management.***



Category Management page looks as follows:



On the FastTab ***Lines*** you can see which Categories the Items in Filter Area are already attached to. In the Filter Area you can use the filtering options to define which Items you want to attach to a Category by using the action ***Attach Line to Category*** or ***Attach Selected Lines to Category***.

Read more information about Category Management in document ***White Paper – TRIMIT Category Management***.

Note

To filter out (hide) certain Items being synchronized with TRIMIT Portals, you can create a new Portal Profile and assign a new Category Structure to it. This Category Structure should have the hidden products.
Assign this Portal Profile to an admin user.
Another way is to make products published or unpublished in PIR. This way they are only visible for admins.

Portals Newsletter

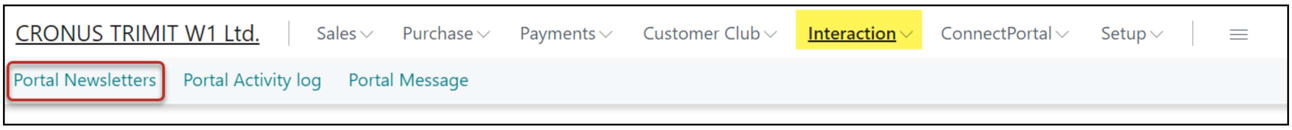
When the Salesperson creates a new Customer on the SA, it is possible to set a checkmark in the field **Newsletter**. When doing so, the Customer is created as **Recipient** in the **Portal Newsletter Code** in TRIMIT based on the field **Customer Newsletter** in the SA Portal Profile.

The same approach is used in the B2B – the Customer can set a checkmark in field **Newsletter** on the ***Customer Address Edit*** (via ***My details***) page. When done, the corresponding Customer will be added to the **Recipients** of the **Portal Newsletter Code** in TRIMIT based on the field **Customer Newsletter** in the B2B Webshop Portals Profile. Sending Newsletters can be done manually.

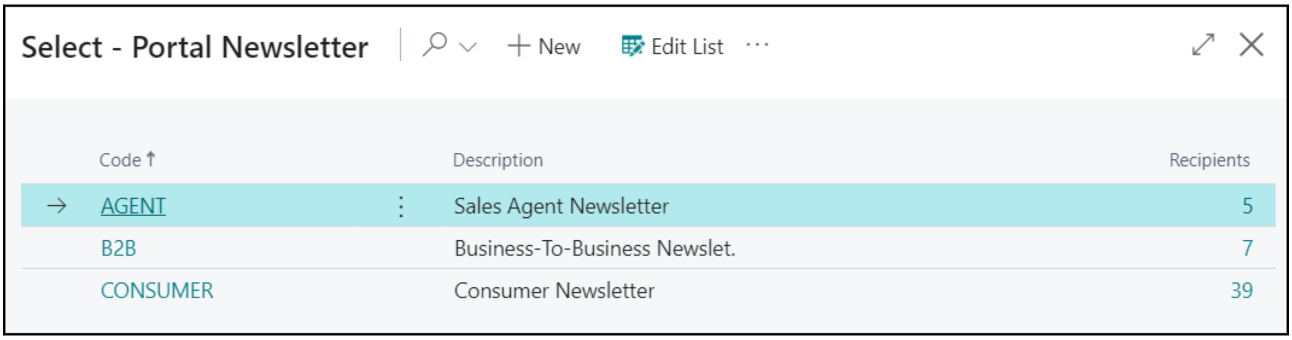
The same approach is used on B2C Webshop – when a Consumer registers on the web site it is possible to set a checkmark in field, **I wish to receive newsletters** in the ***Join*** or ***My Account/Checkout*** page on B2C Webshop. When done, the corresponding Customer will be added to the **Recipients** of the **Portal Newsletter Code** in TRIMIT based on the field **Customer Newsletter** in the B2C Webshop Portals Profile. Sending Newsletters can be done manually.

It is possible to create different **Portal Newsletter Codes**. The Code can be assigned on SA and B2C Portal Profile Cards in **Customer Newsletter** field.

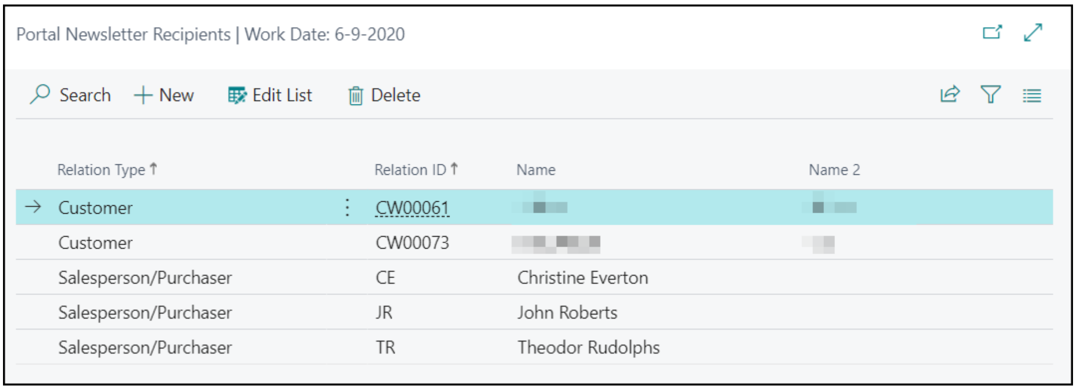
To create a **Portal Newsletter Code**, in the **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator* you can go to ***Interaction, Portal Newsletters.*** Otherwise, use **Search** *Portal Newsletters*



go to ***Departments/Portals/Setup/Portals/Newsletters***.
This will open the list of Portal Newsletters:



To see the Recipients –double click in the field **Recipients**.



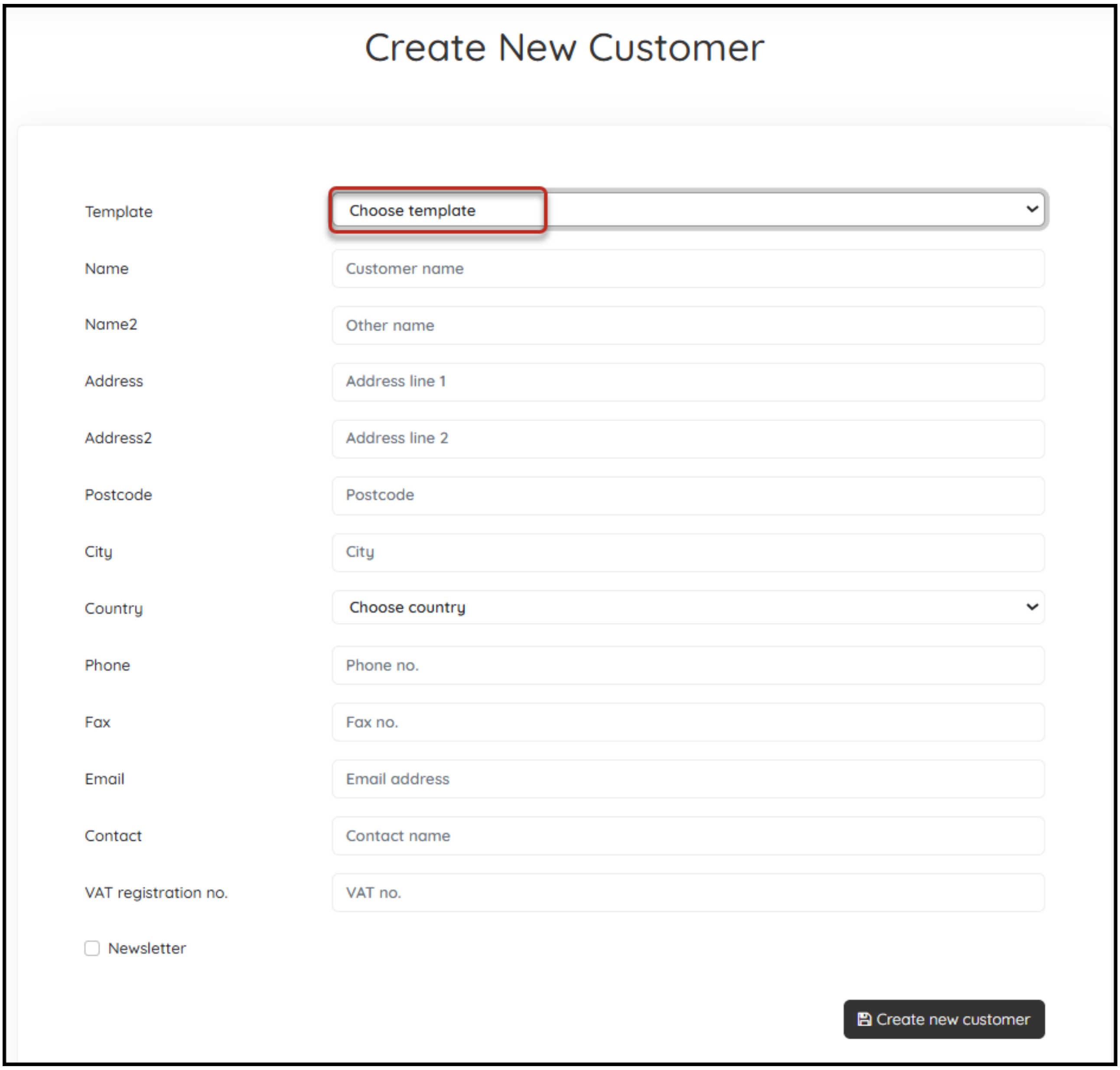
You are also able to enter the **Portals Newsletter Recipients** manually in this page.

The **Relations Type** can be *Employee, Contact Company, Contact Person, Customer, Vendor, Resource* or *Salesperson/Purchaser.* The **Relation ID** will then be related to the **Relation Type.**

> **Note**
> TRIMIT does not provide the solution for sending actual Newsletter E-Mails. Instead, this can be handled by third party software like MailChimp or other specifically developed for these purposes' applications.

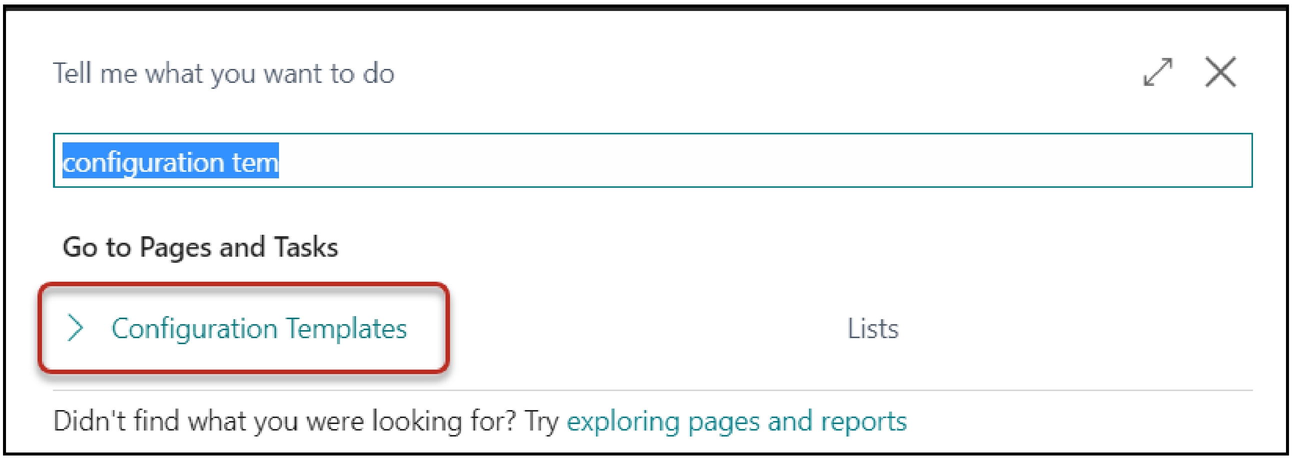
Customer Templates

The SA enables the logged in Salesperson to create new Customers entering information shown on screenshot below:

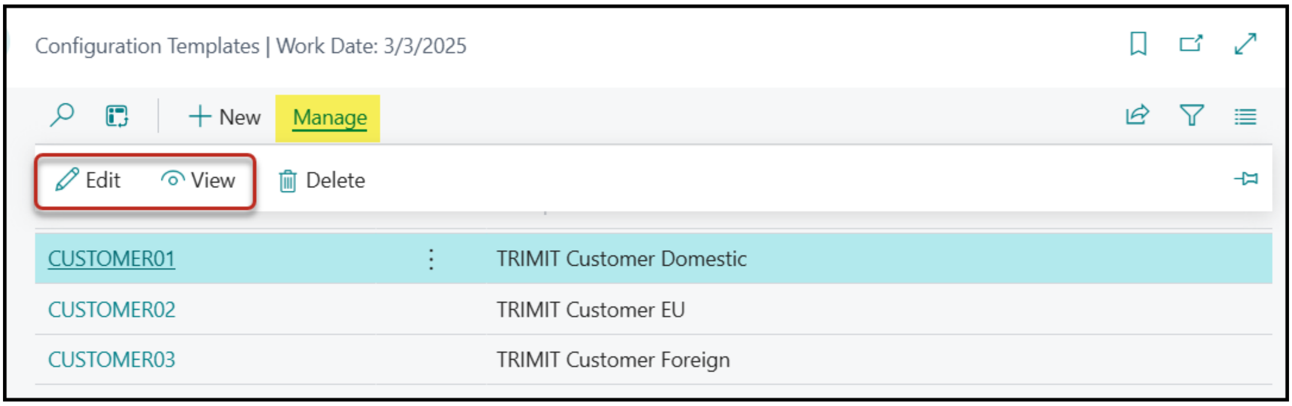


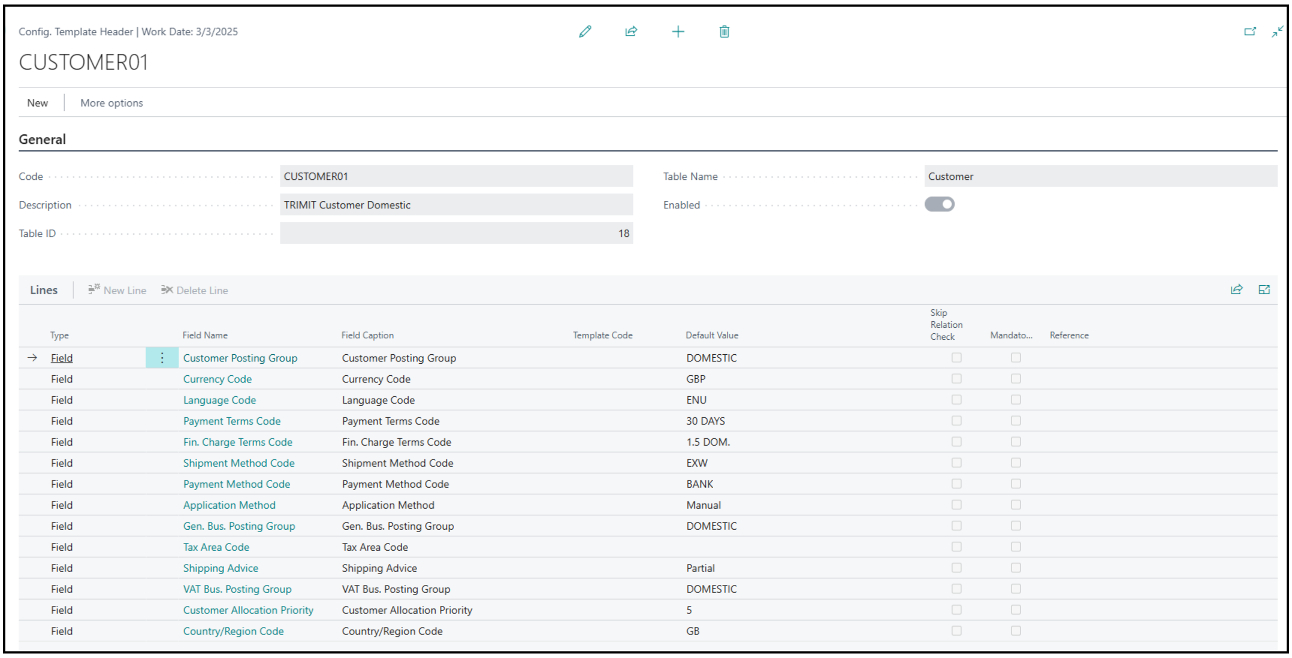
Before the Customer in TRIMIT can be used for creating Sales Orders, information regarding Posting Groups, Currency Code, Payment Terms, etc. also must be filled.
It is not expected that the Salesperson is able to decide on that type of information.
Hence, TRIMIT Salesperson makes use of the Configuration Templates in TRIMIT. When the Salesperson creates a new Customer, the first field **Choose template** is where the Template needs to be selected.

The **Configuration Templates** needs to be created in TRIMIT ERP and can be found via **Search** *Configuration Templates.*

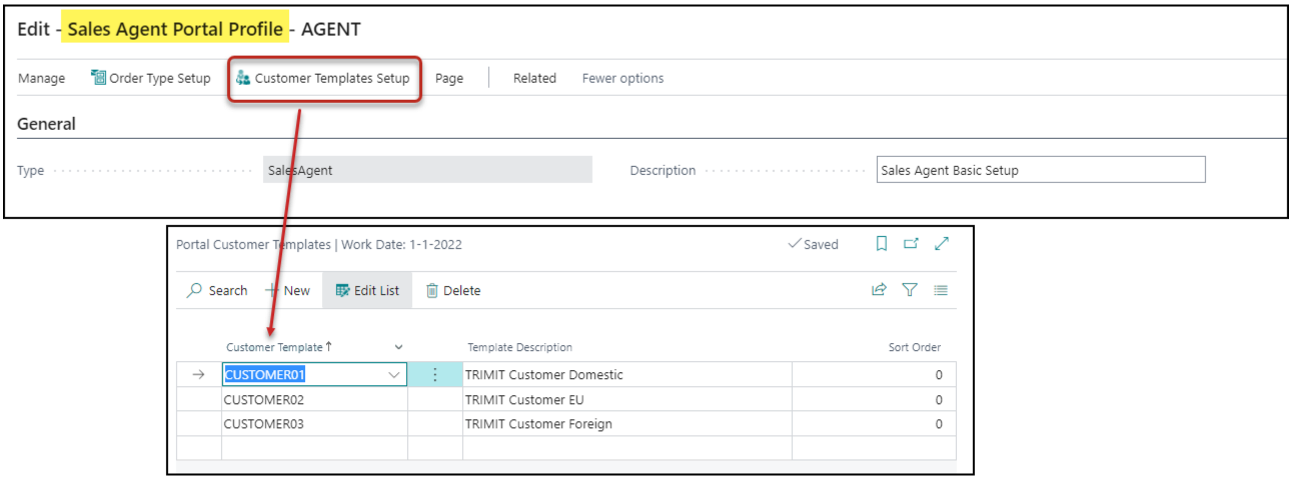


The CRONUS TRIMIT W1 Ltd. Demo company includes some examples of how the Template can be created. It is important to define just enough Templates, to make it easy for the Salesperson to quickly create new Customers. I.e.:

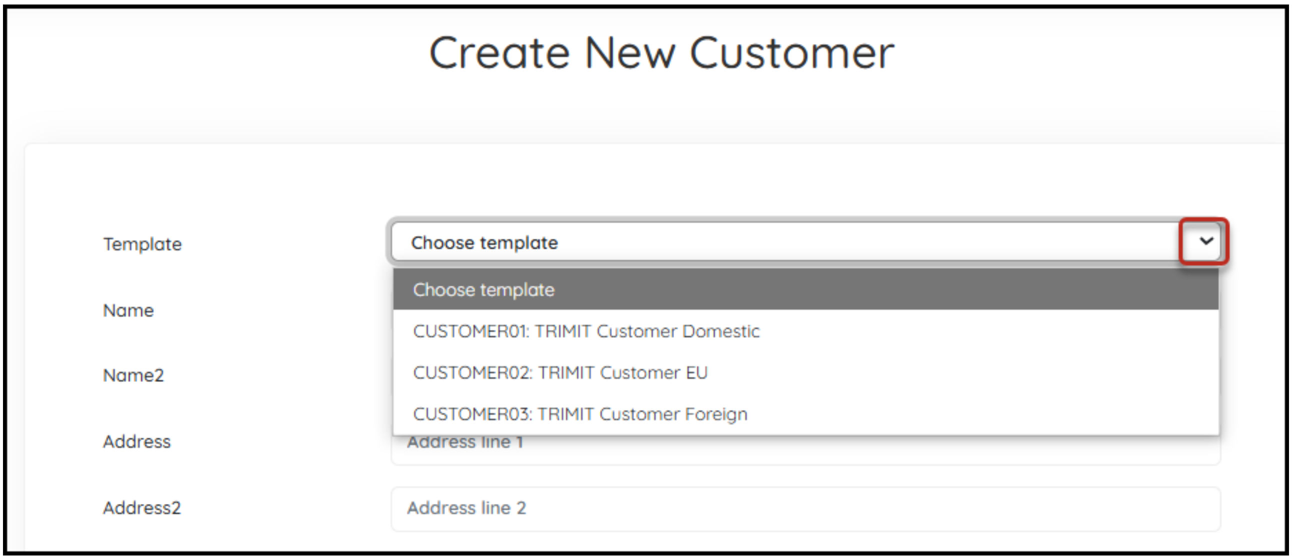




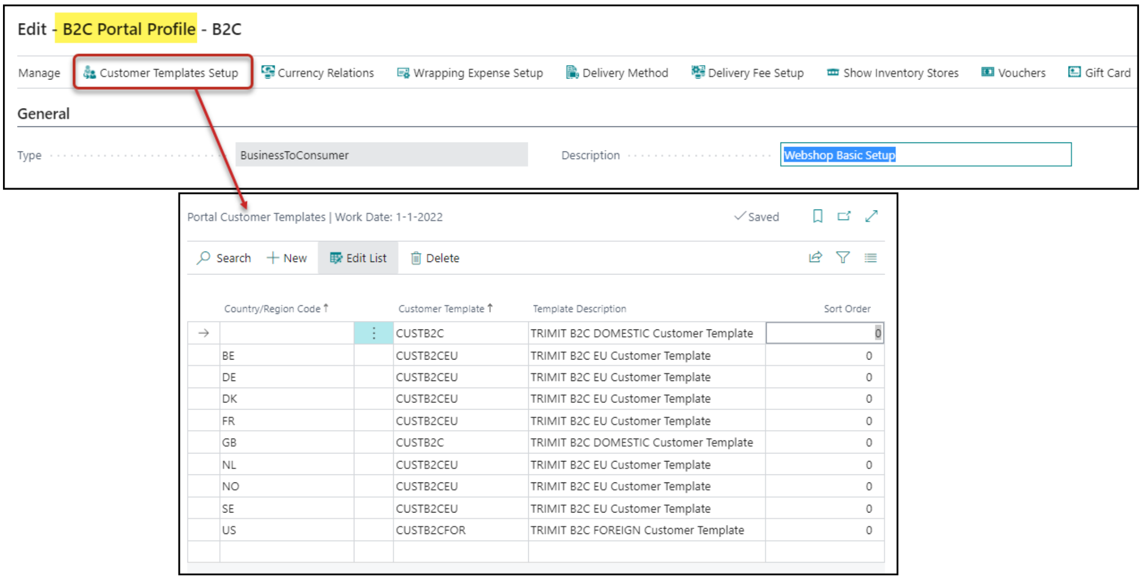
Customer Templates Setup for the SA can be done in the **Portal Profile** Card of the SA by clicking ***Customer Templates Setup.*** I.e.:



Here it is possible to define a set of Customer Templates, which will be displayed in drop-down for the field **Template** on ***Create New Customer*** page on the SA. The above example will result on the SA in a selection of only these three Templates:



Customer Templates Setup for the B2C Webshop can be done in the **Portal Profile** Card of the B2C Webshop by clicking ***Customer Templates Setup***. I.e.:

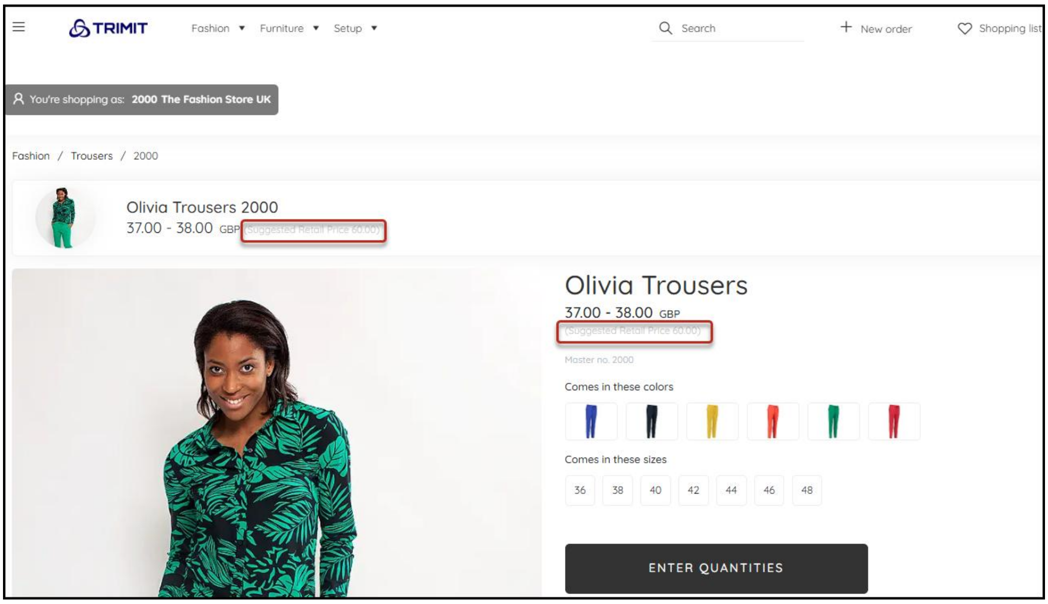


Here it is possible to define a set of Customer Templates related to the **Country Code** of the Consumer. If no **Customer Template** has been chosen for a specific **Country Code,** the content of the field **Customer Template for Registry** in the Profile Card will be applicable.

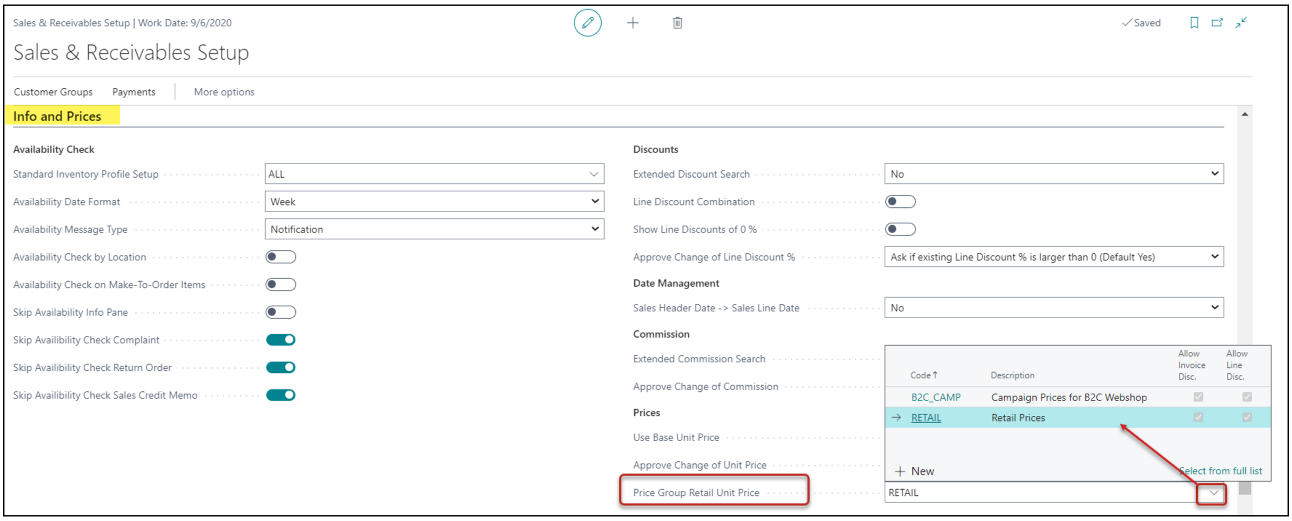
Note
Templates are functionality also used for Configuration Packages. If you insert a field requiring a Boolean content, the **Default Value** MUST be stated in the Language of the Web service connection. Boolean in the Template are translated from False to Yes. AL Code will only accept the value if it is in the setup processing language. I.e., if your web service user account is set to work with Language *1033 English (United States)* then a Boolean value must be set to *Yes* not *Si, Nein, Nee* or like.

Suggested Retail Price

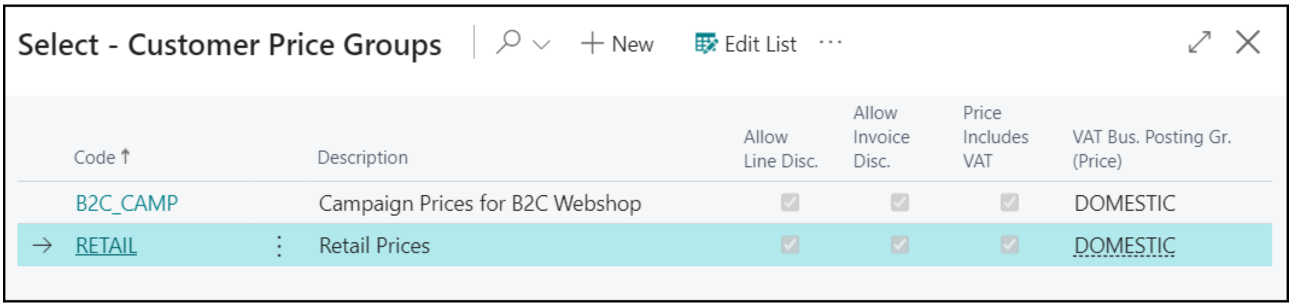
The Fashion industry works with the term *Suggested Retail Price* or *Recommended Retail Price*, being the Sales Price that the Consumer must pay when buying the Item in a shop.
In B2B and SA the **Suggested Retail Price** is shown as follows:



The following shows how to setup the **Suggested Retail Price** in TRIMIT.
Via **Search** *Sales & Receivables Setup*, you can open the following page:

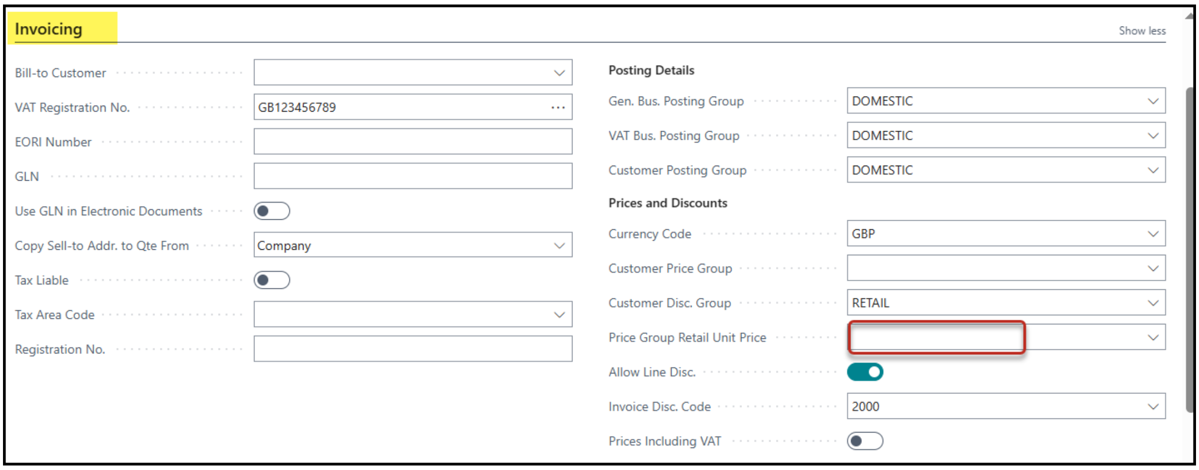


Press look-up button in the field **Price Group Retail Unit Price** and click ***Select from full list*** to get the list of Customer Price Groups:



In the CRONUS TRIMIT W1 Ltd. Demo company, a Customer Price Group called *RETAIL* is created and selected in the field.

It is also possible on the Customer Card to fille a **Price Group Retail Unit Price**:

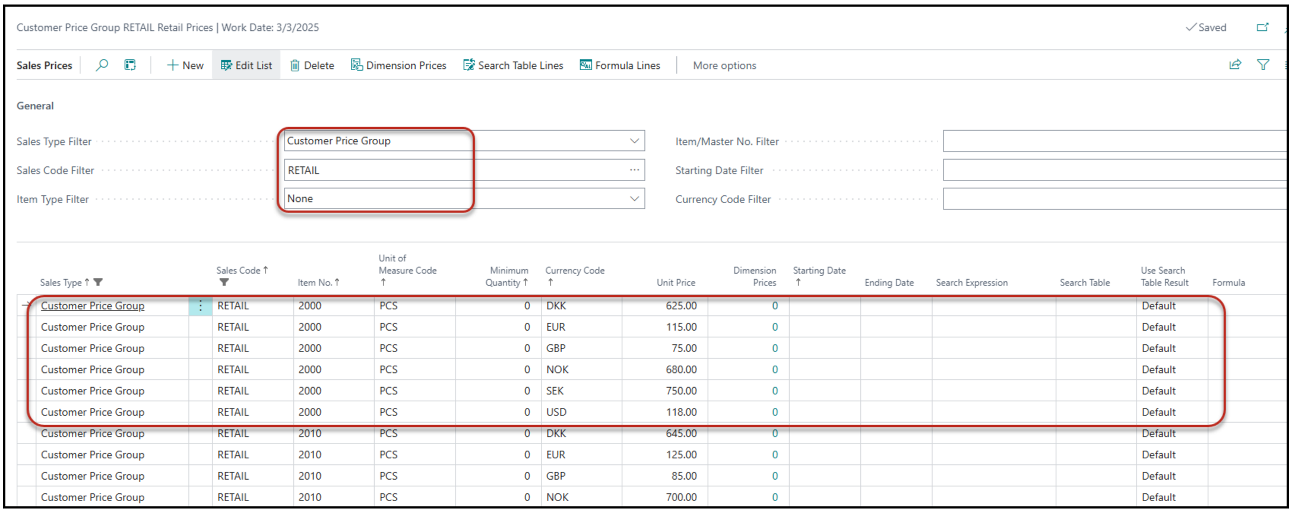


If filled, this will overrule the **Price Group Retail Unit Price** in the Sales & Receivables Setup to determine the *Suggested Retail Price.*

Now prices must be filled for these **Customer Price Groups**. This can be done on every Master individually via the Master Card or via the Customer Price Group.

Via the Customer Price Group:

Via **Search** *Customer Price Groups* open the page with the Customer Price Groups.
Select *RETAIL* and click ***Sales Prices***

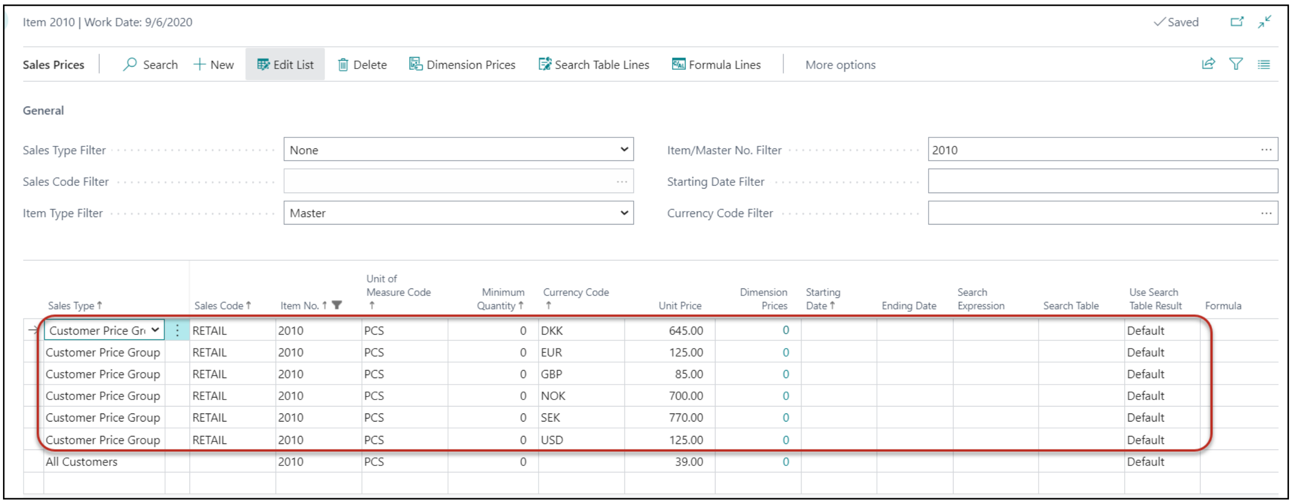


Sales Type	Sales Code	Item No.	Unit of Measure Code	Minimum Quantity	Currency Code	Unit Price	Dimension Prices	Starting Date	Ending Date	Search Expression	Search Table	Use Search Table Result	Formula
Customer Price Group	RETAIL	2000	PCS	0	DKK	625.00	0					Default	
Customer Price Group	RETAIL	2000	PCS	0	EUR	115.00	0					Default	
Customer Price Group	RETAIL	2000	PCS	0	GBP	75.00	0					Default	
Customer Price Group	RETAIL	2000	PCS	0	NOK	680.00	0					Default	
Customer Price Group	RETAIL	2000	PCS	0	SEK	750.00	0					Default	
Customer Price Group	RETAIL	2000	PCS	0	USD	118.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	DKK	645.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	EUR	125.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	GBP	85.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	NOK	700.00	0					Default	

You can create new lines for new Masters or Items.
The field **Sales Type** (*Customer Price Group*) and **Sales Code** (*RETAIL*) will already be filled in and you only need to enter the rest of the fields. This is a standard Business Central functionality.

<u>Via the Master List/Master Card</u>

Via **Search** *Master List* open the Master List.
Select the right Master (i.e., *2010*) can click ***Related, Sales Receivables, Sales Prices.***
The **Sales Prices** page opens. Create a new line where the **Sales Type** = *Customer Price Group* and the **Sales Code** = *RETAIL* and fill in the relevant price:



Sales Type	Sales Code	Item No.	Unit of Measure Code	Minimum Quantity	Currency Code	Unit Price	Dimension Prices	Starting Date	Ending Date	Search Expression	Search Table	Use Search Table Result	Formula
Customer Price Gr	RETAIL	2010	PCS	0	DKK	645.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	EUR	125.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	GBP	85.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	NOK	700.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	SEK	770.00	0					Default	
Customer Price Group	RETAIL	2010	PCS	0	USD	125.00	0					Default	
All Customers		2010	PCS	0		39.00	0					Default	

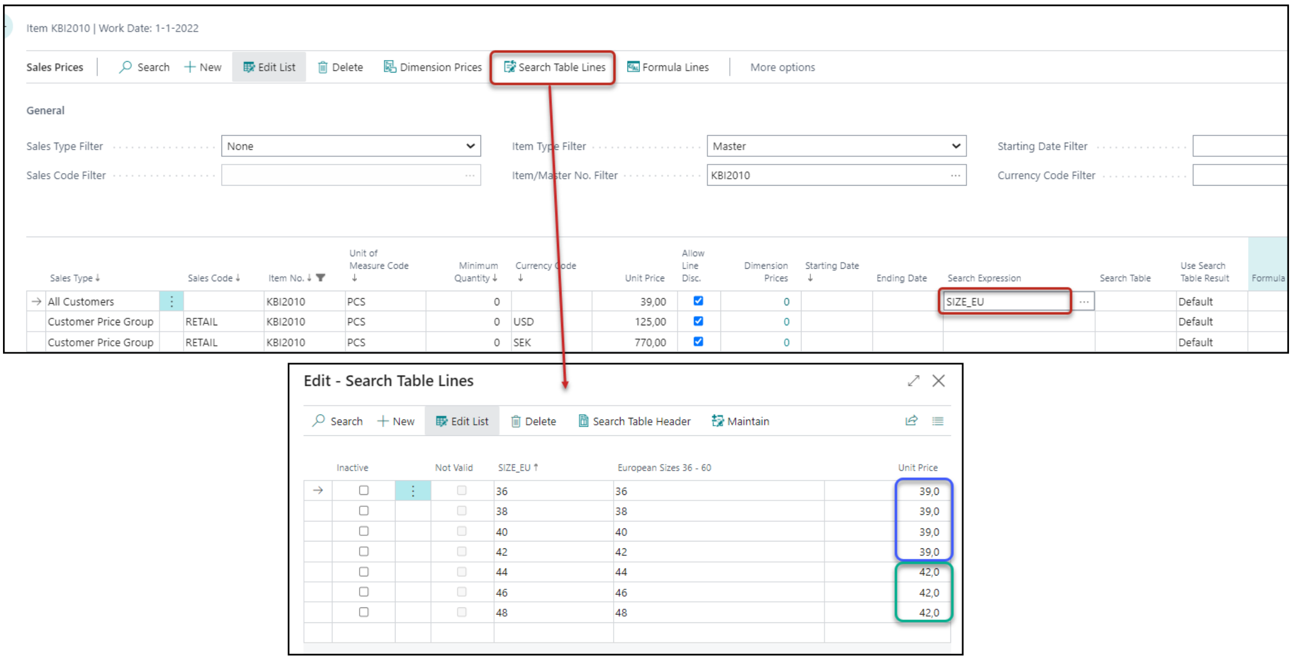
In the CRONUS TRIMIT W1 Ltd. Demo company, six lines are created for the Master *2010*, one per **Currency Code**.
Once these Sales Prices have been entered – the **Suggested Retail Price** will be shown on the Portal.

Note
Suggested Retail Price on SA comes from Sales & Receivables Setup field **Price Group Retail Unit Price** or from Customer field **Price Group Retail Unit Price** – and will usually be Sales Prices including VAT.
Whereas **Unit price** on **product details** page on SA comes from the normal Sales Price Search method in TRIMIT.
The *Suggested Retail Price* on the Product page, will always be shown based on the VAT settings of the Customer itself, so might be without VAT, and not showing the Retail Price shown in the **Sales Prices.**

Note
Portals do not support multiline discounts (for now) because of the performance reasons. Therefore, Combination Discounts are not supported. It is in development to be able in the future.

Price Differentiation on Item Variants

If a Product must have different Prices for different Variants, i.e., larger Size costs more than smaller Sizes, then this can be reflected in Product Matrix on SA, B2B and B2C Webshops.
Different Item Variant Prices can be specified via **Search Table Lines** page. This page can be accessed from **Sales Prices** page (via ***Master List*** or ***Card, Related, Sales Receivables, Sales Prices***). If Prices are already set, then to set up Variant specific Prices, locate field **Search Expression** on the lines and click look-up button in it. In ***Auto generate Formulas*** page select which VarDim Type you want to set different Prices for and click **OK**.
Now on **Sales Price** page click ***Search Table Lines.*** In ***Search Table Lines*** page set field **Unit Prices** for specific Variant values. Click **OK**. Run schedules on Portal to synchronize Prices.



Here are some examples of Prices presentations on Portals.

Scenario 1:

Master has a default Unit Price and different Color related Unit Prices. Also, Master has default Campaign Unit Prices with different Color related Unit Prices.
Default Sales Price: *500,00 GBP*
Sales Price per Color: White *505,00 GBP*, Blue *510,00 GBP*, Red *515,00 GBP*
Default Campaign Price: *250,00 GBP*
Campaign Price per Color: White *255,00 GBP*, Blue *260,00 GBP*, Red *265,00 GBP*

Output on **Product** page:
White *~~505,00~~ 255,00 GBP*, Blue *~~510~~,00 260,00 GBP*, Red *~~515~~,00 265,00 GBP*

Scenario 2:

Master has a default Unit Price and different Color related Unit Prices. Also, Master has default Campaign Unit Price without different Color related Unit Prices.
Default Sales Price: *500,00 GBP*
Sales Price per Color: White *505,00 GBP*, Blue *510,00 GBP*, Red *515,00 GBP*
Campaign Price: *250,00 GBP*

Output on **Product** page:
White *~~505,00~~ 250,00 GBP*, Blue *~~510~~,00 250,00 GBP*, Red *~~515~~,00 250,00 GBP*

Scenario 3:

Master has a default Unit Price and different Color related Unit Prices. Also, Master has default Campaign Unit Prices with different Size related Unit Prices.
Default Sales Price: *500,00 GBP*
Sales Price per Color: White *505,00 GBP*, Blue *510,00 GBP*, Red *515,00 GBP*
Default Campaign Price: *250,00 GBP*
Campaign Price per Size: XS *280,00 GBP,* M *285,00 GBP*, XL *290,00 GBP*

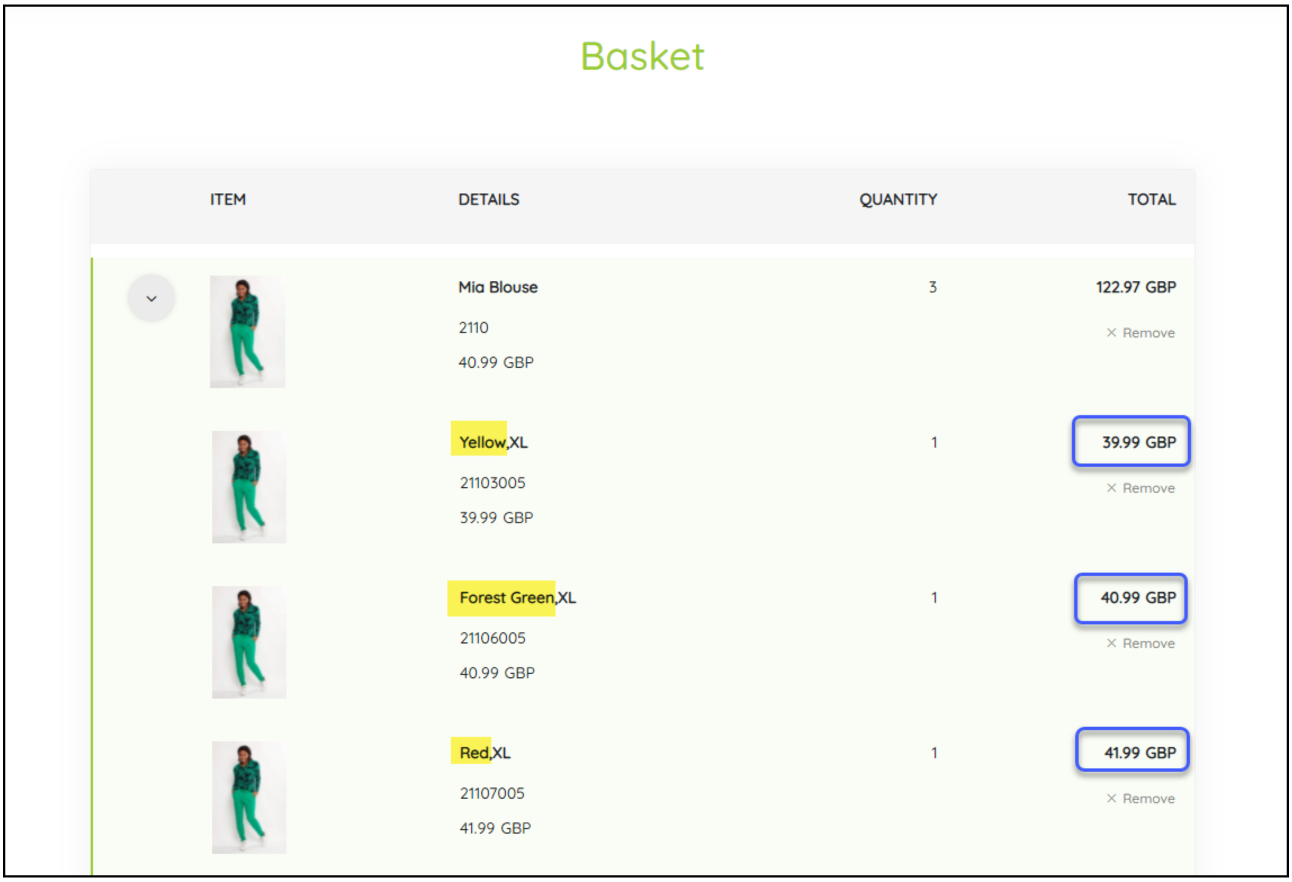
Output on **Product** page: White/XS *505,00 GBP*, Blue/M *510,00 GBP*, Red/L *515,00 GBP*
Output in **Basket**: White/XS *280,00 GBP*, Blue/M *285,00 GBP*, Red/L *250,00 GBP*

Scenario 4

Master has a default Unit Price without different variant Unit Prices. Also, Master has default Campaign Unit Prices with different color prices.
Default Sales Price: *500,00 GBP*
Default Campaign Price: *250,00 GBP*
Campaign Price per Color: White *255,00 GBP*, Blue *260,00 GBP*, Red *265,00 GBP*

Output on **product details** page:
White ~~*500,00*~~ *255,00 GBP*, Blue ~~*500,00*~~ *260,00 GBP*, Red ~~*500,00*~~ *265,00* GBP.

It is possible to set different Unit Prices per Color and Size at the same time or separately.
Color related Unit Price differentiation will be reflected in the Master Matrix on **Product** page on B2B and SA if the **Price Info on Matrix** in the Portal Profile is set to Y-Axis.
When Master is added to the Basket, it is always possible to expand the Matrix Line and view Color and/or Size related Prices on sublines:



Size related Unit Price differentiation will be reflected in the Master Matrix on **Product** page on B2B and SA if the [Price Info on Matrix]() in the Portal Profile is set to X-Axis.

Size related Unit Price can then also be viewed on the sublines in the basket.

B2C Webshop can reflect different Prices per Size and Color on the **Product** page. But this can apply either for Retail or Campaign Price Groups This can be set by putting two VarDim Types (e.g., Color and Size) into **Search Expression** on the **Sales Prices** page in TRIMIT. This needs Price Synchronization on Portal.

Retail Price cannot be differentiated by Color or Size and shown on SA and B2B. You will only see 1 *Suggested Retail Price* on the **Product** page.
Making changes to Sales Prices in TRIMIT does not require running Modelyn schedules on SA and B2B in contrast to B2C Webshop where Product Prices can be synchronized by a separate Price Schedule in soft admin.

Note
Line Discounts based on Combinations of Discount Lines are not supported yet in the TRIMIT e-commerce. If you buy 10 pieces in total of a Master, you will get 5 % Discount. It is right now in development and will be possible in future releases.
However, Line Discounts based on single Items are supported.

Composition, Care label and Additional Info

Composition, Care Label, Additional Info and Sustainability functionality extends the Item information shown on B2C Webshop and on B2B, SA and SUP.

Composition

To show the **Composition** of an Item, you have an option to show the Master Composition information. This information is displayed on the **Product** page, in tab ***Composition***).
This information can be set from the Master Card in TRIMIT (via **Search** *Master List*) by clicking ***Process, Composition.*** In the ***Composition Lines*** page, it is possible to set up Master Composition, i.e., specify a particular part of an Item (*MAIN*), type of material (*Polyamide*) and percentage (*70 %*).

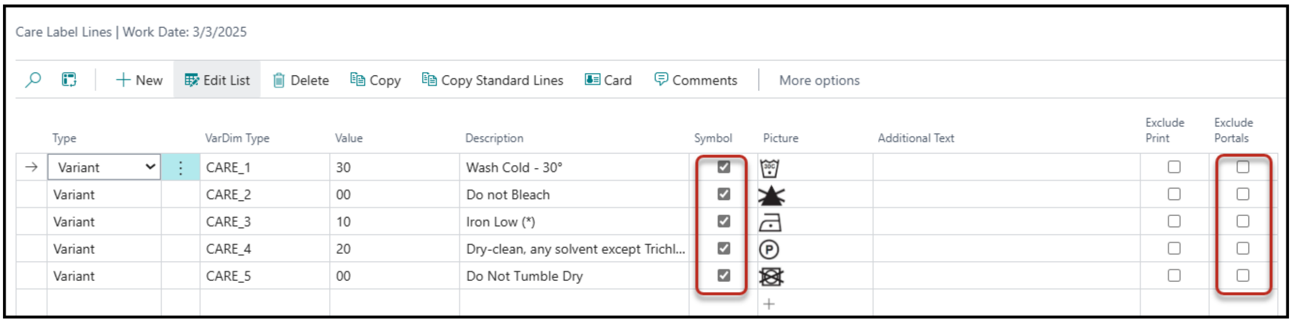
With a checkmark in **Exclude Portals** a **Composition Line** will not be shown on the TRIMIT e-commerce.

Care Label

Care Label functionality shows a way to handle Masters regarding Wash & Care. This information can be displayed as Icons or as a Text, i.e., *Drying, Line Dry*. The Care Label info is placed next under the ***Wash & Care*** tab on the **Product** page.

This information can be set from the Master Card in TRIMIT (via **Search** *Masters List*) by clicking ***Process, Care Label.***

Type field is set to *Variant* option by default. If **Symbol** is set to *Yes,* then the corresponding Wash & Care **Picture** will be displayed as well on the **Product** page.



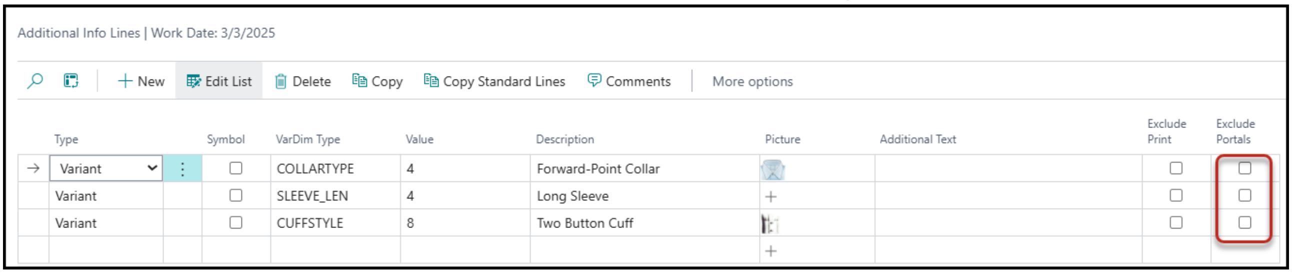
With a checkmark in **Exclude Portals** a **Care Label Line** will not be shown on TRIMIT e-commerce.

Additional Info

The Additional Info can be used to add extra information to a Master based on Variant Tables.

This information can be set from the Master Card in TRIMIT (via **Search** *Master List*) by clicking ***Process, Additional Info.***

The Additional Info is placed next to ***Composition*** tab on **Product** page on Portals.



With a checkmark in **Exclude Portals** an **Additional Info Line** will not be shown on the Shops/Portals.

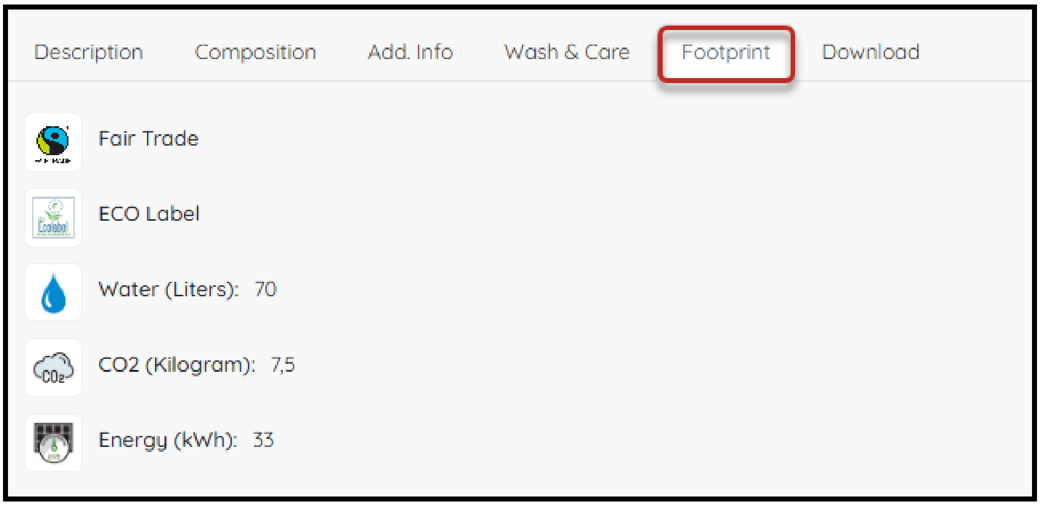
Sustainability Information

The Sustainability information can be used to add extra information to a Master based on Variant Tables. This information can be set from the Master Card in TRIMIT (via **Search** *Master List*) by clicking ***Process, Sustainability.***

The Sustainability information is placed next to ***Wash & Care*** tab as a ***Footprint*** *tab* on **Product** page on Portals.

If **Symbol** is set to *Yes*, then the corresponding Sustainability **Picture** will be displayed as well on the **Product** page.

With a checkmark in **Exclude Portals** a **Sustainability Line** will not be shown on the Shops/Portals.

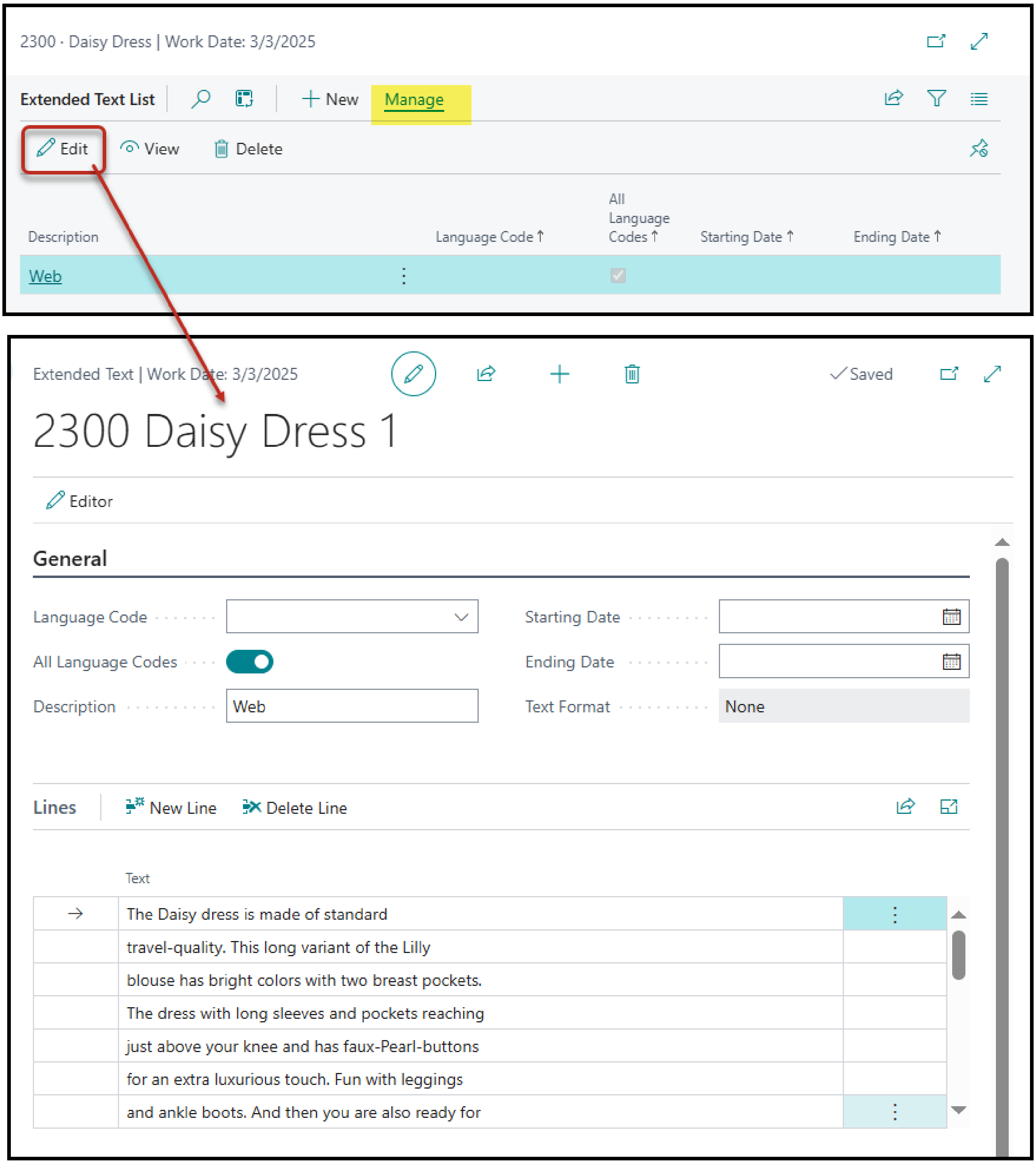


For more information about Composition, Care label and Additional info functionality refer to ***White Paper – TRIMIT Master Additional information***.

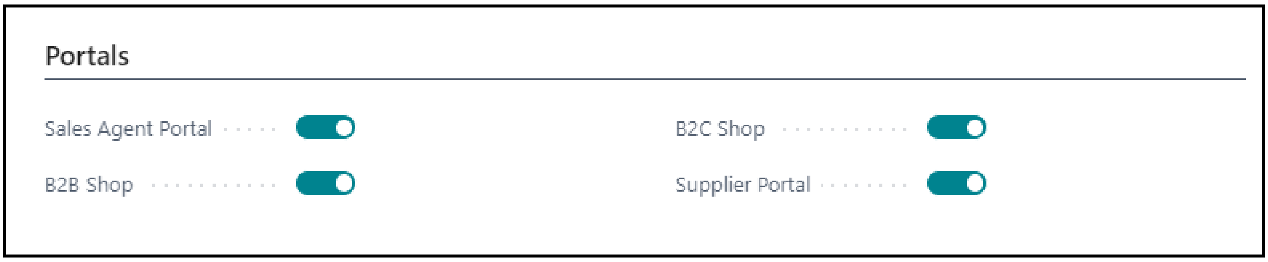
Extended Texts for Products

TRIMIT SA, B2B and B2C Webshop have a possibility to show Extended Product Description on a **Product** page (Masters and flat Items) and on **Category overview** pages.

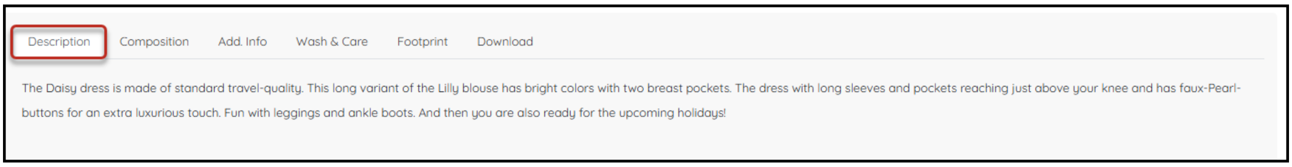
The Extended Text can be set on a Master in TRIMIT (via **Search** *Master List*) by clicking ***Related, Master Data, Extended Texts***.



The functionality on this page is a standard Business Central functionality.
The only difference is that page ***Extended Text*** has additional FastTab ***Portals*** and a specific TRIMIT ***Editor***.



This FastTab includes four check boxes: **Sales Agent Portal**, **B2B Shop**, **B2C Shop** and **Suppliers Portal**. Setting a checkmark in these fields results in showing the Extended Text for the Master/Item on the corresponding site in the Product page.
After setting the Extended Text in TRIMIT it is only required to clear the cache on the web site to see the result. This example above will result on the Portals in:



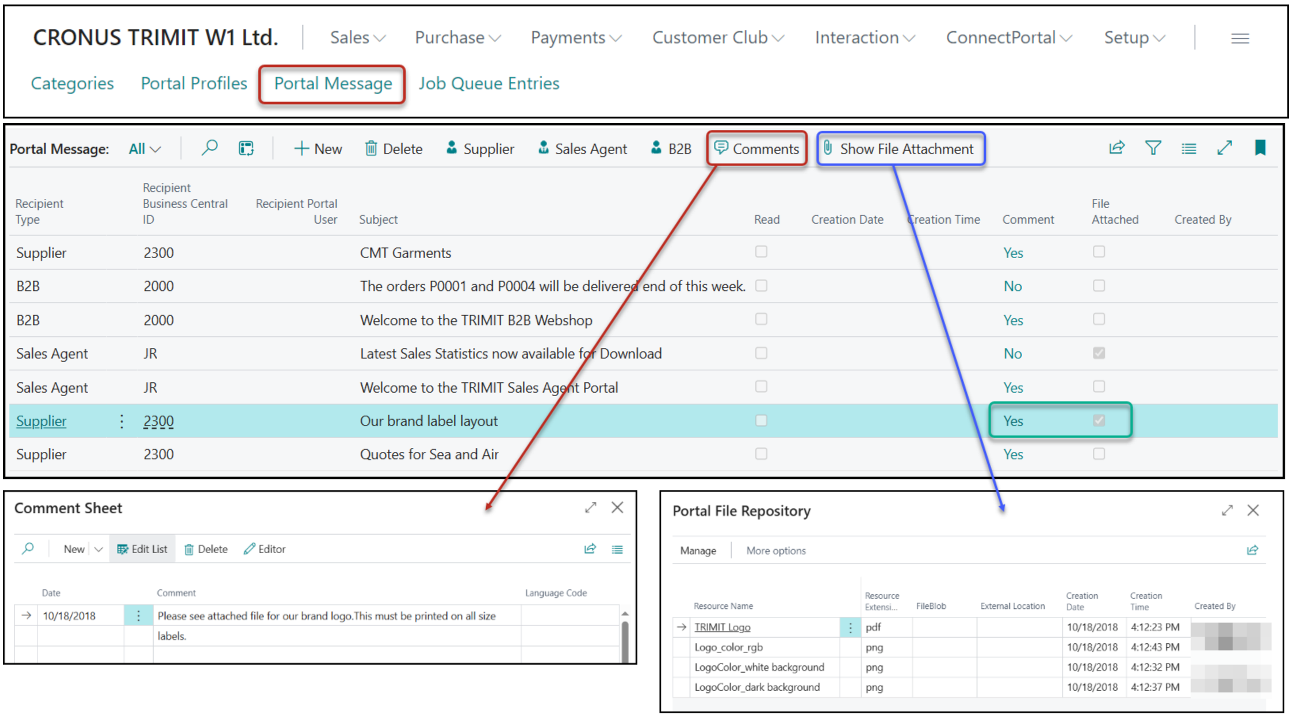
Note
Although ***Edit – Extended Text*** page has Boolean field **Supplier Portal** – this functionality is not available on SUP and setting this field to *TRUE* will not have any effect.

If you however want a fancier text shown on e-commerce with line breaks or **bold** or *Italic* words in it, it is possible to add Portal Description – that will overrule the Extended Text from TRIMIT – via the PIR.
See ***White Paper - Portals Product Information Repository (PIR).***

Portal Interaction

Portal Message List in Business Central

It is possible to create user **Messages** in TRIMIT and then display them on different e-commerce i.e., SA, B2B and SUP. In **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator*, you can find the **Portal Message** via ***Portal Message*** otherwise use **Search** *Portal Message.*



Description of the Fields

Recipient Type

Displays Portal Type where the message is applied. Available options are *Supplier, Sales Agent* and *B2B*

Recipient Business Central ID

Displays the Recipient of the Message. Selectable values depend on the **Recipient Type** field and can be whether Vendor Number (*Supplier*), Salesperson/Purchaser (*Sales Agent*) or Customer Number (*B2B*).

Recipient Portal User

Displays the Recipient Modelyn user. This can only be applied for **Recipient Type** *Supplier* and *B2B*. The lookup on this field will show you the ***Modelyn User List*.**

Subject

Displays the header of the Message; being a short Description for the content of your Message.

Read

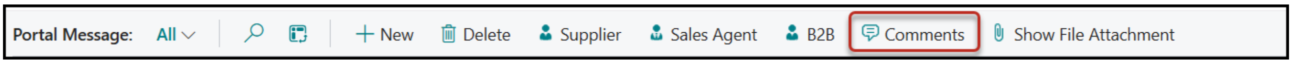
Displays the Status of the Message, i.e., Read (*TRUE*) or Not read (*FALSE*) by the user of e-commerce.

Creation Date

Displays the Creation Date of the Message.

Creation Time
Displays the Creation Time of the Message

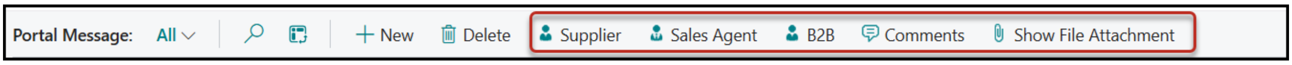
Comment
This field will get a checkmark automatically if **Comments** have been entered.



File attached
This field will get a checkmark automatically if **Attachments** have been imported.

Created By
Displays TRIMIT User who created the Message.

Actions
Portal Message List page has the following Actions:

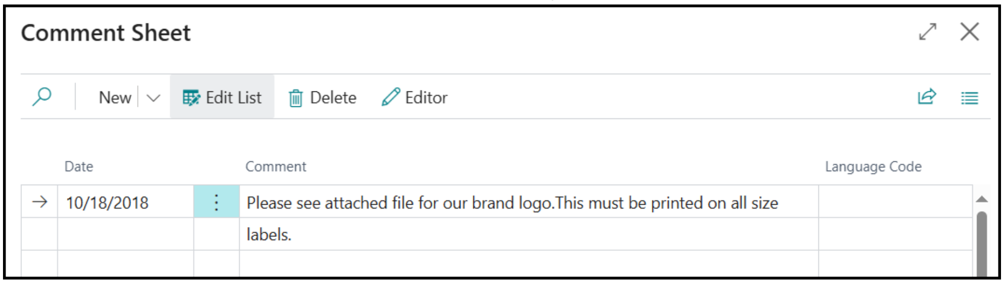


Supplier
This will filter the **Portal Messages** base on **Recipient Type** = *Supplier.*

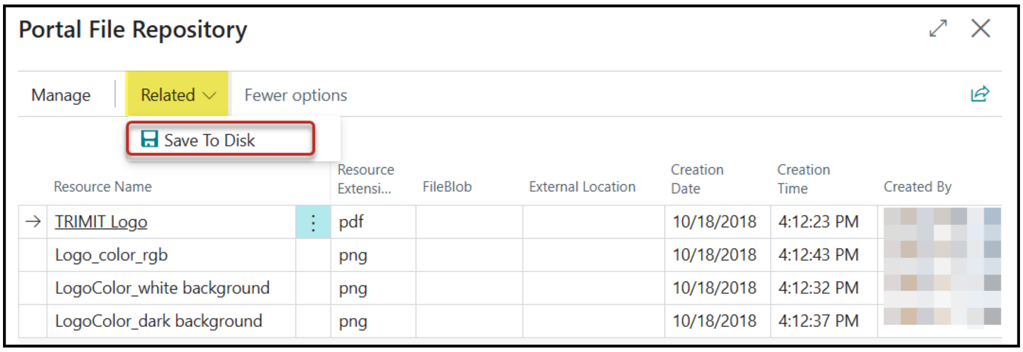
Sales Agent
This will filter the **Portal Messages** base on **Recipient Type** = *Sales Agent.*

B2B
This will filter the **Portal Messages** base on **Recipient Type** = *B2B.*

Comments
This will open the **Comment Sheet** in which you can see/maintain the Comments for this Message.

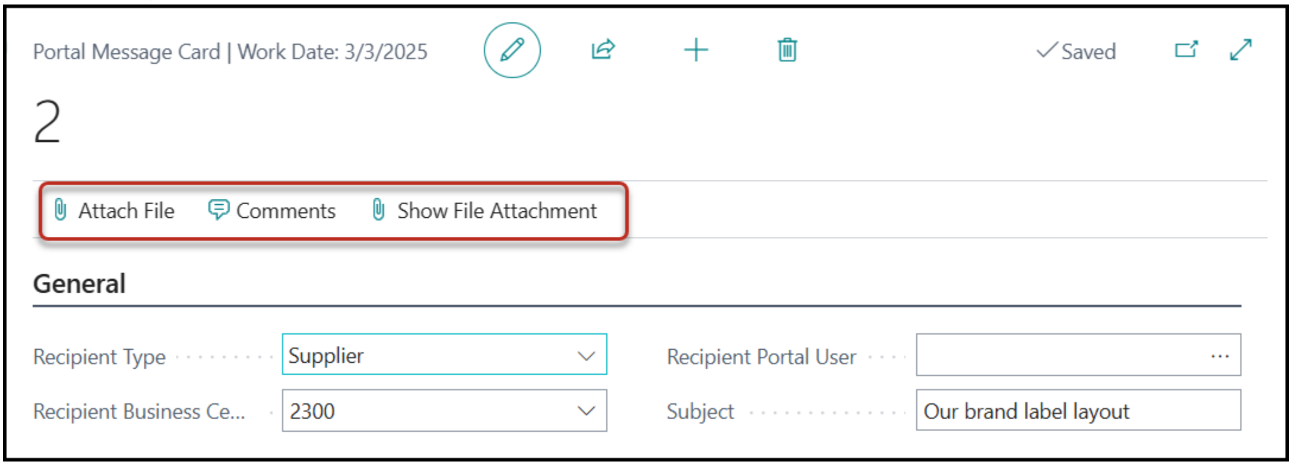


Show File Attachment
This will open **Portal File Repository** with list of Files that have been attached to a Message.
Via ***Manage, Delete***, you can Delete a **Resource Name** (attached File).
Via ***Related, Save To Disc***, you can download a **Resource Name** (attached File) to your disc.



Portal Message Card in Business Central

Clicking **+ *New*** or clicking on the **Recipient Type** in the ***Portal Message List,*** will open the **Portal Message Card,** which has the following fields:
Recipient Type, Recipient Business Central ID, Recipient Portal User and **Subject.**

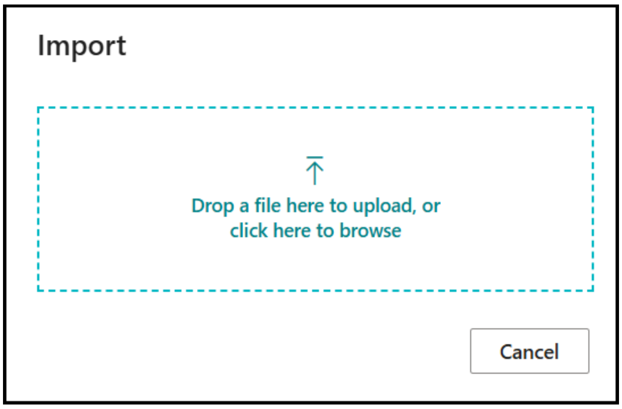


Description of these fields is same as for page ***Portals Message List***.

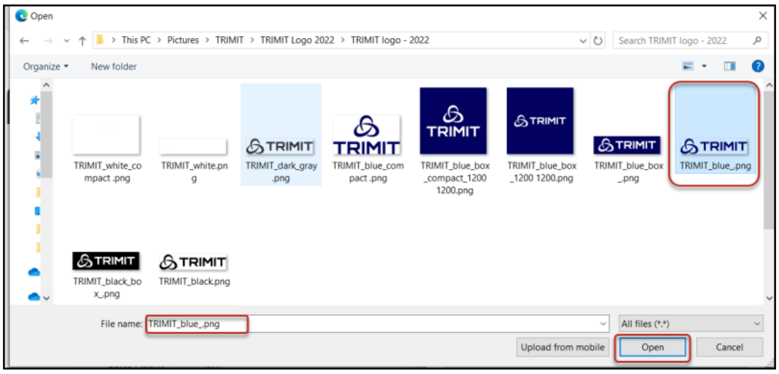
Actions

Attach File

With this Action, you can attach Files.



Click in the box and you can select a File. I.e.



Comments

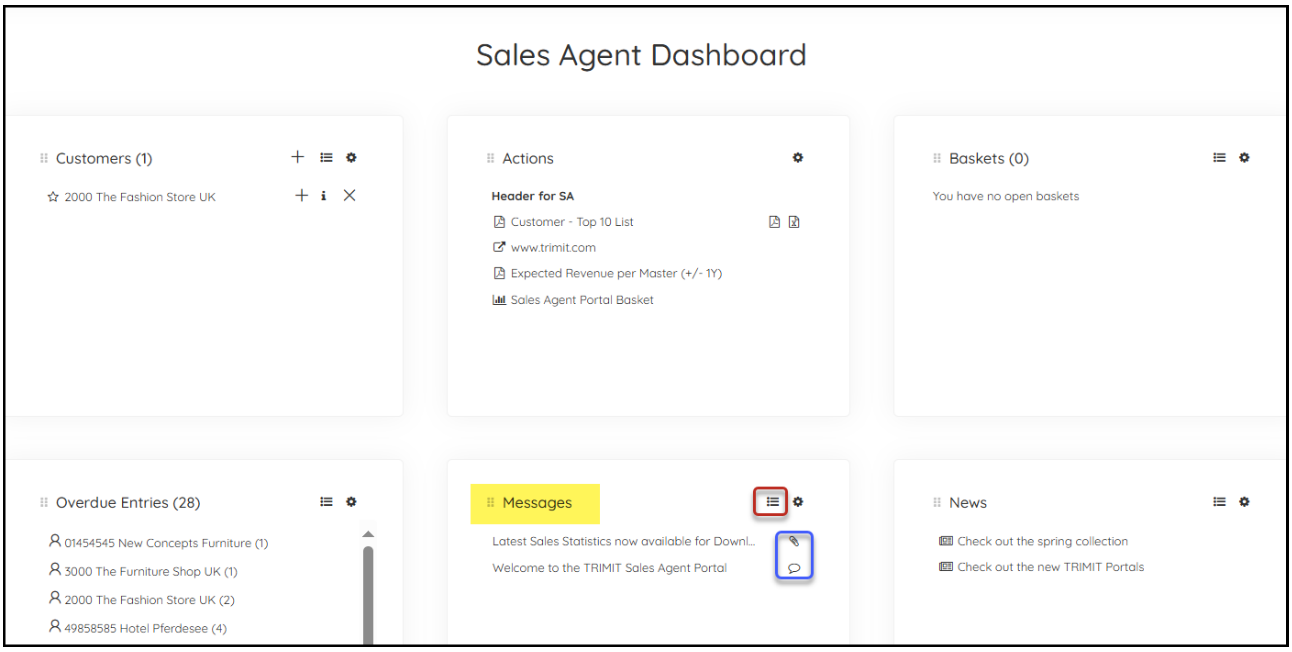
Same Action as in the **Poral Message List.**

Show File Attachment

Same Action as in the **Poral Message List.**

Portal Messages on Portals

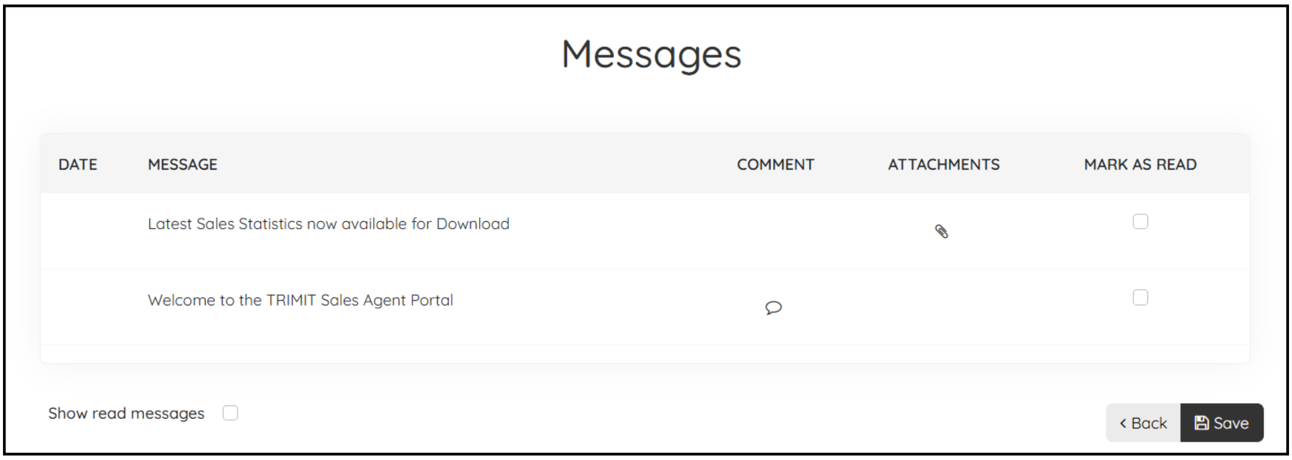
The following e-commerce websites have messaging functionality: SA, B2B and SUP.
Portal Messages have a simplified functionality, which allows sending Text Messages from TRIMIT to the e-commerce websites, which can also include Files. Messages can be sent only one way, i.e., from TRIMIT to e-commerce in which it will display the list of received Messages.



SA, B2B and SUP have identical Message functionality.
Here is a description of Message functionality:
Messages area is a part of the Dashboard. Message contains:

- *Message Subjects as links*
- ***Attachment** icon if Message contains Attachments*
- ***Comment** icon if Message contains Comments*
- *See all Messages link (red in above picture) to open Messages overview*

Clicking *See all messages* link opens page *Messages*. Message overview contains the following fields:



Date

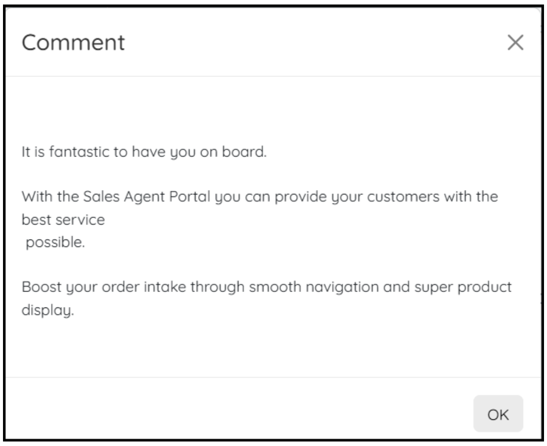
Message Creation date

Message

Subject of a Message

Comment

Message Comment icon clicking which opens Dialog Window with Message content (the Comments). I.e.



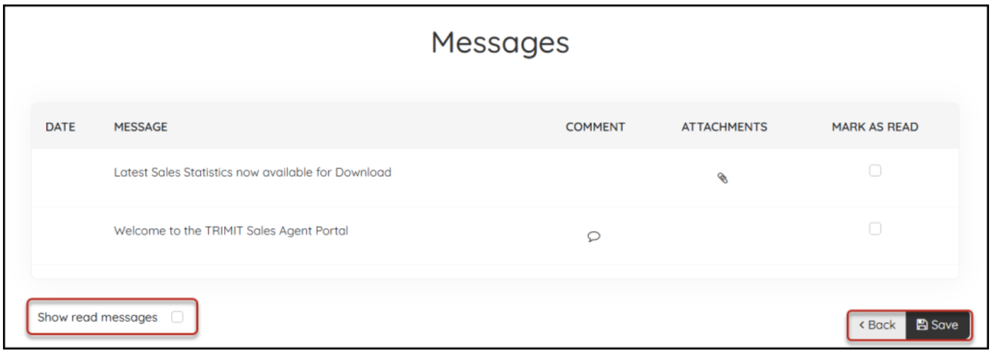
Attachments

Message Attachment icon clicking which opens **Attachments** page. Here it is possible to open or download the attachment I.e.

Mark as read

Manually set a checkmark if a Message has been read.

Messages page has the following actions:



Show read messages

Setting to *FALSE* filters the list to show only Messages that have not been read. Setting to *TRUE* shows both read and unread Messages

Back

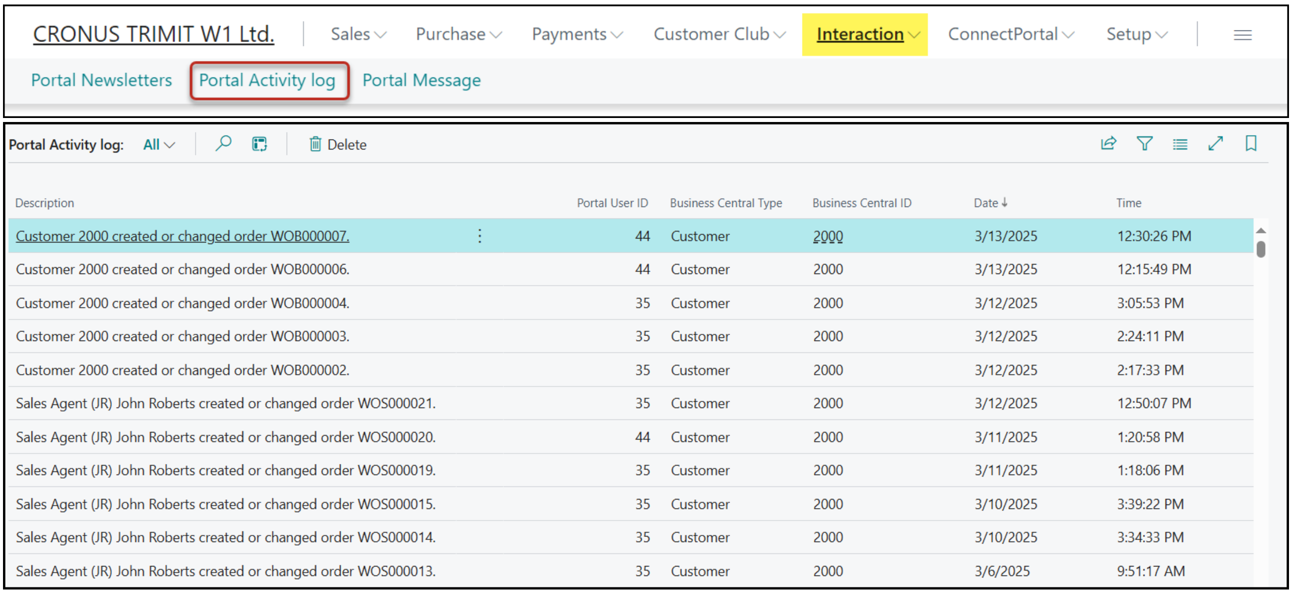
Navigate to Dashboard

Save

After Message is marked as read – click **Save** to submit change to TRIMIT ERP so the field **Read** is set to *Yes* in the Portal Message.

Portals Activity Log

Portals Activity Log collects all the Customer or Sales Agent Actions regarding Sales Quote/Order CRUD and Customer CRUD as well as Vendor Actions regarding Purchase Order CRUS.
In addition, other Actions can be added after customization.
Portals Activity Log can be found in the **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator* via ***Interaction, Portal Activity Log*** or via **Search** *Portal Activity Log*.



Description	Portal User ID	Business Central Type	Business Central ID	Date	Time
Customer 2000 created or changed order WOB000007.	44	Customer	2000	3/13/2025	12:30:26 PM
Customer 2000 created or changed order WOB000006.	44	Customer	2000	3/13/2025	12:15:49 PM
Customer 2000 created or changed order WOB000004.	35	Customer	2000	3/12/2025	3:05:53 PM
Customer 2000 created or changed order WOB000003.	35	Customer	2000	3/12/2025	2:24:11 PM
Customer 2000 created or changed order WOB000002.	35	Customer	2000	3/12/2025	2:17:33 PM
Sales Agent (JR) John Roberts created or changed order WOS000021.	35	Customer	2000	3/12/2025	12:50:07 PM
Sales Agent (JR) John Roberts created or changed order WOS000020.	44	Customer	2000	3/11/2025	1:20:58 PM
Sales Agent (JR) John Roberts created or changed order WOS000019.	35	Customer	2000	3/11/2025	1:18:06 PM
Sales Agent (JR) John Roberts created or changed order WOS000015.	35	Customer	2000	3/10/2025	3:39:22 PM
Sales Agent (JR) John Roberts created or changed order WOS000014.	35	Customer	2000	3/10/2025	3:34:33 PM
Sales Agent (JR) John Roberts created or changed order WOS000013.	35	Customer	2000	3/6/2025	9:51:17 AM

Description of the Fields

Description

Description of the Activity, i.e., "*Customer 2000 created or edited order WOB000007*".

Portal User ID

ID of the Portal User who initiated the Activity.

Business Central Type

Business Central Type of the user who initiated the activity, i.e., *Customer, Vendor*, *Sales Agent, etc*.

Business Central ID

Number of the *Customer, Vendor, etc.* based on the **Business Central Type.**

Date

Date the activity was initiated.

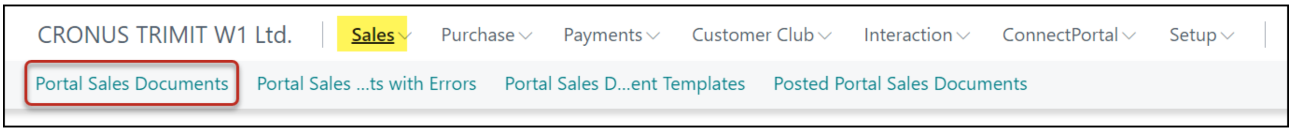
Time

Time the activity was initiated.

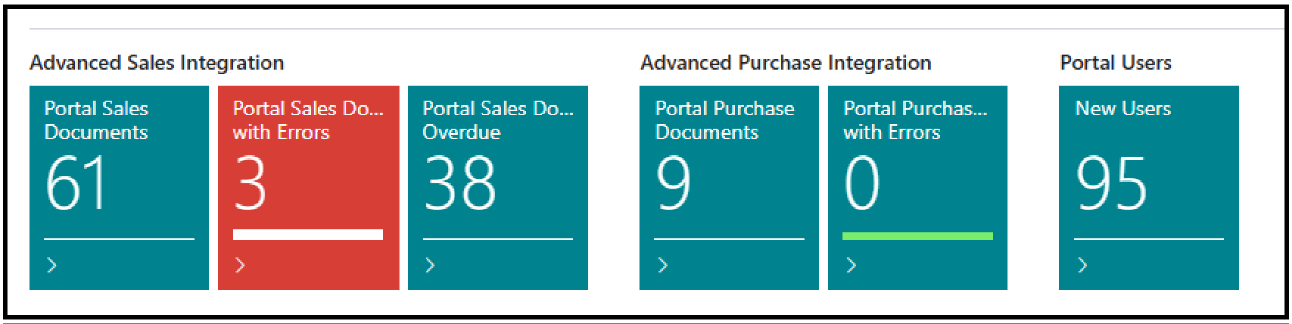
Portal Overdue Documents

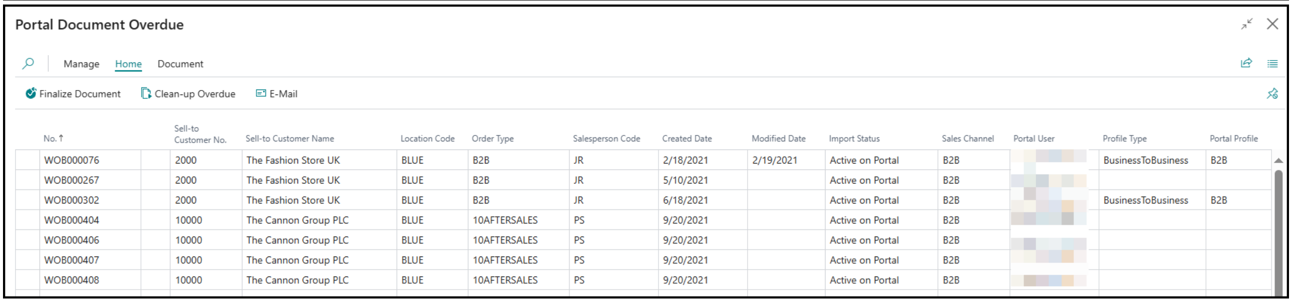
Since SA and B2B got Availability Functionality - this arises a problem with created and not finalized Sales Documents on the portals.

I.e., E-commerce Sales Document is not finalized when e-commerce User clicked **New order** on Customer Dashboard and added Item to basket but never finalized this order by clicking **Finalize Order** on **Finalize Order** page.
Another scenario is when Order was finalized and reopened again on e-commerce but never finalized again.
In these cases, the Sales Document is saved in ***Portals Sales Documents*** (**Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator*, ***Sales, Portals Sales Documents***) with **Import Status** equal to *Active on Portal*.



These Orders reserve Items (are included in the Availability) without further processing in the backend system. **Portal Sales Document Overdue** functionality enables detection of Overdue open Orders of e-commerce. These documents are collected in a list page ***Portal Sales Documents Overdue*** (**Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator*, stack called ***Portals Sales Doc., Overdue***).





No. ↑	Sell-to Customer No.	Sell-to Customer Name	Location Code	Order Type	Salesperson Code	Created Date	Modified Date	Import Status	Sales Channel	Portal User	Profile Type	Portal Profile
WOB000076	2000	The Fashion Store UK	BLUE	B2B	JR	2/18/2021	2/19/2021	Active on Portal	B2B		BusinessToBusiness	B2B
WOB000267	2000	The Fashion Store UK	BLUE	B2B	JR	5/10/2021		Active on Portal	B2B			
WOB000302	2000	The Fashion Store UK	BLUE	B2B	JR	6/18/2021		Active on Portal	B2B		BusinessToBusiness	B2B
WOB000404	10000	The Cannon Group PLC	BLUE	10AFTERSALES	PS	9/20/2021		Active on Portal	B2B			
WOB000406	10000	The Cannon Group PLC	BLUE	10AFTERSALES	PS	9/20/2021		Active on Portal	B2B			
WOB000407	10000	The Cannon Group PLC	BLUE	10AFTERSALES	PS	9/20/2021		Active on Portal	B2B			
WOB000408	10000	The Cannon Group PLC	BLUE	10AFTERSALES	PS	9/20/2021		Active on Portal	B2B			

Description of the Fields

No.

Overdue Document Number.

Sell-to Customer No.

Customer Number the Overdue Document is created for.

Sell-to Customer Name

Customer Name the Overdue Document is created for.

Location Code
Location Code used on the Overdue Document.

Order Type
Order Type used on Overdue Document.

Salesperson Code
A code of a Salesperson who created the Overdue Document.

Creation Date
Overdue Document Creation Date.

Modified Date
Overdue Document change Date.

Import Status
Overdue document Import Status. Available options are *Open, Active on Portal, Posting is Running*.

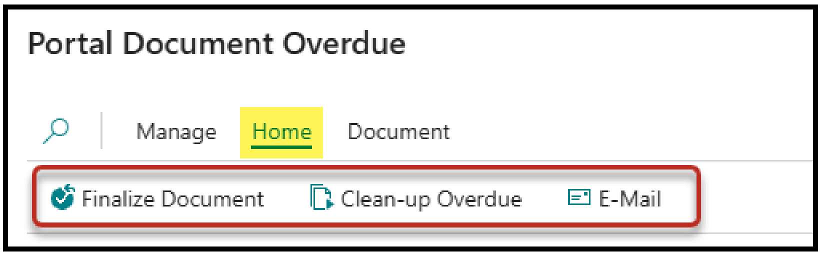
Sales Channel
Sales Channel on the Overdue Document.

Portal User
E-commerce user that created the Overdue Document.

Profile Type
The Type of the Profile on which the Overdue Document has been created. Available options are *BusinessToBusiness, BusinessToConsumer, SalesAgent* and *BusinessToSupplier.*

Portal Profile
Portal Profile that was used when creating the Overdue Document.

Actions

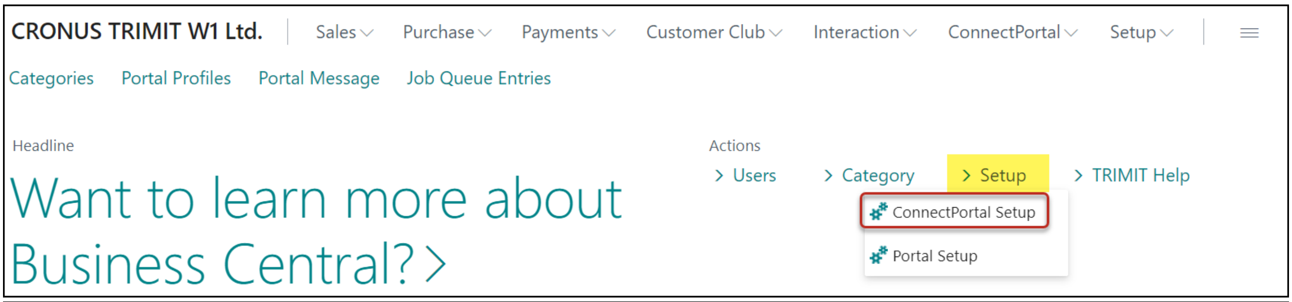


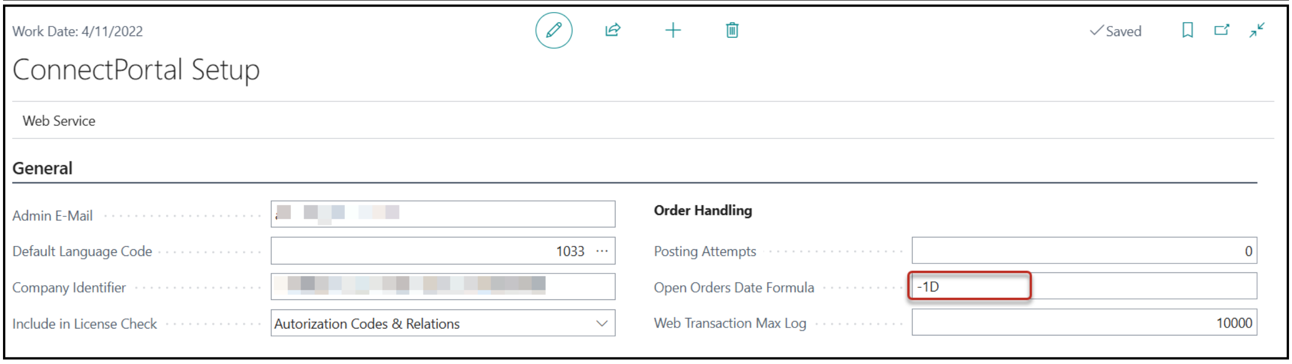
Finalize Document
Clicking this Action changes **Import status** for the Sales Document in ***Portal Sales Documents*** page from *Active on Portal* to *Open*.
At the same time, on e-commerce, Sales Document Status will be changed from *Open* to *Pending*.

Clean-up Overdue
Clicking this Action deletes all the Overdue Documents.

E-Mail
Clicking this Action opens Outlook window and allows sending notification to a Sales Document owner.

It is possible to set a Date Formula, which determines the Sales Documents to be Overdue.
The Date Formula can be set on ***ConnectPortal Setup*** page in field **Open Orders Date Formula**





I.e., setting *-1D* enables showing Sales Documents, in ***Portal Documents Overdue*** page, which **Creation Date** or **Changed Date** is older than 1 day from Work Date.
Portal Sales Documents, Overdue stack can be found in **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator*.

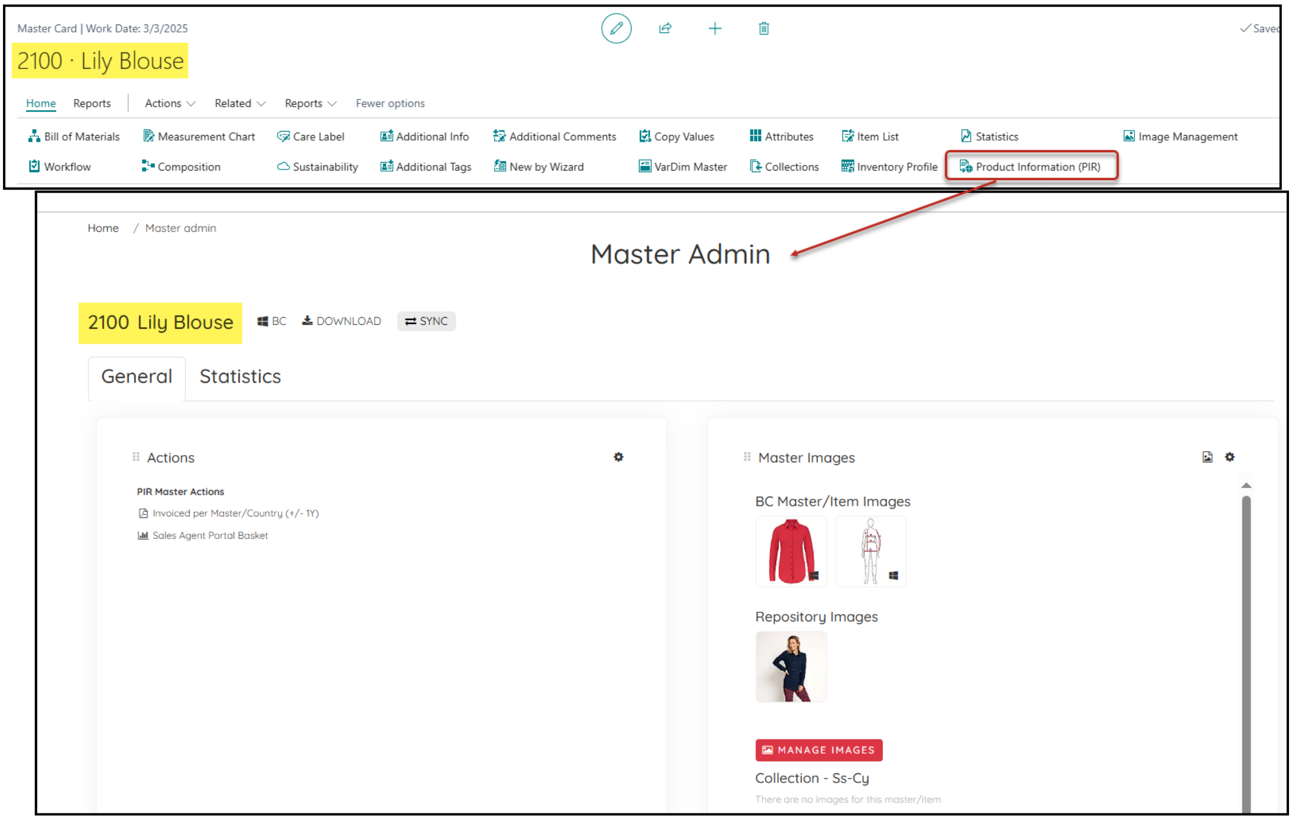
Note
The **Overdue entries** in the Dashboard of the B2B and SA, show Posted Sales Invoices that are due based on the **Due Date** of the Posted Sales Invoice; they are in no way related to the Portal Overdue Documents – which are open Portal Sales Documents.

User Mapping and Token Authentication

TRIMIT has a feature of opening e-commerce pages from within the Business Central application. This is one of the important steps in making TRIMIT and e-commerce one system for the user.

When you are in TRIMIT you are TRIMIT user like: andrew@trimit.com which means, you are a domain user. Andrew could also be an e-commerce Portal User, where he is created with his E-Mail and permissions/groups e.g., on the SA, B2B or SUP.

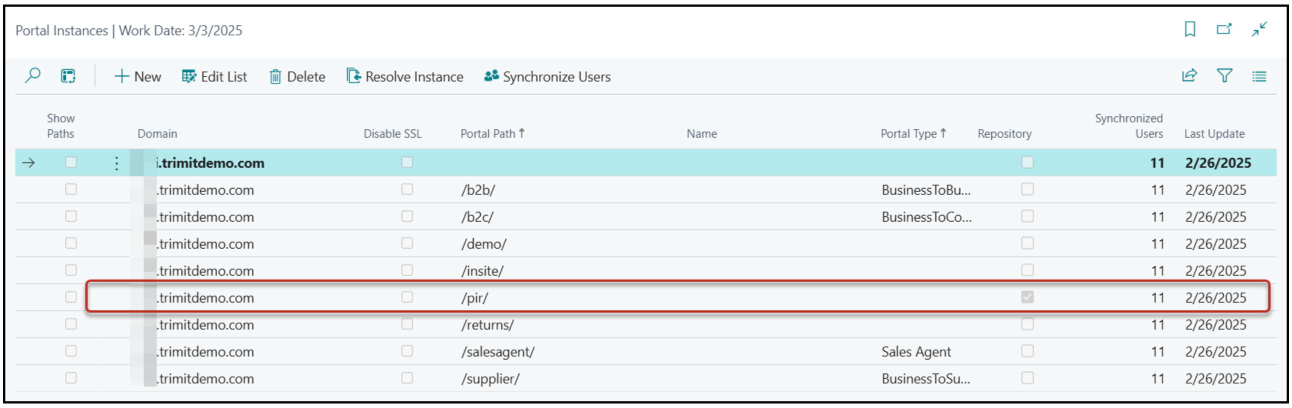
If you want others to be able to interact with e-commerce from within TRIMIT you can call an e-commerce page.



When clicking the Action on the Master page (**Portal Information (PIR)** and **Image Management**) a new e-commerce Extension page is called in a browser which calls a page on a given Portal.
The URL is generated dynamically on the call combined by what you have of information in the Portal Instance mapping table (in **Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator*, ***ConnectPortal, Portal Instances***).

For more information about resolving portal instance and user token setup refer to ***White Paper – TRIMIT ConnectPortal Instances***.

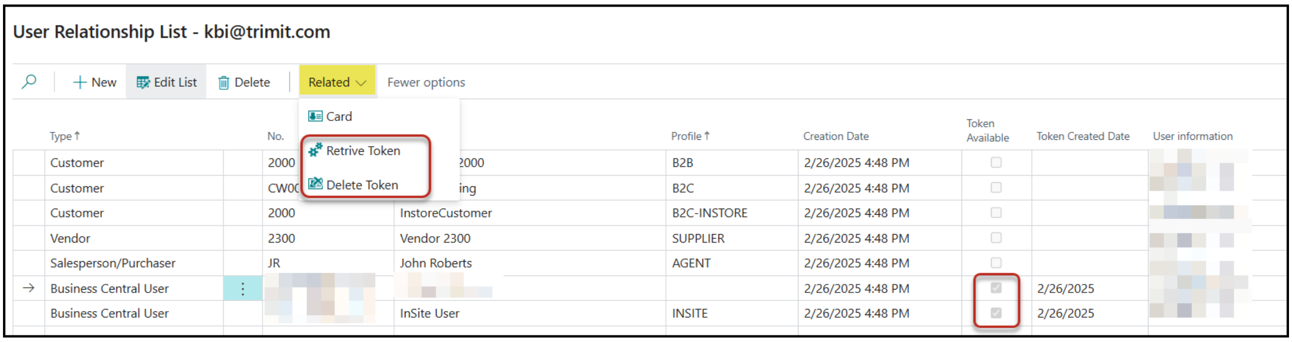
In the ***Portal instances*** it is needed to specify the Portals Domain name in field **Domain**.
Set field **Disable SSL** to *FALSE* when using "https".
Then click ***Resolve Instance***. This will create the Portal Instances for you with the right **Portal Path** and **Portal Type**.



The URL also contains parameters.
The page that is being called on the portal side resides behind the login. Therefore, there is a need to let system login automatically which is more user friendly. But that means sending Username and Password in the URLs and behind the scenes as clear text.
This is of course a major security risk as it could be captured by other software parts e.g., via fiddler.
That is why we use tokens which can be sent in the URL as authentication.
In short, a token is generated and attached to a User in the portal database. This token will, when send in parameter, allow the system to login seamlessly and the user is sent directly to the requested page.
How to setup the mapping:

- *Create needed user on e-commerce if not yet created*
- *Synchronize Users*
- *Go to **User Relationship List***
- *Create a relation of type Business Central User*
- *Select the Business Central user*

Here is a ***User Relationship List*** with relation **Type** set to *Business Central User.*



Below is a description of the Actions under ***Related***.

Description of the Actions

Retrieve Token

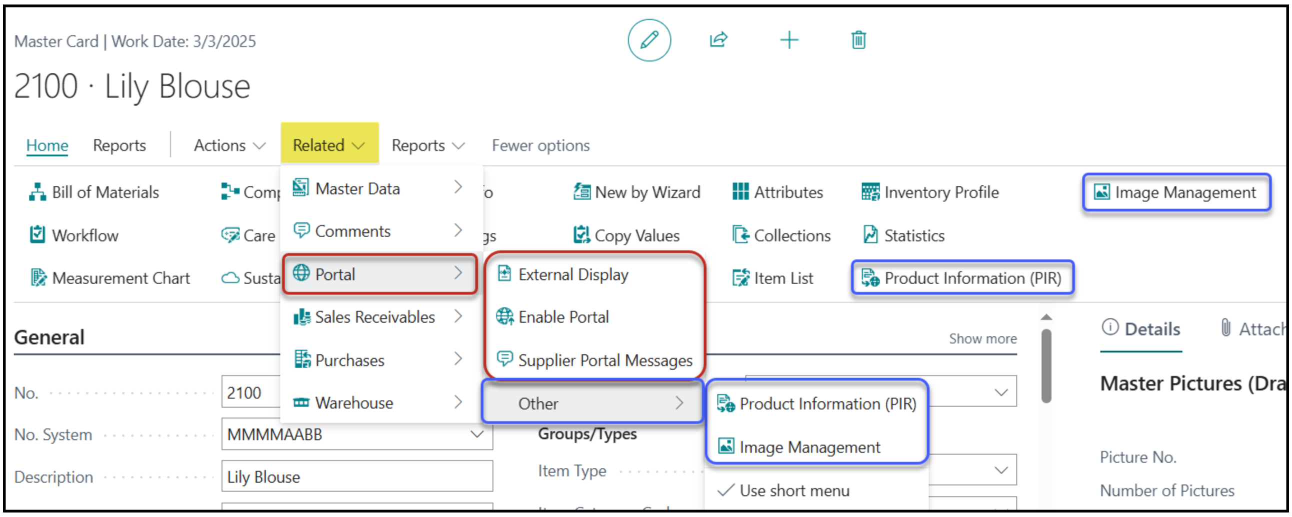
When this is clicked, the system will make a service call to the Portal repository services (see Instance mapping). Where the system will security check the call via token handshakes. If that goes well the Modelyn will generate a token and attach that to the Modelyn user. The Token is then returned to Business Central where it is set on the relationship.
This token is used behind the scenes and applied to any request that needs authentication.

Delete Token

This action will remove the token and send a request to the Modelyn side to delete the token. After deletion, the auto login ability does not work anymore – any request from Business Central to a page behind login will be redirected to a login page (it is considered that the request should not be executed if a token is not present).

Portal Integration on Master List/Card

TRIMIT ***Master List*** and ***Master card*** both have Portal related Actions:



Description of the Actions

Product information (PIR)

Clicking this Action for the first time requires login. After the login, it will be possible to see a **Master Admin** page in PIR (Portals Product Information Repository). Here multiple options are available. Read more details in ***White Paper – Portals Product Information Repository (PIR)***.

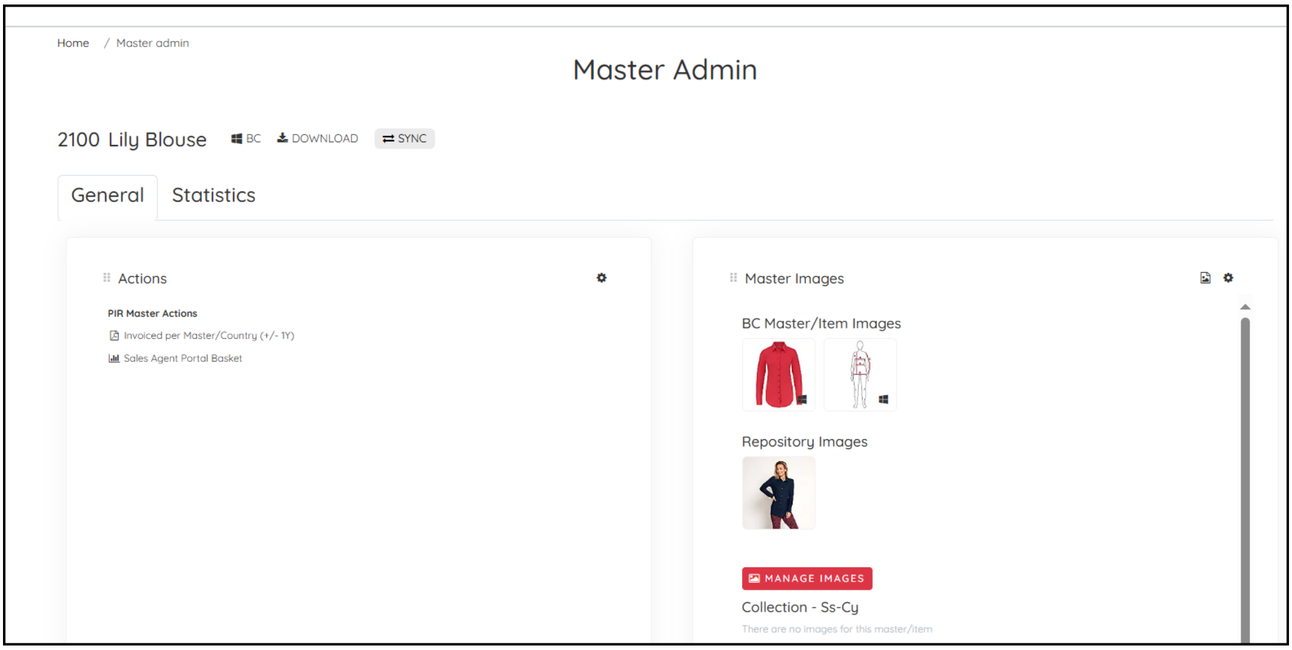
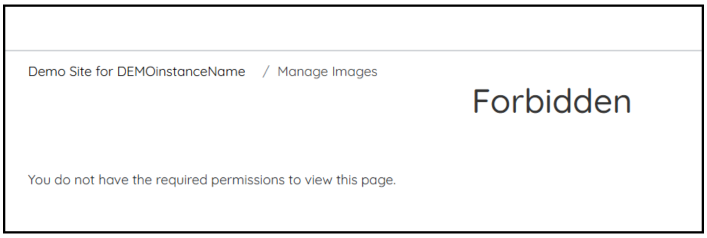
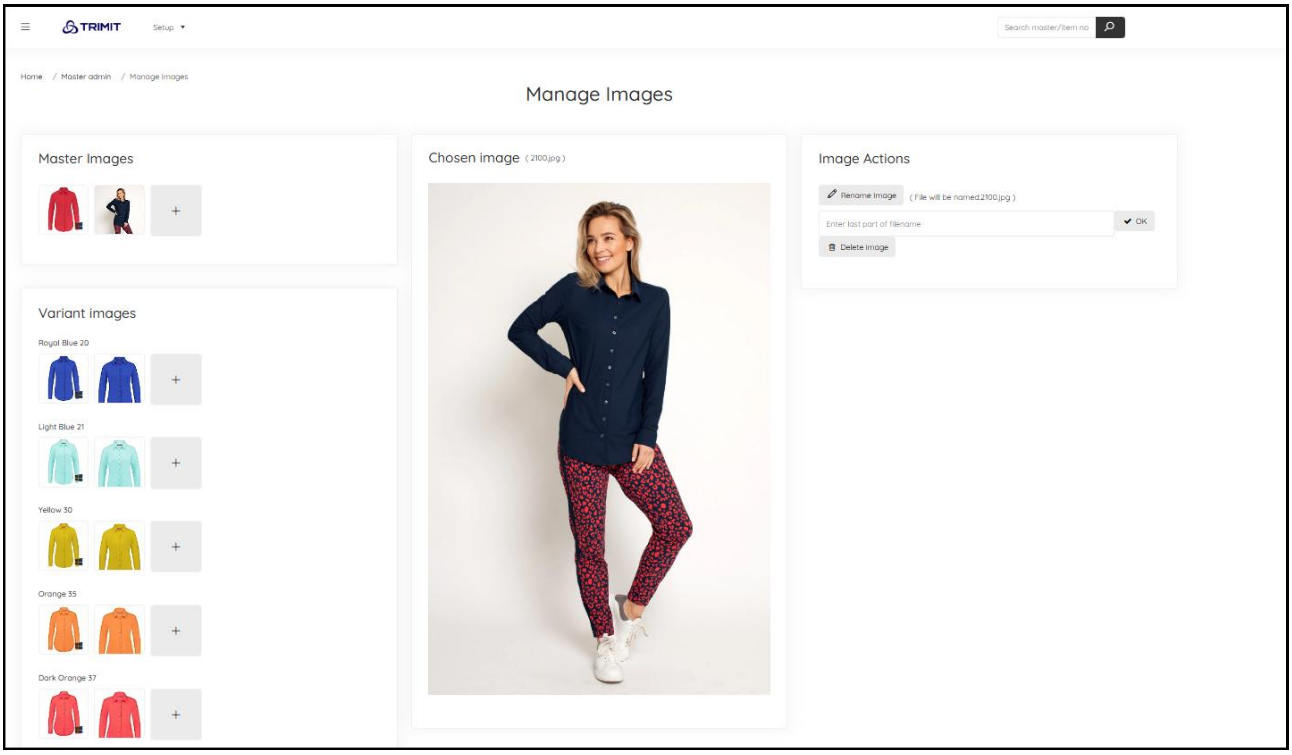


Image Management

Clicking this Action for the first time requires login with the rights to see/change Master Images, otherwise you will get an error message:

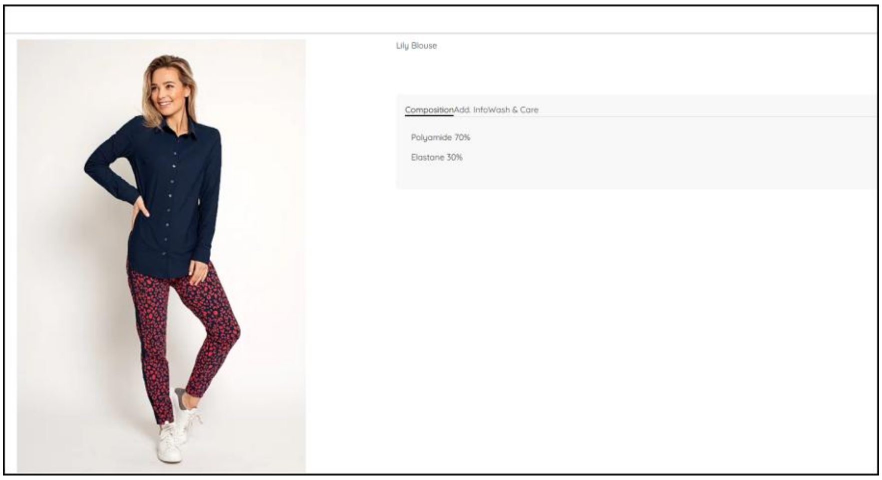


After the login, it will be possible to see a **Manage Images** page in PIR (Portals Product Information Repository). Here multiple options are available.
Read more details in ***White Paper – Portals Product Information Repository (PIR)***.



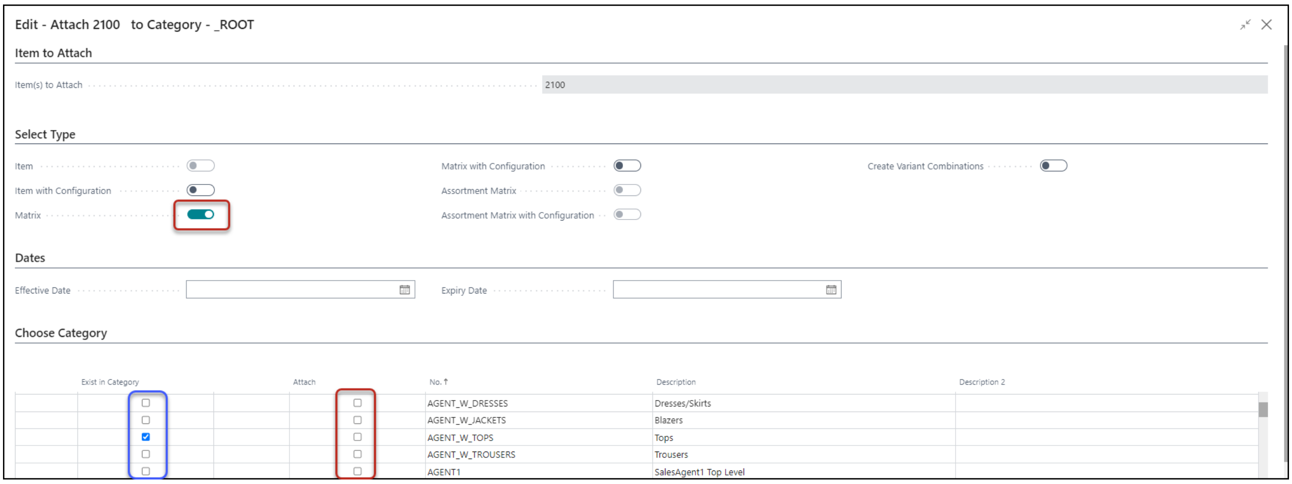
External Display

Clicking this Action will open a Product view for the external systems. The view includes data available for this product.
Read more details in ***White Paper – Portals Product Information Repository (PIR)***.



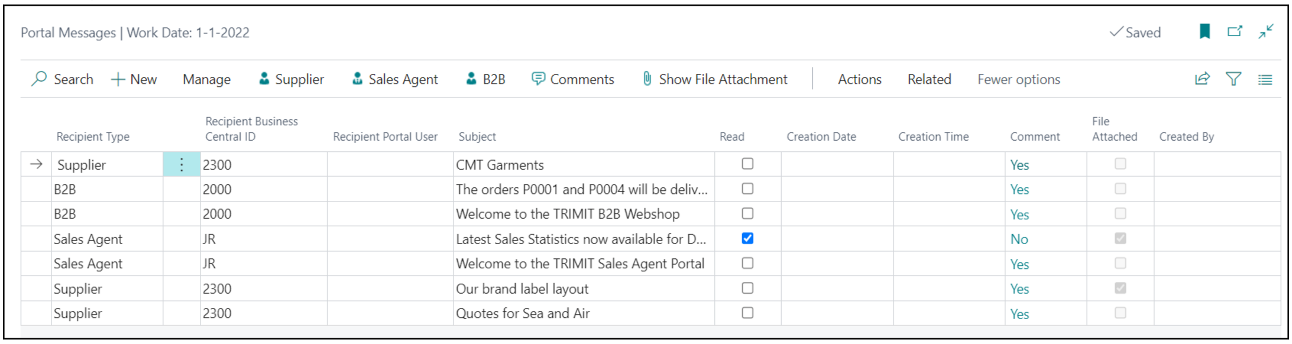
Enable Portal

Clicking this Action opens a page where it is possible to attach this Product to one or more Categories. You first need to choose a **Select Type** and can attach the Product by checkmarks in the column **Attach.** In the column **Exist in Category** you can see to which Categories the Product already has been attached.



Supplier Portal Messages

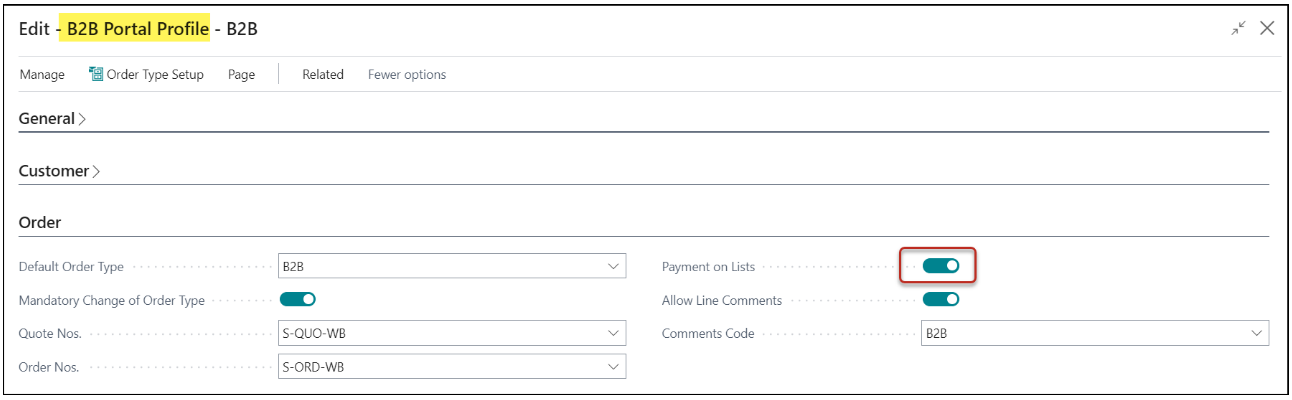
Clicking this Action opens **Portal Message List**



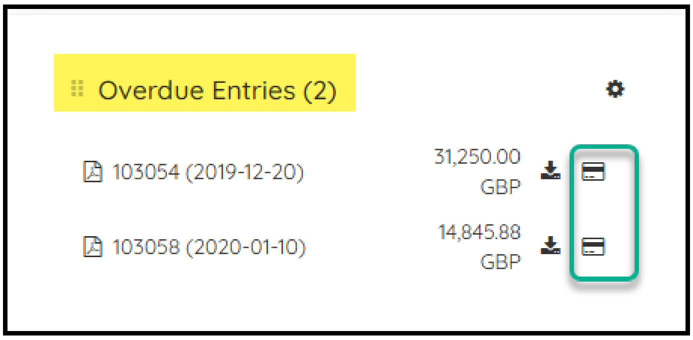
Recipient Type	Recipient Business Central ID	Recipient Portal User	Subject	Read	Creation Date	Creation Time	Comment	File Attached	Created By
Supplier	2300		CMT Garments	☐			Yes	☐	
B2B	2000		The orders P0001 and P0004 will be deliv...	☐			Yes	☐	
B2B	2000		Welcome to the TRIMIT B2B Webshop	☐			Yes	☐	
Sales Agent	JR		Latest Sales Statistics now available for D...	☑			No	☑	
Sales Agent	JR		Welcome to the TRIMIT Sales Agent Portal	☐			Yes	☐	
Supplier	2300		Our brand label layout	☐			Yes	☑	
Supplier	2300		Quotes for Sea and Air	☐			Yes	☐	

B2B Payment

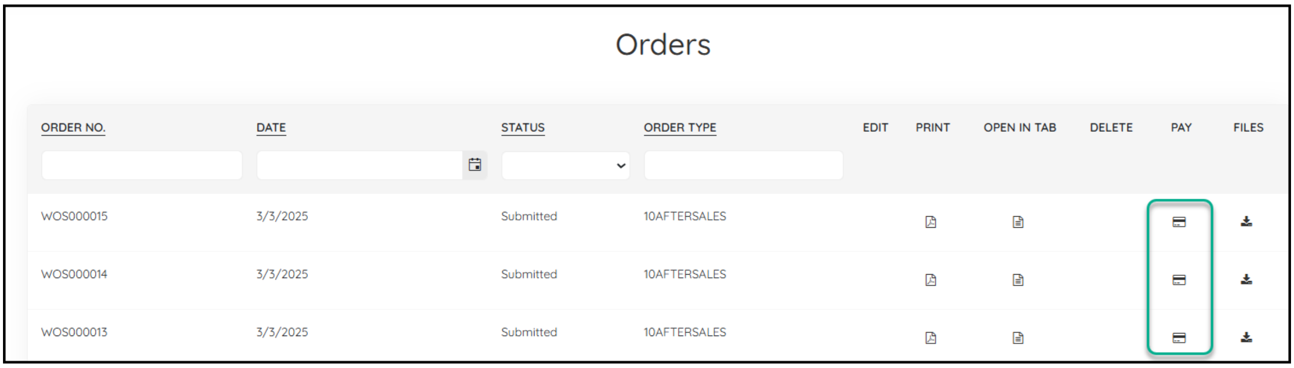
Here is described B2B Payment setup in TRIMIT.
B2B Portal Profile card has a Boolean field which, when set to *TRUE*, enables Payment icons to appear on Order list pages on B2B. Only relevant Orders will have this Payment icon, i.e., Orders which must be paid, but not yet have been paid.



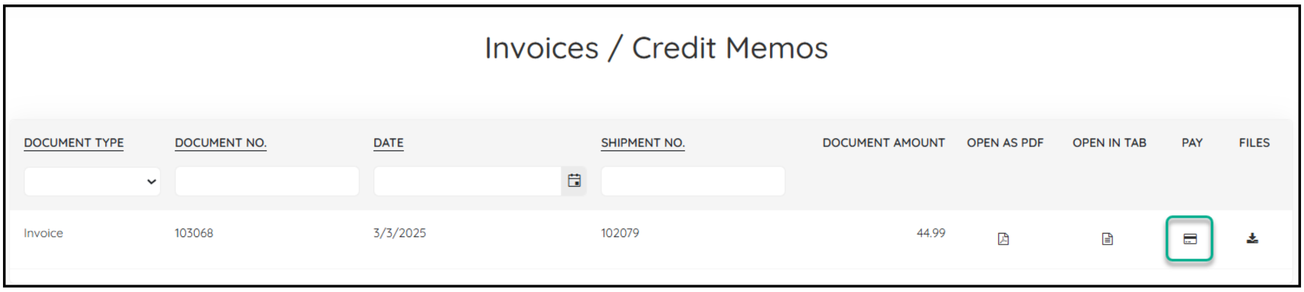
Payment icons in **Overdue Entries** dock:



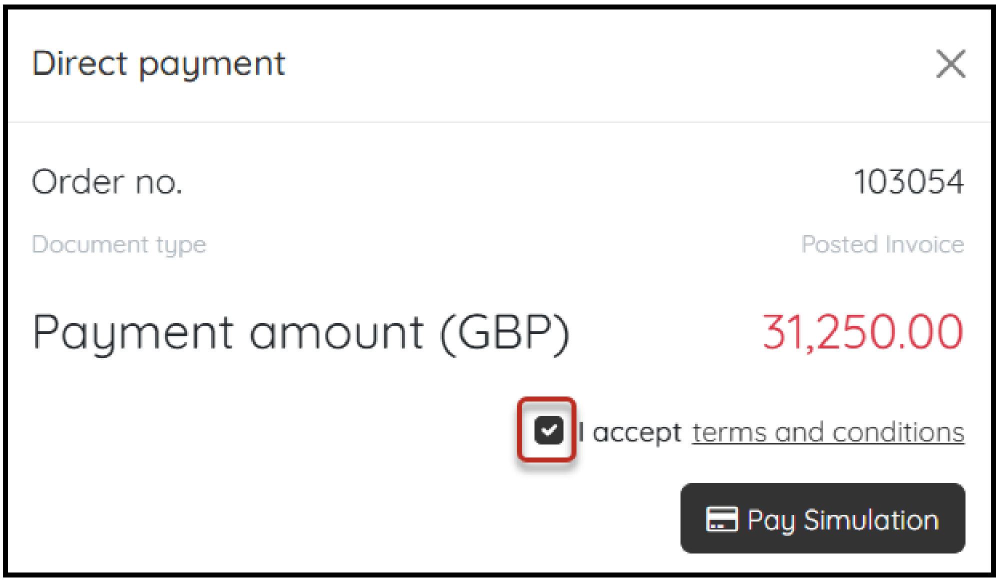
Payment icons on **Orders** page:



Payment icons on **Invoices/Credit Memos** page:



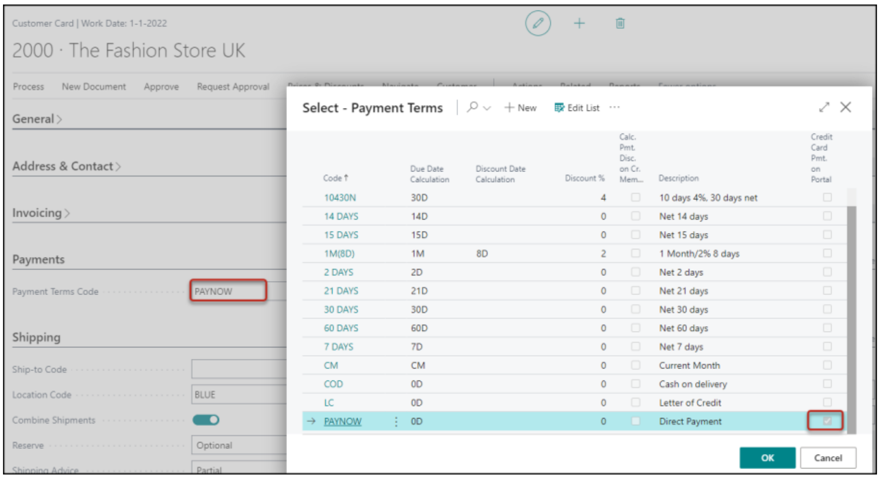
After clicking this Payment icon, a new pop-up window will appear which shows Order number, Order Amount and Currency and available Payment Methods (in TRIMIT Demo Site, only a Pay Simulation). Make sure you put a checkmark in *I accept terms and conditions*.
Clicking on Payment Methods will create a payment (this requires Credit Card information).



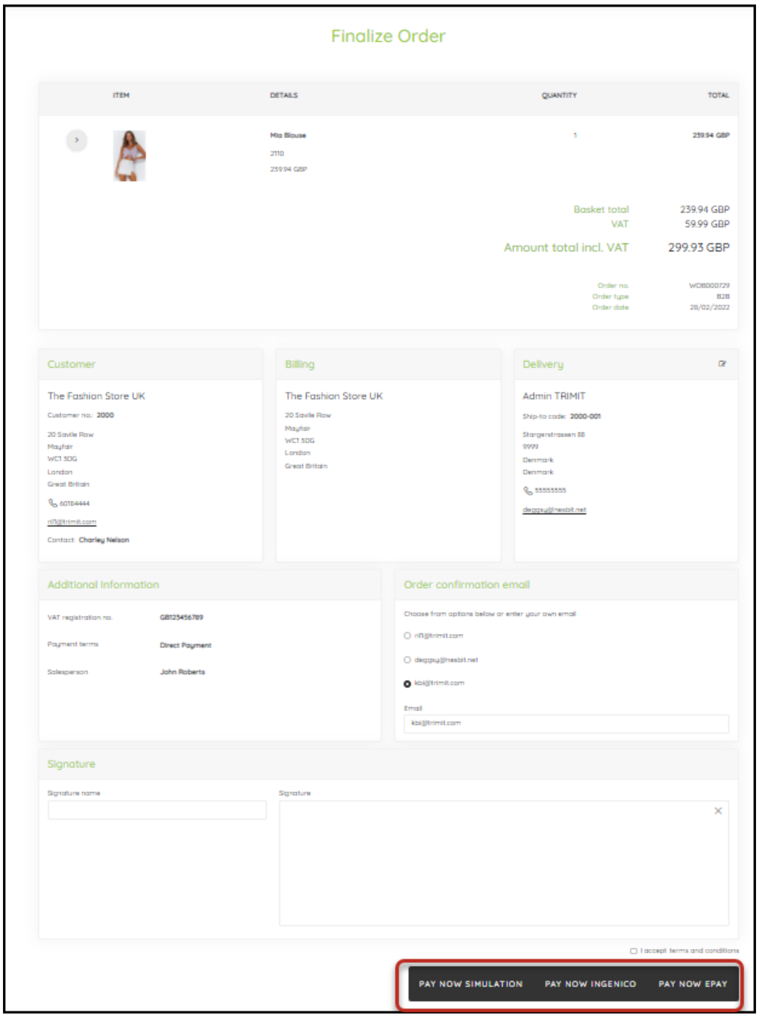
Note
Payment providers which are available on B2B: NETS Easy, Ingenico, ePay and Simulation (only for test).
We currently support the following payment providers:

Payment captures functionality for other payment providers is not provided by TRIMIT and must be developed by TRIMIT partner.

To enable Payment on Orders confirmation page, the customer must have **Payment Terms Code** set as follows.

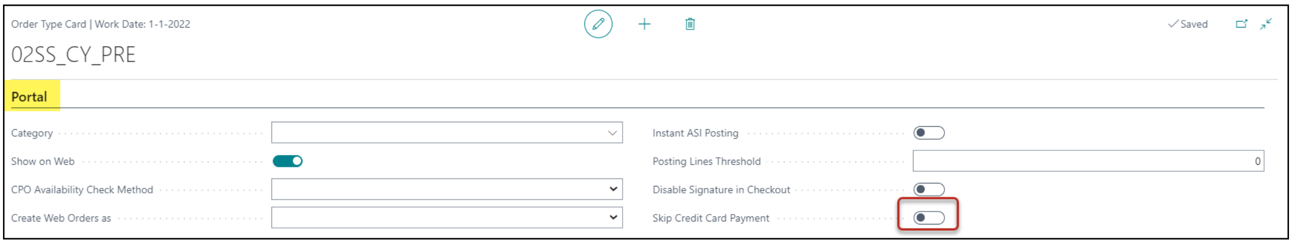


If **Credit Card Pmt. On Portal** is set to *TRUE*, payment provider buttons appear on B2B **Finalize Order** page:



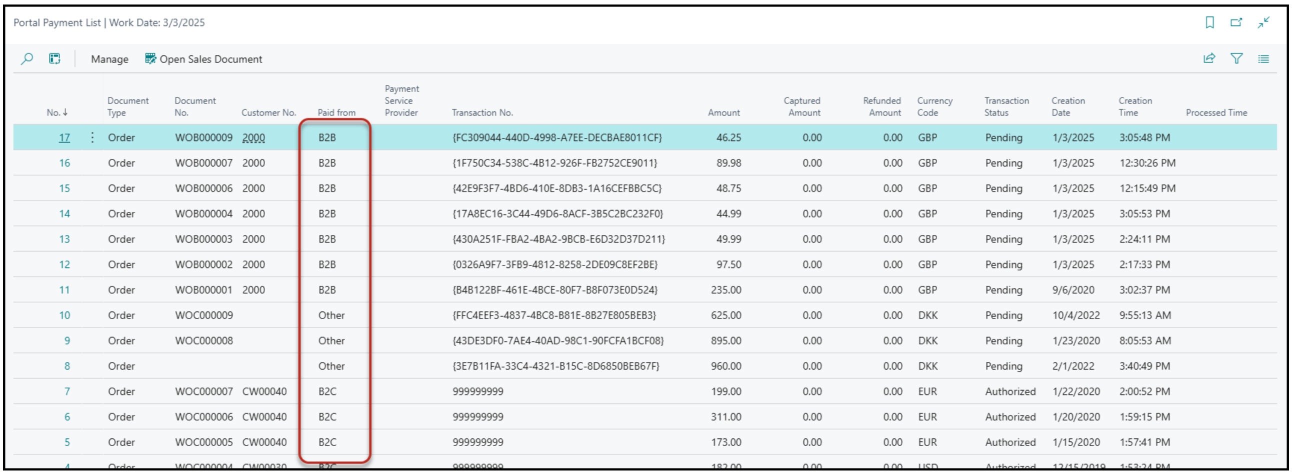
Note
Entering **Finalize Order** page on B2B initiates creation of temporary order in TRIMIT. This triggers all needed calculations, defining that this is a payment mode (if payment is activated) and at this stage it is possible to retrieve all the extra information using e.g., credit card fees, shipment cost etc.

The Credit Card payment can be disabled on **Order Type** card:



Payment in B2B cannot be made for a quote – if **Create Web Order as** (on B2B Portal Profile) is set to *Quote* the payment cannot be applied.
Order must be posted in ASI to see the Payment icon in Order list.

If Order was created on SA but paid from B2B then on **Payments** (**Role Center (Profile)** *TRM_PORTAL - TRIMIT Portal Administrator*, ***Payments, Payments)*** in Business Central, the **Paid from** will be stated as *Sales Agent*.



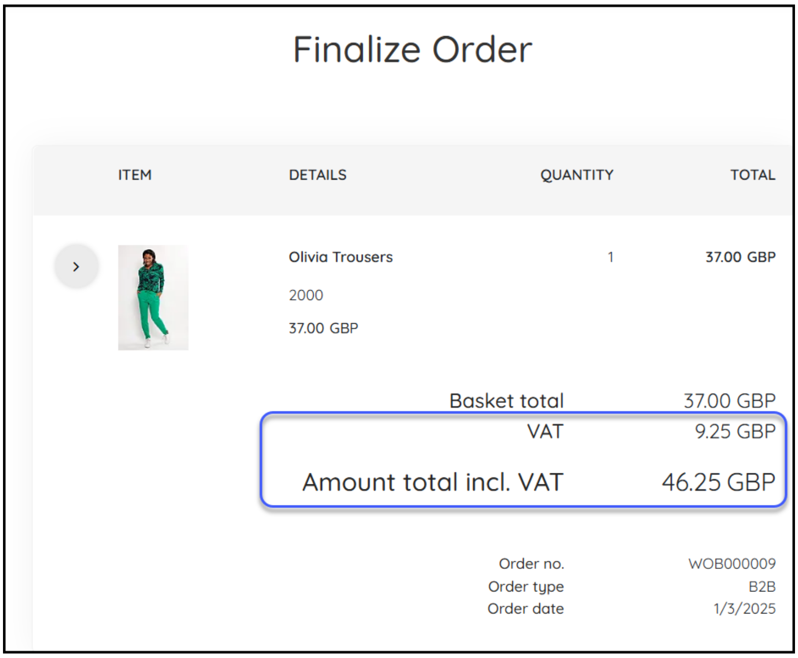
Portal Payment List | Work Date: 3/3/2025

Manage | Open Sales Document

No. ↓	Document Type	Document No.	Customer No.	Paid from	Payment Service Provider	Transaction No.	Amount	Captured Amount	Refunded Amount	Currency Code	Transaction Status	Creation Date	Creation Time	Processed Time
17	Order	WOB000009	2000	B2B		{FC309044-440D-4998-A7EE-DECBAE8011CF}	46.25	0.00	0.00	GBP	Pending	1/3/2025	3:05:48 PM	
16	Order	WOB000007	2000	B2B		{1F750C34-538C-4B12-926F-FB2752CE9011}	89.98	0.00	0.00	GBP	Pending	1/3/2025	12:30:26 PM	
15	Order	WOB000006	2000	B2B		{42E9F3F7-4BD6-410E-8DB3-1A16CEFBBC5C}	48.75	0.00	0.00	GBP	Pending	1/3/2025	12:15:49 PM	
14	Order	WOB000004	2000	B2B		{17A8EC16-3C44-49D6-8ACF-3B5C2BC232F0}	44.99	0.00	0.00	GBP	Pending	1/3/2025	3:05:53 PM	
13	Order	WOB000003	2000	B2B		{430A251F-FBA2-4BA2-9BCB-E6D32D37D211}	49.99	0.00	0.00	GBP	Pending	1/3/2025	2:24:11 PM	
12	Order	WOB000002	2000	B2B		{0326A9F7-3FB9-4812-8258-2DE09C8EF2BE}	97.50	0.00	0.00	GBP	Pending	1/3/2025	2:17:33 PM	
11	Order	WOB000001	2000	B2B		{B4B122BF-461E-4BCE-80F7-B8F073E0D524}	235.00	0.00	0.00	GBP	Pending	9/6/2020	3:02:37 PM	
10	Order	WOC000009		Other		{FFC4EEF3-4837-4BC8-B81E-8B27E805BEB3}	625.00	0.00	0.00	DKK	Pending	10/4/2022	9:55:13 AM	
9	Order	WOC000008		Other		{43DE3DF0-7AE4-40AD-98C1-90FCFA1BCF08}	895.00	0.00	0.00	DKK	Pending	1/23/2020	8:05:53 AM	
8	Order			Other		{3E7B11FA-33C4-4321-B15C-8D6850BEB67F}	960.00	0.00	0.00	DKK	Pending	2/1/2022	3:40:49 PM	
7	Order	WOC000007	CW00040	B2C		999999999	199.00	0.00	0.00	EUR	Authorized	1/22/2020	2:00:52 PM	
6	Order	WOC000006	CW00040	B2C		999999999	311.00	0.00	0.00	EUR	Authorized	1/20/2020	1:59:15 PM	
5	Order	WOC000005	CW00040	B2C		999999999	173.00	0.00	0.00	EUR	Authorized	1/15/2020	1:57:41 PM	
4	Order	WOC000004	CW00030	B2C		999999999	182.00	0.00	0.00	USD	Authorized	12/15/2019	1:53:24 PM	

If B2B Customer goes to Payment, selects Payment Provider but then goes back by clicking browser **Back** button, it will still be possible to pay at a later point of time. But the Payment line is already created in ***Portal Payments List*** in TRIMIT with no Payment Service provider filled in. When customer will go to Payment again this line in ***Portal Payments List*** will be finished.

If payment is enabled on B2B then there will be added VAT to the order on **Finalize Order** page.

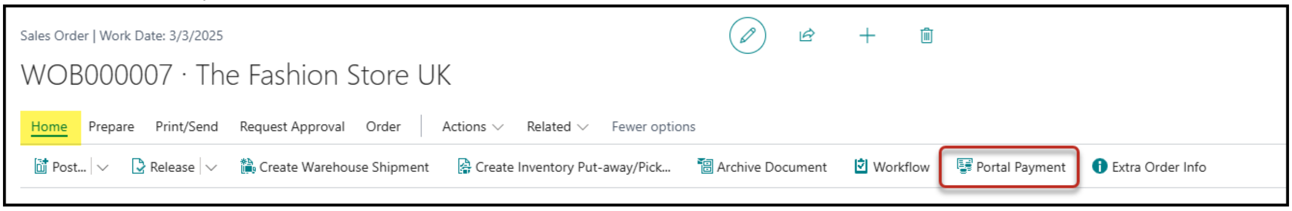


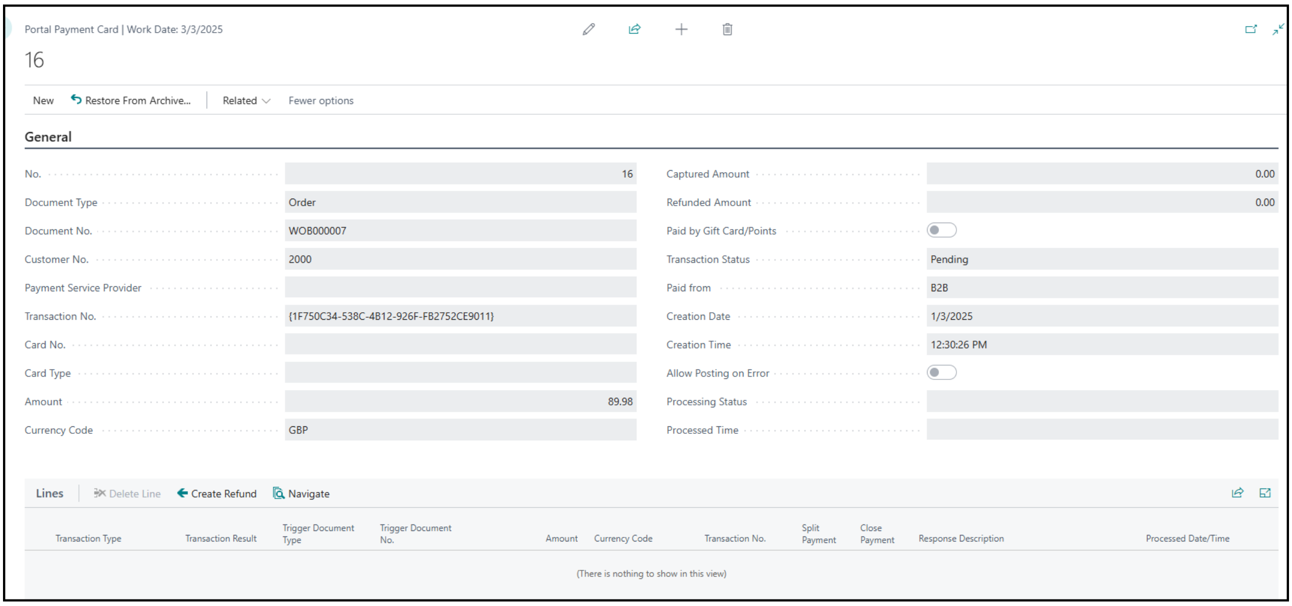
If an Order has been paid, then it will not be possible to reopen it for editing anymore on B2B.

Note

Order Type Presale must be considered to have ***Skip Credit Card Payment*** field set to *TRUE* (payment not available on Finalize Order page on B2B). This is because of the presale nature, where order conditions can be modified in the future.

Payment details can be seen in ***Portal Payment*** card which can be opened from ***Sales Order*** card, ***Home, Portal Payment***.

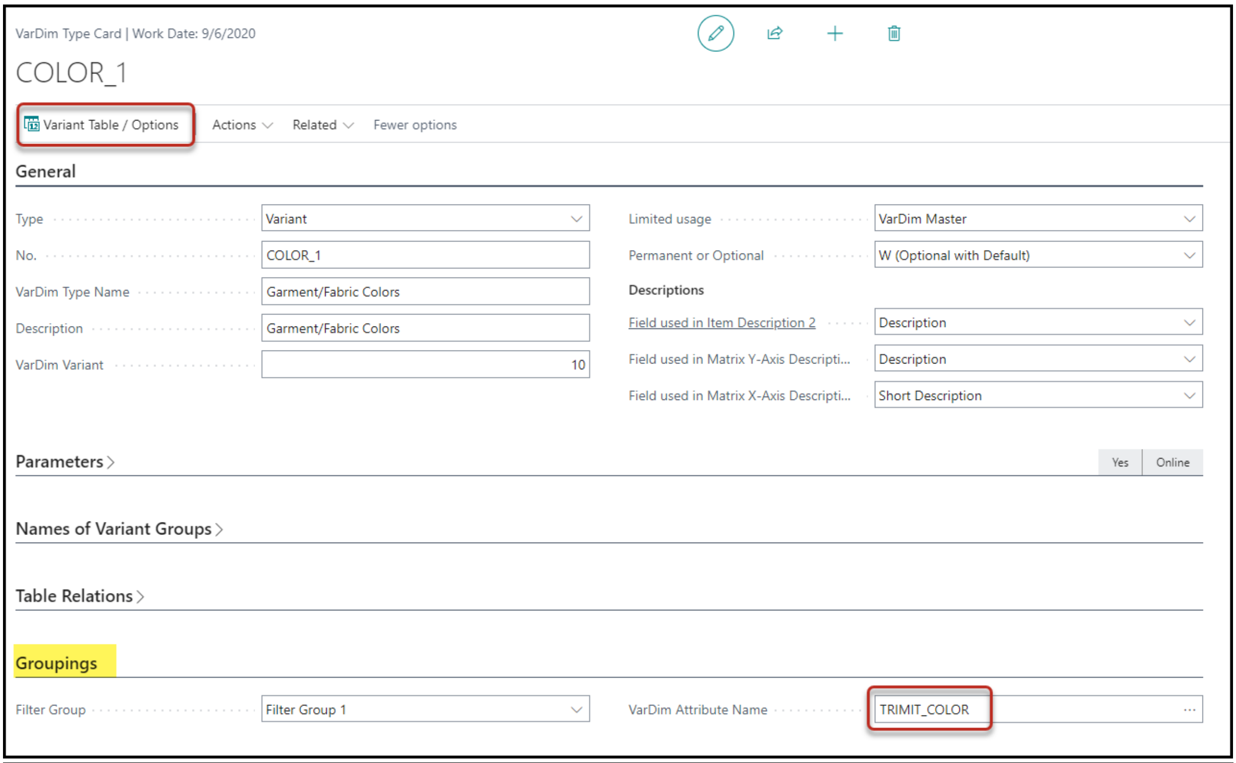


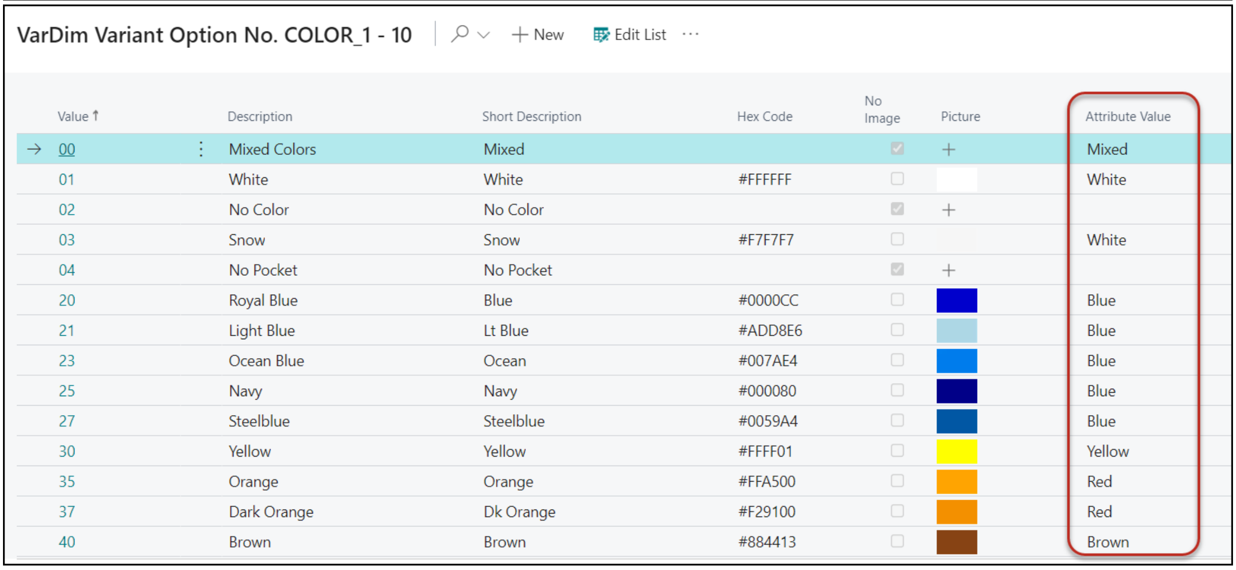

Portal Payment Card | Work Date: 3/3/2025
16
New
Restore From Archive...
Related
Fewer options
General
No.
16
Document Type
Order
Document No.
WOB000007
Customer No.
2000
Payment Service Provider
Transaction No.
{1F750C34-538C-4B12-926F-FB2752CE9011}
Card No.
Card Type
Amount
89.98
Currency Code
GBP
Captured Amount
0.00
Refunded Amount
0.00
Paid by Gift Card/Points
Transaction Status
Pending
Paid from
B2B
Creation Date
1/3/2025
Creation Time
12:30:26 PM
Allow Posting on Error
Processing Status
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)

Filter Groups/Item Attributes in VarDim Types

The field **Filter Group** in the VarDim Types (**Search** *VarDim Type*) has almost lost his influence on the Filters on the Portals.

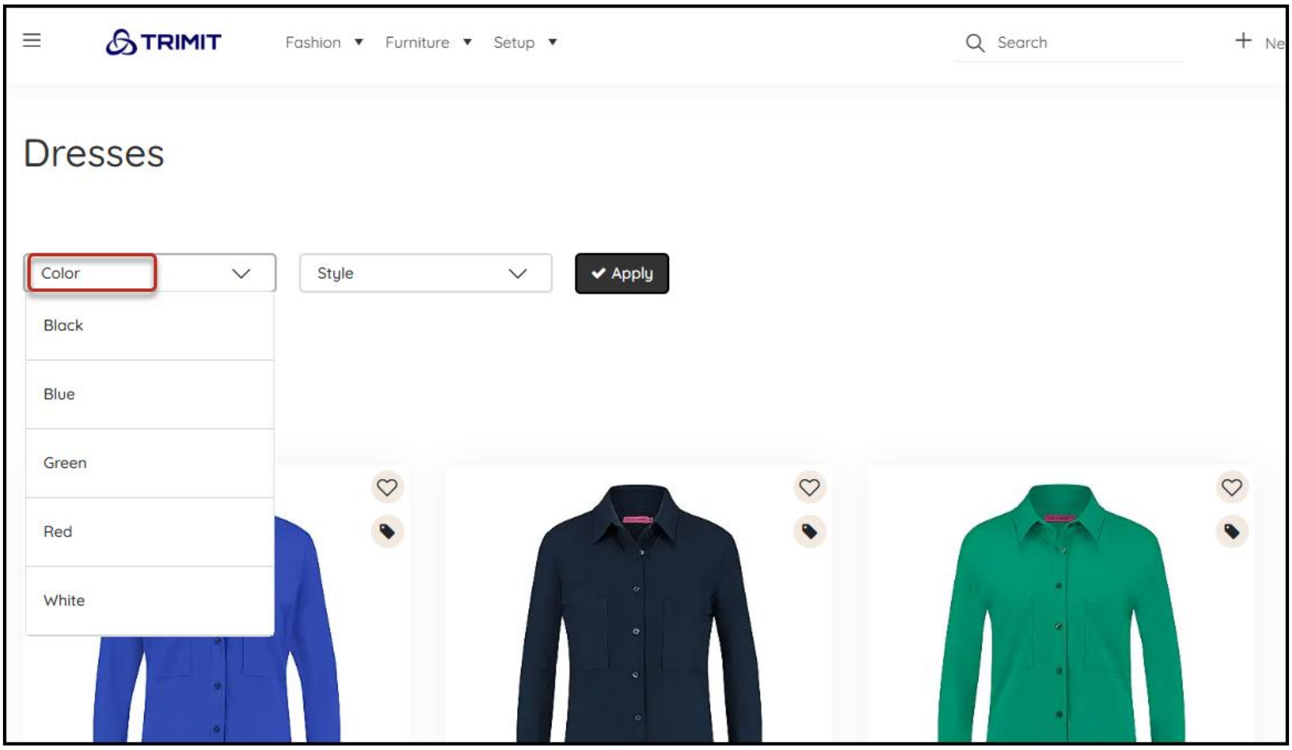
Filters on the Portals are now initiated by the Business Central **Item Attributes,** which can be attached to Masters, Items and Variants of VarDim Types (in case you have filled the **VarDim Attribute Name** in the VarDim Type). I.e., an **Item Attribute** with **Type** *Option* for Colors, could be setup and connected to a VarDim Type, so it can be used as a Filter on the Portals:





Value	Description	Short Description	Hex Code	No Image	Picture	Attribute Value
00	Mixed Colors	Mixed		☑	+	Mixed
01	White	White	#FFFFFF	☐		White
02	No Color	No Color		☑	+	
03	Snow	Snow	#F7F7F7	☐		White
04	No Pocket	No Pocket		☑	+	
20	Royal Blue	Blue	#0000CC	☐		Blue
21	Light Blue	Lt Blue	#ADD8E6	☐		Blue
23	Ocean Blue	Ocean	#007AE4	☐		Blue
25	Navy	Navy	#000080	☐		Blue
27	Steelblue	Steelblue	#0059A4	☐		Blue
30	Yellow	Yellow	#FFFF01	☐		Yellow
35	Orange	Orange	#FFA500	☐		Red
37	Dark Orange	Dk Orange	#F29100	☐		Red
40	Brown	Brown	#884413	☐		Brown

In the Product Overview, you can click the specific Filter field, and see the possible Filter Options:



For the **Color** it is based on the VarDim Type *COLOR_1* with the **VarDim Attribute Name**.
But these Products also have **Item Attributes** filled for *STYLE*, so also that Filter is shown.
The Filters shown depend on the **Item Attributes** that have been used for the Products in this Product Overview page.