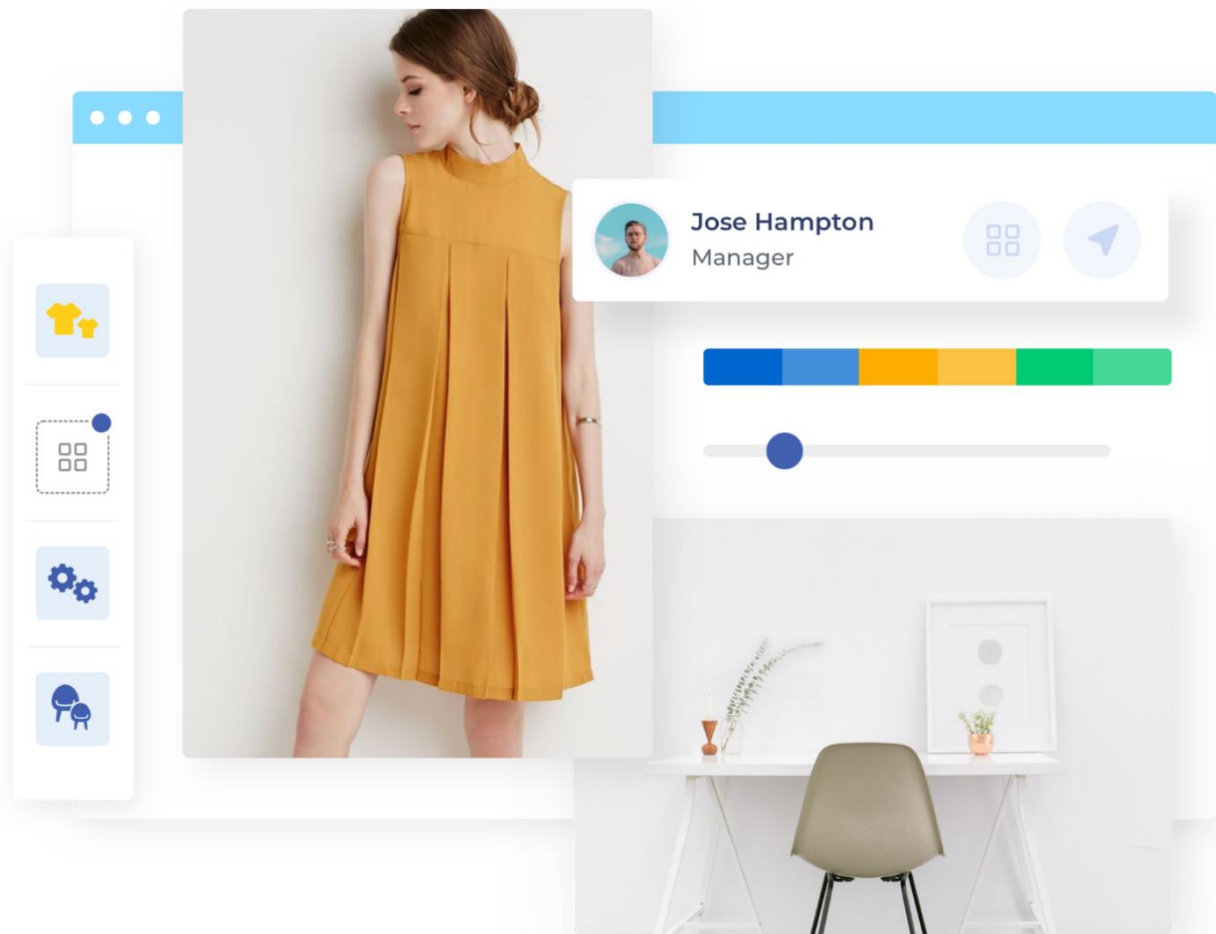


**WHITE PAPER**

TRIMIT Group Filter in BOM 20.2

This document contains information about the Group Filter in the Bill of Materials in TRIMIT 20.2 for Business Central W1 BC17.X.

Version: 20.2.1975
Date: 08-03-2021

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INTRODUCTION

Selecting a specific Item, Setup or Operation on a Bill of Materials (BOM) Component Line, always showed you the complete list of Items, Operations with Type *Setup* or Operations with Type *Operation*. With the **Group Filter in BOM** functionality, you are now able to limit your lookup by a pre-defined Filter on Items, Setups or Operations.

I.e. if you are searching for Fabrics, you can now setup a pre-defined Filter for all the Fabrics in your Items based on a combination of Filters over all Items.

This will then limit your lookup on the Items that you want to choose for a specific BOM Component Line.

The functionality described is the functionality in **TRIMIT 20.2 for Business Central W1 BC17.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 20.2**, which is based on Microsoft Dynamics 365 Business Central 2020 release wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT Group Filter for BOM contains the following objects:

The tables **6036682 trm Group Code**
 6037324 trm Filters

The pages **6036704 trm Group Codes**

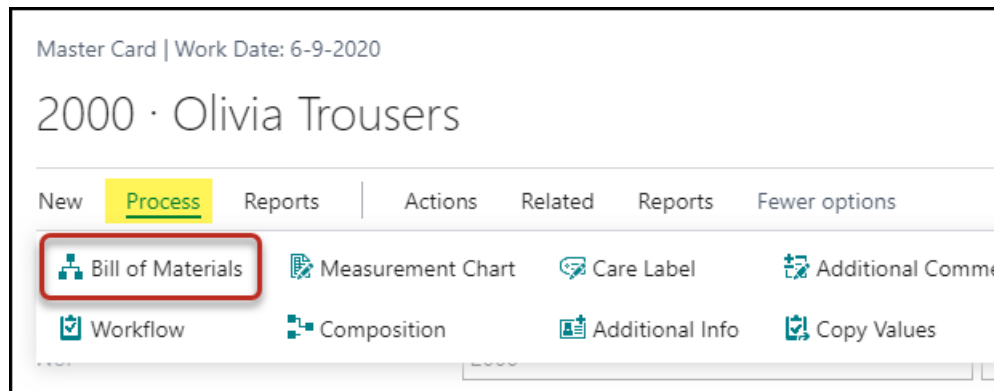
Besides these main objects also the following objects have been changed:

Table **6037341 trm BOM Component Line**
Page **6037341 trm BOM Component Lines**

CREATING GROUP FILTER

You can only create the **Group Filters** via the **Bill of Materials**:

You can go to the **Bill of Materials** via the **Master List/Card** by clicking **Process, Bill of Materials**.



To create a **Group Filter**, you need to **Lookup value** (Alt+Arrow Down) in the field **Group Filter**.

2000 · Olivia Trousers Work Date: 6-9-2020							
BOM Component Lines Search + New Edit List Delete Formula Lines Search Table Lines Group Filter							
Type	Part Item No.	Group Filter	No.	Description	Description 2	Quantity	
→ Item	MAIN	FABRICS	M2000	Fabric 72 % Polyamide, 28 % Elastane			
Item	CORD	FABRICS	M2000	Fabric 72 % Polyamide, 28 % Elastane			
Item	POCKET	FABRICS	M2000	Fabric 72 % Polyamide, 28 % Elastane			
Item		THREAD	M2100	Thread 100% CO			

This will open the page **Group Codes** for the **Type Group Filter**.

Now you can enter the basic information of your **Group Filter**.

Group Codes - Group Filter				
Search + New Edit List Delete Set Group Filter Open in Excel More options				
Code ↑	Description	BOM Type ↑	Default Part Item No.	Group Filter
→ ALL	All Materials Fashion	Item		No.: M2000..M2999, Item Type: Master Item
BUTTONS	Buttons	Item		No.: M2200..M2299, Item Type: Master Item
COVERS	Covers	Item		Item Type: Master Item, Item Statistics Group 2: 945
FABRICS	Fabrics / Leathers	Item		Item Type: Master Item, Item Statistics Group 2: 910..920
FURNPARTS	Furniture Parts	Item		Item Type: Raw Materials Master Item, Item Statistics Group 2: 990
LABELS	Labels	Item		No.: M2400..M2499, Item Type: Master Item
METAL	Metal	Item		Item Type: Raw Materials Master Item, Item Statistics Group 2: 950
PACKING	Packing Materials	Item		No.: M2500..M2599, Item Type: Master Item
PAINTS	Paints/Lacquers	Item		Item Type: Master Item, Item Statistics Group 2: 995
SERVICES	Services	Item		Gen. Prod. Posting Group: SERVICES, Item Type: Master Item
SHOEPARTS	Shoe Parts	Item		Item Type: Master Item, Item Statistics Group 2: 960
SUBASSEMBL	Sub-Assemblies Furniture	Item		Item Type: Master Item, Item Statistics Group 2: 970
THREAD	Threads/Varns	Item		No.: M2100..M2199, Item Type: Master Item
WOOD	Wood	Item		Item Type: Raw Materials Master Item, Item Statistics Group 2: 940
ZIPPERS	Zippers	Item		No.: M2300..M2399, Item Type: Master Item
SETUPS	Machine Setups	Setup		Type: Setup
CUTTING	Cutting Operations	Operation		Type: Operation, Work Center: 3010
OPERATIONS	All Operations	Operation		Type: Operation
SEWING	Sewing Operations	Operation		Type: Operation, Work Center: 3080

DESCRIPTION OF THE FIELDS:

CODE

The unique Code for the **Group Filter**.

DESCRIPTION

The Description for the **Group Filter**.

NOTE

You can also enter a **Description 2** if you choose that specific column into the page as well.

BOM TYPE

You can choose *Item*, *Operation*, *Setup* or *Sub-Supplier Work*.

The same – besides *Matrix* – as for the **Type** of the Component Lines of a Bill of Materials.

DEFAULT PART ITEM NO.

You can enter a **Part Item No.** that will also fill the **Part Item No.** on the Component Line, if this specific **Group Filter** is chosen

GROUP FILTER

This field needs to be filled by clicking **Set Group Filter**.

Although you can click on the content of the field, which will also open the page for **Set Group Filter**.

CREATING THE FILTERS FOR THE GROUP FILTER

Now you can determine the actual filters that are applicable for a **Group Filter**.

Make sure you are in the **Bill of Materials** again and click **Lookup value** again on the field **Group Filter**.

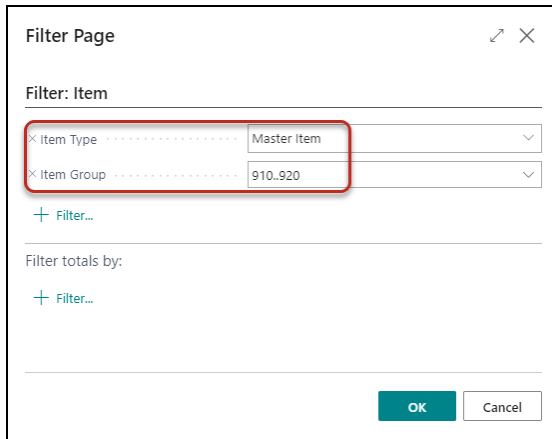
Only after entering the **BOM Type** of a Group Filter, you can click **Set Group Filter** to determine the filters.

Group Codes - Group Filter				
Search + New Edit List Delete Set Group Filter Open in Excel More options				
Code 4	Description	BOM Type 4	Default Part Item No.	Group Filter
SEWING	Sewing Operations	Operation		Type: Operation, Work Center: 3080
OPERATIONS	All Operations	Operation		Type: Operation
CUTTING	Cutting Operations	Operation		Type: Operation, Work Center: 3010
SETUPS	Machine Setups	Setup		Type: Setup
	Zipper	Item		No.: M2300..M2399, Item Type: Master Item
LABELS				Item Type: Master Item
FURNPARTS	Furniture Parts	Item		Item Type: Raw Materials Master Item, Item Statistics Group 2: 990
→ FABRICS	Fabrics / Leathers	Item		Item Type: Master Item, Item Statistics Group 2: 910..920
COVERS	Covers	Item		Item Type: Master Item, Item Statistics Group 2: 945
BUTTONS	Buttons	Item		No.: M2200..M2299, Item Type: Master Item
ALL	All Materials Fashion	Item		No.: M2000..M2999, Item Type: Master Item

SET GROUP FILTER FOR BOM TYPE = ITEM

You can set Filters on any field of the **Item** Table by clicking **Set Group Filter**

I.e. for the **Group Filter FABRICS**



Filter Page

Filter: Item

Item Type Master Item

Item Group 910..920

+ Filter...

Filter totals by:

+ Filter...

OK Cancel

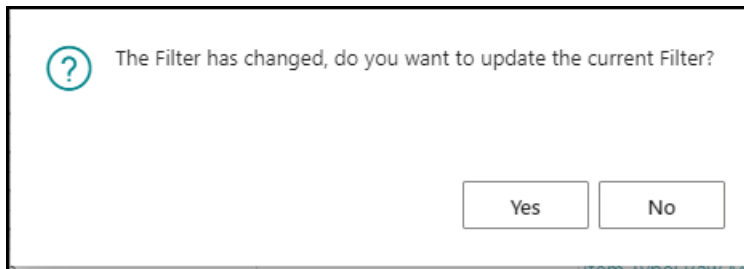
In this example, the **Item Type** is not filtered on *Raw Materials*, because this would show all Items with this **Item Type** and we only want to be able to see the Masters in a lookup!

Therefore, the filter for **Item Type** has been set to *Master Item*, so you only see the Master Items.

In this example, **Item Group** is the **Item Statistics Group 2** of the Demo Company, and all the fabrics and leathers have a specific value (910 or 920).

Therefore, this also means, that the **Item Statistics Group 2** always needs to be filled in the different fabric/leather Masters as well, otherwise this **Item Group** Filter will not work properly.

You can get the following message after changing the filters:



The Filter has changed, do you want to update the current Filter?

Yes No

Click **Yes**.

This will fill the field **Group Filter** with the chosen Filters.

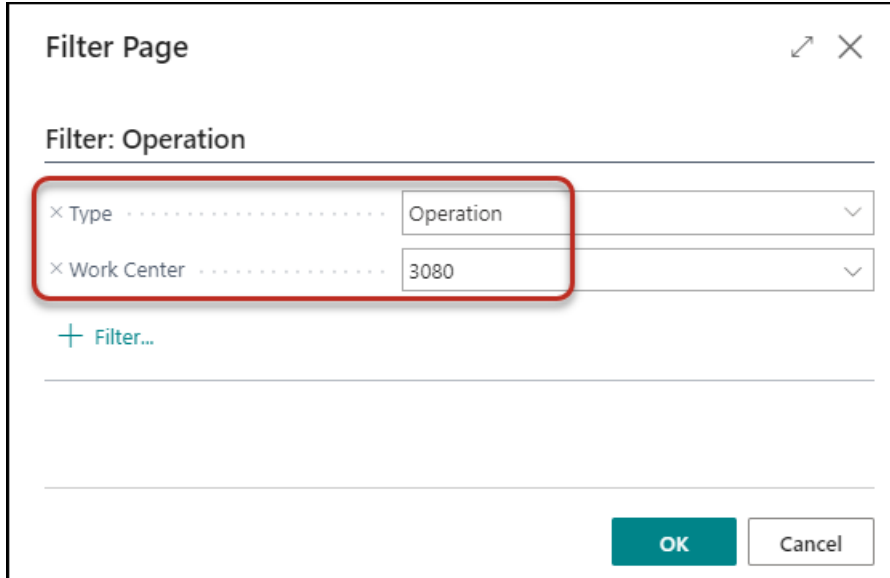
Now the **Group Code** will look as follows: The Field **Group Filter** is now filled with the filters you entered.

Group Codes - Group Filter				
Code #	Description	BOM Type #	Default Part Item No.	Group Filter
ALL	All Materials Fashion	Item		No.: M2000..M2999, Item Type: Master Item
BUTTONS	Buttons	Item		No.: M2200..M2999, Item Type: Master Item
COVERS	Covers	Item		Item Type: Master Item, Item Statistics Group 2: 945
FABRICS	Fabrics / Leathers	Item		Item Type: Master item, Item Statistics Group 2: 910..920
FURNPARTS	Furniture Parts	Item		Item Type: Raw Materials Master Item, Item Statistics Group 2: 990
LABELS	Labels	Item		No.: M2400..M2499, Item Type: Master item

SET GROUP FILTER FOR BOM TYPE = OPERATION

After creating the basic information of a Group Filter for Operations (**Code, Description, BOM Type = Operation**), you can set Filters on any field of the **Operations** Table by clicking **Set Group Filter**.

I.e. for the **Group Filter SEWING**

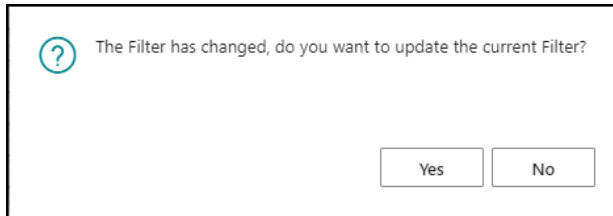


The 'Filter Page' dialog box shows the 'Filter: Operation' section. It contains two filter criteria: 'Type' set to 'Operation' and 'Work Center' set to '3080'. A red box highlights these two criteria. Below the criteria is a '+ Filter...' button. At the bottom are 'OK' and 'Cancel' buttons.

In this example, the **Type** (of the Operations Table) is filtered on *Operation*.

In this example, for the **Filter Group SEWING**, we want to filter the Operations based on **Work Center 3080 Sewing Machine**.

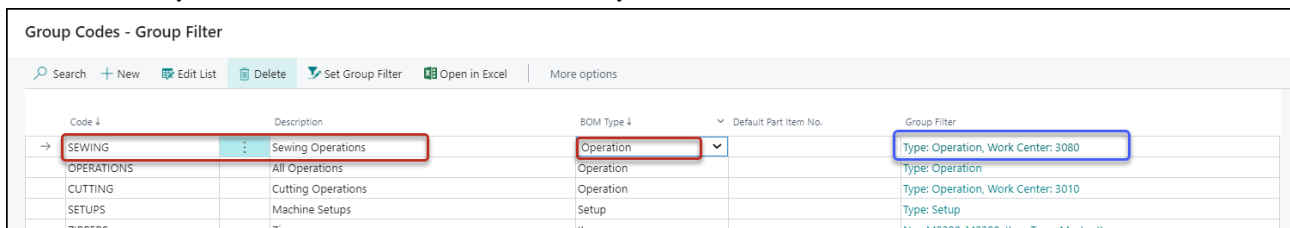
You can get the following message after changing the filters:



A confirmation dialog box with a question mark icon and the text: 'The Filter has changed, do you want to update the current Filter?'. It has 'Yes' and 'No' buttons.

Click **Yes**.

Now the **Group Code** will look as follows: The **Group Filter** is now filled.

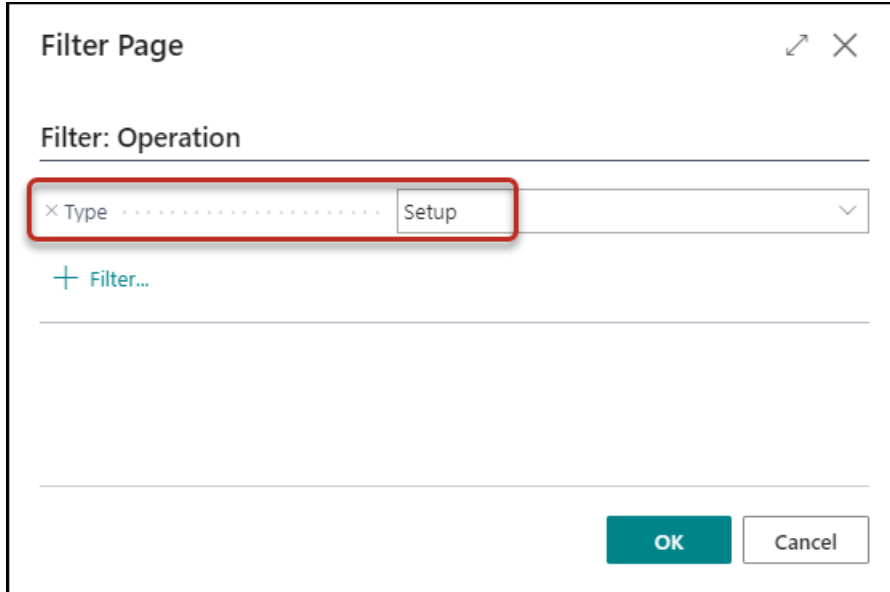


Code ↓	Description	BOM Type ↓	Default Part Item No.	Group Filter
SEWING	Sewing Operations	Operation		Type: Operation, Work Center: 3080
OPERATIONS	All Operations	Operation		Type: Operation
CUTTING	Cutting Operations	Operation		Type: Operation, Work Center: 3010
SETUPS	Machine Setups	Setup		Type: Setup
ZIPPERS	Zippers	Item		No.: M2300, M2399, Item Type: Master item

SET GROUP FILTER FOR BOM TYPE = SETUP

After creating the basic information of a Group Filter for (Machine) Setups (**Code, Description, BOM Type = Setup**), you can set Filters on any field of the **Operations** Table by clicking **Set Group Filter**.

I.e. for the **Group Filter SETUPS**

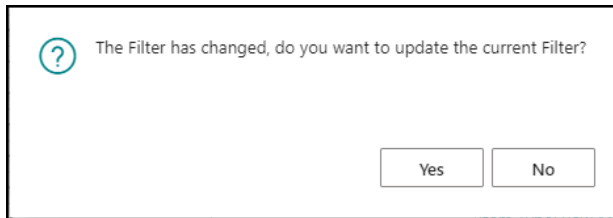


The 'Filter Page' dialog box is shown. It has a title bar with a close button. Below the title bar, the text 'Filter: Operation' is displayed. A dropdown menu is open, showing 'Type' selected and 'Setup' as the chosen value. Below the dropdown, there is a '+ Filter...' button. At the bottom right, there are 'OK' and 'Cancel' buttons.

In this example, the **Type** (of the Operations Table) is filtered on *Setup*.

In this example, for the **Filter Group SETUPS**, we want to filter the Operations based on the **Type Setup**.

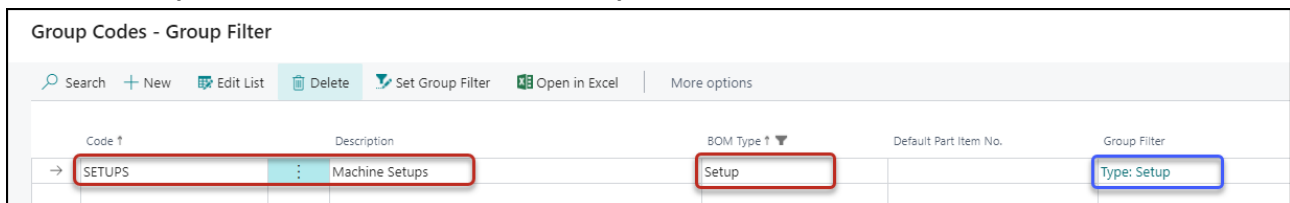
You can get the following message after changing the filters:



A confirmation dialog box is shown with a question mark icon. The text inside says 'The Filter has changed, do you want to update the current Filter?'. At the bottom, there are 'Yes' and 'No' buttons.

Click **Yes**.

Now the **Group Code** will look as follows: The **Group Filter** is now filled.



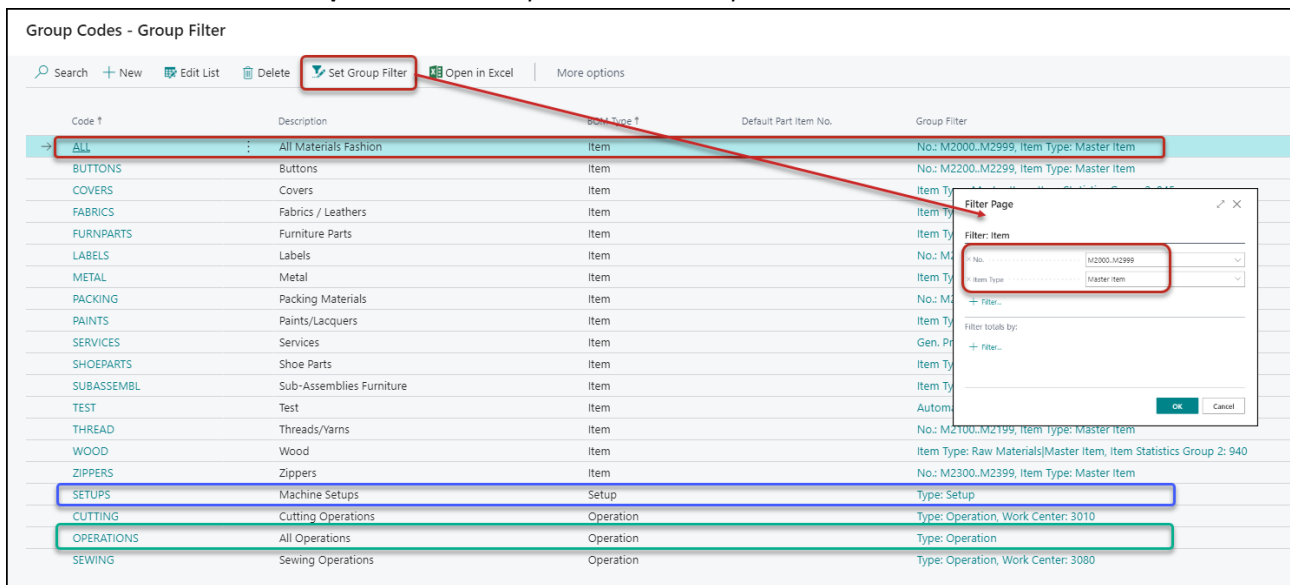
The 'Group Codes - Group Filter' table is shown. It has a toolbar with buttons for Search, New, Edit List, Delete, Set Group Filter, Open in Excel, and More options. The table has columns for Code, Description, BOM Type, Default Part Item No., and Group Filter. The first row is highlighted with a red box around the 'Code' and 'Description' cells, and a blue box around the 'Group Filter' cell. The 'Code' cell contains 'SETUPS', the 'Description' cell contains 'Machine Setups', and the 'Group Filter' cell contains 'Type: Setup'.

PROCESS FOR USING GROUP FILTERS

After you have created the **Group Filters** as described in [Setup for Group Filters](#) you can now use these **Group Filters** to create your Bill of Materials.

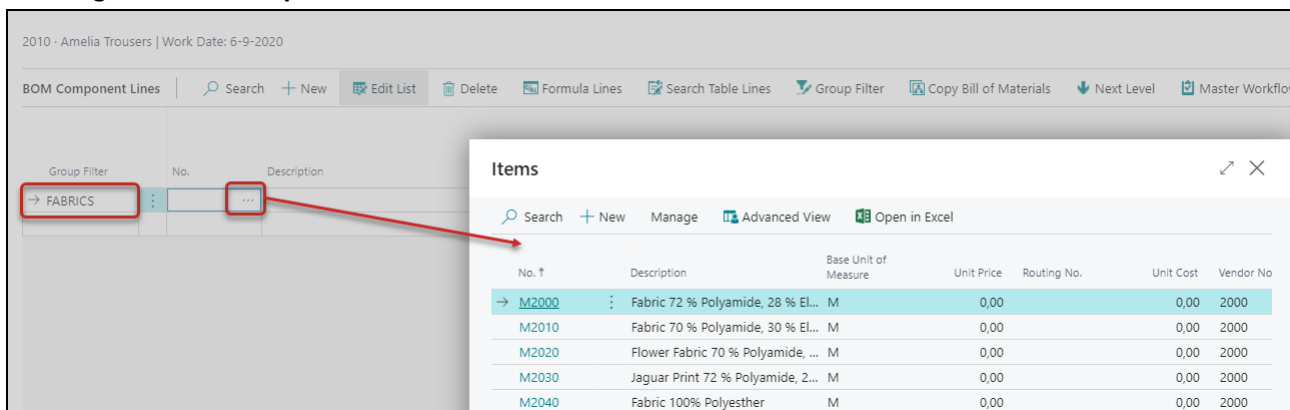
If you want to use the **Group Filters** for all the **BOM Component Lines**, and have set them up accordingly, you could remove the field **Type** from your page and only use the **Group Filters** for the Component Lines. But you can also decide to keep the **Type** in the page, and only use the **Group Filter** for specific groups of Items or Operations you want to choose.

In case you always want to use the **Group Filter**, it might be necessary to add a **Group Filter** with all your Material Masters and **Group Filters** for all *Operations* or *Setups*.



Code ↑	Description	BOM Type ↑	Default Part Item No.	Group Filter
→ ALL	All Materials Fashion	Item		No.: M2000.M2999, Item Type: Master Item
BUTTONS	Buttons	Item		No.: M2200.M2299, Item Type: Master Item
COVERS	Covers	Item		Item Ty...
FABRICS	Fabrics / Leathers	Item		Item Ty...
FURNPARTS	Furniture Parts	Item		Item Ty...
LABELS	Labels	Item		No.: M...
METAL	Metal	Item		Item Ty...
PACKING	Packing Materials	Item		No.: M...
PAINTS	Paints/Lacquers	Item		Item Ty...
SERVICES	Services	Item		Gen. Pr...
SHOEPARTS	Shoe Parts	Item		Item Ty...
SUBASSEMBL	Sub-Assemblies Furniture	Item		Item Ty...
TEST	Test	Item		Autom...
THREAD	Threads/Varns	Item		No.: M2100.M2199, Item Type: Master Item
WOOD	Wood	Item		Item Type: Raw Materials(Master Item, Item Statistics Group 2: 940
ZIPPERS	Zippers	Item		No.: M2300.M2399, Item Type: Master Item
SETUPS	Machine Setups	Setup		Type: Setup
CUTTING	Cutting Operations	Operation		Type: Operation, Work Center: 3010
OPERATIONS	All Operations	Operation		Type: Operation
SEWING	Sewing Operations	Operation		Type: Operation, Work Center: 3080

Entering the **BOM Component Lines** could now look as follows:



Group Filter	No.	Description
→ FABRICS		

No. ↑	Description	Base Unit of Measure	Unit Price	Routing No.	Unit Cost	Vendor No
→ M2000	Fabric 72 % Polyamide, 28 % EL...	M	0,00		0,00	2000
M2010	Fabric 70 % Polyamide, 30 % EL...	M	0,00		0,00	2000
M2020	Flower Fabric 70 % Polyamide, ...	M	0,00		0,00	2000
M2030	Jaguar Print 72 % Polyamide, 2...	M	0,00		0,00	2000
M2040	Fabric 100% Polyester	M	0,00		0,00	2000

2010 - Amelia Trousers | Work Date: 6-9-2020

BOM Component Lines | Search | + New | Edit List | Delete | Formula Lines | Search Table Lines | Group Filter | Copy Bill of Materials | Next Level | Master Workf

Group Filter	No.	Description
FABRICS	M2000	Fabric 72 % Polyamide, 28 % Elastane
LABELS		

Items

Search | + New | Manage | Advanced View | Open in Excel

No. ↑	Description	Base Unit of Measure	Unit Price	Routing No.	Unit Cost	Vendor No
M2400	Size Label 36 - 60	PCS	0,00		0,00	2000
M2410	Brand Logo Label	PCS	0,00		0,00	2000
M2420	Wash & Care Label	PCS	0,00		0,00	2000
M2430	Size Label XS - 5XL	PCS	0,00		0,00	2000
M2440	Size Label 4 - 20	PCS	0,00		0,00	2000

Therefore, the final **Bill of Materials** could look as follows:

Group Filter	No.	Description	Part Item
FABRICS	M2000	Fabric 72 % Polyamide, 28 % Elastane	
LABELS	M2400	Size Label 36 - 60	
BUTTONS	M2200	Buttons 0,5" Acrylic	
THREAD	M2110	Thread 100% Polyester	
CUTTING	300010	Cut	
SETUPS	O300080	Setup for Sewing Machines	
→ SEWING	300080	Sew	

NOTE 1

It is not mandatory to use the **Group Filter** for all the **BOM Component Lines**. You can also just use it for a few groups of Items, to make it easier to select the right Item.
The choice is yours.

NOTE 2

Even if you have entered a **Group Filter**, you can still enter any **No.** (Item or Operation). The **Group Filter** is not a limitation, only a help for a limited lookup of possibilities.

After you have entered the **Group Filter** in the **BOM Component Line**, you are able to see the actual used filter by clicking **Group Filter**.

BOM Component Lines | Search | + New | Edit List | Delete | Formula Lines | Search Table Lines | Group Filter | Copy Bill of Materials | Next Level | Master Workf

Group Filter	No.	Description	Part Item No.	Description 2	Quantity per	Unit of Measure Code
→ FABRICS	M2000	Fabric 72 % Polyamide, 28 % Elastane			0	M
LABELS	M2400	Size Label 36 - 60			0	PCS
BUTTONS	M2200	Buttons 0,5" Acrylic			0	PCS
THREAD	M2110	Thread 100% Polyester			0	M
CUTTING	300010	Cut			0	MIN
SETUPS	O300080	Setup for Sewing Machines			0	MIN
SEWING	300080	Sew			0	MIN

Group Filter | Work Date: 6-9-2020

Group Codes | Search | + New | Edit List | Delete | Set Group Filter | Open in Excel | More options

Code 1	Description	BOM Type	Default Part Item No.	Group Filter
→ FABRICS	Fabrics / Leathers	Item		Item Type: Master Item, Item Statistics Group 2: 910-920