



WHITE PAPER

E-commerce Setup in Business Central

TRIMIT version: **24.2**

Date: **April 2, 2025**

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

The pages

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

The Pages

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

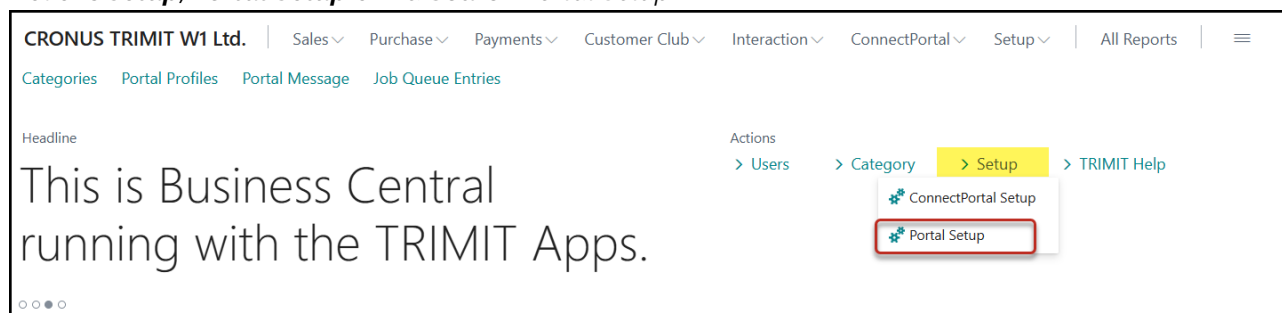
The reports

6038101	<i>trm Create B2B Author. Code</i>
6038129	<i>trm Batch Delete ASI Document</i>

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

General	
Points Item No.	B2C_POINT01
Registration Level	Level 0
Points from Level	Level 0
Portal Payment Tolerance (LCY)	0,10
Payment Tolerance G/L Account	9280
Fee G/L Account	6840
Payment Difference in Exchange	9285
Gift Card Currency Tolerance	0,10
Payment Gen. Journal Template	WEBRCPT
Payment Gen. Journal Batch	DEFAULT
B2C Responsibility Center	
Capture Payment by Invoicing	☒
Payment Integration	Instant
Payment Notification User ID	

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

Payment Processing

Order Cleanup Active

Archive Order Threshold

4 minutes

Exclude Availability Threshold

2 minutes

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

Advanced Sales Integration

Delete Posted Portal Sales Documents On Sales Invoice Posting ▾

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

Data Feed Setup

Brand Mapping Global Dimension 1 ▾

Age Group Attribute Id 25 ▾

Gender Attribute Id 24 ▾

Age Group Attribute Name Data-Feed-Age-Group

Gender Attribute Name Data-Feed-Gender-Group

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:

Options  		
Is set in the Demo Company for:		
Description		
→	Brand Code	= Global Dimension 1
	Season Code	= Global Dimension 2
	Design	= Item Statistics Group
	Item Group	= Item Statistics Group 2
	Gender	= Item Statistics Group 3
	Item Statistics Group 4	
	Item Statistics Group 5	

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*.

Item Attributes | Work Date: 9/6/2020

[New](#)
[Edit List](#)
[Delete](#)
[Edit](#)
[View](#)
[Item Attribute Values](#)

Name ↑	Type	Values	Blocked
Color	Option	Red,Orange,Yellow,Green,Blue,Violet,Purpl...	☐
✓ Data-Feed-Age-Group	Option	newborn,infant,toddler,kids,adult	☐
→ ✓ Data-Feed-Gender-Group	Option	male,female,unisex	☐
Depth	Decimal	—	☐
Height	Decimal	—	☐
Material Description	Text	—	☐

Related, Multiple Bank Accounts Setup

[Actions](#)
[Related](#)

[Multiple Bank Accounts Setup](#)

Multiple Bank Accounts Setup | Work Date: 9/6/2020

[Search](#)
[New](#)
[Edit List](#)
[Delete](#)

Currency Code ↑	Country/Region Code ↑	Portal Payment Service Provider ↑	Account Type	Account No.
→	:		G/L Account	
			G/L Account	
			Bank Account	

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.

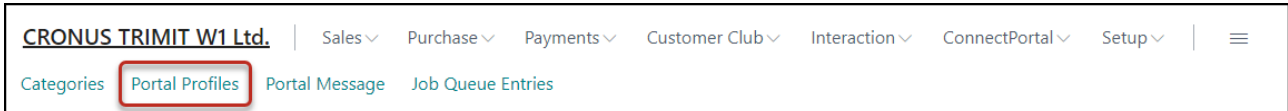
Portal Profiles

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.

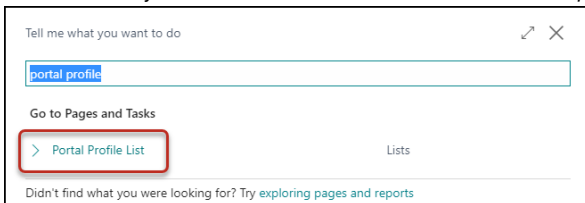
The **B2C Webshop Profile** is described in document **White Paper - TRIMIT B2C Webshop Setups in Business Central**.

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**:



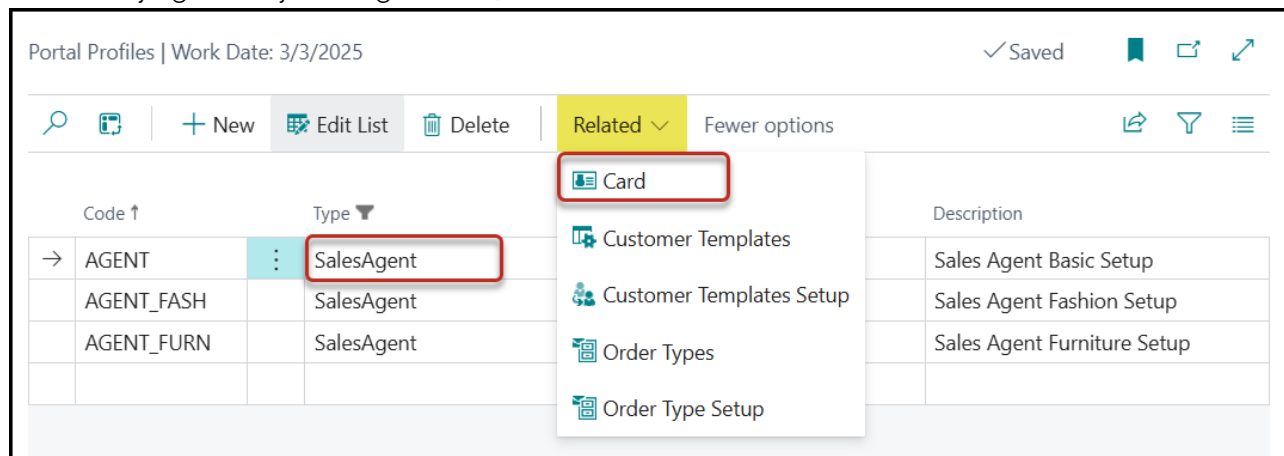
Portal Profiles: All ▾			Search	+ New	Delete	Edit List	Related ▾	Fewer options
Code ↑		Type	Description					
AGENT	:	SalesAgent	Sales Agent Basic Setup					
AGENT_FASH		SalesAgent	Sales Agent Fashion Setup					
AGENT_FURN		SalesAgent	Sales Agent Furniture Setup					
B2B		BusinessToBusiness	B2B Basic Setup					
B2B_FASH		BusinessToBusiness	B2B Fashion Setup					
B2B_FURN		BusinessToBusiness	B2B Furniture Setup					
B2C		BusinessToConsumer	Webshop Basic Setup					
INSITE		InSite	InSite Setup					
SUPPLIER		BusinessToSupplier	Supplier Basic Setup					

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

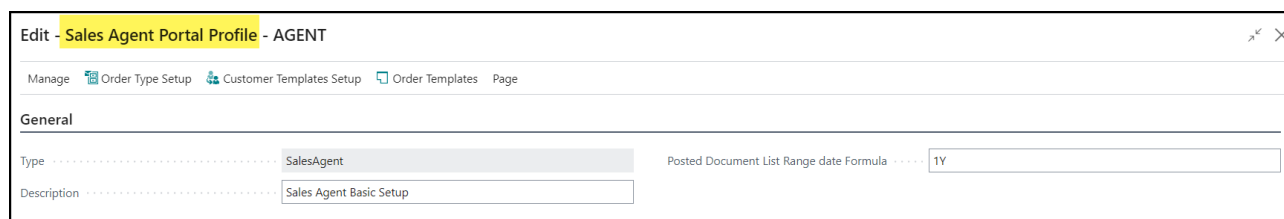
To open the Sales Agent Portal Profile (called *AGENT* in our Demo Company) page click on **Code AGENT**.

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*.

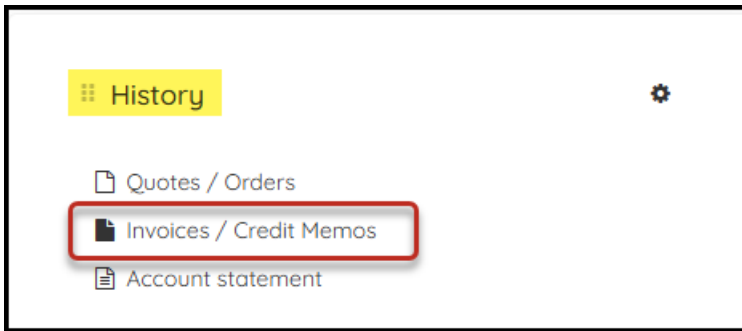
Description

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 Today's 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 X
TRIMIT Development AS_TRIMIT_24.2.20.93 > src > src > AL PortalSalesDocHandTemp.Table.al
415 #endif
1598 {
1614     begin
1628         if not skipPostingDateFilter_loc then begin
1629             if format(portalProfile_loc."Posted Doc. List Date Formula") = '' then
1631                 else
1632                     dateRange_loc := CalcDate(portalProfile_loc."Posted Doc. List Date Formula", Today);
1633                     salesInvHeader_loc.setfilter("Posting Date", '%1..', dateRange_loc);
1634                 end;
1635                 Pf_SetPostedInvoiceFilters(salesInvHeader_loc);
1636                 salesInvHeader_loc.SetAutocalcFields("Amount Including VAT", "Remaining Amount");
1637                 if salesInvHeader_loc.FindSet then
1638                     repeat
1639                         Clear(salesDocumentTemp_loc);
1640                         salesDocumentTemp_loc.TransferFields(salesInvHeader_loc);
1641
2567     /// <summary>
2568     /// This publisher will allow a more specific filter on the Sales Invoice Header eg. a filter on posting date -Y1 or like
2569     /// minimizing the set will create a better performance on portals.
2570     /// </summary>
2571     /// <param name="salesInvHeader_loc"></param>
2572     [IntegrationEvent(false, false)]
2573     local procedure Pf_SetPostedInvoiceFilters(var salesInvHeader_loc: Record "Sales Invoice Header")
2574     begin
2575     end;
2576
```

FastTab Customer

Customer	
Customer Newsletter	AGENT
Customer Nos.	CUSTWEB
Disallow Creation of New Customer	☐
Allow Customer Detail Edit	☒
Sales Channel	SA
Max. No. of Overdue Entries	

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**)

Sales & Receivables Setup | Work Date: 6-9-2020

Sales & Receivables Setup

Number Series

Customer Nos.	CUST	Canceled Issued Reminder Nos.	
Quote Nos.	S-QUOTE	Fin. Chrg. Memo Nos.	S-FIN
Blanket Order Nos.	S-BLK	Issued Fin. Chrg. M. Nos.	S-FIN+
Order Nos.	S-ORDER	Canceled Issued Fin. Charge Memo N...	

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.

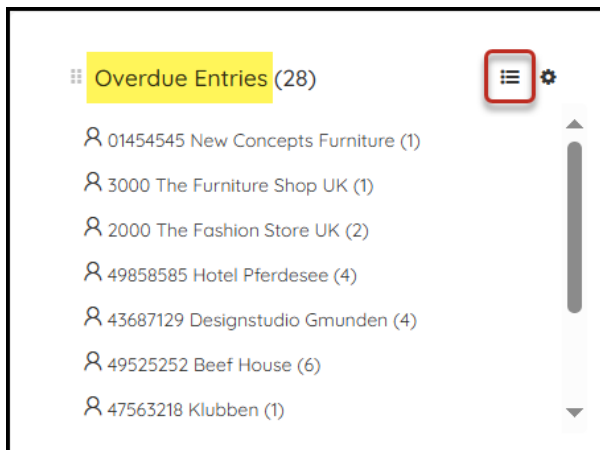
This could also influence Campaign Prices; for more details see **White Paper – TRIMIT Price Group Parameters and Campaigns**.

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 with 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
47565218	Klubben	1
49633663	Autohaus Mielberg KG	3
32656565	Antarcticopy	1
35963852	Heimilisprydi	1

« ‹ 1 2 › »

FastTab Order

Order	
Enable Template Selection	☐
Default Order Type	SA
Order Type Mandatory	☒
Allow Quote to Order	☐
Quote Nos.	S-QUO-WSA
Order Nos.	S-ORD-WSA
Allow Change of Price	☒
Allow Change of Line Discount	☒
Allow Change of Shipment Date on Sales Header	☒
Allow Line Comments	☒
Comments Code	

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.

New order

Customer

The Fashion Store UK (2000)

Order type

Sales Agent Portal Orders

START NEW ORDER

Select an order type



SALES AGENT PORTAL ORDERS



SPRING/SUMMER CURRENT YEAR PRESALES



FALL/WINTER CURRENT YEAR PRESALES



AFTERSALES

USE AN ORDER TEMPLATE

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.

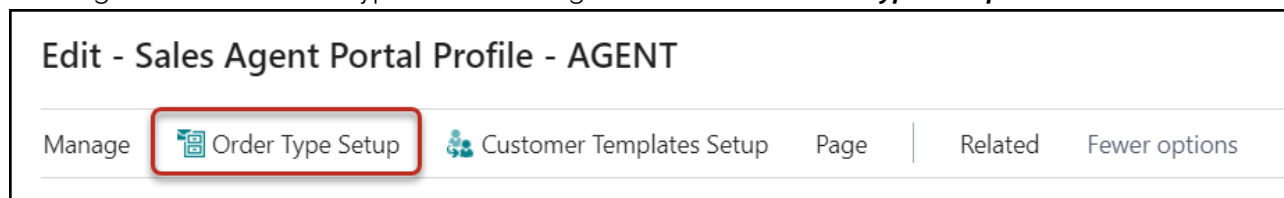
When setting this field to *TRUE* you will have to go to the **Order Type** card in TRIMIT and under FastTab **Portal** set the field **Show on Web** = *TRUE*.

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.

The screenshot shows the 'Profile Order Type Relations' table. The table has the following columns: Portal Profile ID, Order Type, Order Type Description, and Alternative Sorting. The table is filtered for 'AGENT' in the Portal Profile ID column. The table is sorted by Alternative Sorting in ascending order.

Portal Profile ID	Order Type	Order Type Description	Alternative Sorting
AGENT	02SS_CY_PRE	Spring/Summer Current Year Presales	2
AGENT	03FW_CY_PRE	Fall/Winter Current Year Presales	3
AGENT	10AFTERSALES	Aftersales	4
AGENT	SA	Sales Agent Portal Orders	1

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.

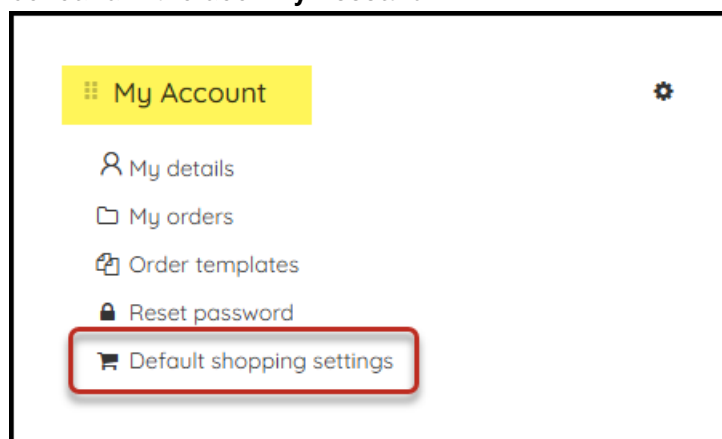
If this field is set to **FALSE**, then the filter will be removed and both Orders with and without Order Type will be shown.

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**.

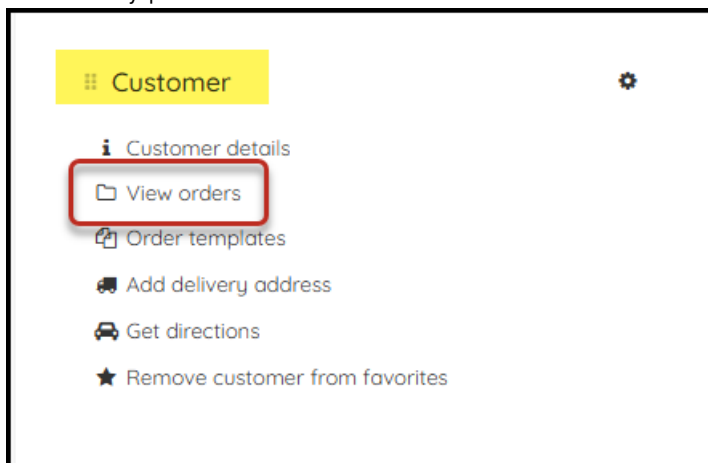
It is also possible to set the default **Order Type** via the **Default shopping settings** of the SA, which can be found in the dock **My Account**:



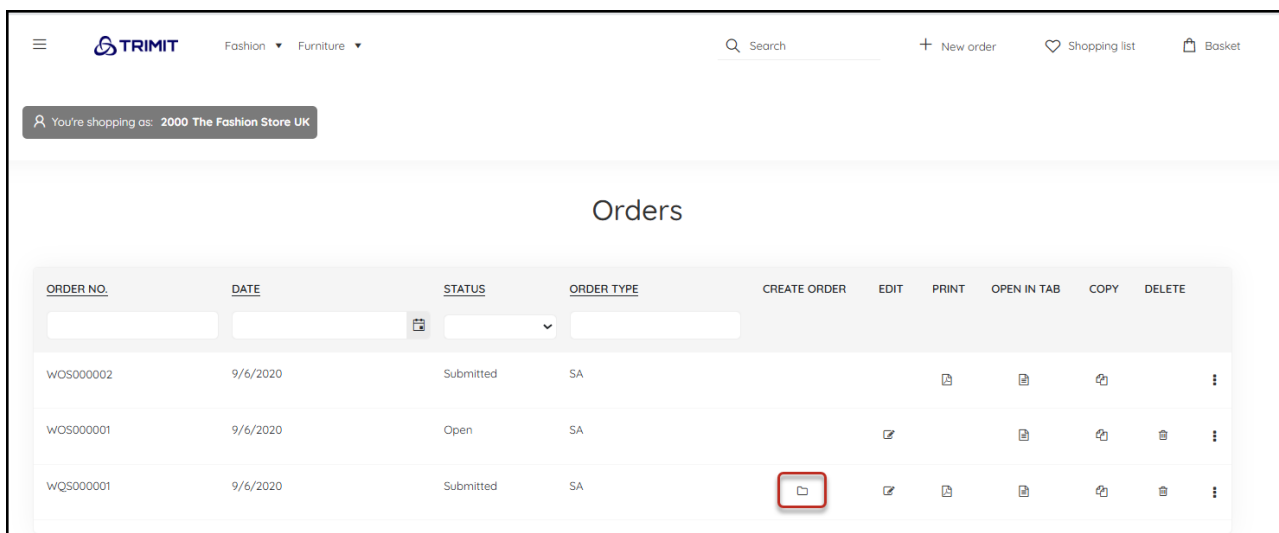
Allow Quote to Order

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.



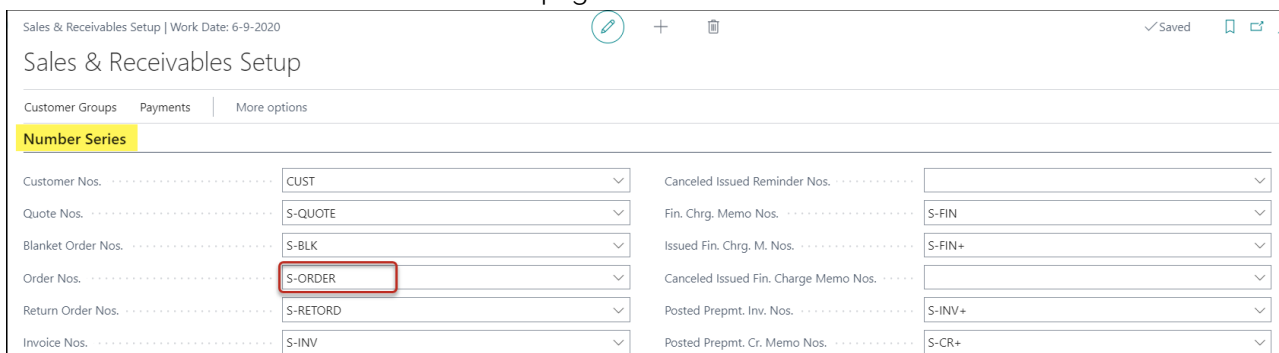
The Sales Quote document in the **Orders** list on SA looks as follows:



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

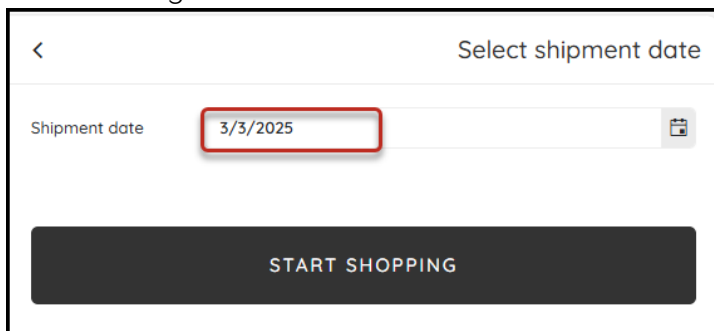
Keep in mind, that the Unit Price will then always override the different Unit Prices based on Search Tables or Formulas in case of a Matrix; the Unit Price you have on the record in the Table 7002 will then become the price for all the Colors/Sizes/Variants.

Allow Change of Line Discount

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

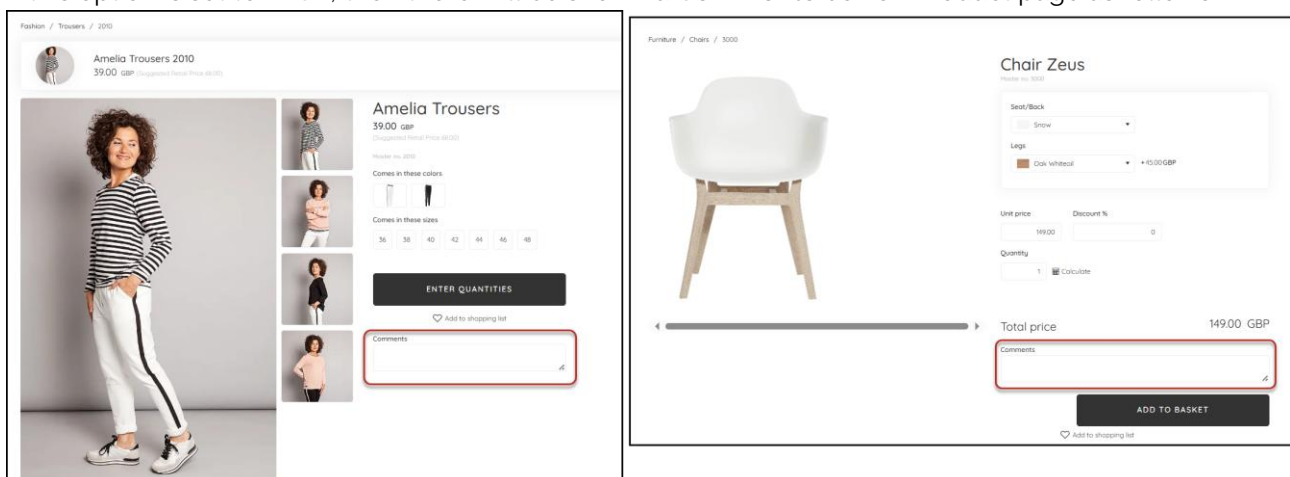
Allow Change of Shipment Date on Sales Header

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 the **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) <i>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.</i> (2) <i>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.)</i> 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.

Fullscreen ☐ Paste to all

	36	38	40	42	44	46	48
White 01 Amount 0 pcs							
Black 99 Amount 0 pcs							

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.

Fullscreen ☐ Paste to all

	36	38	40	42	44	46	48
White 01 Amount 0 pcs	7 pcs	13 pcs	18 pcs	15 pcs	12 pcs	6 pcs	10 pcs
Black 99 Amount 0 pcs	0 pcs	2 pcs	5 pcs	3 pcs	4 pcs	3 pcs	3 pcs

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*:

Fullscreen ☐ Paste to all

	XS	S	M	L	XL	XXL	3XL
Royal Blue 20 Amount 0 pcs		13 pcs	25 pcs	26 pcs	12 pcs	6 pcs	0 pcs
Light Blue 21 Amount 0 pcs	1 pcs	1 pcs	1 pcs	1 pcs	1 pcs	1 pcs	0 pcs
Yellow 30 Amount 0 pcs	0 pcs	0 pcs	0 pcs	0 pcs	0 pcs	0 pcs	0 pcs
Orange 35 Amount 0 pcs	0 pcs	25 pcs	43 pcs	44 pcs	26 pcs	10 pcs	1 pcs

If set to *FALSE*:

Fullscreen ☐ Paste to all

	XS	S	M	L	XL	XXL	3XL
Royal Blue 20 Amount 0 pcs	0 pcs	13 pcs	25 pcs	26 pcs	12 pcs	6 pcs	0 pcs
Light Blue 21 Amount 0 pcs	1 pcs	1 pcs	1 pcs	1 pcs	1 pcs	1 pcs	0 pcs
Yellow 30 Amount 0 pcs	0 pcs	0 pcs	0 pcs	0 pcs	0 pcs	0 pcs	0 pcs
Orange 35 Amount 0 pcs	0 pcs	25 pcs	43 pcs	44 pcs	26 pcs	10 pcs	1 pcs

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*:

20109938
Stock
2 pcs 12 pcs 27 pcs
15/04/2025 20/05/2025

White 01
Amount 0 pcs
Black 99
Amount 1 pcs

	36	38	40	42	44	46	48
White 01	7 pcs	13 pcs	18 pcs	15 pcs	12 pcs	6 pcs	10 pcs
Black 99	25 pcs	1	5 pcs	3 pcs	4 pcs	3 pcs	3 pcs

If set to *Week*:

20109938
Stock
2 pcs 12 pcs 27 pcs
week 16 week 21

White 01
Amount 0 pcs
Black 99
Amount 1 pcs

	36	38	40	42	44	46	48
White 01	7 pcs	13 pcs	18 pcs	15 pcs	12 pcs	6 pcs	10 pcs
Black 99	25 pcs	1	5 pcs	3 pcs	4 pcs	3 pcs	3 pcs

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.

20109938
Stock
2 pcs

12 pcs 27 pcs
15/04/2025 20/05/2025

White 01
Amount
0 pcs
Black 99
Amount
0 pcs

Size	36	38	40	42	44	46	48
White	7 pcs	13 pcs	18 pcs	15 pcs	12 pcs	6 pcs	10 pcs
Black	25 pcs	2 pcs	5 pcs	3 pcs	4 pcs	3 pcs	3 pcs

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.

20109938
Stock
1 pcs

11 pcs 26 pcs
15/04/2025 20/05/2025

White 01
Amount
0 pcs
Black 99
Amount
10 pcs

Size	36	38	40	42	44	46	48
White	7 pcs	13 pcs	18 pcs	15 pcs	12 pcs	6 pcs	10 pcs
Black	25 pcs	10 pcs	5 pcs	5 pcs	4 pcs	3 pcs	3 pcs

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

The screenshot shows the TRIMIT interface for managing a matrix. At the top, there are buttons for 'Fullscreen', 'Paste to all', 'In stock', 'Delivery', 'Clear matrix', and 'Show cell details'. Below these, the matrix for '20109940' is displayed. The matrix shows stock levels and shipment dates for different quantities. A red arrow points to the 'Show cell details' button.

Stock	15 pcs	30 pcs
5 pcs	15/04/2025	20/05/2025

The matrix also shows a grid of quantities and their corresponding shipment dates:

Quantity	36	38	40	42	44	46	48
White 01	39 GBP	39 GBP	39 GBP	39 GBP	39 GBP	39 GBP	39 GBP
Amount	7 pcs	13 pcs	18 pcs	15 pcs	12 pcs	6 pcs	10 pcs
Black 99	25 pcs	1 pcs	25	3 pcs	4 pcs	3 pcs	3 pcs
Amount	25 pcs	1 pcs	5 pcs	3 pcs	4 pcs	3 pcs	3 pcs

When ordering **25** pieces, the **Shipment Date** will become May 20, 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	
→ ☒	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 if 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.

Fullscreen
☐
☒
Paste to all
☐
Clear matrix

21002001
Stock

None

		XS	S	M	L	XL	XXL	3XL
Royal Blue 20 Amount 0 pcs	X <input checked="" type="button" value="X"/> X							
Light Blue 21 Amount 0 pcs	X X X							
Yellow 30 Amount 0 pcs	X X X							

Fullscreen
☐
☒
Paste to all
☐
Clear matrix

21002001
Stock

X-Axis

		XS	S	M	L	XL	XXL	3XL
Royal Blue 20 Amount 0 pcs	X <input checked="" type="button" value="X"/> X	35.99 GBP	35.99 GBP	35.99 GBP	35.99 GBP	35.99 GBP	35.99 GBP	35.99 GBP
Light Blue 21 Amount 0 pcs	X X X							
Yellow 30 Amount 0 pcs	X X X							

Fullscreen
☐
☒
Paste to all
☐
Clear matrix

21002001
Stock

Y-Axis

		XS	S	M	L	XL	XXL	3XL
Royal Blue 20 Amount 0 pcs 35.99 GBP	X <input checked="" type="button" value="X"/> X							
Light Blue 21 Amount 0 pcs 35.99 GBP	X X X							
Yellow 30 Amount 0 pcs 35.99 GBP	X X X							

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

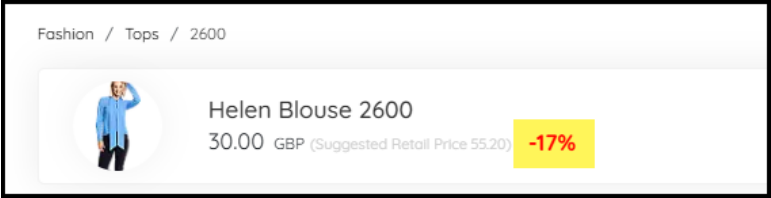
This field determines on which Level the Campaign Prices should be evaluated to determine if there are Campaign Prices, and then it can be shown at the Master or in the Matrix on the Product Page that there is a Campaign Price. The various Levels are mainly for performance reason.

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.
--------	--

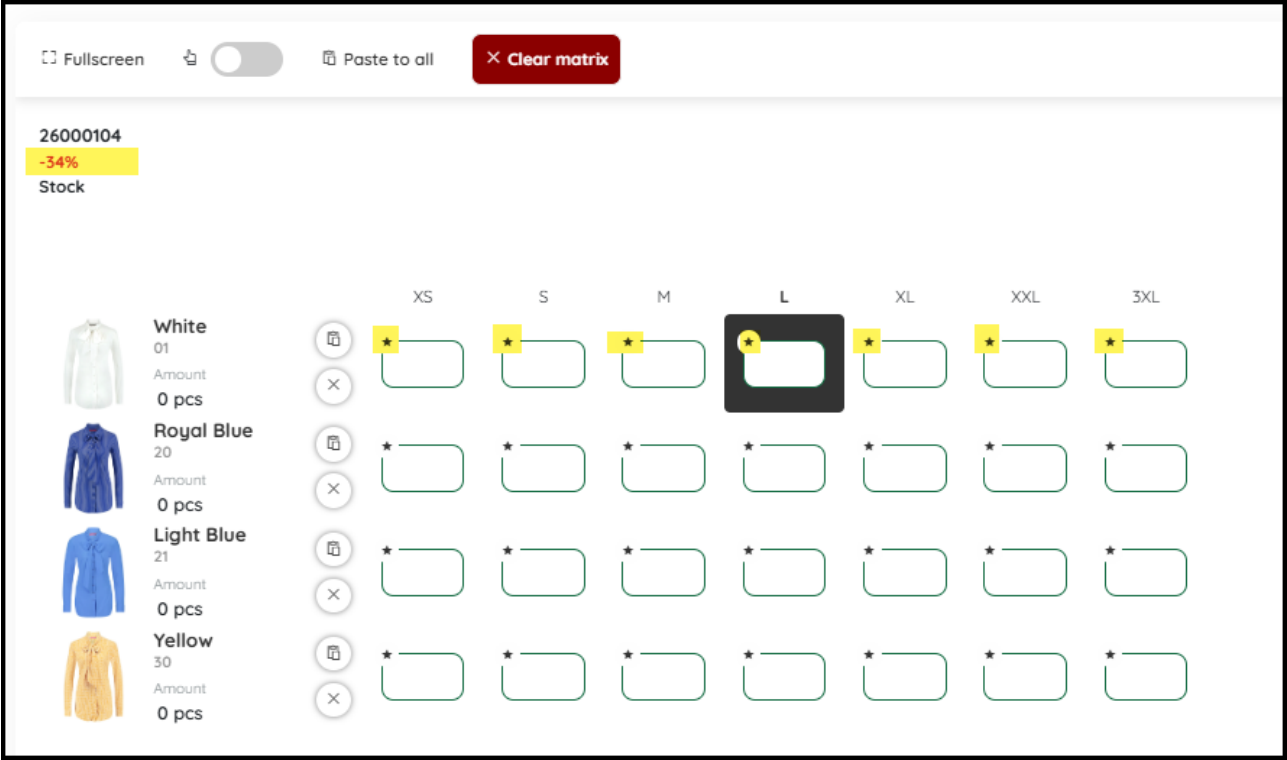
Y-Axis	This option will evaluate for every Y-Axis (typically a Color) if there is a Campaign Price. In that case, on the Product Page, all the Columns in the Matrix (typically the Sizes) for that Y-Axis will get an icon above the cell of the Matrix to indicate there is a Campaign Price.
X-Axis	This option 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="LineAwesomelcons">true</value>
```

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

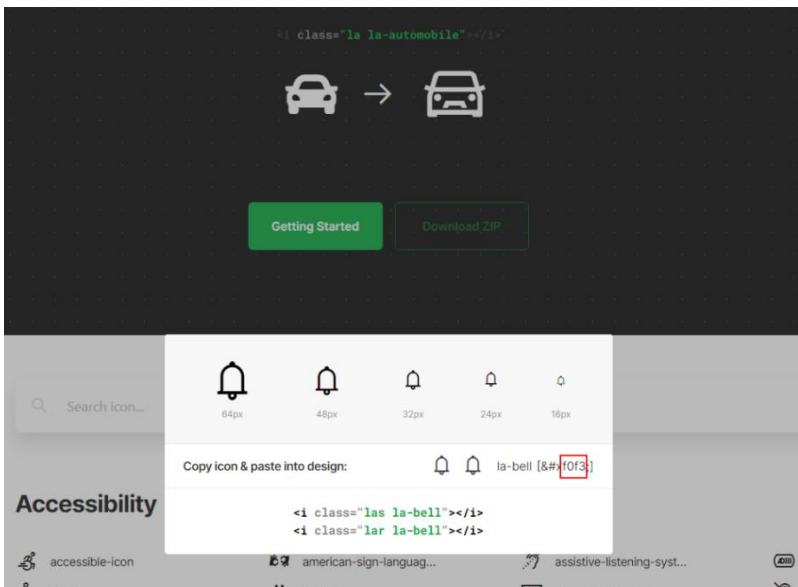
The screenshot shows the Trimit System File Manager interface. On the left is a sidebar with navigation options: CONTENT, USERS, SYSTEM, and SETTINGS. The main area displays a file tree structure. The path **Custom > portals > bs5 > portals** is highlighted with red boxes. The file **_variables.optional.scss** is selected in the right-hand pane. Below the file manager, a code editor displays the content of the selected file. The code includes comments and SCSS syntax. A red box highlights the line **\$strm-matrix-campaign-marker: '\f005';** at line 53.

```

33
34 // This depends on a custom color added in modify-maps.scss (or the optional version for customers)
35 // It cannot simply be a color; it needs to be a color, so classes are built for bg, text and context (light or dark)
36 // $strm-header-bg: davey;
37
38
39
40 // =====
41 // Port existing my-custom-variables.scss code here: start
42 // =====
43 //
44 //
45 // Your code goes here...
46 //
47 //
48 // =====
49 // Port existing my-custom-variables.scss code here: end
50 // =====
51
52
53 $strm-matrix-campaign-marker: '\f005';
54
55 // Portals ($strm-) variable overrides per portal
56 // Note: the commented syntax is by design - do not try to uncomment!
57 // These files do not exist, so please create them if you need them
58 // Optional syntax means they only get imported if they exist
59 /* <zml>
60
61 // b2c
62 <zml:if test="$portalId = 'B2C'" >
63   @import "_portals-vars-b2c.optional.scss";
64 </zml:if >

```

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:

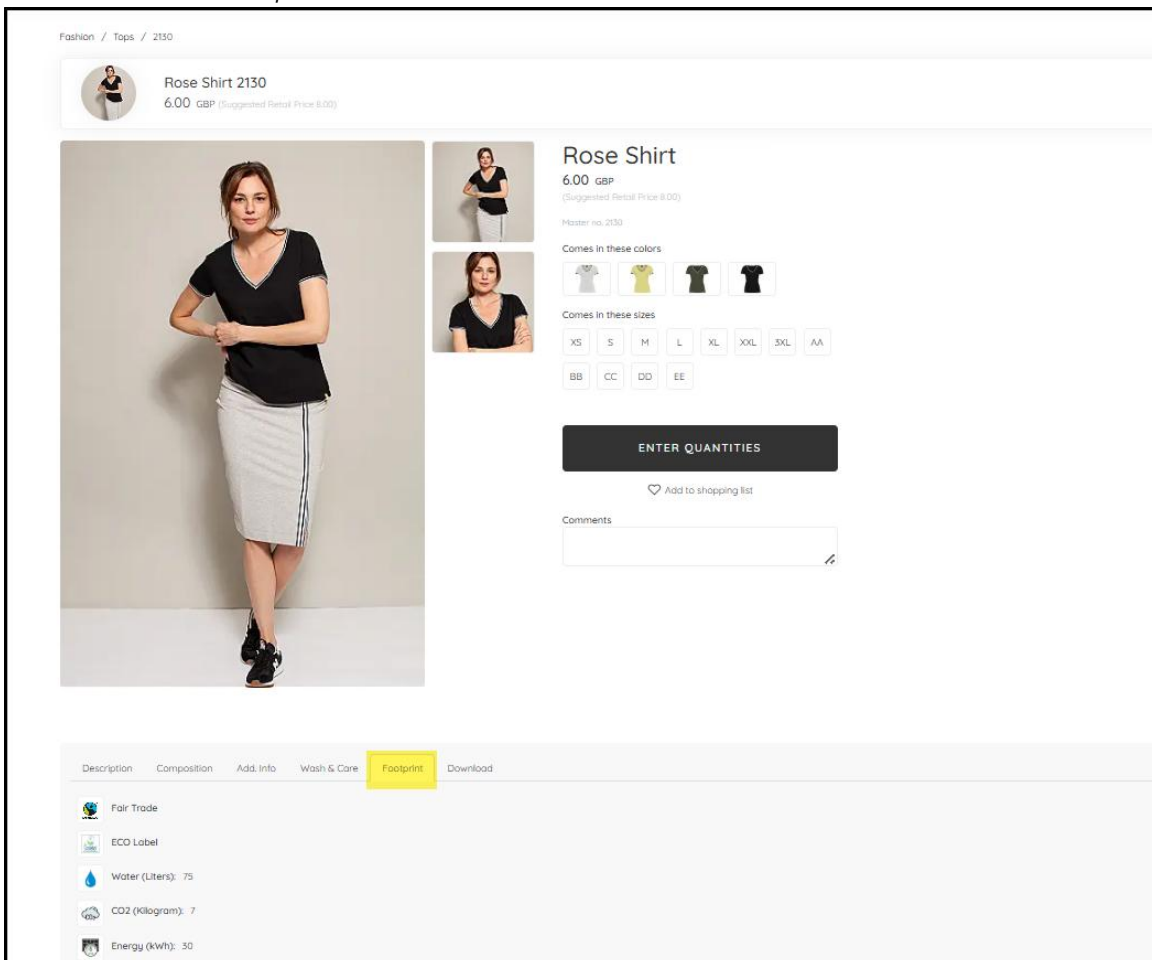


On a brand new TRIMIT Portals installation, the small Asterix (*) icons are present by default. Make sure to put and save new theme value, so the small Asterix (*) icon appears in the Matrix on Product page on SA and B2B:

`<value id="LineAwesomelcons">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

Check-Out			
Allow Alternate Ship-to Code	☒	Create Web Orders as	Order
Allow Change of Ship-to Code	☒	Signature in Checkout	☒
Skip Confirmation E-Mail	☐	Instant ASI Posting	☒
Allow Skip E-Mail Online	☐	Posting Lines Threshold	100
Edit Order Confirmation E-Mail	☒	Availability Check on Submit	☐

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.

The image shows two screenshots from the SA Portal. The left screenshot is the 'Select shipment date and delivery address' form, which includes fields for Shipment date, Choose Address, Name, Name2, Address, Address2, Postcode, City, Country, Phone, Email, and Contact. A red box highlights the 'Choose Address' field. The right screenshot is the 'Finalize Order' page, which displays a table of items (Olivia Trousers) and a summary of the order (Total order price: 37.00 GBP). Below the table, there are sections for Customer, Billing, and Delivery. A red box highlights the 'Change delivery address' dropdown menu in the Delivery section.

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*.

Delivery Address

Delivery no.

Name

Name2

Address

Address2

Postcode

City

Country

Phone

Email

Contact

Finalize Order

ITEM	DETAILS	QUANTITY	TOTAL
1	480 Lg/Blauer - Production 480 Lg/Blauer - Production 10.00 GBP	1	10.00 GBP
Total order price			35.99 GBP

Customer

The Fashion Store UK

Customer no: 2000

20 South Row

Weybridge

WID 30G

London

Great Britain

GB 20000000

01753 610000

Billing

The Fashion Store UK

20 South Row

Weybridge

WID 30G

London

Great Britain

GB 20000000

01753 610000

Delivery

Admin TRIMET

Ship-to code: 2000-00

Storgerstrassen 88

9999

Denmark

55555555

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**

Customer

Customer details

View orders

Order templates

Add delivery address

Get directions

Remove customer from favorites

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.

Order confirmation email

Choose from options below or enter your own email

☐ sales@cronuscorp.net

☒ purchase@contoso.com

Email

☐ Do not send confirmation email

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.

Portal

Order Type Card

Category AGENT

Show on Web

CPO Availability Check Method Available

Create Web Orders as

Instant ASI Posting

Posting Lines Threshold 0

Disable Signature in Checkout

Skip Credit Card Payment

Signature in Checkout

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

Signature

Signature name

Name

Signature

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**.

Sales Order | Work Date: 3/3/2025

WOS000020 · The Fashion Store UK

Home

Prepare

Print/Send

Request Approval

Order

Actions

Related

Fewer options

Post...

Release

Create Warehouse Shipment

Create Inventory Put-away/Pick...

Archive Document

Workflow

Portal Payment

Extra Order Info

Order Extra Info - Order · WOS000020

Open Document

Page

General >

Delivery >

Customer >

InStore B2C >

Signature

Signature Name

KBI

Signature



Close

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:

 TRIMIT

WHITE PAPER: E-COMMERCE SETUP IN BUSINESS CENTRAL

Date: April 2, 2025

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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

Page Actions							
Dashboard		5	...	Order Document		4	...
Customer		4	...	Order History		1	...

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.

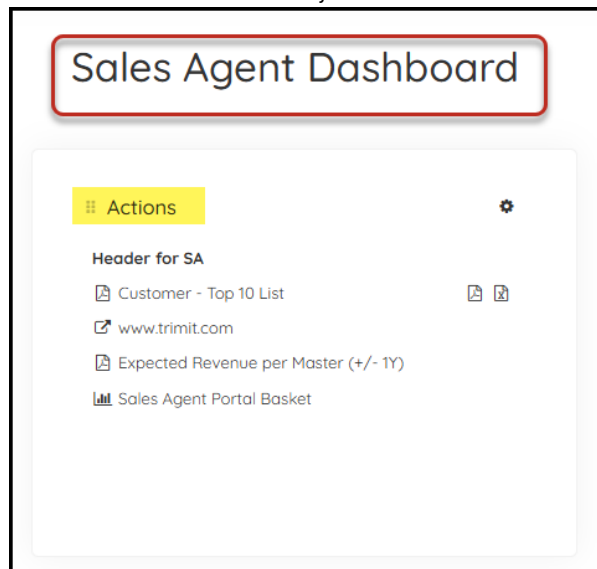
Custom Parameter

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**.

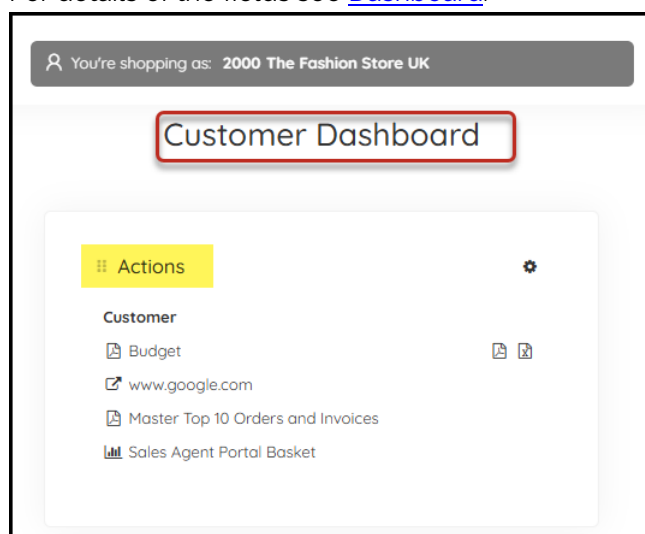


Customer

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.

Edit - Portal Action Setup				
Search + New Edit List Delete				
Type	No. / Link	Name		Custom Parameter
Header		Header on Customer		
Report	8	Budget		
Link	www.google.com	www.google.com		
Sales Statistics	MASTERTOP10	Master Top 10 Orders and Invoices		
→ Statistics Overview	SA_BASKET	Sales Agent Portal Basket		

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.

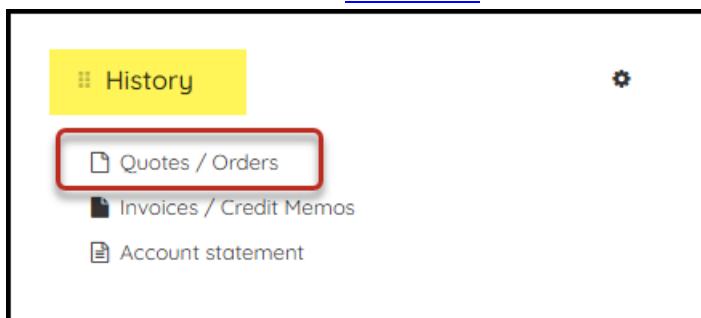
Click on the **Assist-Edit** button of the field to open the **Portal Action Setup** page.

Edit - Portal Action Setup

Search + New Edit List Delete

Type	No. / Link	Name	Custom Parameter
→ Header		Order header	
Sales Statistics	CUSTOMERTOP10	Customer Top 10 Invoices	
Statistics Overview	SA_BASKET	Sales Agent Portal Basket	
Sales Statistics	MASTERTOP10	Master Top 10 Orders and Invoices	
Link	https://trimit.com	https://trimit.com	

For details of the fields see [Dashboard](#).



DOCUMENT TYPE	ORDER NO.	DATE	DOCUMENT AMOUNT	COPY	OPEN AS PDF	OPEN IN TAB
Order	WOS000015	3/3/2025	975.00			
Order	WOS000014	3/3/2025	390.00			
Order	WOS000013	3/3/2025	39.00			

Order

Customer Top 10 Invoices
 Master Top 10 Orders and Invoices
 Sales Agent Portal Basket
 www.trimit.com

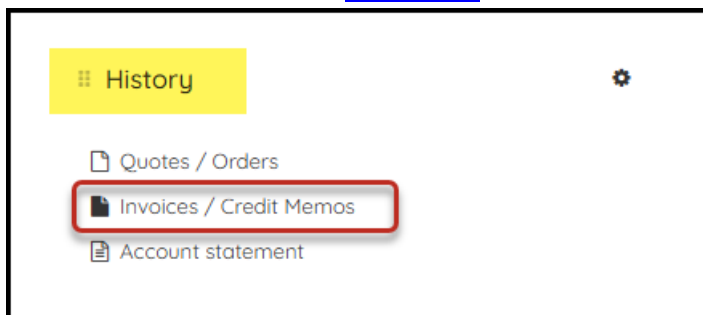
Order History

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.

Portal Action Setup				
Type	No. / Link	Name	Custom Parameter	
Header		Order History		
Statistics Overview	SA_BASKET	Sales Agent Portal Basket		
→ Sales Statistics	MASTERTOP10	Master Top 10 Orders and Invoices		

For details of the fields see [Dashboard](#).



Invoices / Credit Memos						
DOCUMENT TYPE	DOCUMENT NO.	DATE	SHIPMENT NO.	DOCUMENT AMOUNT	OPEN AS PDF	OPEN IN TAB
Invoice	103068	3/3/2025	102079	44.99		
Invoice	103061	12/31/2019	102072	87,500.00		
Invoice	103058	12/10/2019	102069	14,845.88		

FastTab Statistics

Statistics	
Basket Statistics	SA_BASKET
Period Length for Customer Aging	1M
Customer Aging Starting Date Formula	-CY-1M

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 Heimilisprydli	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	
01445444 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 Englands 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

Edit - Sales Agent Portal Profile - AGENT

Manage

Order Type Setup

Customer Templates Setup

Order Templates

Page

Order Type Setup

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

Profile Order Type Relations | Work Date: 1-1-2022 ✓ Saved

Search + New Edit List Delete Order Type Card More options

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.

Portal Customer Templates | Work Date: 1-1-2022 ✓ Saved

Search + New Edit List Delete

Customer Template ↑
→ CUSTOMER01
CUSTOMER02
CUSTOMER03

Page

Edit - Sales Agent Portal Profile - AGENT

Manage

Order Type Setup

Customer Templates Setup

Order Templates

Page

◀ Previous ▶ Next

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

✓ Saved

Search Manage Document Templates Actions Related Fewer options

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*.

Order Details

Order no.

WOS000021

Order type

SA

External document no.

Order comment

Mark 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.

Order Details

Order no.

WOS000021

Order type

SA

External document no.

Order comment

Template for Master 2100

Mark as order template

☒ Remember to save a comment for your order template

BACK

CLOSE ORDER 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.

My Account

My details

My orders

Order templates

Reset password

Default shopping settings

Order Templates						
GLOBAL	COMMENT	ORDER TYPE	ORDER NO.	DATE	EDIT	DELETE
	Template for Master 2100	SA	WOS000021	1/3/2025		

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.

You're shopping as: 2000 The Fashion Store UK

Order Details

Order no.

WOS000631

Order type

SA

External document no.

Order comment

Order Template - dresses

Mark as order template

☒ Remember to save a comment for your order template

Global

☒

BACK

CLOSE ORDER TEMPLATE

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**:

CRONUS TRIMIT W1 Ltd.

Sales

Purchase

Payments

Customer Club

Interaction

ConnectPortal

Setup

Portal Sales Documents

Portal Sales ...ts with Errors

Portal Sales D...ent Templates

Posted Portal Sales Documents

Portal Sales Document Templates:

All

Delete

Document

Templates

Document Type	No.	Order Type	Global Order Template	Salesperson Code	User E-Mail
Order	: WOS000021	SA	☐	JR	

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

Document Type	No.	Order Type	Salesperson Code
Order	WOS000021	SA	JR

Card

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

Skip Post...	Type	No.	Description	Description 2	Quantity	Qty per Unit of Measure	Shipment Date	Period Code	Unit Price	Line Discount %	Line Discount Amount	Line Amount	Brand Code	Season Code
→	Matrix	2100	Lily Blouse		3	1	1/3/2025		35.99	0	0.00	107.97		
→	Item	21002002	Lily Blouse	Royal Blue.S	1	1	1/3/2025		35.99	0	0.00	35.99		
→	Item	21002003	Lily Blouse	Royal Blue.M	1	1	1/3/2025		35.99	0	0.00	35.99		
→	Item	21002004	Lily Blouse	Royal Blue.L	1	1	1/3/2025		35.99	0	0.00	35.99		

Comments

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

Sales Comment List Work Date: 3/3/2025		
CPO · Order · WOS000021 · 0 · 10000		
No. ↑ ▼	Date	Comment
→ WOS000021	1/3/2025	Template for Master 2100

Templates

Portal Sales Document Templates: All ▼			Delete	Document ▼	Templates ▼
Document Type	No.	Order Type			
Order	WOS000021	SA			JR

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.

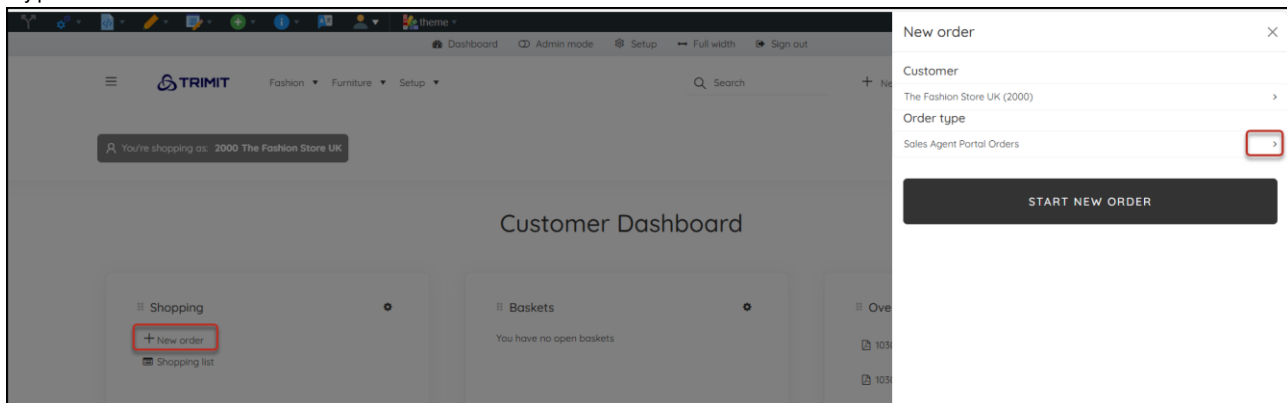
If this is done – then button **Close order template** is shown instead of **Next** button.

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.

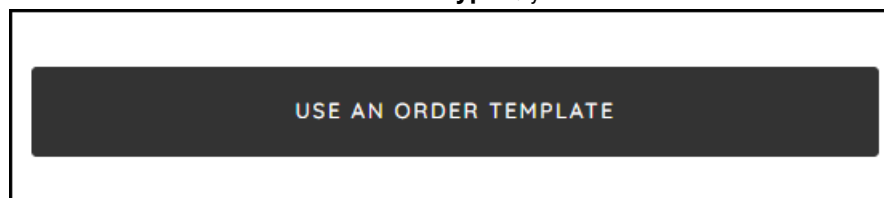
Create Order based on Template Order

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**:

New order

Customer

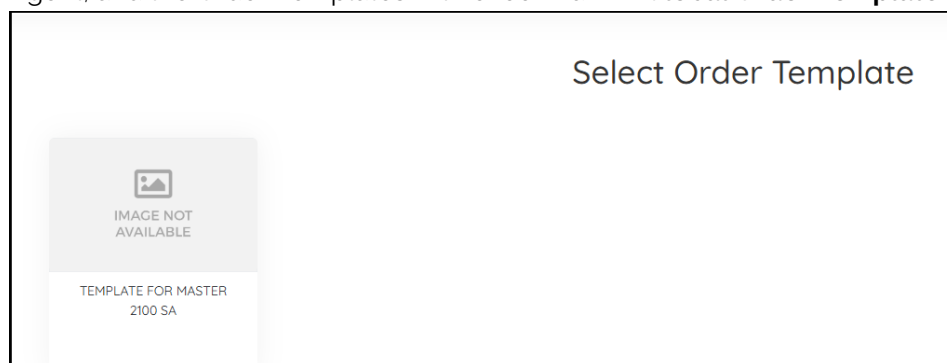
The Fashion Store UK (2000)

Order type

Use an order template

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.

Basket

Basket

Statistics

ITEM	DETAILS	QUANTITY	TOTAL
> 	Lily Blouse 2100 35,99 GBP	3	107.97 GBP Edit Remove
Total order price			107.97 GBP
Order no.		WOS000022	
Order type		SA	
Order date		1/3/2025	

DELETE ORDER

COPY

NEXT

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

Salespeople/Purchasers | Work Date: 3/3/2025

[+ New](#)
[Manage](#)
[Home](#)
[Salesperson](#)
[Related](#)
[Fewer options](#)

[Create Interaction...](#)
[Send Email](#)
[Relations](#)
[Commission](#)

Code ↑	Name	Commission %	Phone No.	Exchange Rate Commission Calculation	Calculation Base Commission	Exchange Rate Commission Payment
AH	Annette Hill	0.00		Exchange Rate	% Before Discount	Exchange Rate
BD	Bart Duncan	0.00		Exchange Rate	% Before Discount	Exchange Rate
CE	Christine Everton	0.00		Exchange Rate	% Before Discount	Exchange Rate
DC	Debra L. Core	0.00		Exchange Rate	% Before Discount	Exchange Rate
JR	John Roberts	5.00		Exchange Rate	% Before Discount	Exchange Rate
LM	Linda Martin	0.00		Exchange Rate	% Before Discount	Exchange Rate

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**.

Salespeople/Purchasers | Work Date: 3/3/2025

[+ New](#)
[Manage](#)
[Home](#)
[Salesperson](#)
[Related](#)
[Fewer options](#)

[Statistics](#)
[Dimensions-Multiple](#)

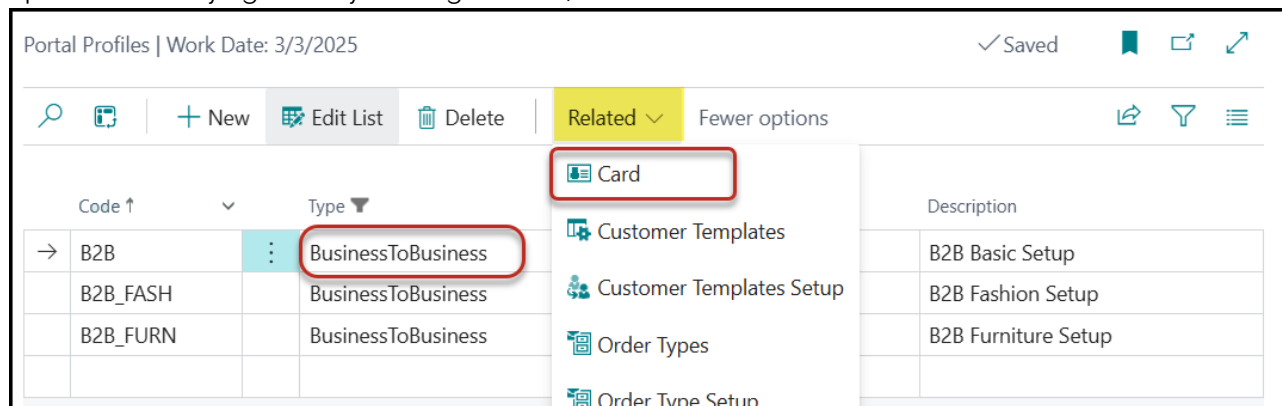
[Salesperson](#)
[Customer Relations](#)
[Show Customer Relations](#)

[History](#)
[Other](#)

Code ↑	Name	Commission %	Exchange Rate Commission Calculation	Calculation Base Commission	Exchange Rate Commission Payment
AH	Annette Hill	0.00	Exchange Rate	% Before Discount	Exchange Rate
BD	Bart Duncan	0.00	Exchange Rate	% Before Discount	Exchange Rate
CE	Christine Everton	0.00	Exchange Rate	% Before Discount	Exchange Rate
DC	Debra L. Core	0.00	Exchange Rate	% Before Discount	Exchange Rate
JR	John Roberts	5.00	Exchange Rate	% Before Discount	Exchange Rate
LM	Linda Martin	0.00	Exchange Rate	% Before Discount	Exchange Rate

B2B Portal Profile

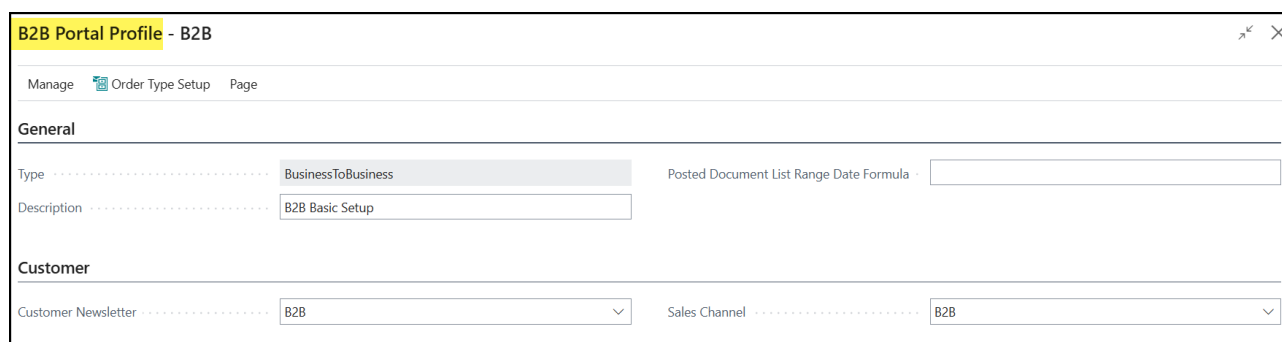
To open the B2B Portal Profile (called *B2B* in our Demo Company) page click on **Code B2B**.
Or click + **New** to create a new Portal Profile with **Type BusinessToBusiness** in the list, after which you can open the underlying Card by clicking **Related, Card**.



Code	Type	Description
B2B	BusinessToBusiness	B2B Basic Setup
B2B_FASH	BusinessToBusiness	B2B Fashion Setup
B2B_FURN	BusinessToBusiness	B2B Furniture Setup

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



B2B Portal Profile - B2B

Manage Order Type Setup Page

General

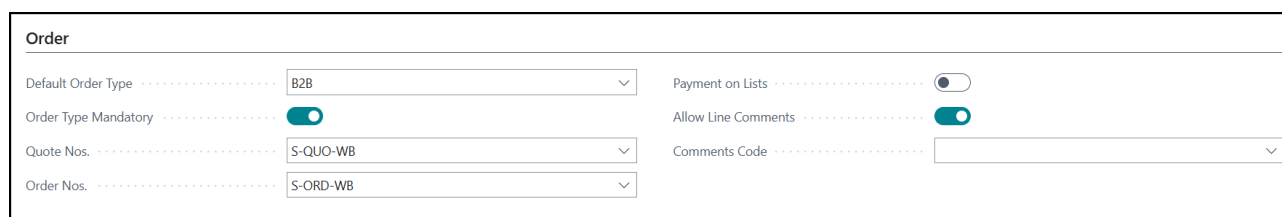
Type: BusinessToBusiness
Description: B2B Basic Setup

Customer

Customer Newsletter: B2B
Sales Channel: B2B

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

FastTab Order



Order

Default Order Type: B2B
Order Type Mandatory: ☒
Quote Nos.: S-QUO-WB
Order Nos.: S-ORD-WB

Payment on Lists: ☐
Allow Line Comments: ☒
Comments Code:

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](#).

My Account

- My details
- My orders**
- Reset password
- Add delivery address
- Quotes / Orders
- Invoices / Credit Memos
- Account statement

My Account

- My details
- My orders
- Reset password
- Add delivery address
- Invoices / Credit Memos**
- Account statement
- Quotes / Orders

Overdue Entries (2)

103054 (2019-12-20)	31,250.00 GBP	
103058 (2020-01-10)	14,845.88 GBP	

Orders

ORDER NO.	DATE	STATUS	ORDER TYPE	EDIT	PRINT	OPEN IN TAB	DELETE	PAY	FILES
W05000015	3/3/2025	Submitted	10AFTERSALES						
W05000014	3/3/2025	Submitted	10AFTERSALES						
W05000013	3/3/2025	Submitted	10AFTERSALES						

Invoices / Credit Memos

DOCUMENT TYPE	DOCUMENT NO.	DATE	SHIPMENT NO.	DOCUMENT AMOUNT	OPEN AS PDF	OPEN IN TAB	PAY	FILES
Invoice	103068	3/3/2025	102079	44.99				

FastTab Item

Item

Category Structure	B2B	Show Available Dates as	Date
Calculate Prices in Item Menu	☒	Set Item Shipment Date	
Availability Check Method	Available	Allow Change of Delivery Period	☒
Inventory Profile Setup	B2B	Price Info on Matrix	None
Hide Available Qty.	☐	Campaign Calc. Level	Master
Hide Availability Markers	☐	Show Sustainability Data	☒

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) <i>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.</i> <i>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.)</i> 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.

The screenshot shows a stock matrix for item 20002036. The matrix has columns for sizes 36, 38, 40, 42, 44, 46, and 48, and rows for colors Royal Blue and Navy. The cell for size 48 and color Navy is highlighted in green, indicating unlimited stock. The other cells show specific stock quantities (e.g., 3 pcs, 4 pcs, 5 pcs).

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:

The screenshot shows the 'Order Type Card' for 'UNLIMITED'. The 'Availability Check' field is set to 'Skip if No Transactions' and the 'Inventory Profile Setup' field is set to 'ALL'. The 'Sales' section includes fields for Requested Delivery Date, Shipment Date, Item Group, Default Quantity to Ship, Set Ready for Shipping, Set Ready for Invoicing, Sales Price Search Dimension, Unit Price Date Handling, and Unit Price Date.

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

Check-Out

Allow Alternate Ship-to Code

Ship-to Code by Order Start

Allow Customer Detail Edit

Allow Change of Ship-to Code

Allow Direct Consumer Delivery

Create Web Orders as

Order

Skip Confirmation E-Mail

Edit Order Confirmation E-Mail

Signature in Checkout

Instant ASI Posting

Posting Lines Threshold

100

Availability Check on Submit

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*.

Delivery Address

Delivery no.

Admin TRIMIT Stargerstrassen 88 9999 Denmark DK 55555555 deggsy@nesbit.net

Name

Admin TRIMIT

Name2

Address

Stargerstrassen 88

Address2

Postcode

9999

City

Denmark

Country

Denmark

Phone

55555555

Email

deggsy@nesbit.net

Contact

NEXT

After initiating Order

Finalize Order

ITEM	DETAILS	QUANTITY	TOTAL
	KBI Lily Blouse - Production KBI2100 35.99 GBP	1	35.99 GBP
Total order price			35.99 GBP
			Order no. WOB000644 Order type B2B Order date 1/18/2022

Customer

The Fashion Store UK

Customer no.: 2000

20 Savile Row
Mayfair
WC1 3DG
London
Great Britain

📞 60184444

Billing

The Fashion Store UK

20 Savile Row
Mayfair
WC1 3DG
London
Great Britain

Delivery

Admin TRIMIT

Ship-to code: 2000-001

Stargerstrassen 88
9999
Denmark
Denmark

📞 55555555

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.

 **My Account**



 **My details**

 My orders

 Reset password

 Add delivery address

 Quotes / Orders

 Invoices / Credit Memos

 Account statement

My Details

Customer address ✎ Edit

The Fashion Store UK

Customer no.: 2000

20 Savile Row
Mayfair
WC1 3DG
London
Great Britain

Contact: Charley Nelson

Payment terms: Direct Payment

Billing address

The Fashion Store UK

20 Savile Row
Mayfair
WC1 3DG
London
Great Britain

Contact: Charley Nelson

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)

Direct consumer delivery

☒

Name

TRIMIT Solutions A/S

Name2

Address

Toldboden 1

Address2

Postcode

8800

City

Viborg

Country

Denmark

Phone

Email

kbi@trimit.com

Contact

Kitty

START SHOPPING

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**:

Customer	Billing	Delivery 
The Fashion Store UK Customer no.: 2000 20 Savile Row Mayfair WC1 3DG London Great Britain Contact: Charley Nelson	The Fashion Store UK 20 Savile Row Mayfair WC1 3DG London Great Britain	Change delivery address  TRIMIT Solutions A/S Toldboden 1 8800 Viborg Denmark kbi@trimit.com Contact: Kitty

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

Sales Order | Work Date: 3/3/2025

WOB000004 · The Fashion Store UK

Home Prepare Print/Send Request Approval Order Actions Related Fewer options

Post... Release... Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document Workflow Portal Payment Extra Order Info

Shipping and Billing

Ship-to: Custom Address

Code:

Name: TRIMIT Solutions A/S

Address: Toldboden 1

Address 2:

City: Viborg

Post Code: 8800

Country/Region: DK

Phone No.:

Contact: Kitty

Bill-to: Default (Customer)

Location Code: BLUE

Shipment Date: 1/3/2025

Shipping Advice: Partial

Outbound Whse. Handling Time:

Shipping Time:

Late Order Shipping: Yes

Combine Shipments: ☒

Completely Shipped: No

FastTab Actions

Actions

Dashboard: 6 ... Order History: 4 ...

Order Document: 3 ...

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

Statistics

Basket Statistics: SA_BASKET

FastTab Report

Report

Quote Report No.: 6036700

Order Confirmation Report No.: 6036701

Invoice Report No.: 0

Credit Memo Report No.: 0

Return Order Confirmation: 0

Blanket Sales Order No.: 0

Quote Report (ASI): 0

Order Confirmation (ASI): 0

Posted Invoice Report No.: 6036702

Posted Credit Memo Report No.: 6036703

Statement Report No.: 6036650

FastTab Advanced

Advanced

Portal Database Id:

Actions in B2B Portal Profile

Edit - B2B Portal Profile - B2B

Manage Order Type Setup Page

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 filled 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**:

Item	
Category Structure	B2B
Calculate Prices in Item Menu	☒
Availability Check Method	Available
Inventory Profile Setup	B2B
Hide Available Qty.	☐
Hide Availability Markers	☐
Show Available Dates as	Date
Set Item Shipment Date	Earliest Possible

Inventory Profile Setup page:

Code ↑	Description	Locked	Include Inventory	Include Sales Quotes	Include Sales Orders	Include Sales Invoices	Include Sales Blanket Orders	Include Sales Credit Memos	Include Complants	Include Sales Import Lines	Include Production Suggestions	Include Production Orders	Include Transfer Orders	Include Purchase Quotes	Include Purchase Orders	Include Purchase Invoices	Include Purchase Blanket Orders	Include Purchase Credit Memos	Include Intercompany	Location Filter
ALL		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	BLUE
B2B		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	BLUE
B2C		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	BLUE
INVENTORY		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
INVPU		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
INV-SALES		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
INVSALPU		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
INVSALPUPR		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
ISP		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
PRODUCTION		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
PURCHASE		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
SALES		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
SALESAGENT		☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	BLUE

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**)

Sales & Receivables Setup | Work Date: 1-1-2022

Sales & Receivables Setup

Customer Groups Payments More options

Info and Prices

Availability Check

Standard Inventory Profile Setup ALL

Availability Date Format Week

Availability Message Type Notification

Availability Check by Location

Availability Check on Make-To-Order I...

Discounts

Extended Discount Search Automatically per Line

Line Discount Combination

Show Line Discounts of 0 %

Approve Change of Line Discount % Ask if existing Line Discount % is larger than 0 (Defau

Date Management

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

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

Matrix Inventory Profile | Work Date: 1-1-2022

Search Change Transaction Type Update Inventory Profile More options

Options

Type Matrix

Master No. 2130

Y-Axis 01

Y-Axis Title White

Location Filter

Global Dimension 1 Filter

Global Dimension 2 Filter

Profile Type ALL

Show Transaction Type Transaction

Lookup Company

Limit Horizon

Horizon Date

Calculate Assortment Quantity

Transaction	Line Quantity	XS	S	M	L	XL	XXL	3XL	AA	BB	CC	DD	EE
Inventory	15	0	2	3	3	2	2	1	1	0	0	0	1
Sales Quotes	0	0	0	0	0	0	0	0	0	0	0	0	0
Sales Blanket Orders	0	0	0	0	0	0	0	0	0	0	0	0	0

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

Variant 1	Variant Description	Line Quantity	XS	S	M	L	XL	XXL	3XL	AA	BB	CC	DD
30	Yellow		[1]	[2]	[1]	[0]	[1]	[0]	[0]	[0]	[1]	[0]	[0]
65	Lawn Green		[0]	[0]	[0]	[0]	[0]	[0]	[0]	[0]	[0]	[1]	[0]
99	Black		[0]	[2]	[4]	[3]	[1]	[0]	[0]	[0]	[0]	[0]	[1]
01	White		[0]	[0]	[2]	[3]	[2]	[2]	[1]	[1]	[0]	[0]	[0]

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

Order Type Card | Work Date: 1-1-2022

B2B

Related

Sales

Requested Delivery Date		Skip Campaign Unit Prices	☐
Shipment Date		Skip Unit Cost Check Sales	☐
Item Group	*** ITEM GROUP *** (0)	Sales Channel	B2B
Default Quantity to Ship		Availability Check	
Set Ready for Shipping		Location Filter	
Set Ready for Invoicing		Availability Check	
Sales Price Search Dimension		Inventory Profile Setup	
Unit Price Date Handling		Horizon Availability Check	

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

Master Card | Work Date: 1-1-2022

2130 · Rose Shirt

New Process Reports Actions Related Reports Fewer options

New by Wizard

Planning

Purchase		Lead Time Calculation	3M
Vendor No.	2300	Time Final Handling Production	
Vendor Item No.	SH-ROSE	Reduce Production Order Quantity	None
Purch. Unit of Measure	PCS	Process Waste	0
Over-Receipt Code		Scrap %	0
MRP		Lock by Release of Related Order	None
Include in MRP	☒	Material Consumption Method	General
Automatic Replenishment	☐	Material Consumption on Demand	☐
Replenishment System	Purchase	Finishing Method Related Order	Automatically by Shipment
Replenishment Policy	Inventory	Production Order No. Mandatory	☐
Create Related Order Instantly	☐	BOM Information	
MRP Method	Net Requirement	BOM	No

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 screenshot shows the 'Portal Profiles' list interface. At the top, it says 'Portal Profiles | Work Date: 3/3/2025' and 'Saved'. Below the header, there are action buttons: 'New', 'Edit List', 'Delete', and a 'Related' dropdown menu. The 'Related' menu is open, showing options: 'Card', 'Customer Templates', 'Customer Templates Setup', and 'Order Types'. The 'Card' option is highlighted with a red box. In the table below, the 'Type' column has 'BusinessToSupplier' selected, also highlighted with a red box. The 'Description' column shows 'Supplier Basic Setup'.

Code ↑	Type ▼	Description
→ SUPPLIER	BusinessToSupplier	Supplier Basic Setup

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

The screenshot shows the 'Supplier Portal Profile - SUPPLIER' FastTab General settings page. It has a 'Manage' tab and a 'Page' tab. Under the 'General' section, there are four fields: 'Type' (BusinessToSupplier), 'Description' (Supplier Basic Setup), 'Allow Create Additional Comment' (toggle switch), and 'Show Purchase Documents' (dropdown menu set to 'All').

Type	BusinessToSupplier	Allow Create Additional Comment	☒
Description	Supplier Basic Setup	Show Purchase Documents	All

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**.

Select - Group Codes - Additional Comments | 🔍 ⌵ + New 🗒 Edit List ... ⓘ ↗ ✕

Code ↑		Description	Supplier Portal
ACCESS		Accessories Comments	Read
CUSTOMER		Customer Comments	Read
→ DESIGN	⋮	Design Comments	Read
LABEL		Label Comments	No Access
PACKING		Packing Comments	Read
PRODUCTION		Production Comments	Add
PROTO		Prototype Comments	Create
PURCHASE		Purchase Comments	Read
QUALITY		Quality Comments	No Access
SALES		Sales Comments	No Access
WEB		Web Comments	No Access

OK Cancel

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 = <i>Open</i> will be shown.
Only Released	Only Purchase Quotes and Purchase Orders with Status = <i>Released</i> will be shown.

FastTab Actions

Actions

Dashboard 2 ... Master 3 ...

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.

Edit - Portal Action Setup ⓘ ✕

🔍 Search + New 🗒 Edit List 🗑 Delete ⓘ ☰

Type	No. / Link	Name	Custom Parameter
→ Header	⋮	Header on Supplier Dashboard	
Report	8	Budget	

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.

Portal Action Setup

+ New

Edit List

Delete

Type	No. / Link	Name	Custom Parameter
Header		Supplier Actions	
Report	8	Budget	
→ Link	www.trimit.com	www.trimit.com	

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

Products

Products

NO.	DESCRIPTION	DESCRIPTION 2	STATUS CODE	RELATED PURCHASE DOCUMENTS
2000	Olivia Trousers		READY	1
2020	Isla Trousers		READY	1
2030	Ella Trousers		READY	1

Supplier Actions

Budget

www.trimit.com

FastTab Report

Report

Open Documents

Purchase Quote Report No. 404

Purchase Order Report No. 6036730

Pending Documents

Purchase Quote Report (API) 0

Purchase Order Report (API) 0

Product Reports

General Info Report No. 6037200

Additional Info Report No. 6037209

Bill of Materials Report No. 6037204

BOM Report No. 2 0

BOM Report No. 3 0

Measurement Report No. 6037206

Workflow Report No. 0

Product Comments Report No. 6037207

XMLPorts

XMLport No. (Product Data) 0

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

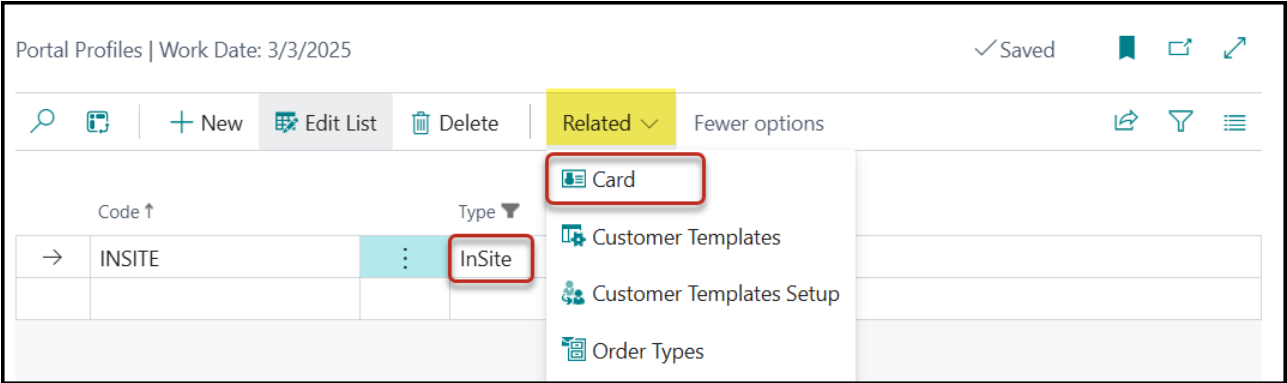
Advanced

Portal Database Id

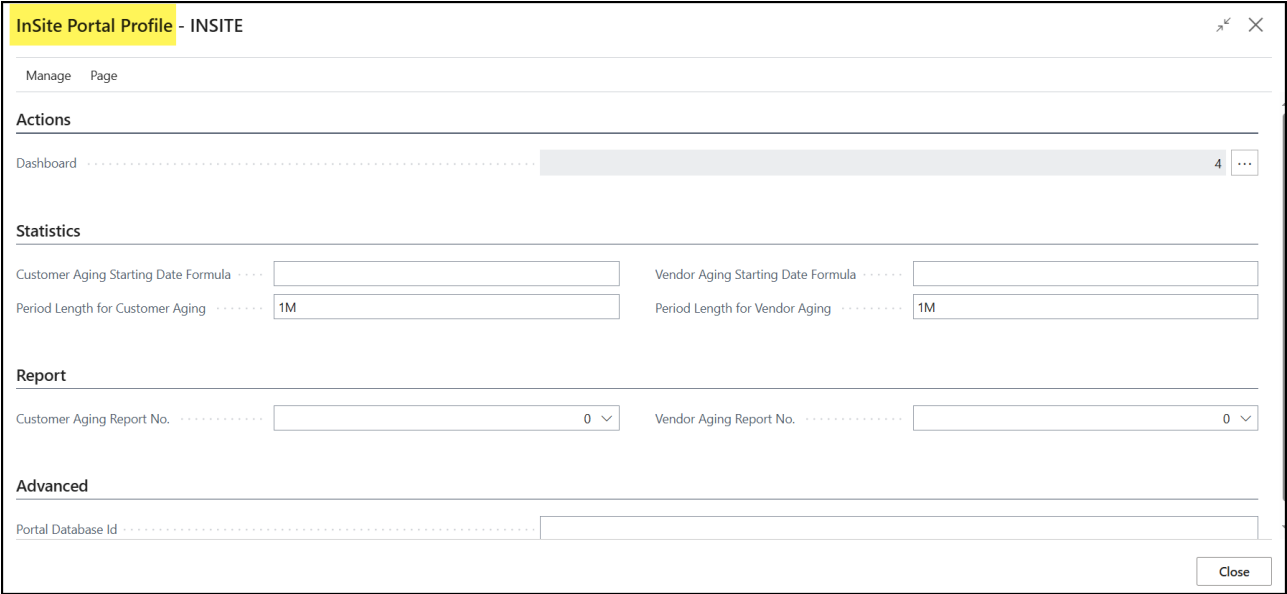
See [FastTab Advanced](#) for the details.

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.



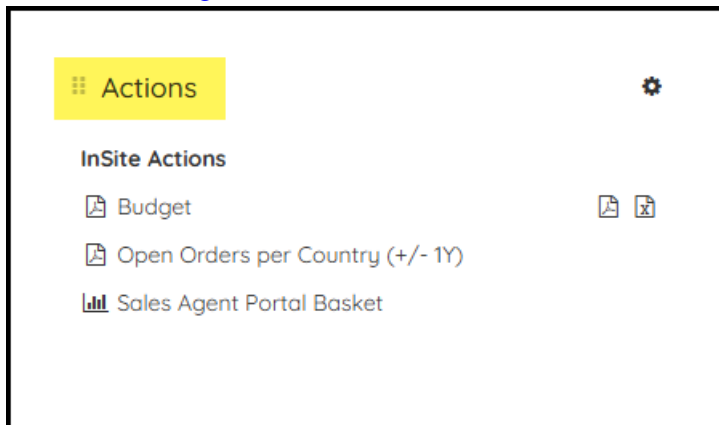
FastTab Actions

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.

Portal Action Setup				
+ New Edit List Delete				
Type	No. / Link	Name	Custom Parameter	
Header		InSite Actions		
Report	8	Budget		
Sales Statistics	COUNTRY	Open Orders per Country (+/- 1Y)		
→ Statistics Overview	SA_BASKET	Sales Agent Portal Basket		

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.

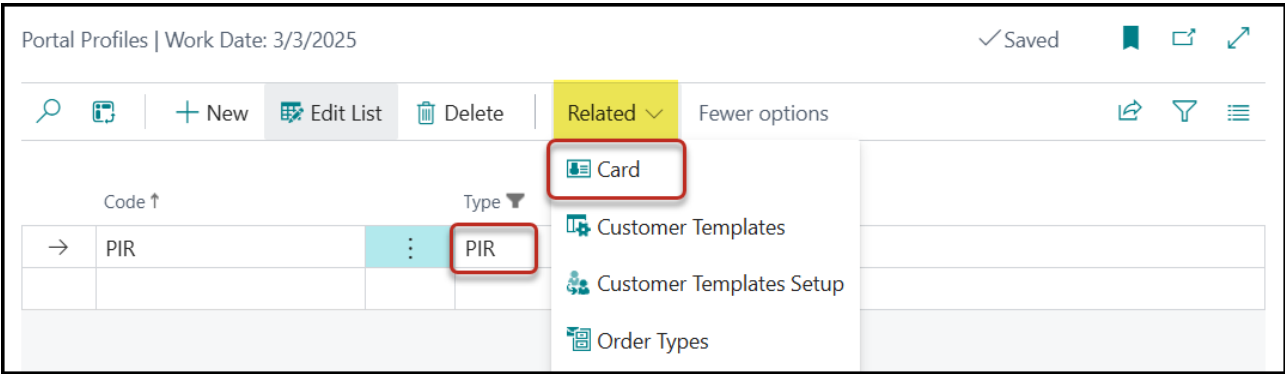
FastTab Advanced

Portal Database Id

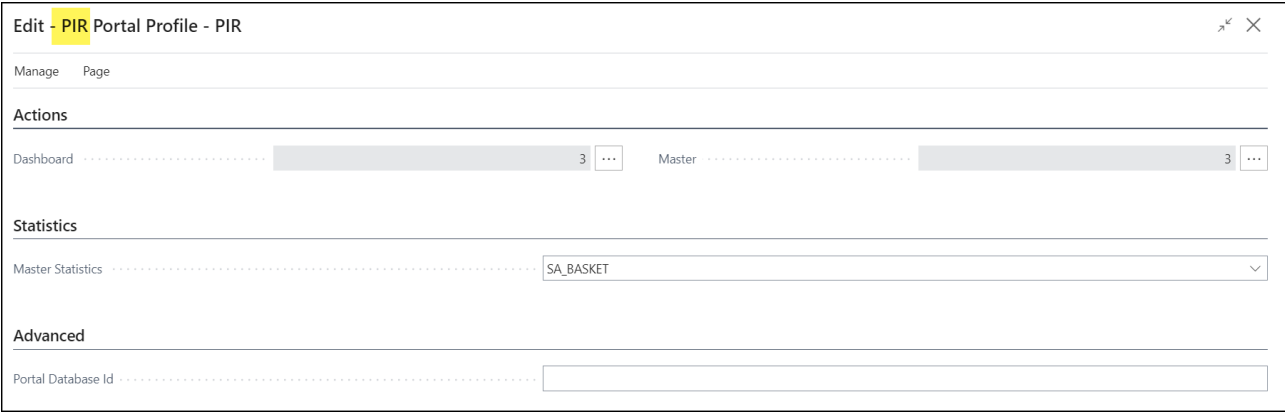
See [Portal Database Id](#) for details.

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**.



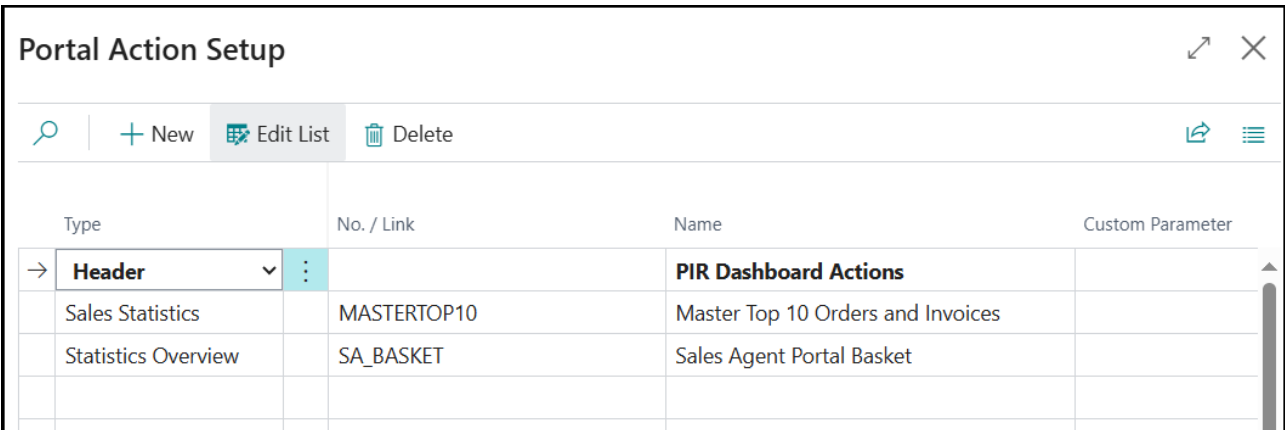
The **Type** and **Description** were already filled in the **Portal Profiles** List. Based on the **Type PIR** the page **PIR Portal Profile** will open.



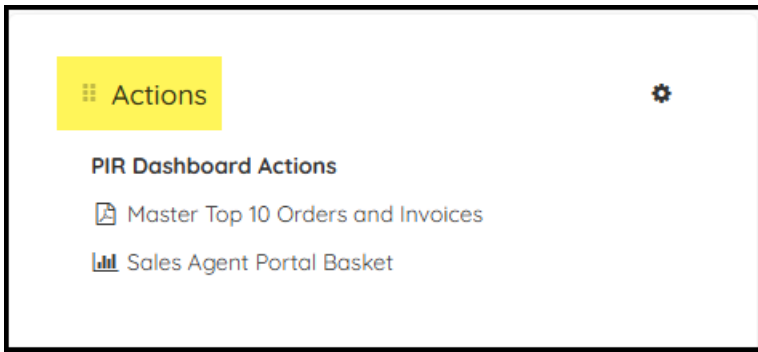
FastTab Actions

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.

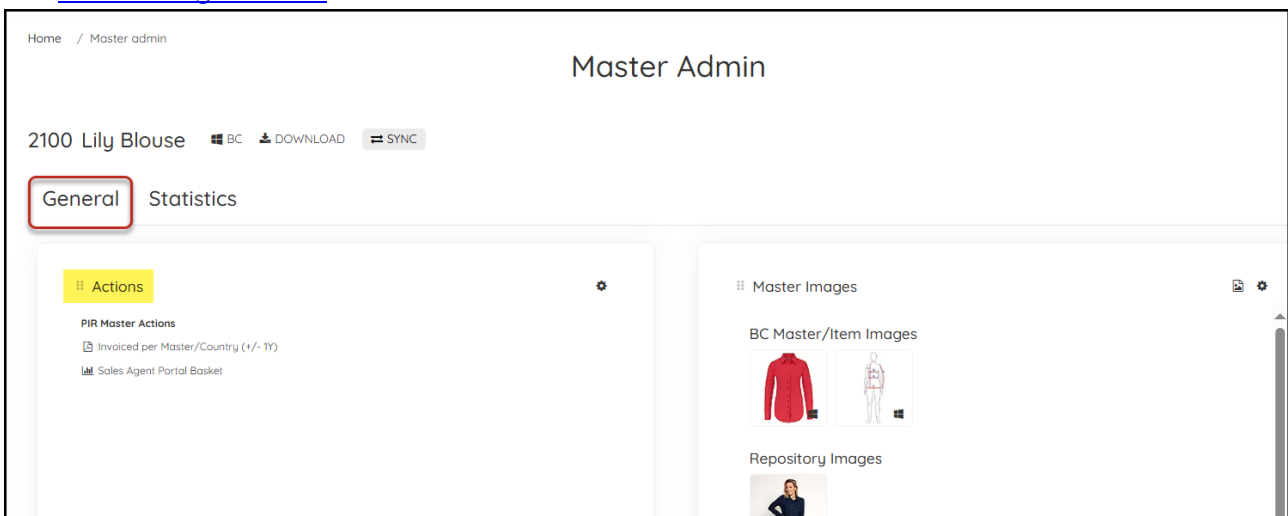


Master

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.

Portal Action Setup				
🔍 + New Edit List Delete 🔗 ☰				
Type	No. / Link	Name	Custom Parameter	
→ Header		PIR Master Actions		
Sales Statistics	INVCOUNTRY	Invoiced per Master/Country (+/- 1Y)		
Statistics Overview	SA_BASKET	Sales Agent Portal Basket		

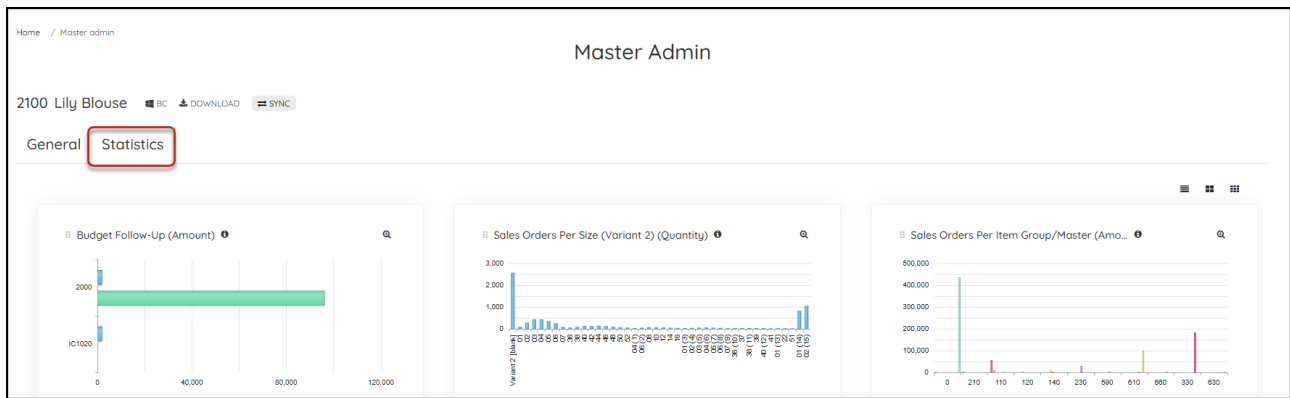
See [FastTab Page Actions](#) for more details.



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 screenshot shows the 'Portal Profiles' list with a 'Custom filtered' dropdown. The table has columns for 'Code', 'Type', and 'Description'. The first row is 'INSTORE' with type 'InStore B2C'. A red box highlights the 'InStore B2C' type. To the right, a 'Related' dropdown menu is open, showing options like 'Card', 'Customer Templates', 'Customer Templates Setup', 'Order Types', and 'Order Type Setup'. The 'Card' option is highlighted with a red box. The 'Description' column shows 'B2C InStore Basic Setup', 'B2C InStore Fashion Setup', and 'B2C InStore Furniture Setup'.

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

The screenshot shows the 'InStore Profile - INSTORE' page. It has a top navigation bar with 'Manage', 'Customer Template Setup', 'Currency Setup', 'Delivery Method', 'Delivery Setup', 'Locations', and 'Page'. Below this is a list of sections: 'General', 'Customer', 'Order', 'Item', 'Field Mapping', 'Check-Out', 'Report', and 'Advanced'. Each section has a right-pointing arrow.

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

The screenshot shows the 'Check-Out' FastTab. It has two toggle switches: 'Disable Online Payment' and 'Disable Voucher/Gift Card'. Both are currently turned off.

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.

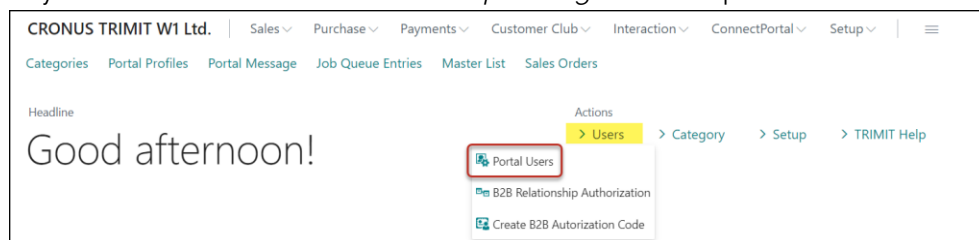
Example:

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.

User Relationship Management Work Date: 3/3/2025						
✓ Saved						
Edit List Delete Relationships Relationship Overview More options						
General						
Status Filter Related						
Status	User information	Relationships	Profile	Last Login	Last Synchronized	ConnectPortal Domain
Related		5	B2B[SUPPLIER AGENT]INSITE	2/6/2025 12:42 P...	9/18/2015 10:18 AM	
Related		5	B2B[SUPPLIER AGENT]INSITE		2/27/2015 8:51 AM	
Related		5	B2B[SUPPLIER AGENT]INSITE	3/12/2025 4:32 P...	4/25/2018 9:33 AM	
Related		5	B2B[SUPPLIER AGENT]INSITE	1/20/2025 1:59 P...	2/27/2015 8:50 AM	
Related		5	B2B[SUPPLIER AGENT]INSITE	2/26/2021 12:07 ...	4/25/2018 10:00 AM	
Related		5	B2B[SUPPLIER AGENT]INSITE		4/23/2020 12:49 PM	
Related		5	B2B[SUPPLIER AGENT]INSITE		2/27/2015 8:51 AM	
→ Related		5	B2B[SUPPLIER AGENT]INSITE	3/12/2025 9:55 P...	3/2/2015 8:12 AM	
Related		5	B2B[SUPPLIER AGENT]INSITE	2/21/2022 3:20 P...	5/14/2020 11:16 AM	
Related		7	B2B[B2C B2C-INSTORE SUPPLIER AGENT]INSITE	3/11/2025 2:19 P...	2/26/2025 4:48 PM	

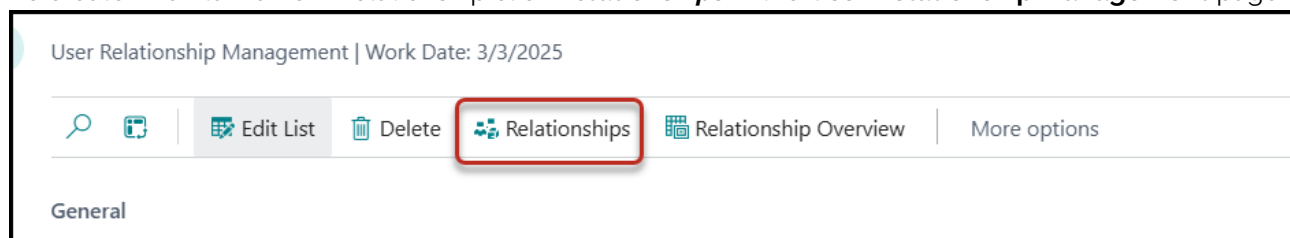
Change the **Status Filter** to see different filters on the synchronized Users.

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:

User Relationship List - Customer 2000							
+ New Edit List Delete More options							
Type ↑	No.	Name	Profile ↑	Creation Date	Token Available	Token Created Date	User information
→ Customer	2000	Customer 2000	B2B	2/26/2025 4:48 PM	☐		
Customer	CW00041		B2C	2/26/2025 4:48 PM	☐		
Customer	2000	InstoreCustomer	B2C-INSTORE	2/26/2025 4:48 PM	☐		
Vendor	2300	Vendor 2300	SUPPLIER	2/26/2025 4:48 PM	☐		
Salesperson/Purchaser	JR	John Roberts	AGENT	2/26/2025 4:48 PM	☐		
Business Central User				2/26/2025 4:48 PM	☒	2/26/2025	
Business Central User		InSite User	INSITE	2/26/2025 4:48 PM	☒	2/26/2025	

Description of the Fields

Type

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

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

User Relationship List - kbi@trimit.com									
+ New Edit List Delete Related Fewer options									
Type ↑	No.	Card		Profile ↑	Creation Date	Token Available	Token Created Date	User information	
Customer	2000	Retrieve Token Delete Token		2000	B2B	2/26/2025 4:48 PM	☐		
Customer	CW00			ing	B2C	2/26/2025 4:48 PM	☐		
Customer	2000	InstoreCustomer			B2C-INSTORE	2/26/2025 4:48 PM	☐		
Vendor	2300	Vendor 2300			SUPPLIER	2/26/2025 4:48 PM	☐		
Salesperson/Purchaser	JR	John Roberts			AGENT	2/26/2025 4:48 PM	☐		
→ Business Central User						2/26/2025 4:48 PM	☐	2/26/2025	
Business Central User		InSite User			INSITE	2/26/2025 4:48 PM	☐	2/26/2025	

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 Card | Work Date: 3/3/2025

2000 · The Fashion Store UK

Home

Request Approval

New Document

Prices & Discounts

Customer

Report

Actions

Related

Reports

Fewer options

Contact

Apply Template

Merge With...

Send Email

Workflow

Customer

History

Prices & Discounts

Sales

Documents

Service

Store Locator List

Pop-up

Portal User Relation

Other

General

No. 2000

Name The Fashion Store UK

Balance (LCY) 46,140.87

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

Vendor Card | Work Date: 3/3/2025

2300 · Oriental Production Services

Home Request Approval New Document Vendor Prices & Discounts Report Actions ▾ Related ▾ Reports ▾ Fewer options

Contact Merge With... Apply Template Send Email Pay Vendor Supplier

General

No. 2300 Balance (LCY) ...

Name Oriental Production Services Balance (LCY) As Customer ...

Blocked Balance Due (LCY) ...

Vendor Purchases Documents History Order Addresses Remit Addresses Pop-up Item Charge Workflow Sustainability Portal User Relation

Via the Salespeople/Purchasers list

Salespeople/Purchasers | Work Date: 3/3/2025

+ New Manage Home Salesperson Related ▾ Fewer options

Create Interaction... Send Email Relations Salesperson Customer Relations History Teams Contacts Campaigns Segments Interaction Log Entries Postponed Interactions Tasks Opportunities Portal User Relation Other

Code ↑	Name	
AH	Annette Hill	0.00
BD	Bart Duncan	0.00
CE	Christine Everton	0.00
DC	Debra L. Core	0.00
JR	John Roberts	5.00
LM	Linda Martin	0.00
MD	Mary A. Dempsey	5.00
PS	Peter Sadow	5.00

Create new Customer on B2B

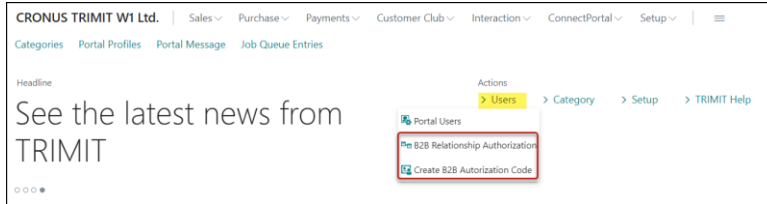
It is possible for a User to register on B2B (see [Registration on the B2B](#)).

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 B2B Authorization Code

Options

Create

Only if no Authorization Code exists

Portal Profile

B2B

E-Mail

☒

Filter: Customer

× No.

× Country/Region Code

× Currency Code

× Language Code

× Sell-to Group

+ Filter...

Filter totals by:

+ Filter...

Schedule...

OK

Cancel

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

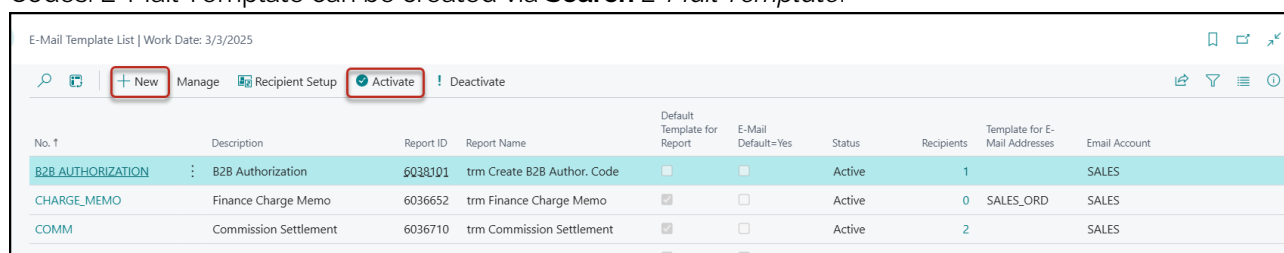
You need to select the Portal Profile for your B2B or B2C InStore Shop.

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.

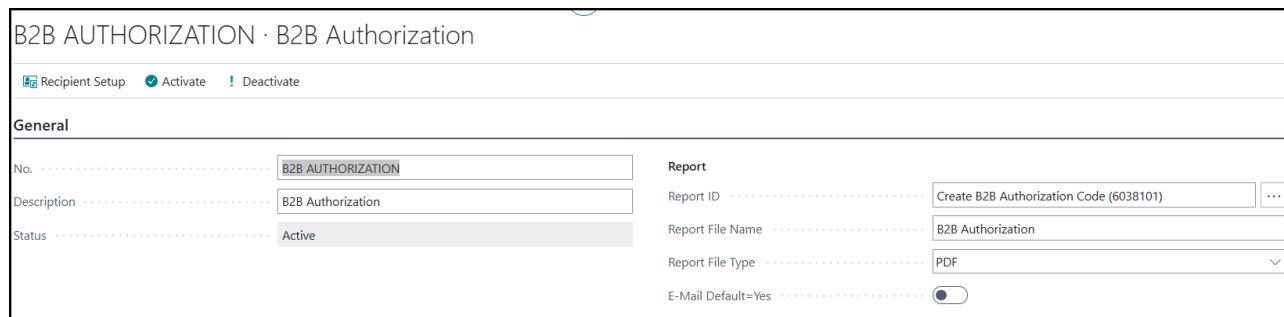
To be able to send an E-Mail, it is required to create an **E-Mail Template** for sending Authorization Codes. E-Mail Template can be created via **Search E-Mail Template**.



No. 1	Description	Report ID	Report Name	Default Template for Report	E-Mail Default=Yes	Status	Recipients	Template for E-Mail Addresses	Email Account
B2B AUTHORIZATION	B2B Authorization	6038101	trm Create B2B Author. Code	☐	☐	Active	1		SALES
CHARGE_MEMO	Finance Charge Memo	6036652	trm Finance Charge Memo	☒	☐	Active	0	SALES_ORD	SALES
COMM	Commission Settlement	6036710	trm Commission Settlement	☒	☐	Active	2		SALES

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



B2B AUTHORIZATION · B2B Authorization

Recipient Setup Activate Deactivate

General

No.

Description

Status

Report

Report ID

Report File Name

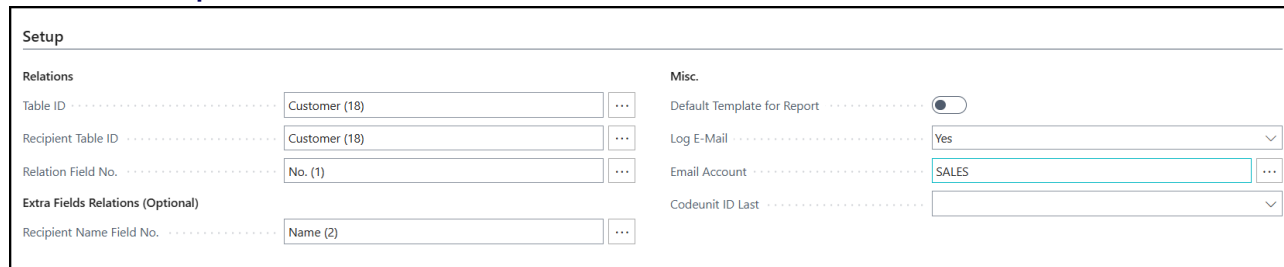
Report File Type

E-Mail Default=Yes ☐

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



Setup

Relations

Table ID

Recipient Table ID

Relation Field No.

Extra Fields Relations (Optional)

Recipient Name Field No.

Misc.

Default Template for Report ☐

Log E-Mail

Email Account

Codeunit ID Last

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

Addresses

Archive E-Mail (Bcc)
Template for E-Mail Addresses

Recipients 1

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

FastTab Subject and Body Text

Subject and Body Text
Manage
Actions

Delete Line
Edit
View
New

Language Code ↑
Default
Subject
Body
Body Format
Ignore Linebreaks in Body

→ ENU
Authorization Code to register on our TRIMIT B2B Solution
Dear #NM#
Text

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

E-Mail Template RTF Editor - B2B AUTHORIZATION - ENU

General

Language Code
Body Format

Default
Ignore Linebreaks in Body

Subject
Authorization Code to register on our TRIMIT B2B Solution

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#

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

E-Mail Template Card | Work Date: 1-1-2022

B2B AUTHORIZATION · B2B Authorization

Recipient Setup ☒ Activate ☐ Deactivate

Edit - E-Mail Template Recipient List

Search + New Edit List Delete Card Extra Addresses More options

Recipient No. ↑	Relation Name	To E-Mail	Cc E-Mail	Alt. Output File Type	Alt. Output Report ID	Alt. Output Report Name	Extra Addresses	Info
→	Used if specific not found	#EM#					0	

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:

Authorization Code to register on our TRIMIT B2B Solution

 To 

di 12:11

Dear 

You can register an InStore user here:
[InStore Portal User Registration](#)

You can register a B2B user here:
[B2B Portal User Registration](#)

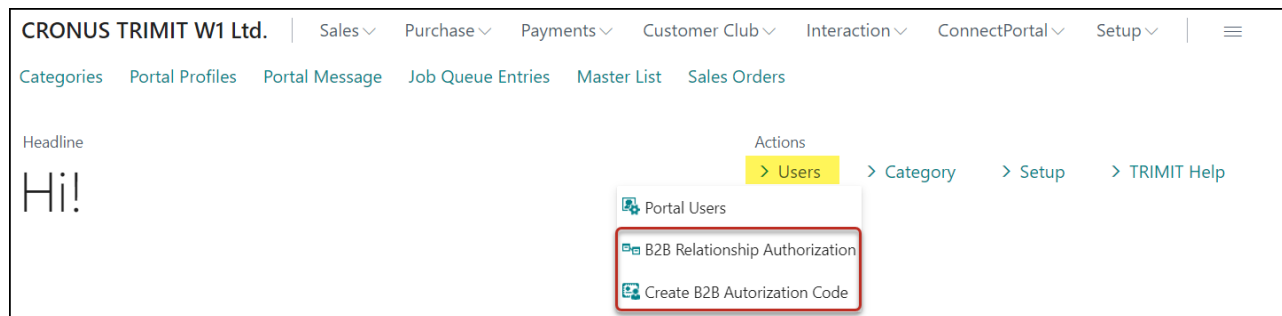
Enter your Customer No. :
CW00163
and this authorization code :
F7JREVPHXNGCWG8P6XAP

Kind Regards,
CRONUS TRIMIT W1 Ltd.


 **TRIMIT**

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

B2B Relation Authorization Work Date: 3/3/2025							
✓ Saved							
+ New Edit List Delete Delete All Used							
Customer No.†	Portal Profile	Name	Authorization Code ↑	Creation Date	Used	Used Date	
→ 2000	B2B	The Fashion Store UK	PPZYE15DXU9TF4MOJAXU	3/3/2025	☐		
20000	B2B	Selangorian Ltd.	9KBUCJWOZO7QU1DEZD9S	3/3/2025	☐		

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.

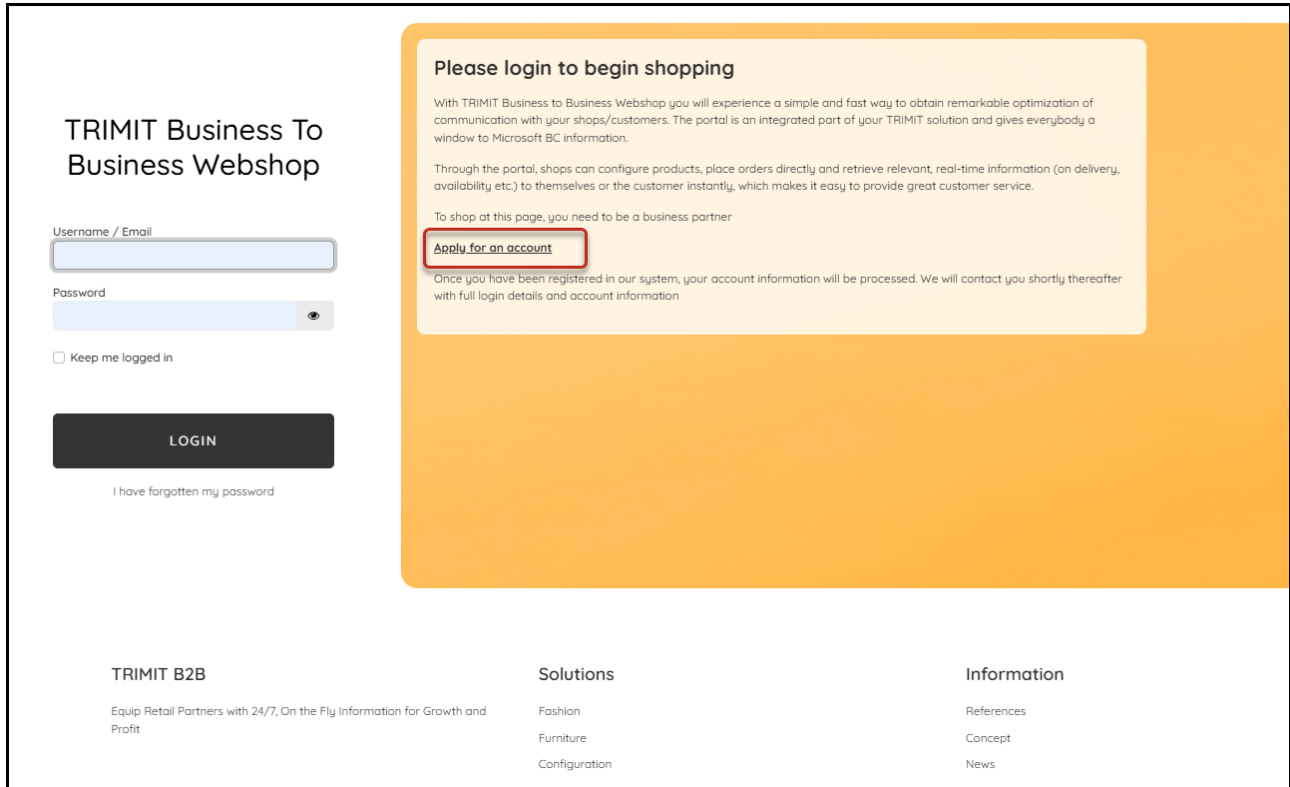
Used Date

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**:



TRIMIT Business To Business Webshop

Username / Email

Password

☐ Keep me logged in

LOGIN

[I have forgotten my password](#)

Please login to begin shopping

With TRIMIT Business to Business Webshop you will experience a simple and fast way to obtain remarkable optimization of communication with your shops/customers. The portal is an integrated part of your TRIMIT solution and gives everybody a window to Microsoft BC information.

Through the portal, shops can configure products, place orders directly and retrieve relevant, real-time information (on delivery, availability etc.) to themselves or the customer instantly, which makes it easy to provide great customer service.

To shop at this page, you need to be a business partner

Apply for an account

Once you have been registered in our system, your account information will be processed. We will contact you shortly thereafter with full login details and account information

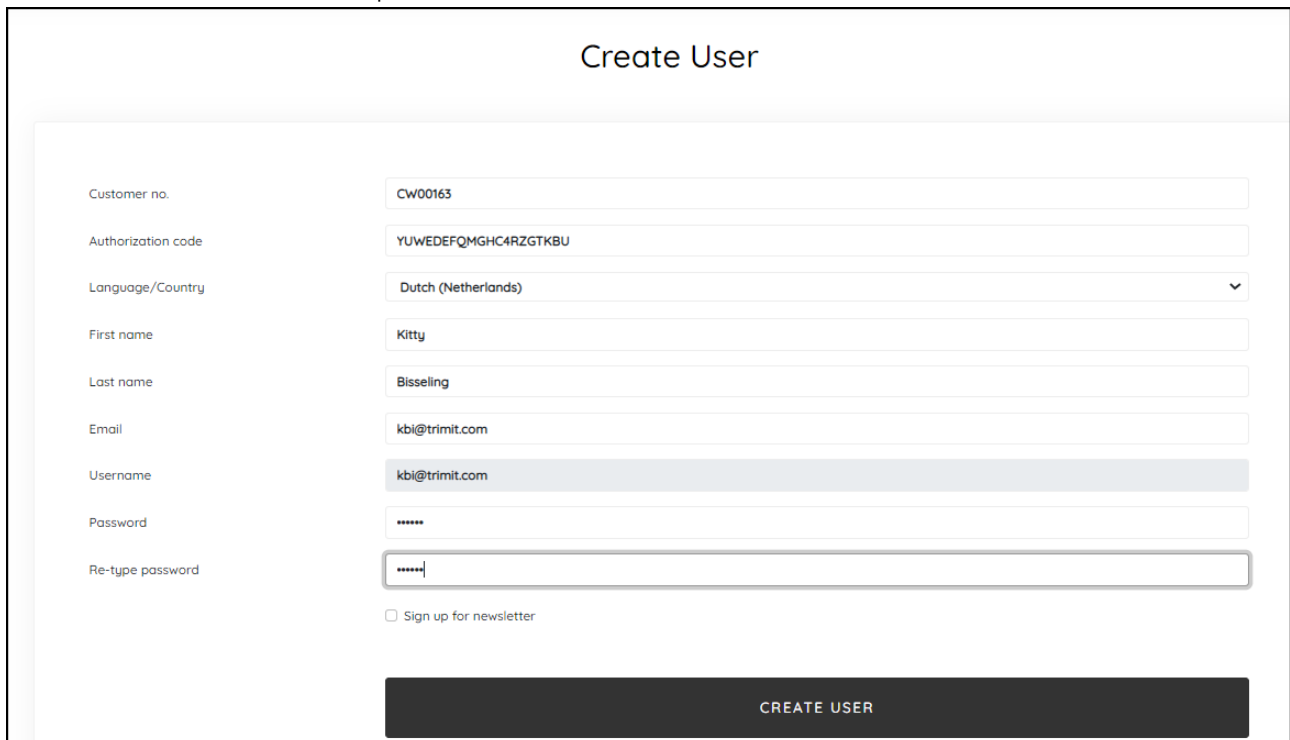
TRIMIT B2B
Equip Retail Partners with 24/7, On the Fly Information for Growth and Profit

Solutions
Fashion
Furniture
Configuration

Information
References
Concept
News

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**:



Create User

Customer no. CW00163

Authorization code YUWEDEFQM9HC4RZGKBU

Language/Country Dutch (Netherlands)

First name Kitty

Last name Bisseling

Email kbi@trimit.com

Username kbi@trimit.com

Password *****

Re-type password *****

☐ Sign up for newsletter

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.

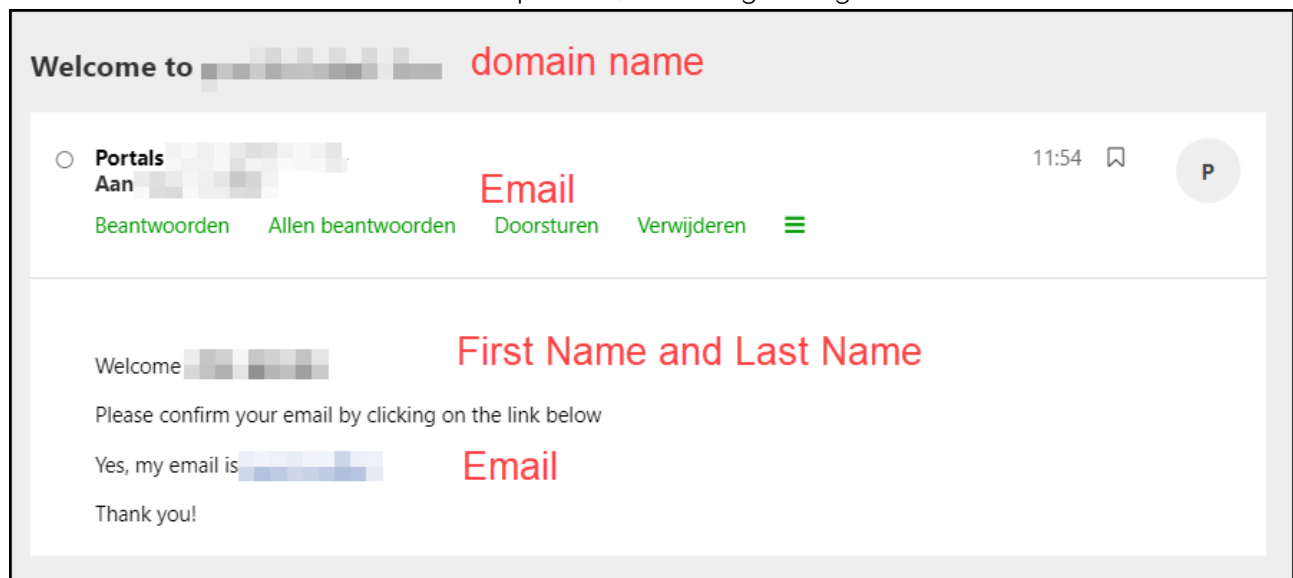
Password

User's Password

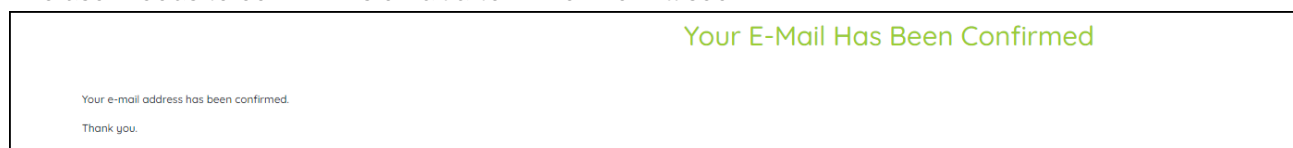
Re-type password

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:



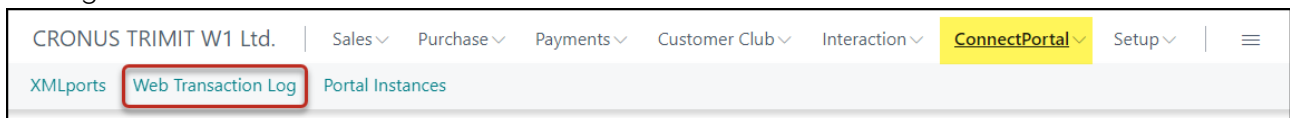
Web Transaction Log

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.

A screenshot of the 'Web Transaction Log' interface. At the top, there's a toolbar with buttons like 'Delete', 'Edit List', 'View Document XML', 'Start Logging', 'Stop Logging', 'Run Transaction', and 'Save Transaction'. Below the toolbar is a table with the following columns: ID, Type, Date Time, Duration, View Called, User Identity, Saved, Description, and Parameters. The table contains several rows of transaction data, including requests and exports for various views like B2B_BASKET and PORTAL_GET_UNITPRICE.

ID	Type	Date Time	Duration	View Called	User Identity	Saved	Description	Parameters
	Import	3/13/2025 1:30 PM	480 milliseconds			☐		
	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			☐		
{e99ce9891-20ab-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

Recording	
Status	User Filter
Test Units Exists ☐	View ID Filter

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

The screenshot displays the 'Web Transaction Log' interface. At the top, there is a toolbar with buttons for 'Delete', 'Edit List', 'View Document XML', 'Start Logging', 'Stop Logging', 'Run Transaction', 'Save Transaction', and 'Actions'. The 'Actions' menu is open, showing options: 'View XMLPort Card', 'Clear Log', 'Unmark All', 'Set User Filter', 'Set View Filter', 'Clear Log Filter', 'Toggle Test Units', 'Export Document', 'Import Document', 'Create Transaction Set', and 'Copy Transaction Set'. Below the toolbar is a table with columns: ID, Type, Date Time, Duration, View Called, User Identity, Saved, Description, Command, and Cor. The table contains several rows of transaction data. One row is highlighted in blue, and the 'Actions' menu is open over it.

ID	Type	Date Time	Duration	View Called	User Identity	Saved	Description	Command	Cor
	Import	3/13/2025 1:30 PM	480 milliseconds			☐			
	Export	3/13/2025 1:30 PM	44 milliseconds			☐			
{3483cb57-c561-47f8-a6ba-f66e901945f5}	Request	3/13/2025 1:30 PM		B2B_BASKET	kbi@trimit.com	☒			
	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	kbi@trimit.com	☐			
	Export	3/13/2025 1:30 PM	5 milliseconds			☐			
{65aabed7-9717-4fb2-b47b-288b066cfeae}	Request	3/13/2025 1:30 PM		PORTAL_GET_UNITPRICE	kbi@trimit.com	☐			
	Export	3/13/2025 1:30 PM	12 milliseconds			☐			
{13c2fab4-766a-4d1c-b545-6fb510f4f7e2}	Request	3/13/2025 1:30 PM		PORTAL_GET_UNITPRICE	kbi@trimit.com	☐			
	Export	3/13/2025 1:30 PM	8 milliseconds			☐			
{e8ec27cb-22c4-4328-9a21-171590c909dd}	Request	3/13/2025 1:30 PM		PORTAL_GET_UNITPRICE	kbi@trimit.com	☐			

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.

Web Transaction Log: All										
Delete Edit List View Document XML Start Logging Stop Logging Run Transaction Save Transaction Actions Fewer options										
ID	Type	Date Time	Duration	View Called	User Identity	Saved	Description	Parameters	Command	
{3483cb57-c561-47f8-a6ba-f66e901945f5}	Request	3/13/2025 1:52 PM		B2B_BASKET	kbi@trimit.com	☒		CUSTID: 2000; DOCNO: TEMPORARY; ORDERTYPE: 10AFTERSAL...	INSERT	
	Import	3/13/2025 1:30 PM	92 milliseconds			☒				
	Export	3/13/2025 1:30 PM	5 milliseconds			☒				

What can you learn from the Web Transaction Log?

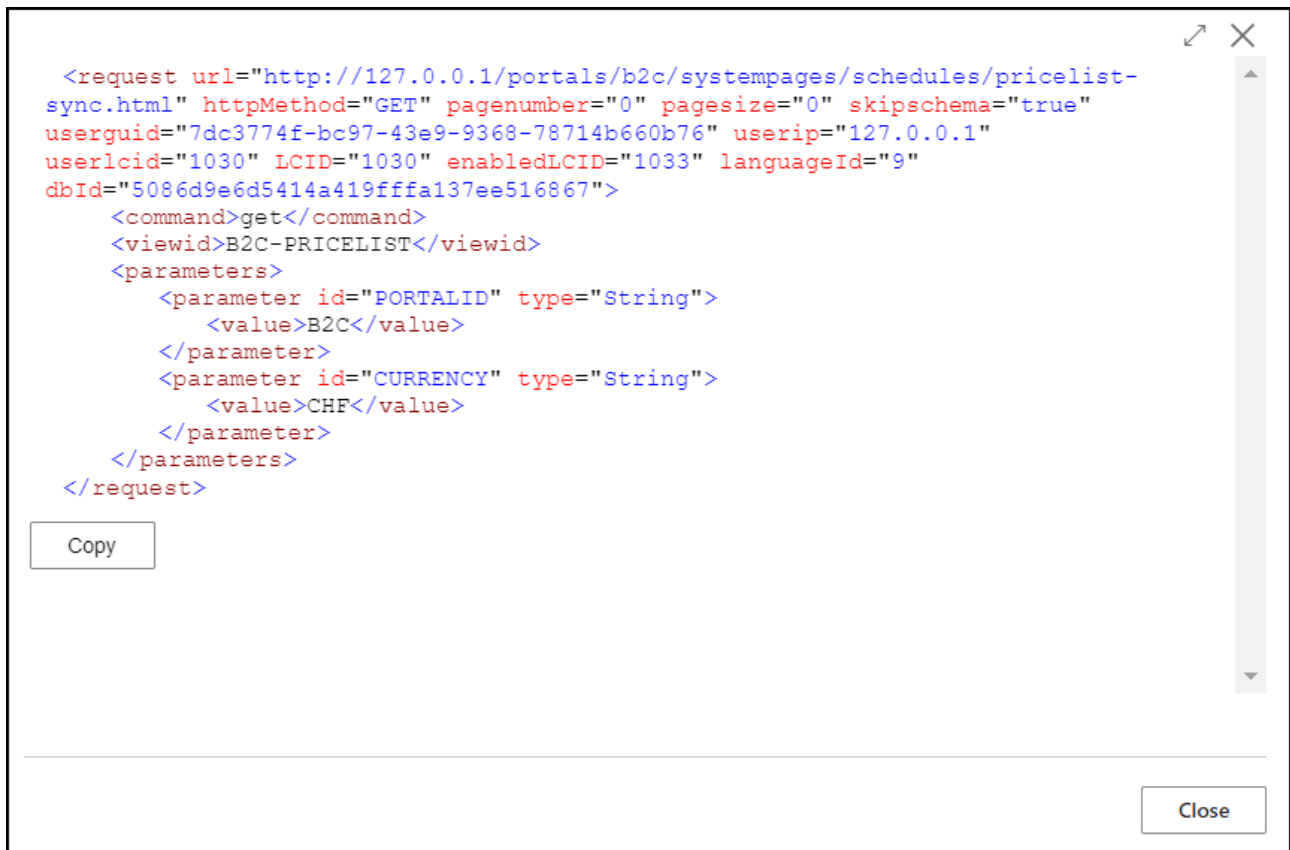
If you filter on *Request* in the field **Type**, you will get a nice indication on what Requests were fired from the web site. If you find that a particular **View Called** is called frequently, you should consider performance and the possibilities for caching the view data on **Modelyn**.

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.



```
<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="5086d9e6d5414a419ffa137ee516867">
  <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.

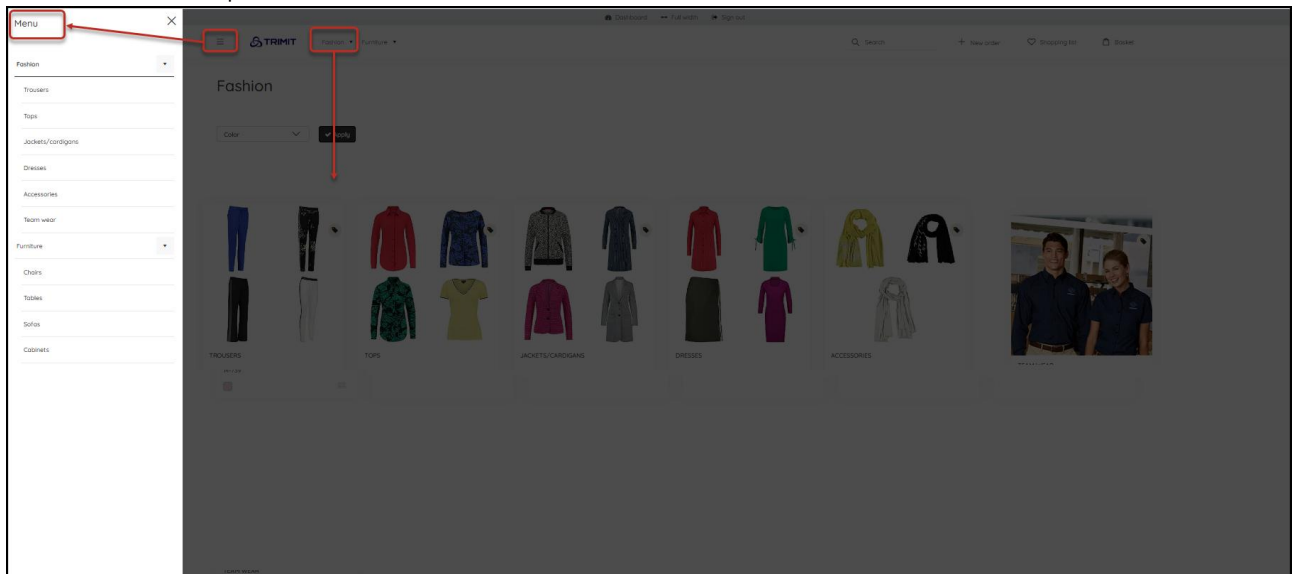
Create a new Transaction Set by clicking **Actions, Create Transaction Set**. You now have a Transaction set with all 3 Types of Requests. It does not contain any data so you can import XML from disk to populate it.

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.

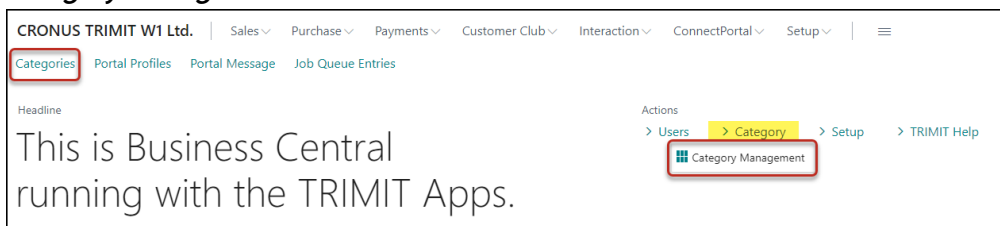
Categories

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**.

Categories: All ▾										
New Delete Edit List Category Lines Show Category Tag Filters Copy Wizard Card Comments										
No.	Description	Matrix Limitation	Do not show on	Alternative Sorting ↑	Customer Club Level	Collection	Tag Filter Group	Expand On Overview	Google Product Taxonomy ID	At to Ce
B2B	B2B Toplevel		☐	0	Level 0		Inherited	0	☒	
B2B_F_CABINETS	Cabinets		☐	0	Level 0		Inherited	0	☒	
B2B_F_CHAIRS	Chairs		☐	0	Level 0		Inherited	0	☒	

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

Category Tree View							
Related Record Category Line							
Category Type	No.	Description	Description 2	Matrix Limitation	Master No. + Var No.	Alternative Sorting	
→ Category	B2B						0
Category	B2B_FASHION	Fashion					0
Category	B2B_W_TROUSERS	Trousers					0
Master	2000	Olivia Trousers					0
Master	2010	Amelia Trousers					0
Master	2020	Isla Trousers					0
Master	2030	Ella Trousers					0
Master	2011	Trousers Amelia					0
Category	B2B_W_TOPS	Tops					0
Master	2100	Lily Blouse					0
Master	2110	Mia Blouse					0
Master	2120	Sophia Shirt					0
Master	2130	Rose Shirt					0

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**:

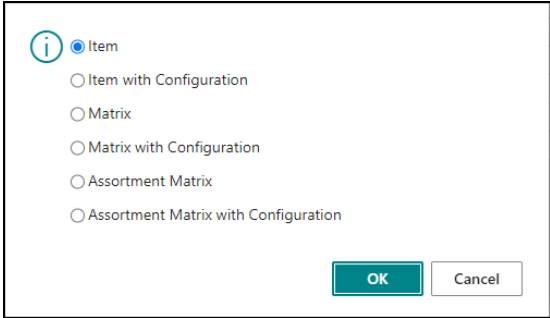
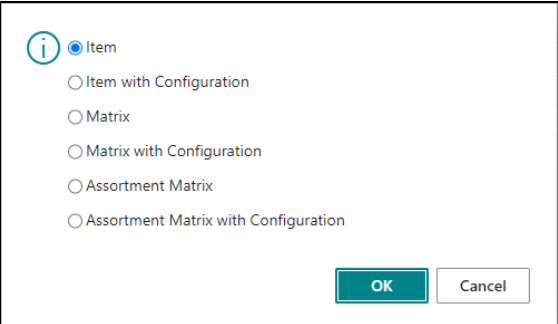
Categories Work Date: 3/3/2025							
New Edit List Delete Category Lines Show Category Tag Filters Copy Wizard							
No.	Description	Matrix Limitation	Do not show on	Alternative Sorting ↑	Customer Club Level	Collection	
AGENT_W_TROUSERS	Trousers		☐	0	Level 0		
→ NEW_CATEGORY	NEW_CATEGORY		☐	0	Level 0		
B2B	B2B Toplevel		☐	0	Level 0		
B2B_F_CABINETS	Cabinets		☐	0	Level 0		

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

Category Lines - NEW_CATEGORY													
New Edit List Delete All Category Lines Related Fewer options													
Type	No.	Matrix Limitation	Exp. Over	Category Line Card	Visual Configuration	Configuration filters Y-axis	Allow Bulk Sale on Webshop	Filter Delivery Period	Category Lines 2	Gift Card	Customer Club Level	Alternative Sorting	Effective Date
Matrix	2100		Inh	Next Level	No	Yes	☐		☐	☐	Level 0	0	
Matrix	2110		Inh	Matrix Limitation Setup	No	Yes	☐		☐	☐	Level 0	0	
Category	B2B_GIFTCARDS		Inh	Comment	No	Yes	☐		☐	☐	Level 0	0	
Item	3000		Inh	Translation Text	No	Yes	☐		☐	☐	Level 0	0	
→ Assortment Matrix	2110		Inh	Picture	No	Yes	☐		☐	☐	Level 0	0	
Move Content To Copy Content To Other													
Matrix	2100		Inh		No	Yes	☐		☐	☐	Level 0	0	
Matrix	2110		Inh		No	Yes	☐		☐	☐	Level 0	0	
Category	B2B_GIFTCARDS		Inh		No	Yes	☐		☐	☐	Level 0	0	
Item	3000		Inh		No	Yes	☐		☐	☐	Level 0	0	
→ Assortment Matrix	2110		Inh		No	Yes	☐		☐	☐	Level 0	0	

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*, *Complimentary 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**.

The image contains three screenshots illustrating the process of setting up category lines and product details in TRIMIT.

Top Screenshot: Category Lines - AGENT_W_JACKETS

This screenshot shows a table of category lines. The table has columns for Type, No., Matrix Limitation, Expanded Over, and Visible. The 'Related' dropdown menu is open, showing options: Category Line Card, Next Level, Matrix Limitation Setup, Comment, Translation Text, Picture, and Move Content To. The 'Next Level' option is highlighted with a red box. A red arrow points from the 'Next Level' option to the 'Accessories' option in the 'Show accessories' dialog box.

Middle Screenshot: Setup Menu

This screenshot shows the 'Setup' menu in the TRIMIT dashboard. The 'Products' option is highlighted with a red box. A red arrow points from the 'Products' option to the 'Show accessories' dialog box.

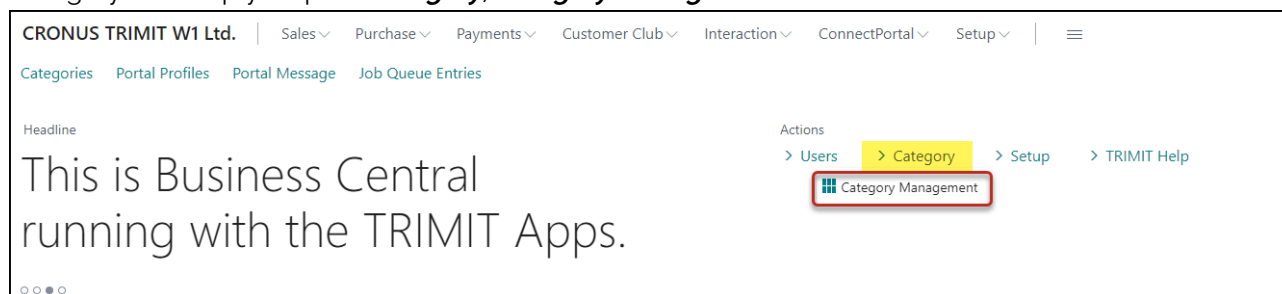
Bottom Screenshot: Show accessories dialog box

This screenshot shows the 'Show accessories' dialog box. It has three sections: 'Show accessories', 'Show alternatives', and 'Show related purchased'. Each section has a dropdown menu with 'Yes' selected. The 'Yes' options are highlighted with red boxes. A red arrow points from the 'Products' option in the 'Setup' menu to the 'Show accessories' dialog box.

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:

Category Management Work Date: 3/3/2025														
Category Management														
Master														
Item Type	No.	Category	Master No.	Category	Description	Description 2	Brand Code	Season Code	Code	Design	Item Group	Gender	Group 4	Group 5
Master Item	2000	3	2000	3	Olivia Trousers	White.36	FASHION			1	210	110	0	20
Finished Goods	20100136		2010	3	Amelia Trousers	White.36	FASHION			1	210	110	0	20
Finished Goods	20100138		2010	3	Amelia Trousers	White.38	FASHION			1	210	110	0	20
Finished Goods	20100140		2010	3	Amelia Trousers	White.40	FASHION			1	210	110	0	20
Finished Goods	20100142		2010	3	Amelia Trousers	White.42	FASHION			1	210	110	0	20
Finished Goods	20100144		2010	3	Amelia Trousers	White.44	FASHION			1	210	110	0	20
Finished Goods	20100146		2010	3	Amelia Trousers	White.46	FASHION			1	210	110	0	20
Finished Goods	20100148		2010	3	Amelia Trousers	White.48	FASHION			1	210	110	0	20
Finished Goods	20109936		2010	3	Amelia Trousers	Black.36	FASHION			1	210	110	0	20

Filter Area

Attachments									
Parent No.	Type	No.	Description	Description 2	Effective Date	Expiry Date	Alternative Sorting	Category Lines	
AGENT_W_TROUSERS	Matrix	2000	Olivia Trousers				0	☐	
B2B_W_TROUSERS	Matrix	2000	Olivia Trousers				0	☐	
B2C_W_TROUSERS	Matrix	2000	Olivia Trousers				0	☐	

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

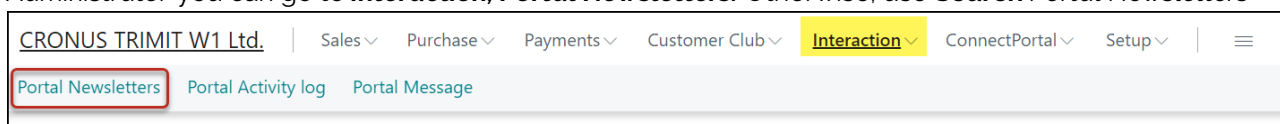
When the Salesperson creates a new Customer on the SA, it is possible to set a checkmark in the field **Newsletter**. When doing so, the Customer is created as **Recipient** in the **Portal Newsletter Code** in TRIMIT based on the field **Customer Newsletter** in the SA Portal Profile.

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:

Select - Portal Newsletter			🔍	+ New	Edit List	⋮	↗	✕
Code ↑		Description					Recipients	
→ AGENT	:	Sales Agent Newsletter					5	
B2B		Business-To-Business Newslet.					7	
CONSUMER		Consumer Newsletter					39	

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

Portal Newsletter Recipients Work Date: 6-9-2020					🔍	↗
🔍 Search	+ New	Edit List	Delete		🔍	🔍
Relation Type ↑	Relation ID ↑	Name	Name 2			
→ Customer	:	CW00061				
Customer	CW00073					
Salesperson/Purchaser	CE	Christine Everton				
Salesperson/Purchaser	JR	John Roberts				
Salesperson/Purchaser	TR	Theodor Rudolphs				

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:

The screenshot shows a web form titled "Create New Customer". The form has the following fields and elements:

- Template:** A dropdown menu with the text "Choose template" and a downward arrow. This field is highlighted with a red rectangular box.
- Name:** A text input field with the placeholder text "Customer name".
- Name2:** A text input field with the placeholder text "Other name".
- Address:** A text input field with the placeholder text "Address line 1".
- Address2:** A text input field with the placeholder text "Address line 2".
- Postcode:** A text input field with the placeholder text "Postcode".
- City:** A text input field with the placeholder text "City".
- Country:** A dropdown menu with the text "Choose country" and a downward arrow.
- Phone:** A text input field with the placeholder text "Phone no.".
- Fax:** A text input field with the placeholder text "Fax no.".
- Email:** A text input field with the placeholder text "Email address".
- Contact:** A text input field with the placeholder text "Contact name".
- VAT registration no.:** A text input field with the placeholder text "VAT no.".
- Newsletter:** A checkbox labeled "Newsletter".
- Create new customer:** A dark button with a white icon of a person and the text "Create new customer".

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**.

Tell me what you want to do

configuration tem

Go to Pages and Tasks

> Configuration Templates

Lists

Didn't find what you were looking for? Try [exploring pages and reports](#)

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.:

Configuration Templates | Work Date: 3/3/2025

+ New

Manage

Edit

View

Delete

CUSTOMER01	:	TRIMIT Customer Domestic
CUSTOMER02		TRIMIT Customer EU
CUSTOMER03		TRIMIT Customer Foreign

Config. Template Header | Work Date: 3/3/2025

CUSTOMER01

New | More options

General

Code

CUSTOMER01

Table Name

Customer

Description

TRIMIT Customer Domestic

Enabled

☒

Table ID

18

Lines

New Line

Delete Line

Type	Field Name	Field Caption	Template Code	Default Value	Skip Relation Check	Mandato...	Reference
→ Field	Customer Posting Group	Customer Posting Group		DOMESTIC	☐	☐	
Field	Currency Code	Currency Code		GBP	☐	☐	
Field	Language Code	Language Code		ENU	☐	☐	
Field	Payment Terms Code	Payment Terms Code		30 DAYS	☐	☐	
Field	Fin. Charge Terms Code	Fin. Charge Terms Code		1.5 DOM.	☐	☐	
Field	Shipment Method Code	Shipment Method Code		EXW	☐	☐	
Field	Payment Method Code	Payment Method Code		BANK	☐	☐	
Field	Application Method	Application Method		Manual	☐	☐	
Field	Gen. Bus. Posting Group	Gen. Bus. Posting Group		DOMESTIC	☐	☐	
Field	Tax Area Code	Tax Area Code			☐	☐	
Field	Shipping Advice	Shipping Advice		Partial	☐	☐	
Field	VAT Bus. Posting Group	VAT Bus. Posting Group		DOMESTIC	☐	☐	
Field	Customer Allocation Priority	Customer Allocation Priority		5	☐	☐	
Field	Country/Region Code	Country/Region Code		GB	☐	☐	

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

Edit - Sales Agent Portal Profile - AGENT

Manage [Order Type Setup](#) [Customer Templates Setup](#) Page | Related | Fewer options

General

Type SalesAgent Description Sales Agent Basic Setup

Portal Customer Templates | Work Date: 1-1-2022

✓ Saved [New](#) [Edit List](#) [Delete](#)

Customer Template ↑	Template Description	Sort Order
CUSTOMER01	TRIMIT Customer Domestic	0
CUSTOMER02	TRIMIT Customer EU	0
CUSTOMER03	TRIMIT Customer Foreign	0

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:

Create New Customer

Template Choose template

Name

Name2

Address Address line 1

Address2 Address line 2

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.:

Edit - B2C Portal Profile - B2C

Manage [Customer Templates Setup](#) [Currency Relations](#) [Wrapping Expense Setup](#) [Delivery Method](#) [Delivery Fee Setup](#) [Show Inventory Stores](#) [Vouchers](#) [Gift Card](#)

General

Type BusinessToConsumer Description Webshop Basic Setup

Portal Customer Templates | Work Date: 1-1-2022

✓ Saved [New](#) [Edit List](#) [Delete](#)

Country/Region Code ↑	Customer Template ↑	Template Description	Sort Order
	CUSTB2C	TRIMIT B2C DOMESTIC Customer Template	0
BE	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
DE	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
DK	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
FR	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
GB	CUSTB2C	TRIMIT B2C DOMESTIC Customer Template	0
NL	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
NO	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
SE	CUSTB2CEU	TRIMIT B2C EU Customer Template	0
US	CUSTB2CFOR	TRIMIT B2C FOREIGN Customer Template	0

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.

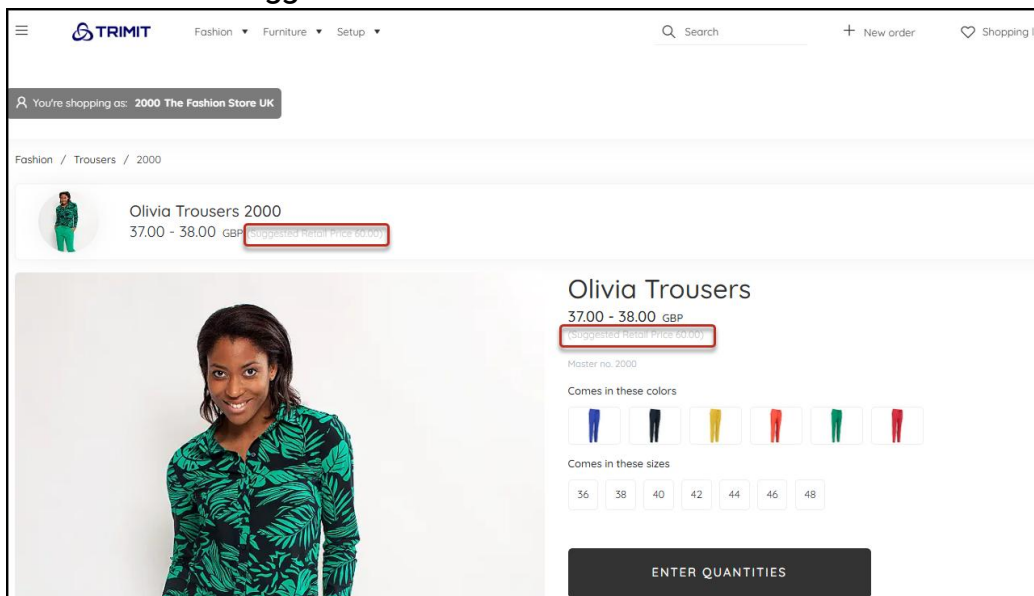
Note

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

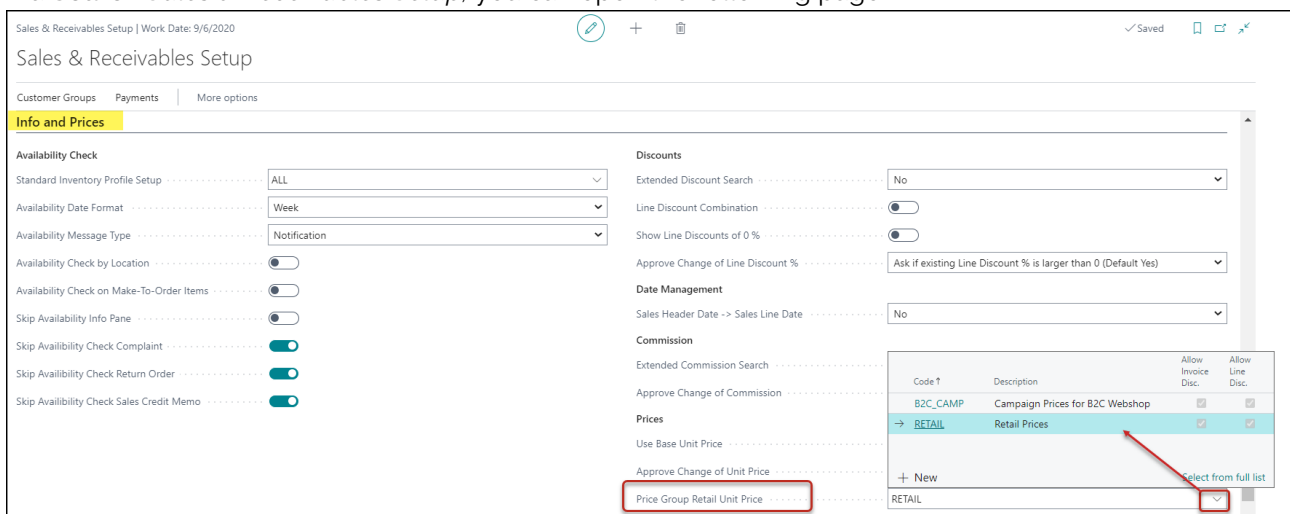
The Fashion industry works with the term *Suggested Retail Price* or *Recommended Retail Price*, being the Sales Price that the Consumer must pay when buying the Item in a shop.

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:

Select - Customer Price Groups						
Code ↑ Description Allow Line Disc. Allow Invoice Disc. Price Includes VAT VAT Bus. Posting Gr. (Price)						
B2C_CAMP	Campaign Prices for B2C Webshop	✓	✓	✓	DOMESTIC	
→ RETAIL	Retail Prices	✓	✓	✓	DOMESTIC	

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 fill a **Price Group Retail Unit Price**:

Invoicing

Bill-to Customer

VAT Registration No.

EORI Number

GLN

Use GLN in Electronic Documents

Copy Sell-to Addr. to Qte From

Tax Liabile

Tax Area Code

Registration No.

Posting Details

Gen. Bus. Posting Group

VAT Bus. Posting Group

Customer Posting Group

Prices and Discounts

Currency Code

Customer Price Group

Customer Disc. Group

Price Group Retail Unit Price

Allow Line Disc.

Invoice Disc. Code

Prices Including VAT

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**

Customer Price Group RETAIL Retail Prices Work Date: 3/3/2025													
Sales Prices													
General													
Sales Type Filter				Customer Price Group				Item/Master No. Filter					
Sales Code Filter				RETAIL				Starting Date Filter					
Item Type Filter				None				Currency Code Filter					
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.

Via the Master List/Master Card

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:

Item 2010 | Work Date: 9/6/2020

✓ Saved

Sales Prices | Search | + New | Edit List | Delete | Dimension Prices | Search Table Lines | Formula Lines | More options

General

Sales Type Filter None

Sales Code Filter

Item Type Filter Master

Item/Master No. Filter 2010

Starting Date Filter

Currency Code Filter

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 Grn	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.

The screenshot shows the 'Search Table Lines' interface. At the top, there are tabs: Sales Prices, Search, + New, Edit List, Delete, Dimension Prices, Search Table Lines (highlighted), Formula Lines, and More options. Below the tabs are filter fields: Sales Type Filter (None), Sales Code Filter, Item Type Filter (Master), Item/Master No. Filter (KBI2010), Starting Date Filter, and Currency Code Filter. A table below shows variant data with columns: Sales Type, Sales Code, Item No., Unit of Measure Code, Minimum Quantity, Currency Code, Unit Price, Allow Line Disc., Dimension Prices, Starting Date, Ending Date, Search Expression (with a dropdown arrow), Search Table, Use Search Table Result, and Formula. A red arrow points from the 'Search Table Lines' tab to a pop-up window titled 'Edit - Search Table Lines'. This pop-up has tabs: Search, + New, Edit List, Delete, Search Table Header, and Maintain. It contains a table with columns: Inactive, Not Valid, SIZE_EU ↑, European Sizes 36 - 60, and Unit Price. The table lists sizes 36, 38, 40, 42, 44, 46, and 48 with corresponding unit prices of 39.0, 39.0, 39.0, 39.0, 42.0, 42.0, and 42.0. The unit prices are highlighted with blue and green boxes.

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:

Basket				
ITEM	DETAILS	QUANTITY	TOTAL	
	Mia Blouse	3	122.97 GBP	
	2110		× Remove	
	40.99 GBP			
		1	39.99 GBP	
	21103005		× Remove	
	Forest Green, XL	1	40.99 GBP	
	21106005		× Remove	
	40.99 GBP			
	Red, XL	1	41.99 GBP	
	21107005		× Remove	
	41.99 GBP			

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 %*).

Composition Lines Work Date: 3/3/2025									
+ New Edit List Delete Copy Copy Standard Lines Card Comments More options									
Type	VarDim Type	Value	Description	Percentage %	Picture	Additional Text	Exclude Print	Exclude Portals	
→ Variant	COMP	PA	Polyamide	72	+		☐	☐	
Variant	COMP	EA	Elastane	28	+		☐	☐	
					+				

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

Description

Composition

Wash & Care

Footprint

Download

Polyamide 72%

Elastane 28%

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.

Care Label Lines Work Date: 3/3/2025									
🔍 📄 + New Edit List Delete Copy Copy Standard Lines Card Comments More options									
Type	VarDim Type	Value	Description	Symbol	Picture	Additional Text	Exclude Print	Exclude Portals	
→ Variant	CARE_1	30	Wash Cold - 30°	☒			☐	☐	
Variant	CARE_2	00	Do not Bleach	☒			☐	☐	
Variant	CARE_3	10	Iron Low (*)	☒			☐	☐	
Variant	CARE_4	20	Dry-clean, any solvent except Trichl...	☒			☐	☐	
Variant	CARE_5	00	Do Not Tumble Dry	☒			☐	☐	
					+				

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

DescriptionCompositionWash & CareFootprintDownload

Wash Cold - 30°
Do not Bleach
Iron low (*)
Dry-clean, any solvent except Trichloroethylene
Do Not Tumble Dry

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.

Additional Info Lines Work Date: 3/3/2025									
🔍 📄 + New Edit List Delete Copy Copy Standard Lines Comments More options									
Type	Symbol	VarDim Type	Value	Description	Picture	Additional Text	Exclude Print	Exclude Portals	
→ Variant	☐	COLLARTYPE	4	Forward-Point Collar			☐	☐	
Variant	☐	SLEEVE_LEN	4	Long Sleeve	+		☐	☐	
Variant	☐	CUFFSTYLE	8	Two Button Cuff			☐	☐	
					+				

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

DescriptionCompositionAdd. InfoWash & CareFootprintDownload

Collar Type: Forward-Point
Sleeve Length: Long Sleeve
Cuff Style: Two Button

Sustainability Information

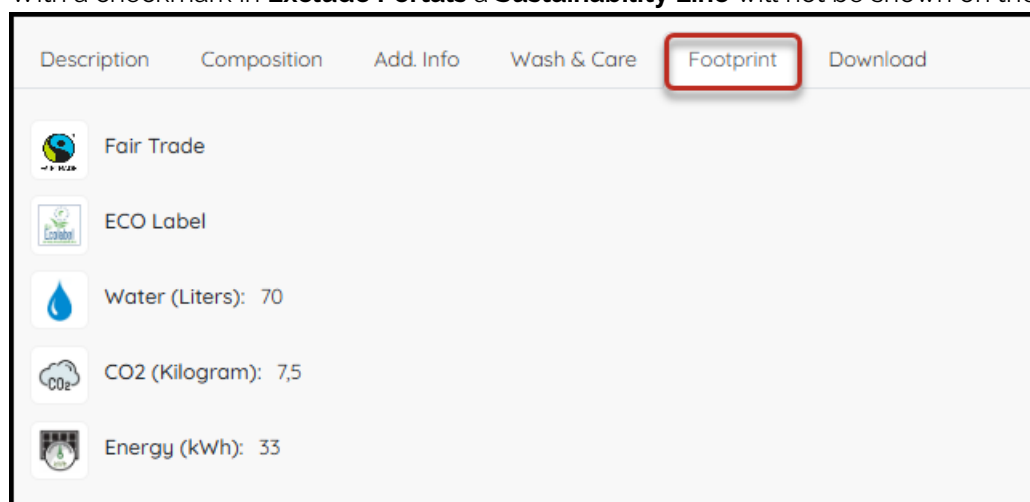
The Sustainability information can be used to add extra information to a Master based on Variant Tables. This information can be set from the Master Card in TRIMIT (via **Search Master List**) by clicking **Process, Sustainability**.

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.

Sustainability info Work Date: 3/3/2025									
🔍 📄 + New Edit List Delete Copy Comments									
Type	VarDim Type	VarDim Type Name	Value	Description	Symbol	Picture	Exclude Print	Exclude Portals	
→ Variant	SUS_CERT	Sustainability Certificates	ECOLABEL	ECO Label	☒		☐	☐	
Dimension	SUS_WATER	Water (Liters)	81.08		☒		☐	☐	
Dimension	SUS_CO2	CO2 (Kilogram)	9.71		☒		☐	☐	
Dimension	SUS_KWH	Energy (kWh)	43.08		☒		☐	☐	

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**.

2300 · Daisy Dress | Work Date: 3/3/2025

Extended Text List | + New **Manage**

Edit View Delete

Description	Language Code ↑	All Language Codes ↑	Starting Date ↑	Ending Date ↑
Web	:	☒		

Extended Text | Work Date: 3/3/2025 + ✓ Saved

2300 Daisy Dress 1

Editor

General

Language Code

Starting Date

All Language Codes ☒

Ending Date

Description Web

Text Format None

Lines | New Line Delete Line

Text
→ The Daisy dress is made of standard
travel-quality. This long variant of the Lilly
blouse has bright colors with two breast pockets.
The dress with long sleeves and pockets reaching
just above your knee and has faux-Pearl-buttons
for an extra luxurious touch. Fun with leggings
and ankle boots. And then you are also ready for

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**.

Portals

Sales Agent Portal ☒ B2C Shop ☒

B2B Shop ☒ Supplier Portal ☒

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:

Description	Composition	Add. Info	Wash & Care	Footprint	Download
-------------	-------------	-----------	-------------	-----------	----------

The Daisy dress is made of standard travel-quality. This long variant of the Lilly blouse has bright colors with two breast pockets. The dress with long sleeves and pockets reaching just above your knee and has faux-Pearl-buttons for an extra luxurious touch. Fun with leggings and ankle boots. And then you are also ready for the upcoming holidays!

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**.

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 delivered end of this week.	☐			No	☐	
B2B	2000		Welcome to the TRIMIT B2B Webshop	☐			Yes	☐	
Sales Agent	JR		Latest Sales Statistics now available for Download	☐			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	☐	

Comment Sheet

Date	Comment	Language Code
10/18/2018	Please see attached file for our brand logo. This must be printed on all size labels.	

Portal File Repository

Resource Name	Resource Extensi...	FileBlob	External Location	Creation Date	Creation Time	Created By
TRIMIT Logo	pdf			10/18/2018	4:12:23 PM	
Logo_color_rgb	png			10/18/2018	4:12:43 PM	
LogoColor_white background	png			10/18/2018	4:12:32 PM	
LogoColor_dark background	png			10/18/2018	4:12:37 PM	

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

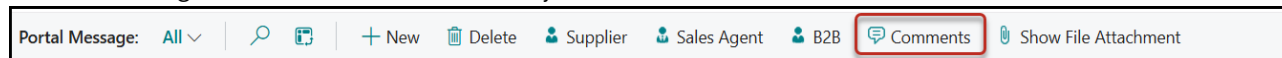
Displays the Creation Date of the Message.

Creation Time

Displays the Creation Time of the Message

Comment

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



File attached

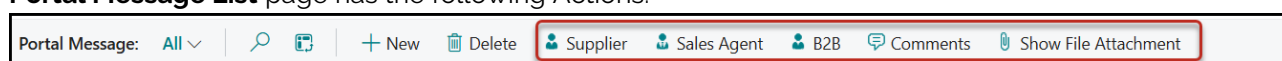
This field will get a checkmark automatically if **Attachments** have been imported.

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

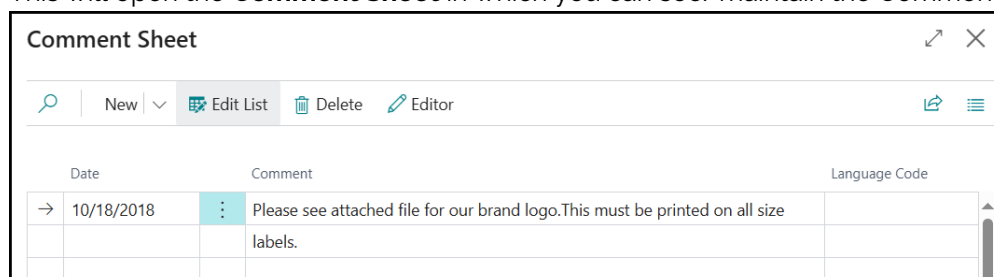
This will filter the **Portal Messages** base on **Recipient Type** = *Sales Agent*.

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.

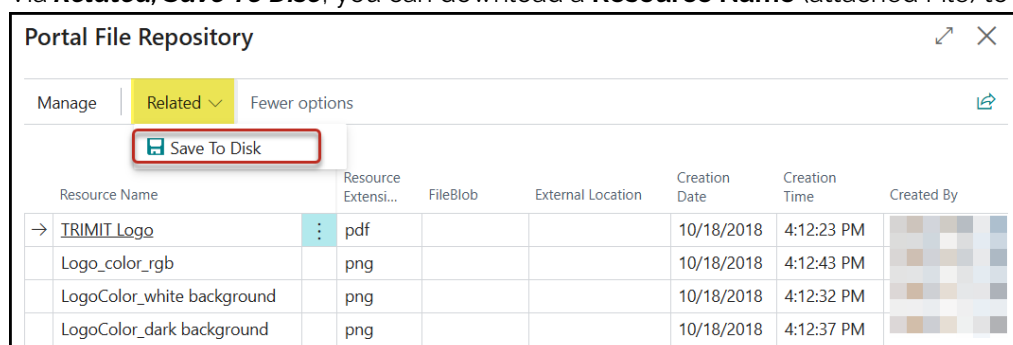


Show File Attachment

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**.

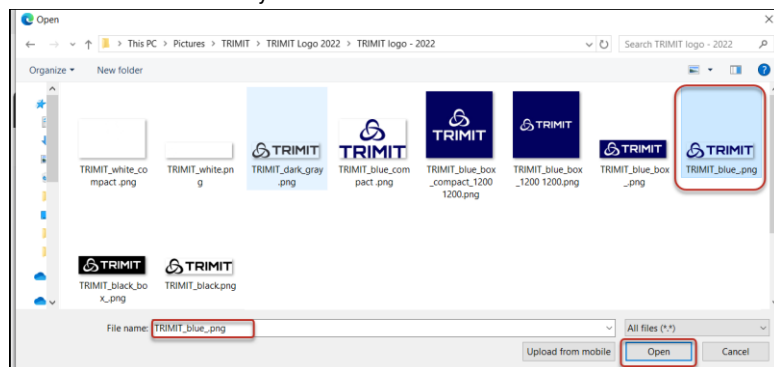
Description of these fields is same as for page **Portals Message List**.

Actions

Attach File

With this Action, you can attach Files.

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



Comments

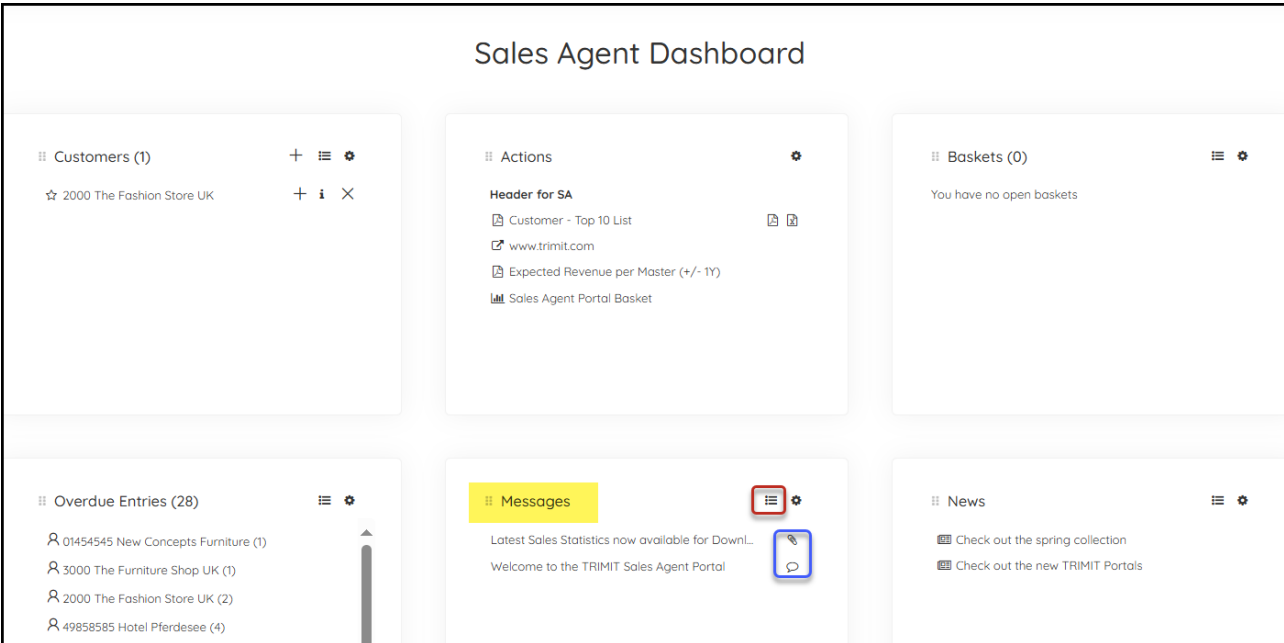
Same Action as in the **Poral Message List**.

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.



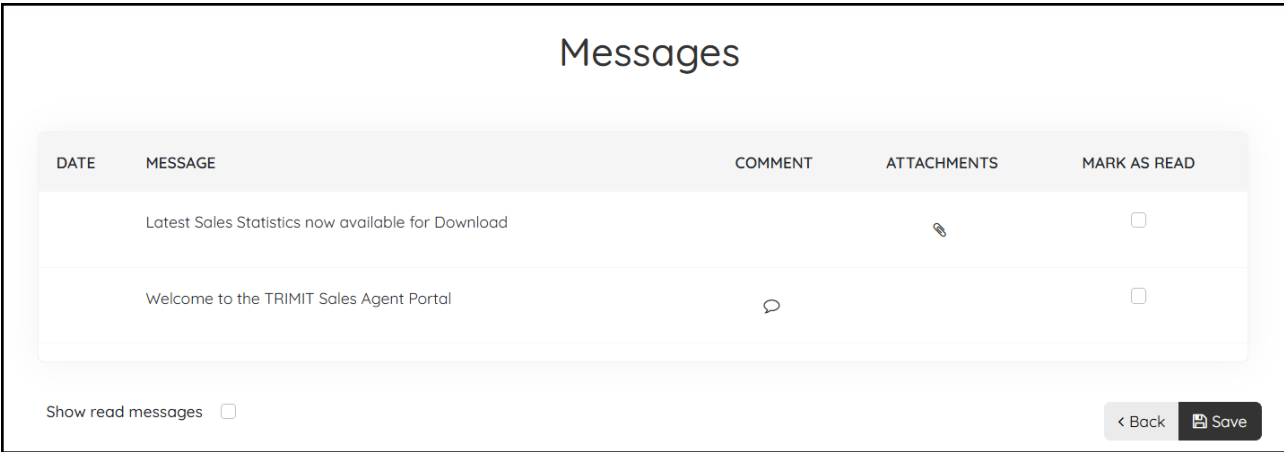
SA, B2B and SUP have identical Message functionality.

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

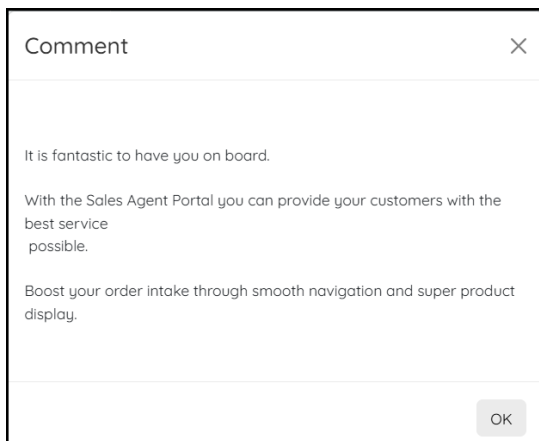
Message Creation date

Message

Subject of a Message

Comment

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



Attachments

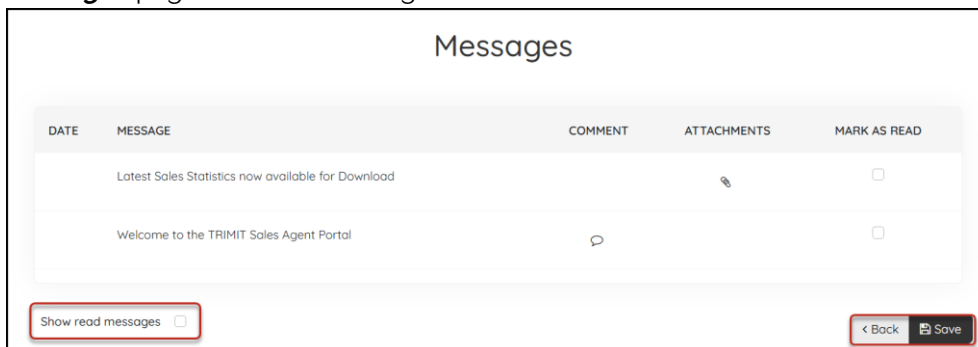
Message Attachment icon clicking which opens **Attachments** page. Here it is possible to open or download the attachment I.e.



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**.

CRONUS TRIMIT W1 Ltd.	Sales	Purchase	Payments	Customer Club	Interaction	ConnectPortal	Setup	
Portal Newsletters	Portal Activity log	Portal Message						

Portal Activity log:	All			Delete				
Description	Portal User ID	Business Central Type	Business Central ID	Date	Time			
Customer 2000 created or changed order WOB0000007.	44	Customer	2000	3/13/2025	12:30:26 PM			
Customer 2000 created or changed order WOB0000006.	44	Customer	2000	3/13/2025	12:15:49 PM			
Customer 2000 created or changed order WOB0000004.	35	Customer	2000	3/12/2025	3:05:53 PM			
Customer 2000 created or changed order WOB0000003.	35	Customer	2000	3/12/2025	2:24:11 PM			
Customer 2000 created or changed order WOB0000002.	35	Customer	2000	3/12/2025	2:17:33 PM			
Sales Agent (JR) John Roberts created or changed order WOS0000021.	35	Customer	2000	3/12/2025	12:50:07 PM			
Sales Agent (JR) John Roberts created or changed order WOS0000020.	44	Customer	2000	3/11/2025	1:20:58 PM			
Sales Agent (JR) John Roberts created or changed order WOS0000019.	35	Customer	2000	3/11/2025	1:18:06 PM			
Sales Agent (JR) John Roberts created or changed order WOS0000015.	35	Customer	2000	3/10/2025	3:39:22 PM			
Sales Agent (JR) John Roberts created or changed order WOS0000014.	35	Customer	2000	3/10/2025	3:34:33 PM			
Sales Agent (JR) John Roberts created or changed order WOS0000013.	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 WOB0000007".

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.

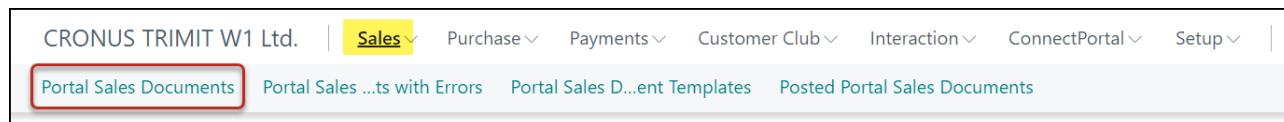
Portal Overdue Documents

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

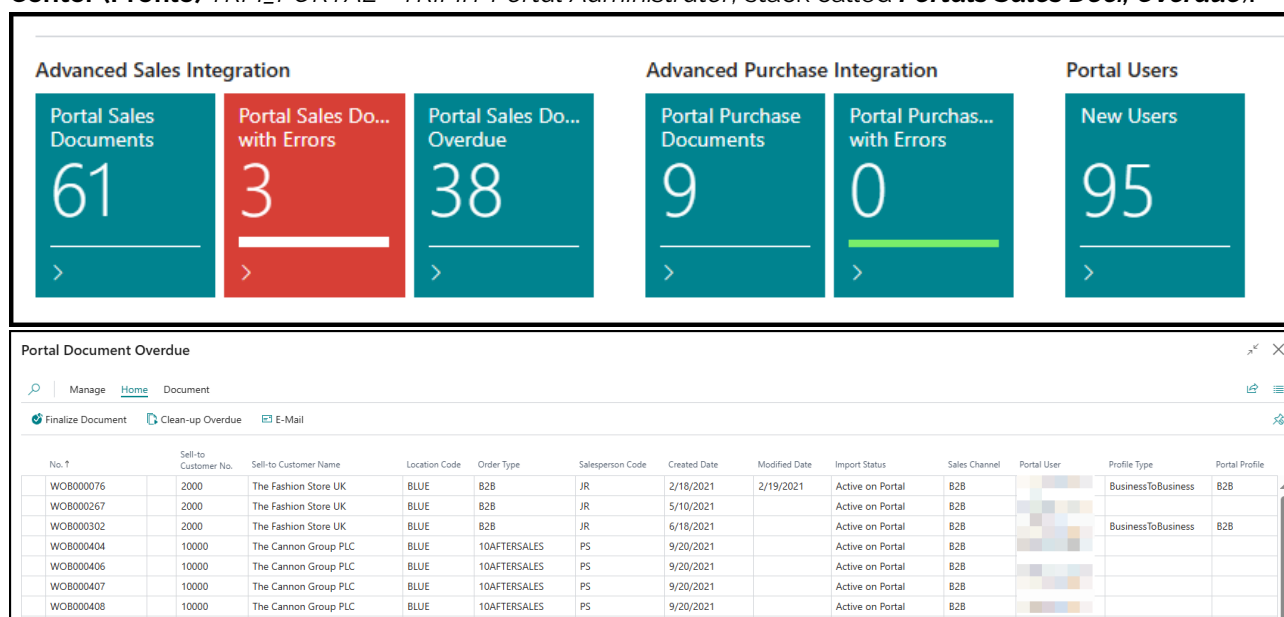
I.e., E-commerce Sales Document is not finalized when e-commerce User clicked **New order** on Customer Dashboard and added Item to basket but never finalized this order by clicking **Finalize Order** on **Finalize Order** page.

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)**.



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.

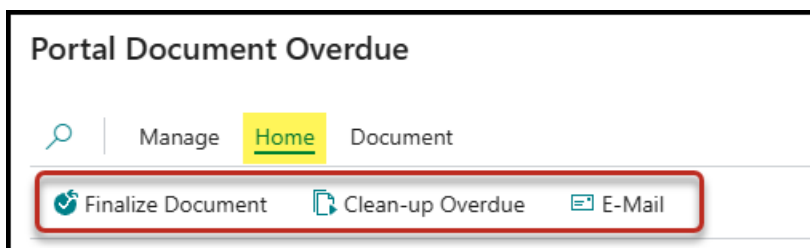
Profile Type

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**

CRONUS TRIMIT W1 Ltd. | Sales ▾ Purchase ▾ Payments ▾ Customer Club ▾ Interaction ▾ ConnectPortal ▾ Setup ▾ | ≡

Categories Portal Profiles Portal Message Job Queue Entries

Headline

Want to learn more about Business Central? >

Actions

> Users > Category > Setup > TRIMIT Help

ConnectPortal Setup

Portal Setup

Work Date: 4/11/2022

ConnectPortal Setup

Web Service

General

Admin E-Mail

Default Language Code 1033

Company Identifier

Include in License Check Authorization Codes & Relations

Order Handling

Posting Attempts 0

Open Orders Date Formula -1D

Web Transaction Max Log 10000

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

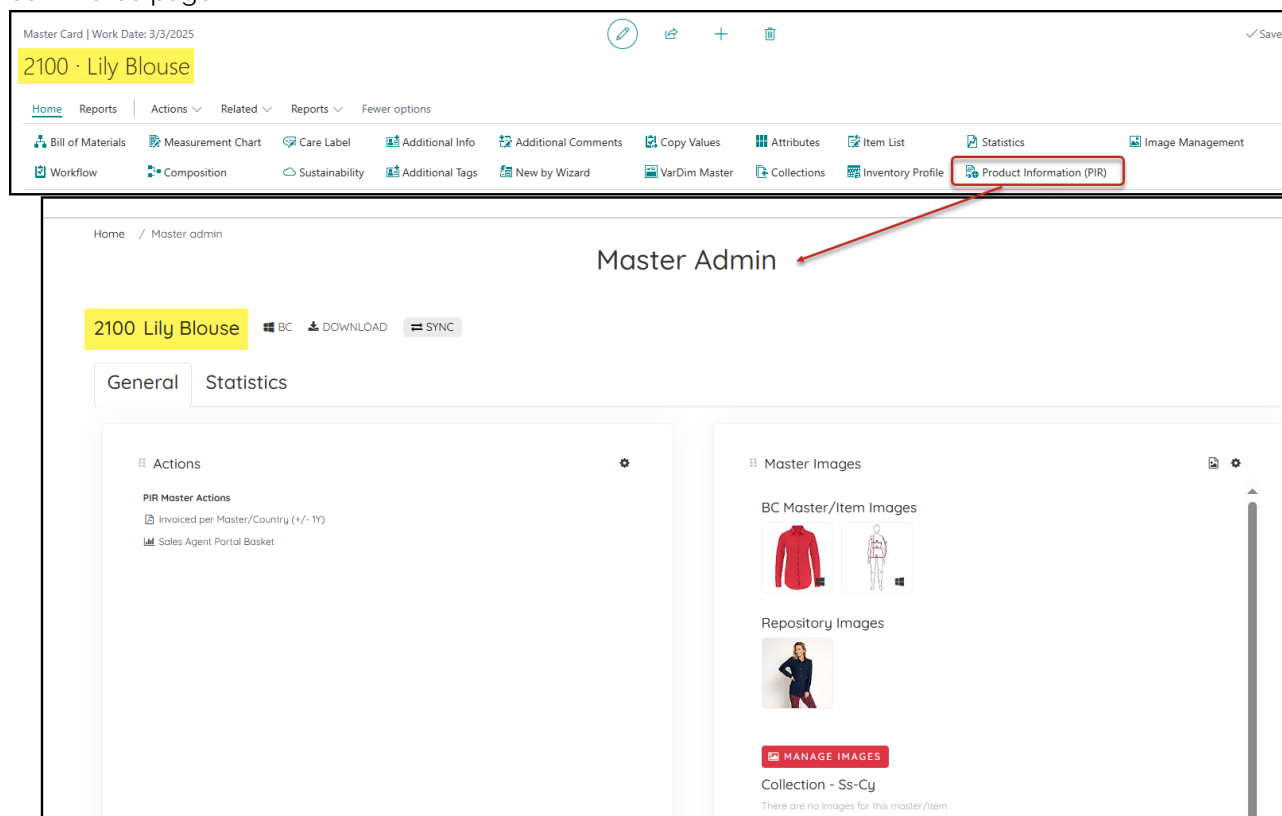
The **Overdue entries** in the Dashboard of the B2B and SA, show Posted Sales Invoices that are due based on the **Due Date** of the Posted Sales Invoice; they are in no way related to the Portal Overdue Documents – which are open Portal Sales Documents.

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**.

Portal Instances Work Date: 3/3/2025									
Show Paths	Domain	Disable SSL	Portal Path ↑	Name	Portal Type ↑	Repository	Synchronized Users	Last Update	
→	.trimitdemo.com	☐				☐	11	2/26/2025	
☐	.trimitdemo.com	☐	/b2b/		BusinessToBu...	☐	11	2/26/2025	
☐	.trimitdemo.com	☐	/b2c/		BusinessToCo...	☐	11	2/26/2025	
☐	.trimitdemo.com	☐	/demo/			☐	11	2/26/2025	
☐	.trimitdemo.com	☐	/insite/			☐	11	2/26/2025	
☐	.trimitdemo.com	☐	/pir/			☒	11	2/26/2025	
☐	.trimitdemo.com	☐	/returns/			☐	11	2/26/2025	
☐	.trimitdemo.com	☐	/salesagent/		Sales Agent	☐	11	2/26/2025	
☐	.trimitdemo.com	☐	/supplier/		BusinessToSu...	☐	11	2/26/2025	

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**.

User Relationship List - kbi@trimit.com									
Type ↑	No.	Card	Profile ↑	Creation Date	Token Available	Token Created Date	User information		
Customer	2000	Retrive Token	2000	2/26/2025 4:48 PM	☐				
Customer	CW00	Delete Token	ing	2/26/2025 4:48 PM	☐				
Customer	2000	InstoreCustomer	B2C	2/26/2025 4:48 PM	☐				
Vendor	2300	Vendor 2300	B2C-INSTORE	2/26/2025 4:48 PM	☐				
Salesperson/Purchaser	JR	John Roberts	SUPPLIER	2/26/2025 4:48 PM	☐				
→ Business Central User			AGENT	2/26/2025 4:48 PM	☐				
Business Central User		InSite User	INSITE	2/26/2025 4:48 PM	☒	2/26/2025			

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.

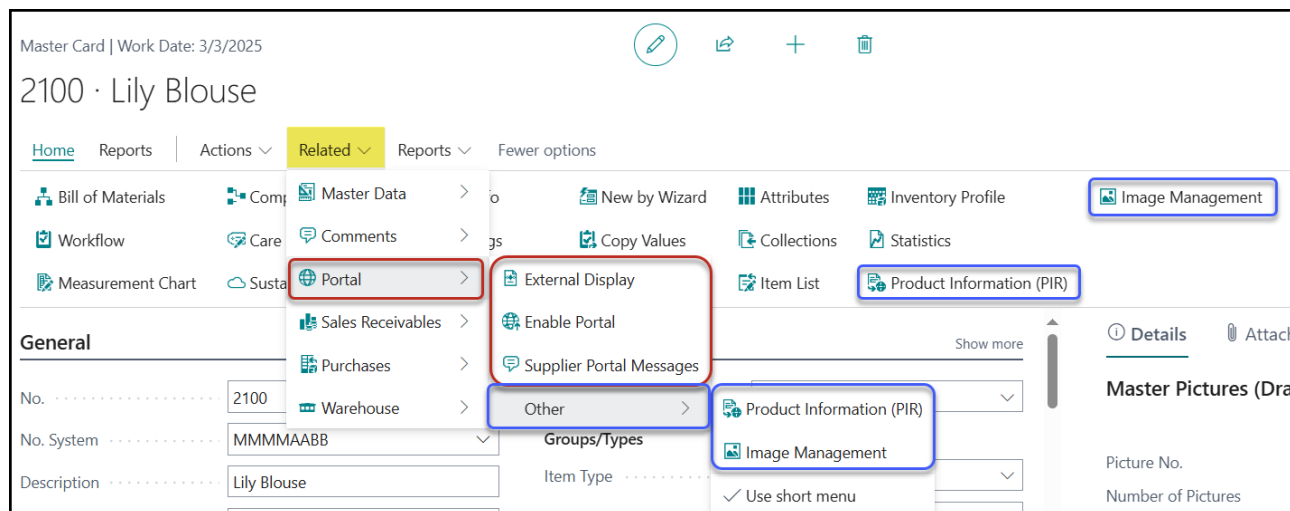
This token is used behind the scenes and applied to any request that needs authentication.

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)**.

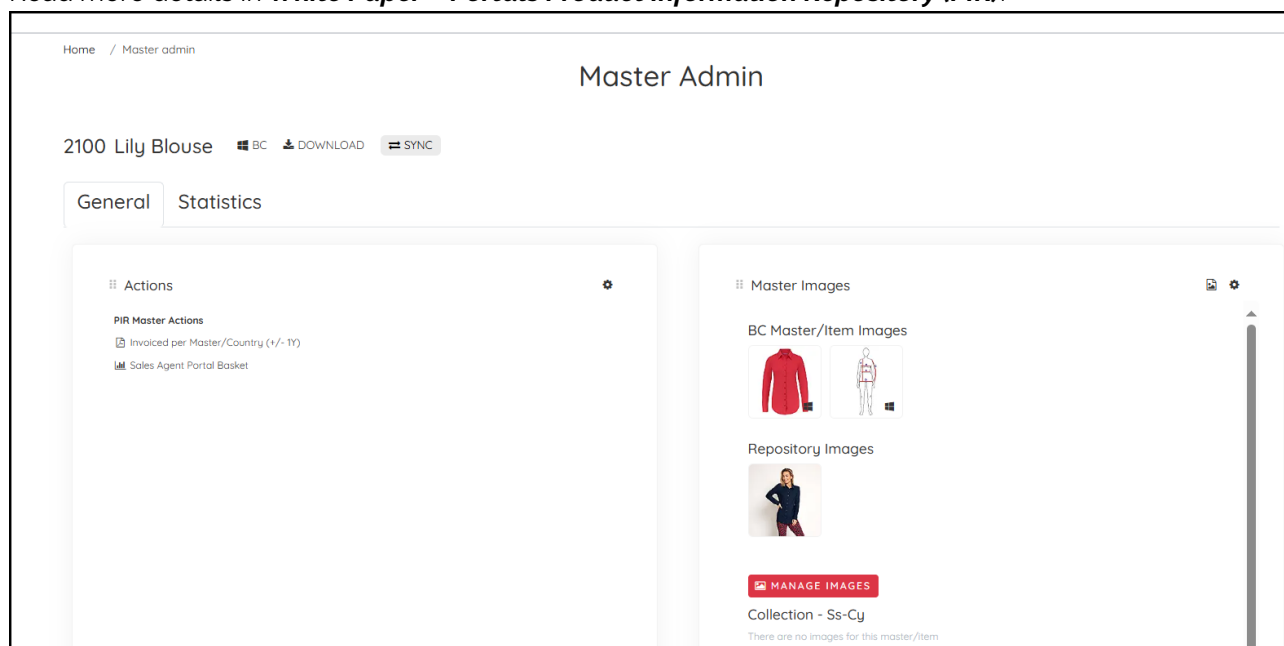
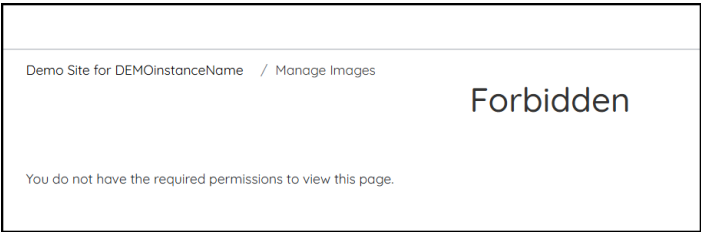


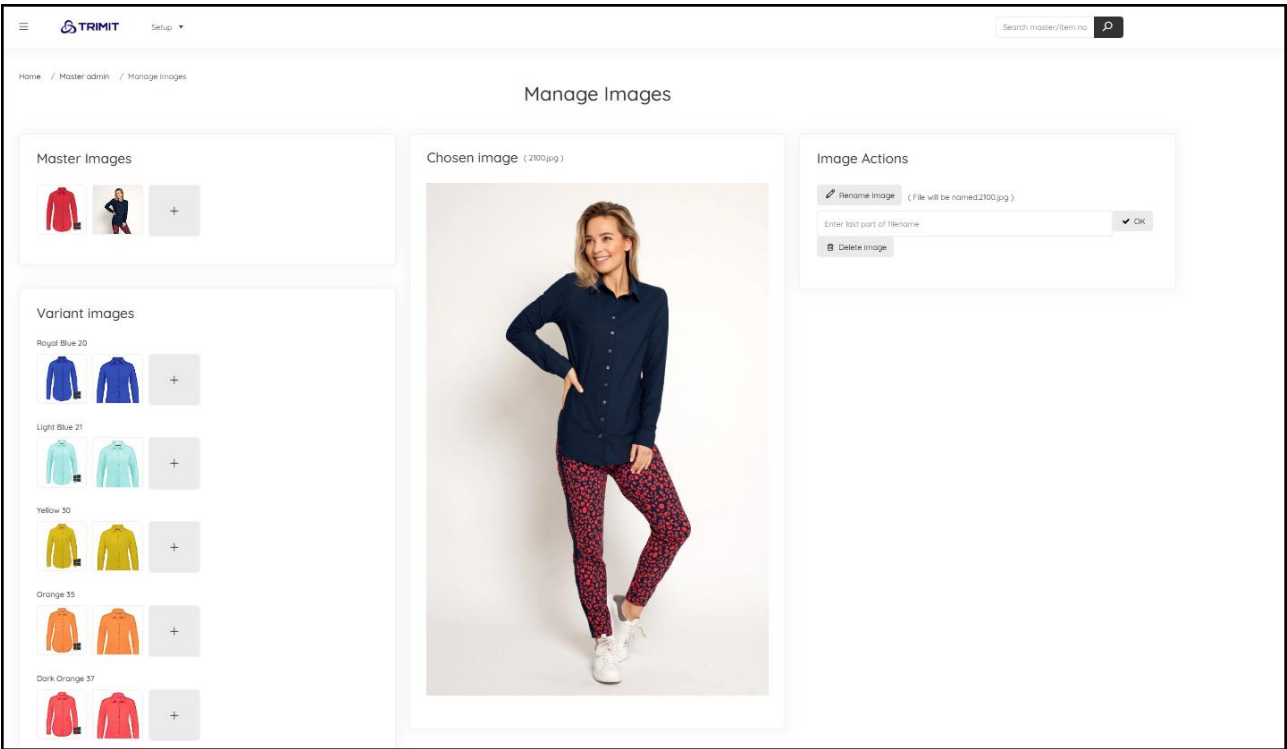
Image Management

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.

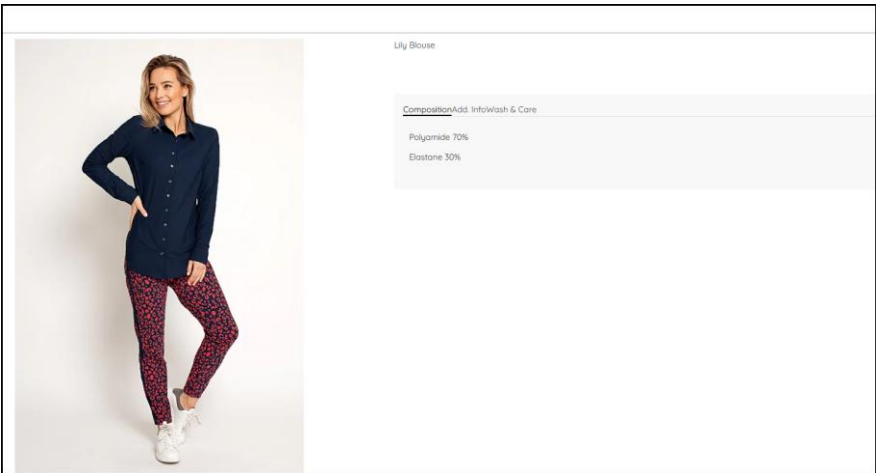
Read more details in ***White Paper – Portals Product Information Repository (PIR)***.



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.

Edit - Attach 2100 to Category - _ROOT

Item to Attach

Item(s) to Attach2100

Select Type

Item

Item with Configuration

Matrix

Matrix with Configuration

Assortment Matrix

Assortment Matrix with Configuration

Create Variant Combinations

Dates

Effective Date

Expiry Date

Choose Category

Exist in Category	Attach	No. 1	Description	Description 2
☐	☐	AGENT_W_DRESSES	Dresses/Skirts	
☐	☐	AGENT_W_JACKETS	Blazers	
☒	☐	AGENT_W_TOPS	Tops	
☐	☐	AGENT_W_TROUSERS	Trousers	
☐	☐	AGENT1	SalesAgent1 Top Level	

Supplier Portal Messages

Clicking this Action opens [Portal Message List](#)

Portal Messages | Work Date: 1-1-2022

✓ Saved

Search

+ New

Manage

Supplier

Sales Agent

B2B

Comments

Show File Attachment

Actions

Related

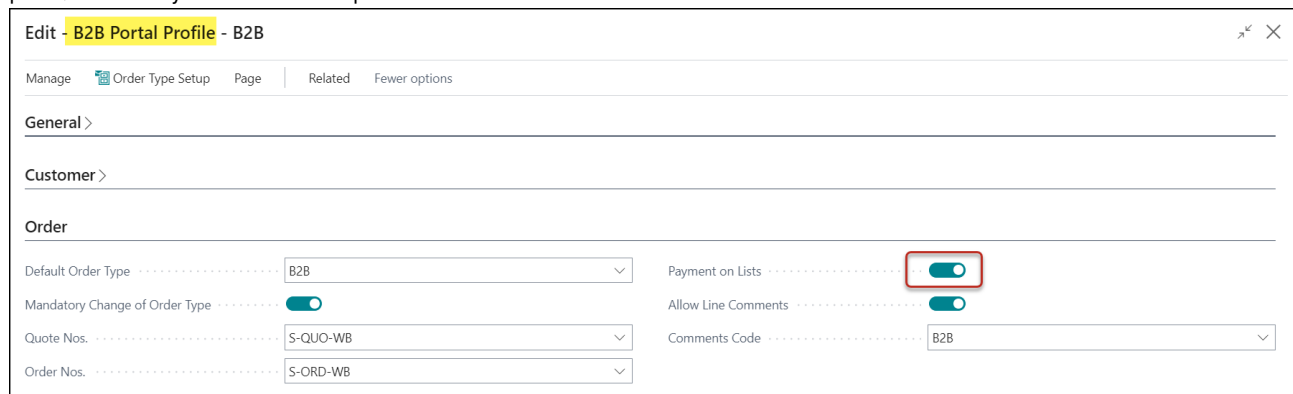
Fewer options

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.



Edit - B2B Portal Profile - B2B

Manage Order Type Setup Page Related Fewer options

General >

Customer >

Order

Default Order Type B2B

Mandatory Change of Order Type ☒

Quote Nos. S-QUO-WB

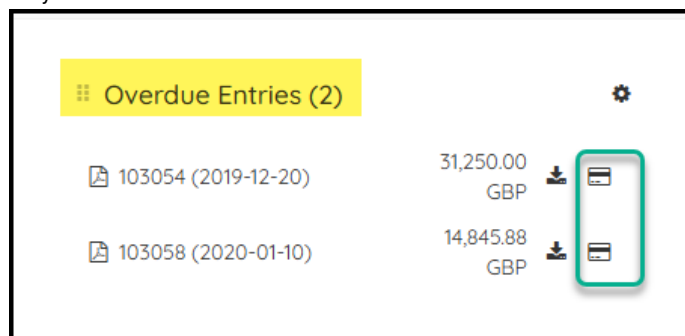
Order Nos. S-ORD-WB

Payment on Lists ☒

Allow Line Comments ☒

Comments Code B2B

Payment icons in **Overdue Entries** dock:

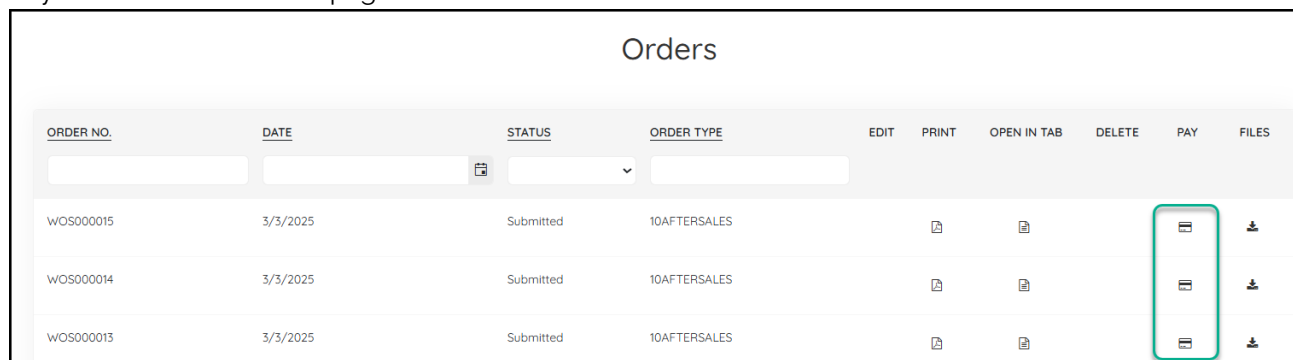


Overdue Entries (2)

103054 (2019-12-20) 31,250.00 GBP

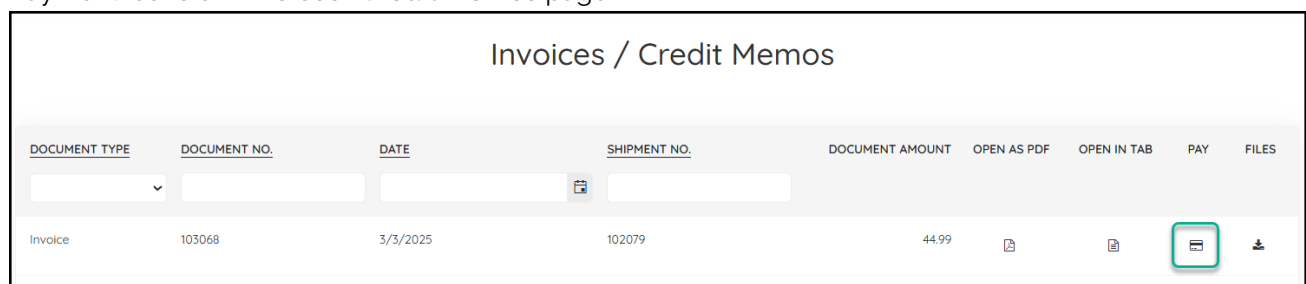
103058 (2020-01-10) 14,845.88 GBP

Payment icons on **Orders** page:



ORDER NO.	DATE	STATUS	ORDER TYPE	EDIT	PRINT	OPEN IN TAB	DELETE	PAY	FILES
WOS000015	3/3/2025	Submitted	10AFTERSALES						
WOS000014	3/3/2025	Submitted	10AFTERSALES						
WOS000013	3/3/2025	Submitted	10AFTERSALES						

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



DOCUMENT TYPE	DOCUMENT NO.	DATE	SHIPMENT NO.	DOCUMENT AMOUNT	OPEN AS PDF	OPEN IN TAB	PAY	FILES
Invoice	103068	3/3/2025	102079	44.99				

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).

Direct payment

Order no.

103054

Document type

Posted Invoice

Payment amount (GBP)

31,250.00

☒ I accept terms and conditions

Pay Simulation

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.

Customer Card | Work Date: 1-1-2022

2000 · The Fashion Store UK

Process New Document Approve Request Approval

General >

Address & Contact >

Invoicing >

Payments

Payment Terms Code PAYNOW

Shipping

Ship-to Code

Location Code BLUE

Combine Shipments

Reserve

Select - Payment Terms

Code	Due Date Calculation	Discount Date Calculation	Discount %	Calc. Pmt. Disc. on Cr. Mem.	Description	Credit Card Pmt. on Portal
10430N	30D		4		10 days 4%, 30 days net	☐
14 DAYS	14D		0		Net 14 days	☐
15 DAYS	15D		0		Net 15 days	☐
1M(8D)	1M	8D	2		1 Month/2% 8 days	☐
2 DAYS	2D		0		Net 2 days	☐
21 DAYS	21D		0		Net 21 days	☐
30 DAYS	30D		0		Net 30 days	☐
60 DAYS	60D		0		Net 60 days	☐
7 DAYS	7D		0		Net 7 days	☐
CM	CM		0		Current Month	☐
COD	0D		0		Cash on delivery	☐
LC	0D		0		Letter of Credit	☐
→ PAYNOW	0D		0		Direct Payment	☒

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

Finalize Order

ITEM	DETAILS	QUANTITY	TOTAL
	Hijab Blouse 2710 239.94 GBP	1	239.94 GBP
			Basket total 239.94 GBP
			VAT 59.99 GBP
			Amount total incl. VAT 299.93 GBP
			Order no. WCB0000729
			Order type 828
			Order date 26/02/2022

Customer

The Fashion Store UK
 Customer no: 2000
 20 Savile Row
 Mayfair
 W1D 3DG
 London
 Great Britain
 6076444
info@trimit.com
 Contact: Charley Nelson

Billing

The Fashion Store UK
 20 Savile Row
 Mayfair
 W1D 3DG
 London
 Great Britain

Delivery

Admin TRIMIT
 Ship-to code: 2000-001
 Stangerstræde 88
 9000
 Denmark
 60000000
deputy@trimit.net

Additional Information

VAT registration no. GB25456789
 Payment terms Direct Payment
 Salesperson John Roberts

Order confirmation email

Choose from options below or enter your own email

☐ info@trimit.com
☐ deputy@trimit.net
☒ ksa@trimit.com

Email

Signature

Signature name

Signature

I accept terms and conditions

PAY NOW SIMULATION
PAY NOW INGENICO
PAY NOW EPAY

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:

Order Type Card | Work Date: 1-1-2022

02SS_CY_PRE

Portal

Category Show on Web ☒ CPO Availability Check Method Create Web Orders as	Instant ASI Posting ☐ Posting Lines Threshold 0 Disable Signature in Checkout ☐ Skip Credit Card Payment ☒
--	---

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
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		(1F750C34-53BC-4B12-926F-FB2752CE9011)	89.98	0.00	0.00	GBP	Pending	1/3/2025	12:30:26 PM
15	Order	WOB000006	2000	B2B		(42E9F3F7-48D6-410E-8D83-1A16CFB8C5C)	48.75	0.00	0.00	GBP	Pending	1/3/2025	12:15:49 PM
14	Order	WOB000004	2000	B2B		(17A8EC16-3C44-49D6-8ACF-385C2BC232F0)	44.99	0.00	0.00	GBP	Pending	1/3/2025	3:05:53 PM
13	Order	WOB000003	2000	B2B		(430A251F-FBA2-4BA2-98CB-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		(FFC4EEF3-4837-48CB-8B1E-8B27E8058EB3)	625.00	0.00	0.00	DKK	Pending	10/4/2022	9:55:13 AM
9	Order	WOC000008		Other		(43DE3DF0-7AE4-40AD-98C1-90CFA1BCF08)	895.00	0.00	0.00	DKK	Pending	1/23/2020	8:05:53 AM
8	Order			Other		(3E7B11FA-33C4-4321-B15C-8D6850BE67F)	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	183.00	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.

Finalize Order

ITEM	DETAILS	QUANTITY	TOTAL
	Olivia Trousers 2000 37.00 GBP	1	37.00 GBP
Basket total			37.00 GBP
VAT			9.25 GBP
Amount total incl. VAT			46.25 GBP
Order no.		WOB000009	
Order type		B2B	
Order date		1/3/2025	

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**.

Sales Order | Work Date: 3/3/2025

WOB000007 · The Fashion Store UK

[Home](#)
[Prepare](#)
[Print/Send](#)
[Request Approval](#)
[Order](#)

[Actions](#)
[Related](#)
[Fewer options](#)

[Post...](#)
[Release](#)
[Create Warehouse Shipment](#)
[Create Inventory Put-away/Pick...](#)
[Archive Document](#)
[Workflow](#)
[Portal Payment](#)
[Extra Order Info](#)

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

+

16

New

Restore From Archive...

Related

Fewer options

General

No.16

Document TypeOrder

Document No.WOB000007

Customer No.2000

Payment Service Provider

Transaction No.(1F750C34-538C-4812-926F-FB2752CE9011)

Card No.

Card Type

Amount89.98

Currency CodeGBP

Captured Amount0.00

Refunded Amount0.00

Paid by Gift Card/Points

Transaction StatusPending

Paid fromB2B

Creation Date1/3/2025

Creation Time12:30:26 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:

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

COLOR_1

Variant Table / Options

General

TypeVariant

Limited usageVarDim Master

No.COLOR_1

Permanent or OptionalW (Optional with Default)

VarDim Type NameGarment/Fabric Colors

Descriptions

DescriptionGarment/Fabric Colors

Field used in Item Description 2Description

VarDim Variant10

Field used in Matrix Y-Axis Descripti...Description

Field used in Matrix X-Axis Descripti...Short Description

Parameters >

Names of Variant Groups >

Table Relations >

Groupings

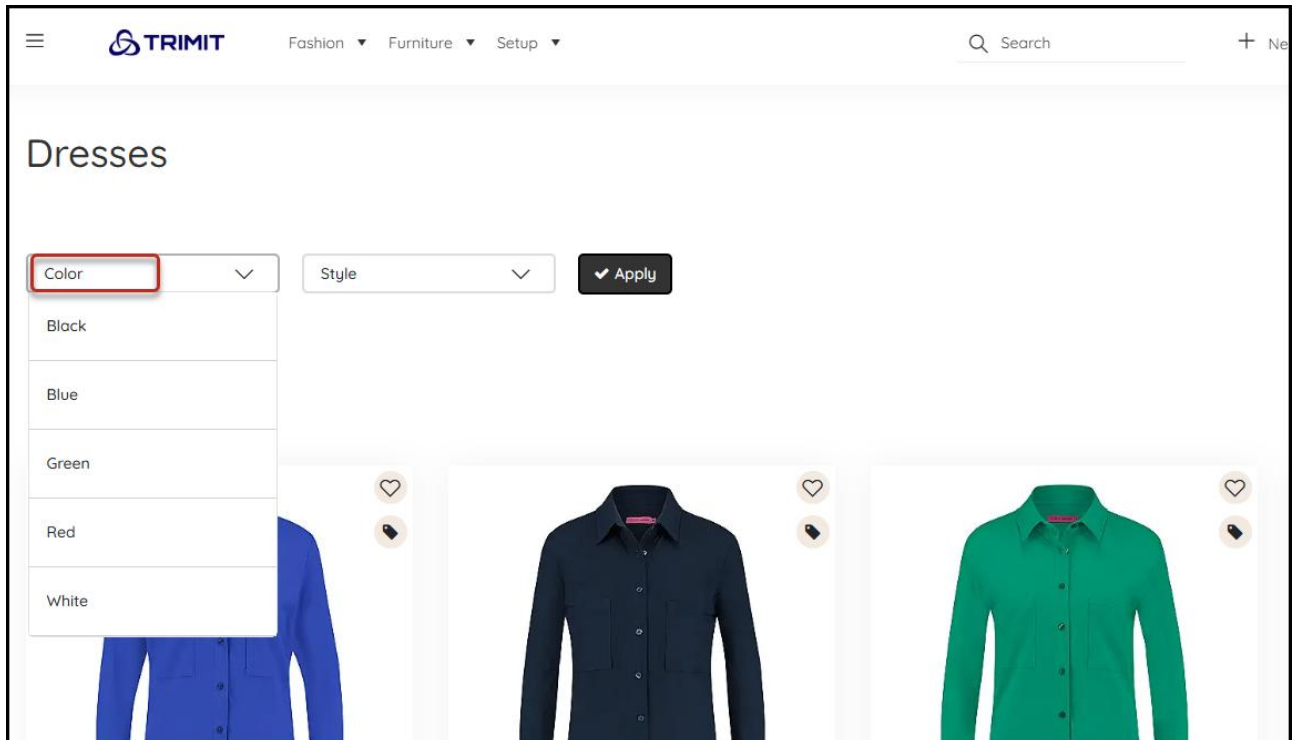
Filter GroupFilter Group 1

VarDim Attribute NameTRIMIT_COLOR

VarDim Variant Option No. COLOR_1 - 10

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.