



WHITE PAPER

TRIMIT Multiple Salesperson Relations 23.2

This document contains information regarding the Customer/Salesperson Relations – specifically for the TRIMIT Sales Agent Portal functionality in TRIMIT 23.2 for Microsoft Dynamics 365 Business Central 2023, Wave 2 (W1).

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CONTENTS

Introduction	1
Components	2
Salesperson.....	3
Salesperson/Customer Relations	3
Description of General Field	4
Description of Lines Fields	4
Show Related Customers	6
Customer/Salesperson Relations	7
Examples.....	8
SCENARIO 1	8
SCENARIO 2	9
SCENARIO 3	10
SCENARIO 4	11
SCENARIO 5	12
SCENARIO 6	13
SCENARIO 7	14
SCENARIO 8	15

INTRODUCTION

In standard Business Central the Salesperson is connected to the Customer and a Customer can only have one Salesperson connected (hereafter called the Primary Salesperson).

TRIMIT has for the purpose of advanced Commission Settlements added two Salespersons to the Customer; hence, with TRIMIT there are three possible recipients of Commission:

The Primary Salesperson, Salesperson 2, and Salesperson 3.

The **TRIMIT Sales Agent Portal** is built for Salespersons to create Orders for their Customers.

Each **Username** in the TRIMIT Sales Agent is related to one Salesperson Code in TRIMIT.

Logging in to the TRIMIT Sales Agent Portal, the user only has access to the Customers, where the related Salesperson is the Primary Salesperson.

Example:

- Portals **Username** is *SA1*
- *SA1* is related to the Salesperson *JR John Roberts*
- *John Roberts* is Primary Salesperson for Customers *2000*, *2040* and *3000*.
- Hence, when *SA1* logs in to the TRIMIT Sales Agent Portal, only for the Customers *2000*, *2040* and *3000* the Salesperson can enter Orders or see information.

In the Fashion Industry there can be several Salespersons working with the same Customer. Salespersons can be related to Brands, specific Item/Masters or even a Collection.

Changing Salespersons may happen often per season.

At a Fashion Fair there is typically a number of Salespersons that needs to be able to create Orders in the TRIMIT Sales Agent Portal to random and new Customers regardless of a Salesperson relationship.

The Sales Manager needs to get an overview of the Salespersons to make an Order or to see the performance also in the TRIMIT Sales Agent Portal.

These examples lead to these key issues:

1. Managing the Salesperson access to Customers in the TRIMIT Sales Agent Portal, hereafter called **Customer/Salesperson Relations**.
2. Managing the Commission recipients in Orders via the TRIMIT Sales Agent Portal with multiple **Customer/Salesperson Relations**.
3. Managing Product related Salespersons. I.e.: Salesperson *A* handles Brand *A* and Salesperson *B* handles Brand *B*.
4. Settings for Creating new Customer.

For Issue 1.: We have the solution: **TRIMIT Multiple Salespersons Relations**.

This functionality enables you to setup specific rules to determine which Customers a Salesperson can see to enter Orders or see information from on the TRIMIT Sales Agent Portal.

For Issue 2.: The Commission recipients in Orders from the TRIMIT Sales Agent Portal will be related to the Salesperson Code that entered the Order on the Portal as the Primary Salesperson and the Salesperson 2

and/or Salesperson 3 that are in the Customer card; therefore, it will overrule the Salesperson Code (the Primary Salesperson) of the Customer!

For Issue 3.: Product related Salespersons

This will be completely disregarded and is not developed.

For Issue 4.: We can handle this via the **Portal Customer Templates** that can be used for a specific Portal Profile of the Sales Agent Portal.

For more details, see **White Paper - TRIMIT Portals Setups in Business Central**.

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 23.2 for Business Central W1 BC23.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 23.2**, which is based on Microsoft Dynamics 365 Business Central 2023 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT Multiple Salesperson Relations contains the following objects:

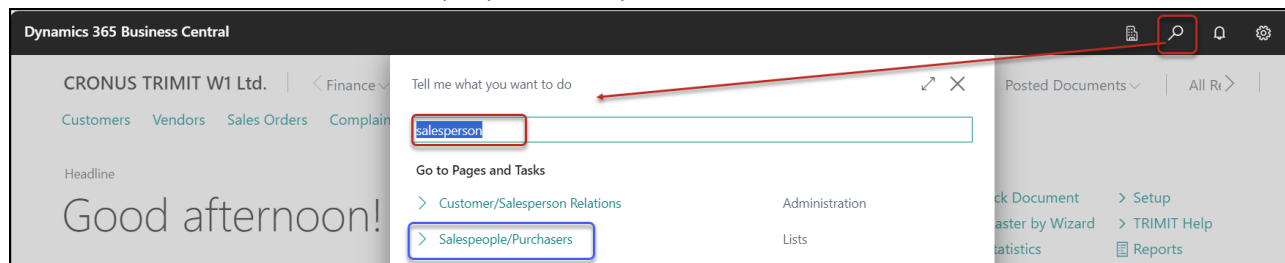
The tables	6036670 trm Cust/Salesperson Relation
The pages	6036669 trm Cust/Salesperson Relations
The codeunits	6036660 trm Cust/Salesperson Relation

There are other objects influenced by **TRIMIT Multiple Salesperson Relations**, but they are not mainly used for this functionality.

SALESPERSON

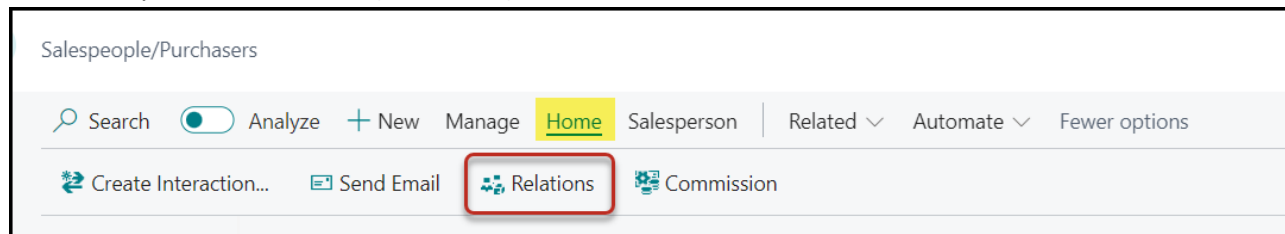
The **TRIMIT Multiple Salesperson Relations** can be setup via the **Salespeople/Purchaser Card (page 5116)** or **Salespeople/Purchasers List (page 14)**.

You can find the List via **Search salespeople or salesperson**.

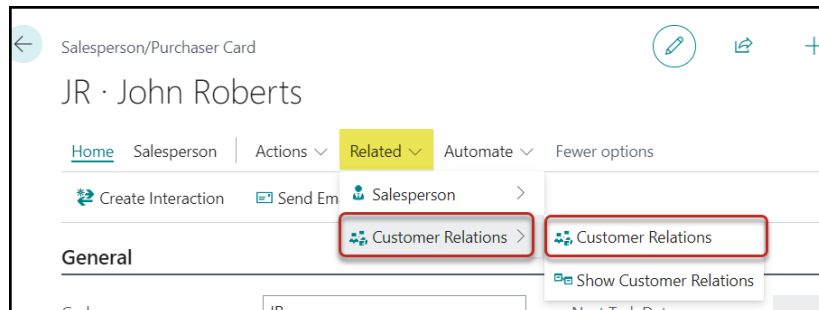


SALESPERSON/CUSTOMER RELATIONS

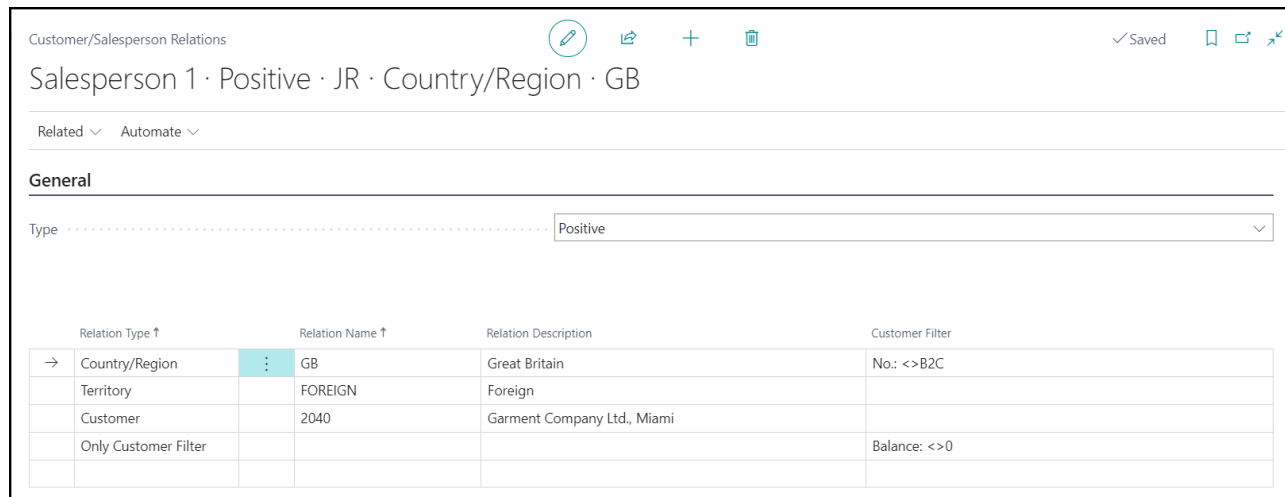
In the List, you can click **Home (or Process), Relations**.



In the Card, you can click **Related, Customer Relations, Customer Relations**.



Both will open the **Customer/Salesperson Relations**:



DESCRIPTION OF GENERAL FIELD

TYPE

You can choose between *Positive* and *Negative*.

We advise to choose only one setting:

1. Go for the *Positive* to enter in the Lines all the Customers that have a relationship to the Salesperson.
2. Go for the *Negative* to enter in the Lines all the Customers that do not have a relationship to the Salesperson, meaning that all other Customers do have a relationship – assuming the Salesperson is the Primary Salesperson of the Customer.

NOTE

If you start creating relationships of **Type Positive**, you overrule the default setting:

A Salesperson can enter Orders for Customers for which he/she is the Primary Salesperson (**Salesperson Code** in the Customer).

On the TRIMIT Sales Agent Portal, you will **only** see the Customers according to your entered *Positive* relationships. Therefore, it is not in addition to the default but instead of!

NOTE

If you start creating relationships of **Type Negative**, you overrule the default setting:

A Salesperson can enter Orders for customer for which he/she is the Primary Salesperson (**Salesperson Code** in the Customer). This still holds, but now the *Negative* relationships rule out some of the Customers of this default setting. Therefore, it is in addition to the default.

You will also overrule the *Positive* relationships:

If you have entered *Positive* relationships, the *Negative* relationships will overrule this!!

DESCRIPTION OF LINES FIELDS

RELATION TYPE

You can setup the *Positive* or *Negative* list on four diverse levels.

You can choose between the following four options:

Country/Region	In the Relation Name you can enter a Country/Region Code , which will be compared with the Country/Region Code of the Customer, but you can also narrow this Customer List down by entering a Customer Filter .
Territory	In the Relation Name you can enter a Territory Code , which will be compared with the Territory Code of the Customer, but you can also narrow this Customer List down by entering a Customer Filter .
Customer	In the Relation Name you can enter a Customer No. , which will be compared with the No. of the Customer.
Only Customer Filter	In the Customer Filter you can determine a Filter on any Field in the Customer.

RELATION NAME

Based on the **Relation**, you can enter:

A **Country/Region Code** if **Relation Type** is *Country/Region*.

A **Territory Code** if **Relation Type** is *Territory*.

A **Customer No.** if **Relation Type** is *Customer*.

You cannot enter a **Relation Name** if **Relation Type** is *Only Customer Filter*.

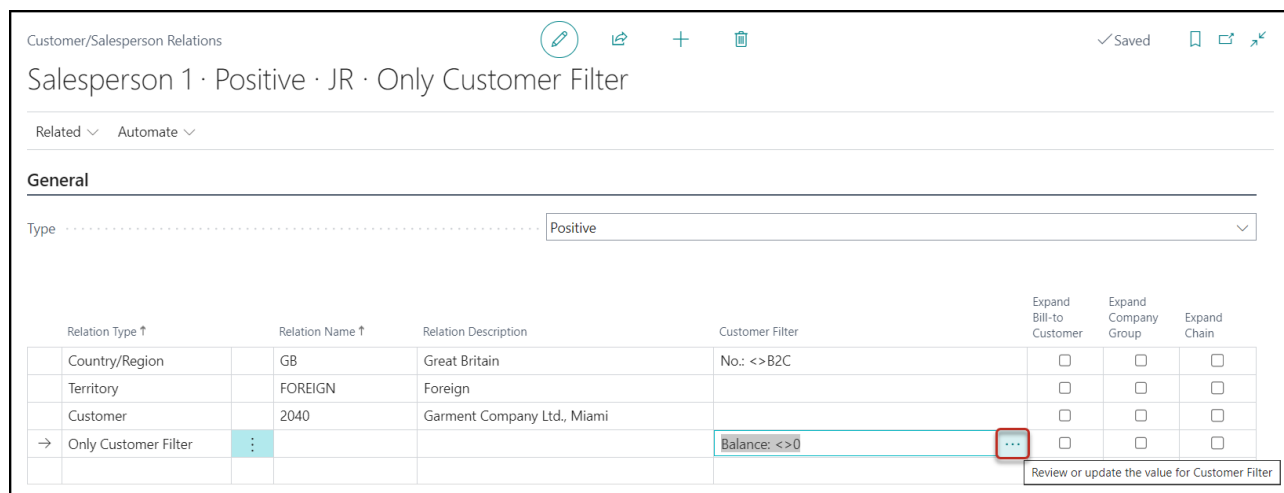
RELATION DESCRIPTION

This field will automatically be filled based on the **Relation Name**.

CUSTOMER FILTER

For all **Relation Types** you can enter a **Customer Filter**, although it makes no sense to enter a **Customer Filter** if **Relation Type** is *Customer*. This Filter is then applicable on the possible Customers based on the **Relation Type** and **Relation Name**.

By clicking the *Review or update the value for Customer Filter*, you can enter a Filter on any Field in the Customer Card.



Customer/Salesperson Relations

Salesperson 1 · Positive · JR · Only Customer Filter

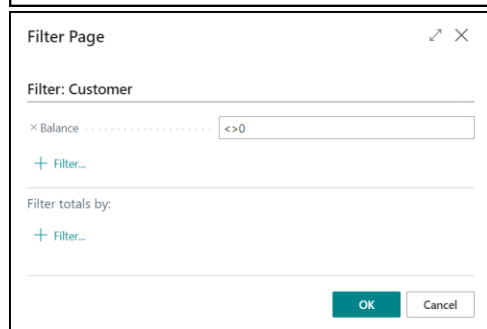
Related ▾ Automate ▾

General

Type Positive ▾

Relation Type ↑	Relation Name ↑	Relation Description	Customer Filter	Expand Bill-to Customer	Expand Company Group	Expand Chain
Country/Region	GB	Great Britain	No.: <>B2C	☐	☐	☐
Territory	FOREIGN	Foreign		☐	☐	☐
Customer	2040	Garment Company Ltd., Miami		☐	☐	☐
→ Only Customer Filter	⋮		Balance: <>0	☐	☐	☐

Review or update the value for Customer Filter



Filter Page

Filter: Customer

× Balance <>0

+ Filter...

Filter totals by:

+ Filter...

OK Cancel

In Table **trm Cust/Salesperson Relation (6036670)**, this Filter is stored in a more technical way, but in the page the Filter is shown in a more user-friendly way: I.e.,

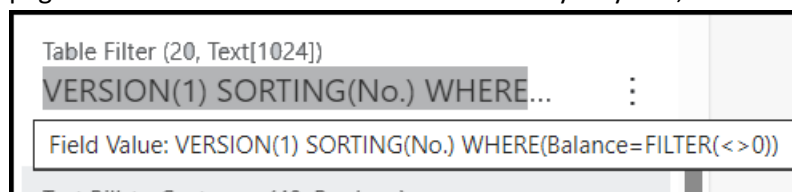


Table Filter (20, Text[1024])

VERSION(1) SORTING(No.) WHERE...

Field Value: VERSION(1) SORTING(No.) WHERE(Balance=FILTER(<>0))

is shown in the page as **Balance<>0**.

EXPAND BILL-TO CUSTOMER, COMPANY GROUP, CHAIN

These three fields are not in the page by default, but you can add them via **Personalize**.

They are only applicable if **Relation Type** is set to *Customer*.

It means, that besides checking the **No.** of the Customer, the system can also check the **Bill-to Customer**, **Company Group** and/or **Chain No.** to determine if the Customer does have a relation to the Salesperson.

NOTE

The different Lines work independently from each other.

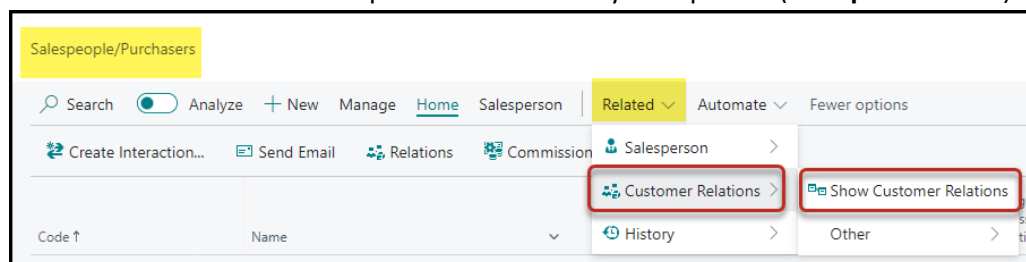
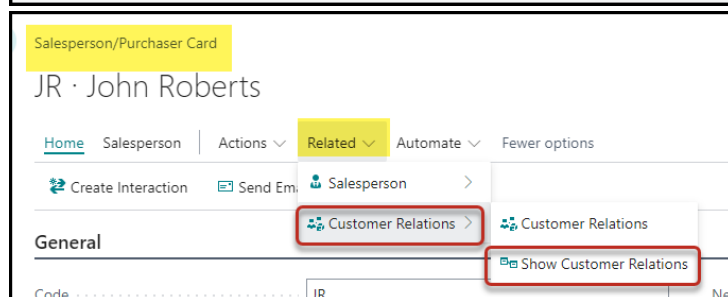
I.e., if you have **Country/Region GB** and **Territory WESTt**, it does not mean that the Salesperson can only enter Orders on the Sales Agent Portal for Customers that have **Country/Region Code GB** and **Territory Code WEST**.

Instead, the Salesperson can enter Orders on the Sales Agent Portal for Customers that have **Country/Region Code GB** or **Territory Code West**.

SHOW RELATED CUSTOMERS

You can see the outcome of the **Customer/Salesperson Relations** via **Show Related Customers**, which can be found in the **Salespeople/Purchasers List**, **Salespeople/Purchaser Card** and in the **Customer/Salesperson Relations**.

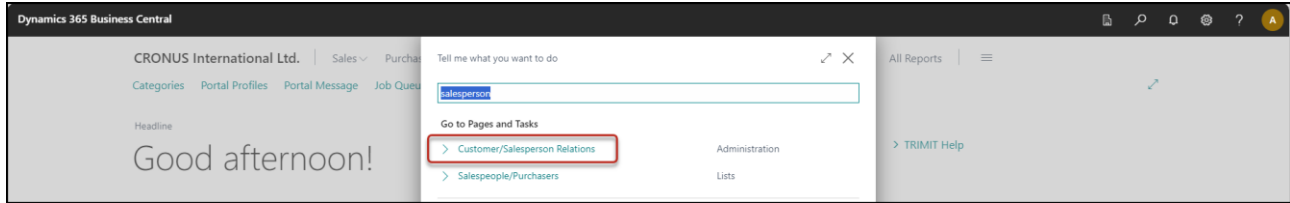
If no **Customer/Salesperson Relations** have been entered for the Salesperson, it will show the List of Customers for which the Salesperson is the Primary Salesperson (**Salesperson Code**).

Customers					
No.†	Name	Responsibility Center	Location Code	Post Code	Address
10000	Adatum Corporation			CB1 2FB	Station Road, 21
2000	The Fashion Store UK	BLUE		CB1 2FB	Station Road, 21
20000	Trey Research			SE1 0AX	Southwark Bridge Rd, 91-95
2030	The Surf Shop Ltd.		2030	SE1 0AX	Southwark Bridge Rd, 91-95
2040	Garment Company Ltd.	BLUE		US-FL 37125	10 High Tower Green
3000	The Furniture Shop UK	BLUE		GU2 7YQ	Occam Court, 1
30000	School of Fine Art			US-FL 37125	10 High Tower Green
50000	Relecloud			GU2 7YQ	Occam Court, 1
CW00010	Linda Nielsen	BLUE		CB1 2FB	Station Road, 21
CW00020	Anders L. Krogh	BLUE		CB1 2FB	Station Road, 21
CW00030	Kristen R. Osborn	BLUE		CB1 2FB	Station Road, 21
CW00040	Nadiah Bakkeren	BLUE		CB1 2FB	Station Road, 21
STD	Standard Customer	BLUE		CB1 2FB	Station Road, 21

CUSTOMER/SALESPERSON RELATIONS

Instead of going via the **Salespeople/Purchasers** List/Card, to determine the **Customer/Salesperson Relations**, you can also go directly to **Customer/Salesperson Relations**.



In that case, the first field on the Lines will be the **Salesperson**, so you can enter all the relations for all the Salespersons in one page:

Customer/Salesperson Relations

Salesperson 1 · Positive · AH · Country/Region · AT

Related Automate

General

Type Positive

Salesperson ↑	Relation Type ↑	Relation Name ↑	Relation Description	Customer Filter
AH	Country/Region	AT	Austria	
AH	Country/Region	CH	Switzerland	
AH	Country/Region	DE	Germany	
CE	Only Customer Filter			Balance: <>0
JR	Country/Region	GB	Great Britain	No.: <>B2C
TR	Territory	FOREIGN	Foreign	

EXAMPLES

You might have the following Customers:

Customer No.	Salesperson Code	Salesperson 2	Salesperson 3	Country/Region Code	Territory Code	Customer Commission Group
A	10	20		GB	WEST	LARGE
B	10	20		GB	WEST	RETAIL
C	10	30		GB	WEST	SMALL
D	10	30		GB	WEST	LARGE
E	20	10		DK	NORTH	RETAIL
F	20	10		DK	NORTH	SMALL
G	20	30		DK	NORTH	LARGE
H	30	10		NL	WEST	RETAIL
I	30	10		NL	WEST	SMALL
J	30	20		NL	WEST	LARGE
K	30	20		NL	WEST	RETAIL

NOTE

These Customers A - K and Salespersons 10 - 30 are not in the Demo Company of TRIMIT.

If you want to execute the following scenario's you need to create them yourself.

For a Customer, you need to enter the **No.**, **Name**, **Address**, **Postcode**, **City**, **Country/Region**, **Salesperson Code**, **Salesperson 2**, **Territory Code**, **Customer Commission Group**, and the **Posting Groups** to make it work.

For a Salesperson, you need the **No.** and the **Name**.

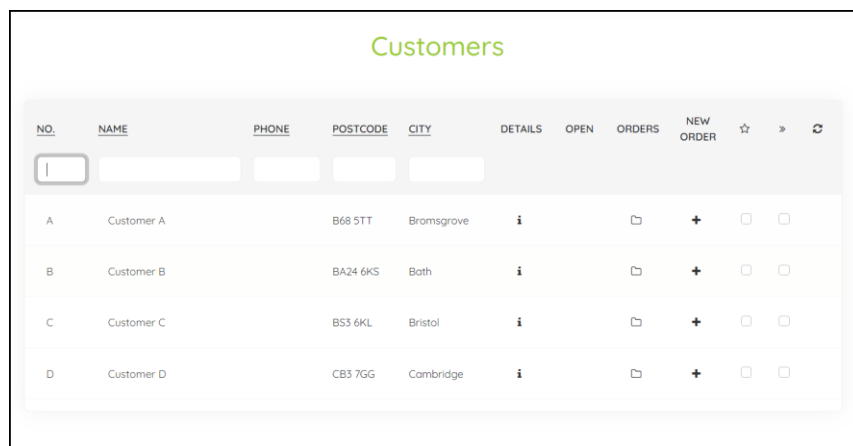
In the scenario's you see how to enter the information regarding the **Customer/Salesperson Relations**.

SCENARIO 1

You do not use the Customer/Salesperson Relations: Therefore, the default setting (Salesperson is **Salesperson Code** in the Customer Card) is applicable.

This means:

Salesperson 10 can see the customers A, B, C, and D in the Customer List on the TRIMIT Sales Agent Portal and enter Orders for them.



NO.	NAME	PHONE	POSTCODE	CITY	DETAILS	OPEN	ORDERS	NEW ORDER	☆	»	↺
A	Customer A		B68 5TT	Bromsgrove	i		+				
B	Customer B		BA24 6KS	Both	i		+				
C	Customer C		BS3 6KL	Bristol	i		+				
D	Customer D		CB3 7GG	Cambridge	i		+				

Salesperson 20 can see Customers E, F, G and Salesperson 30 can see Customers H, I, J, K

SCENARIO 2

For Salesperson 10, you have a *Positive Customer/Salesperson Relation* for: **Territory WEST**

Customer/Salesperson Relations

+

✓ Saved

Salesperson 1 · Positive · 10 · Territory · WEST

Related ▾
Automate ▾

General

Type

Positive

Salesperson ↑

Relation Type ↑

Relation Name ↑

Relation Description

Customer Filter

→ 10

:

Territory

WEST

West

Salesperson 10 can now see the Customers A, B, C, D, H, I, J, K in the **Customers** list on the Sales Agent Portal.

Customers

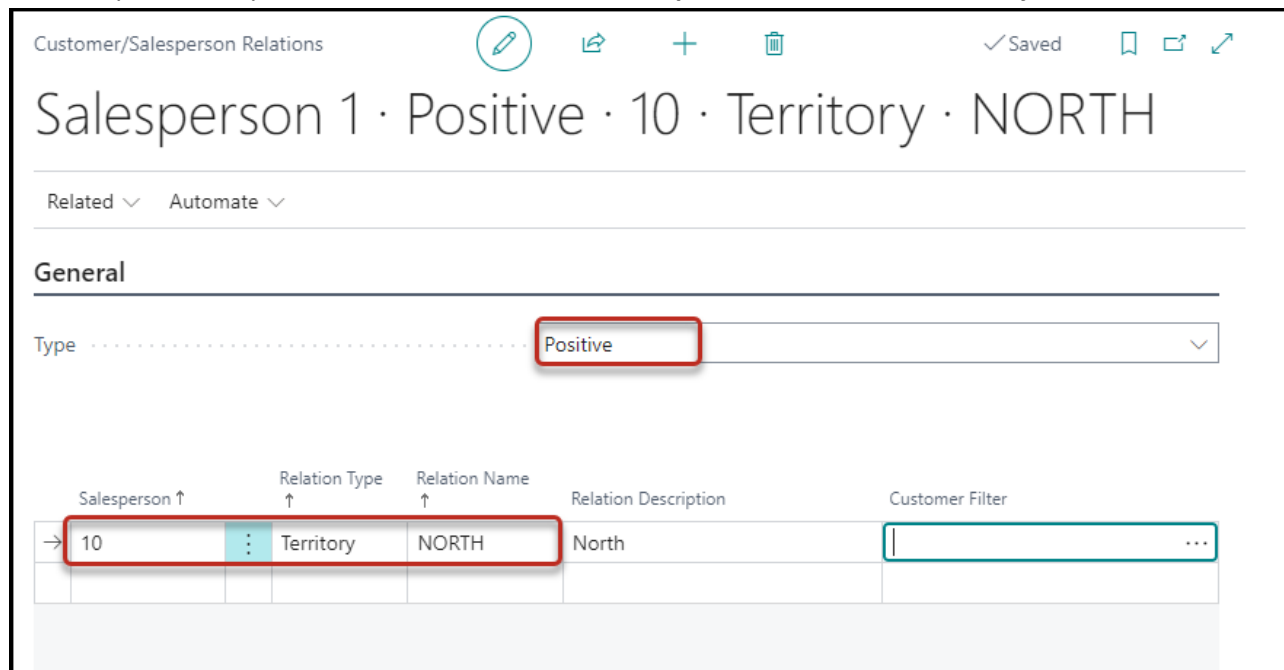
NO.	NAME	PHONE	POSTCODE	CITY	DETAILS	OPEN	ORDERS	NEW ORDER	☆	»	↺
A	Customer A		B68 5TT	Bromsgrove	i			+	☐	☐	
B	Customer B		BA24 6KS	Bath	i			+	☐	☐	
C	Customer C		BS3 6KL	Bristol	i			+	☐	☐	
D	Customer D		CB3 7GG	Cambridge	i			+	☐	☐	
H	Customer H		NL-7202 BP	Zutphen	i			+	☐	☐	
I	Customer I		NL-7321 HE	Apeldoorn	i			+	☐	☐	
J	Customer J		NL-6827 BP	Arnhem	i			+	☐	☐	
K	Customer K		NL-1109 JB	Amsterdam	i			+	☐	☐	

For Salespersons 20 and 30 nothing changes in comparison to SCENARIO 1.

Although i.e., Customer J has **Salesperson Code 30**, if I would enter now – as being Salesperson 10 – an Order for Customer J on the Sales Agent Portal, the **Salesperson Code** of that new Sales Quote/Order will become 10.

SCENARIO 3

For Salesperson 10, you have a *Positive Customer/Salesperson Relation* for: **Territory Code NORTH**



Customer/Salesperson Relations

Salesperson 1 · Positive · 10 · Territory · NORTH

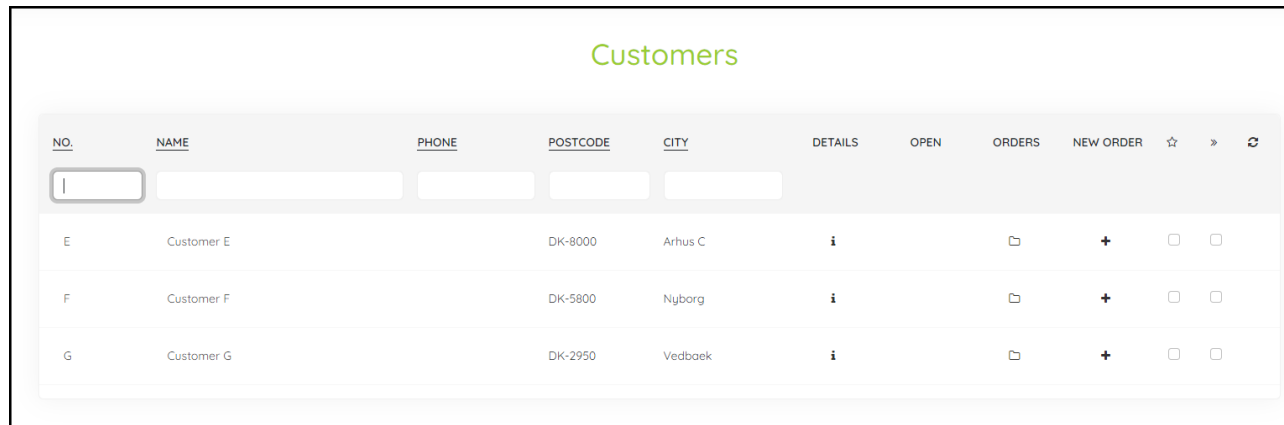
Related Automate

General

Type Positive

Salesperson ↑	Relation Type ↑	Relation Name ↑	Relation Description	Customer Filter
10	Territory	NORTH	North	

Salesperson 10 can now only see the Customers *E, F, G* in the **Customers** list on the Sales Agent Portal. The *Positive* list for *NORTH* will overrule the fact that Salesperson 10 is the Primary Salesperson for Customers *A, B, C, D*.



Customers

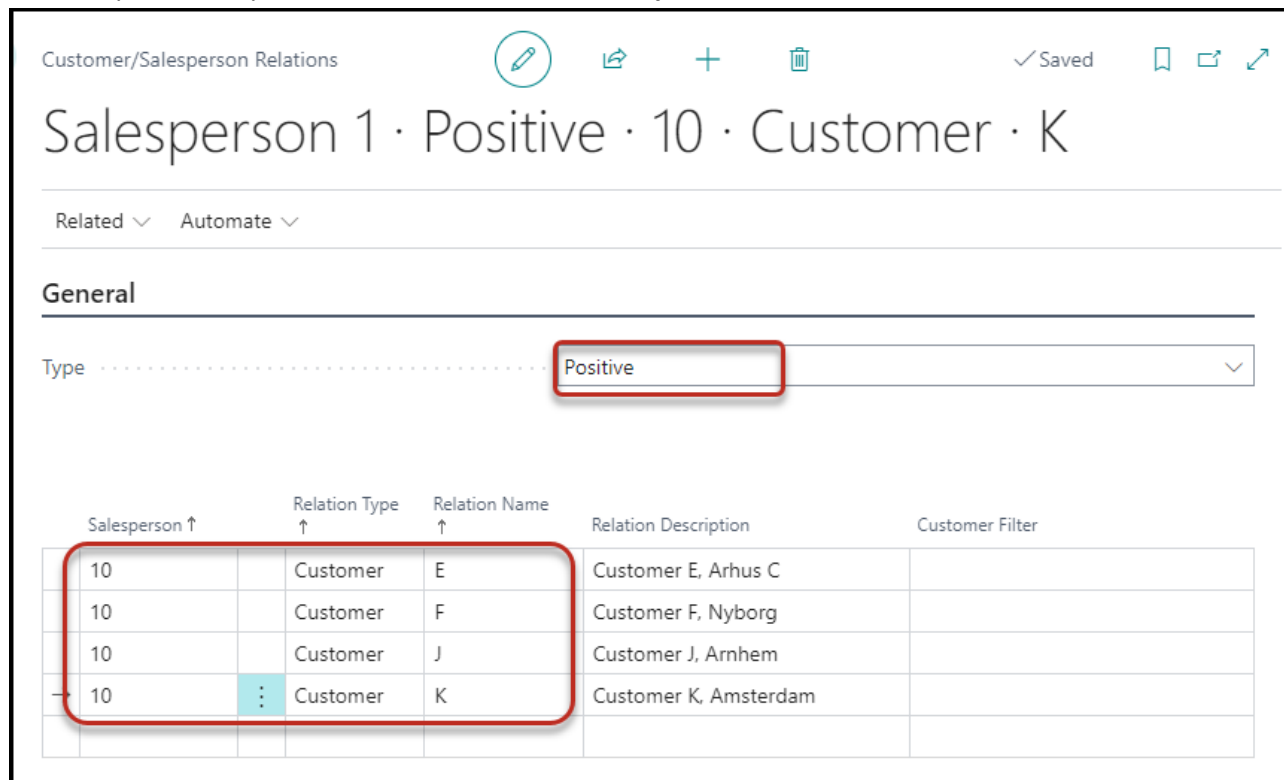
NO.	NAME	PHONE	POSTCODE	CITY	DETAILS	OPEN	ORDERS	NEW ORDER	☆	»	↺
E	Customer E		DK-8000	Arhus C	i		+	+	□	□	
F	Customer F		DK-5800	Nyborg	i		+	+	□	□	
G	Customer G		DK-2950	Vedbaek	i		+	+	□	□	

For Salespersons 20 and 30 nothing changes in comparison to SCENARIO 1.

Although i.e., Customer E has **Salesperson Code 20**, if I would enter now – as being Salesperson 10 – an Order for Customer E on the Sales Agent Portal, the **Salesperson Code** of that new Sales Quote/Order will become 10.

SCENARIO 4

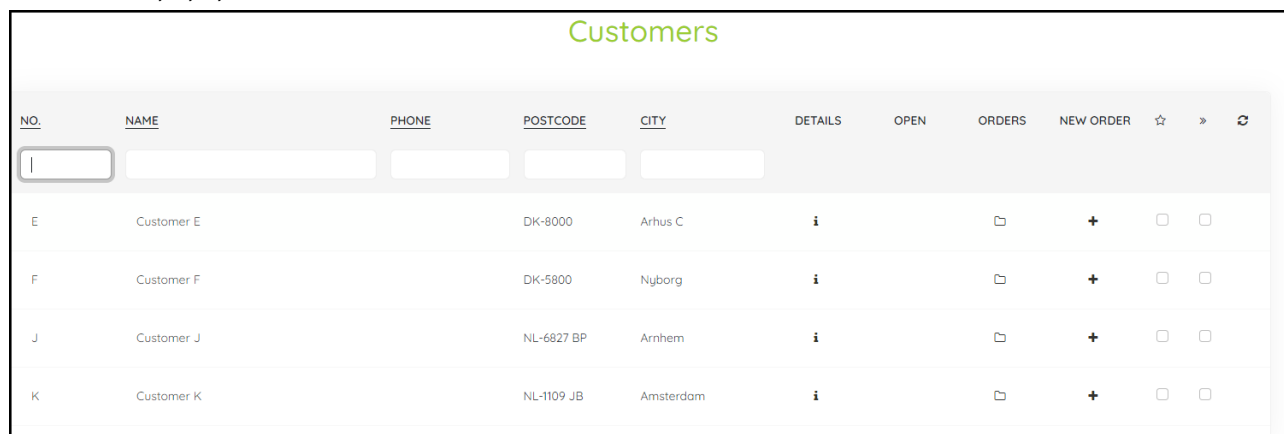
For Salesperson 10, you have *Positive Customer/Salesperson Relations* for: **Customers E, F, J, and K**



Salesperson ↑	Relation Type ↑	Relation Name ↑	Relation Description	Customer Filter
10	Customer	E	Customer E, Arhus C	
10	Customer	F	Customer F, Nyborg	
10	Customer	J	Customer J, Arnhem	
10	Customer	K	Customer K, Amsterdam	

Salesperson 10 can now only see the Customers E, F, J, and K in the **Customers** list on the Sales Agent Portal.

The *Positive* list for *E, F, J and K* will overrule the fact that Salesperson 10 is the Primary Salesperson for Customers A, B, C, D.



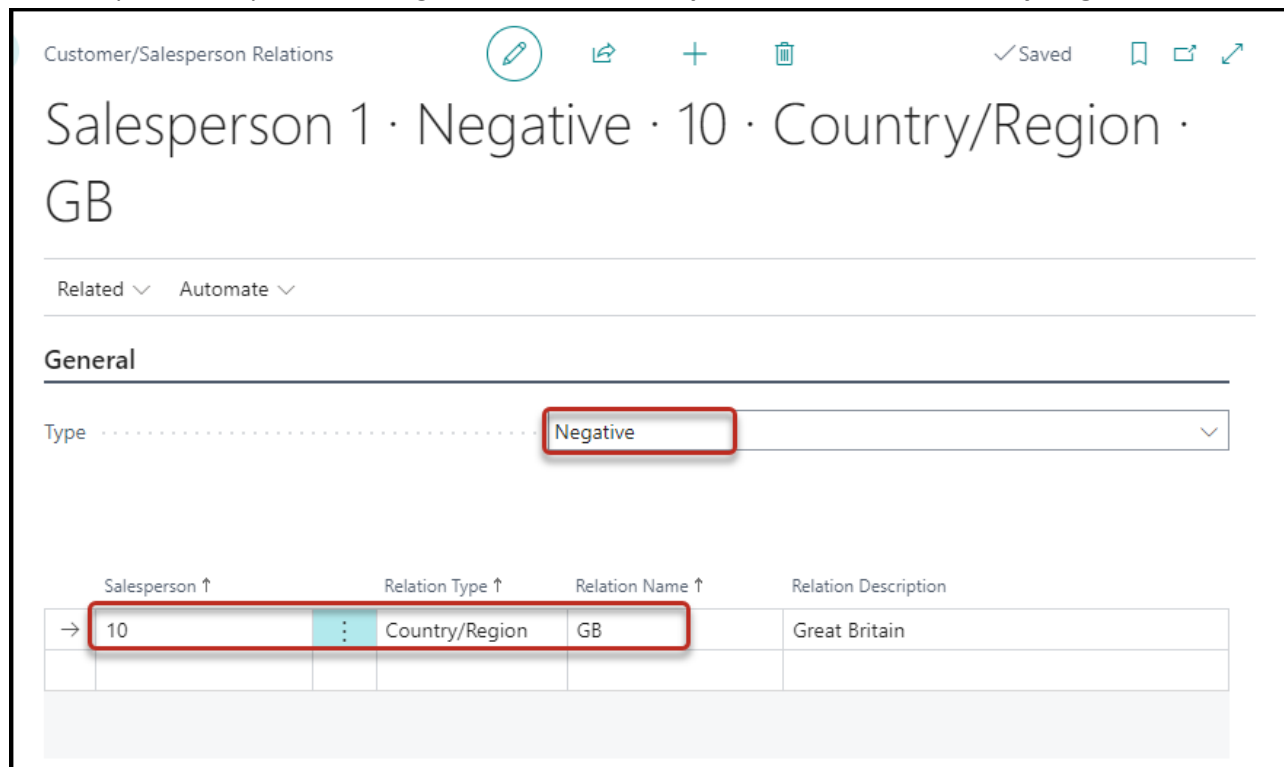
NO.	NAME	PHONE	POSTCODE	CITY	DETAILS	OPEN	ORDERS	NEW ORDER	☆	»	↺
E	Customer E		DK-8000	Arhus C	i		+				
F	Customer F		DK-5800	Nyborg	i		+				
J	Customer J		NL-6827 BP	Arnhem	i		+				
K	Customer K		NL-1109 JB	Amsterdam	i		+				

For Salespersons 20 and 30 nothing changes in comparison to SCENARIO 1.

Although i.e., Customer K has **Salesperson Code 30**, if I would enter now – as being Salesperson 10 – an Order for Customer K on the Sales Agent Portal, the **Salesperson Code** of that new Sales Quote/Order will become 10.

SCENARIO 5

For Salesperson 10, you have a *Negative Customer/Salesperson Relation* for: **Country/Region GB**.



Customer/Salesperson Relations

Salesperson 1 · Negative · 10 · Country/Region · GB

Related ▾ Automate ▾

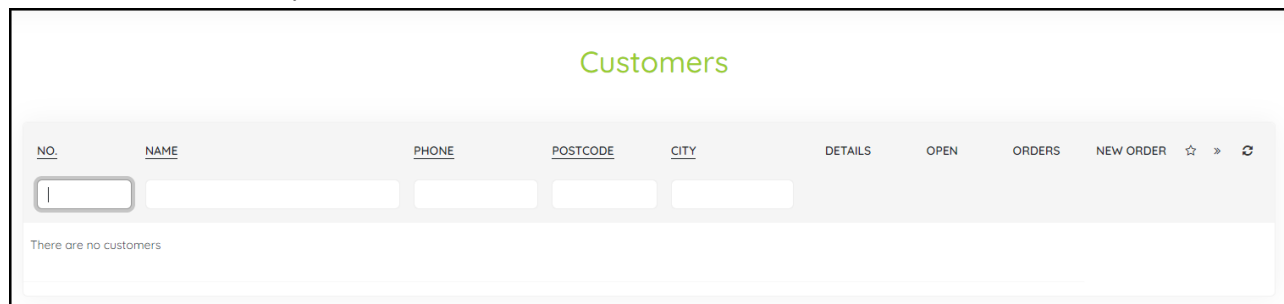
General

Type Negative ▾

Salesperson ↑	Relation Type ↑	Relation Name ↑	Relation Description
→ 10	Country/Region	GB	Great Britain

Salesperson 10 cannot see any customers.

The *Negative* list for *GB* will overrule the fact that Salesperson 10 is the Primary Salesperson for Customers A, B, C, D – because they are based in *GB*.



Customers

NO.	NAME	PHONE	POSTCODE	CITY	DETAILS	OPEN	ORDERS	NEW ORDER	☆	»	↺
There are no customers											

For Salesperson 20 and 30 nothing changes in comparison to SCENARIO 1.

SCENARIO 6

For Salesperson 10, you have a *Positive Customer/Salesperson Relation* for: **Territory WEST**.

Customer/Salesperson Relations

+

✓ Saved

Salesperson 1 · Positive · 10 · Territory · WEST

Related ▾
Automate ▾

General

Type

Positive

Salesperson ↑	Relation Type ↑	Relation Name ↑	Relation Description	Customer Filter
→ 10	:	Territory	WEST	West

Additionally, a *Negative Customer/Salesperson Relation* for: **Country/Region GB**.

Customer/Salesperson Relations

+

✓ Saved

Salesperson 1 · Negative · 10 · Country/Region · GB

Related ▾
Automate ▾

General

Type

Negative

Salesperson ↑	Relation Type ↑	Relation Name ↑	Relation Description
→ 10	:	Country/Region	GB
			Great Britain

Salesperson 10 can now only see the Customers *H, I, J, K*

The *Negative* list for *GB* will overrule the fact that Salesperson 10 is the Primary Salesperson for Customers *A, B, C, D* and overrule the fact that *A, B, C, D* are in **Territory WEST**.

Customers										
NO.	NAME	PHONE	POSTCODE	CITY	DETAILS	OPEN	ORDERS	NEW ORDER	☆	»
I										
H	Customer H		NL-7202 BP	Zutphen	i		+			
I	Customer I		NL-7321 HE	Apeldoorn	i		+			
J	Customer J		NL-6827 BP	Arnhem	i		+			
K	Customer K		NL-1109 JB	Amsterdam	i		+			

For Salesperson 20 and 30 nothing changes in comparison to SCENARIO 1.

Although i.e., Customer K has **Salesperson Code 30**, if I would enter now – as being Salesperson 10 – an Order for Customer K on the Sales Agent Portal, the **Salesperson Code** of that new Sales Quote/Order will become 10.

SCENARIO 7

For Salesperson 10, you have a **Negative Customer/Salesperson Relation** for: **Customer B**

Customer/Salesperson Relations

+

✓ Saved

Salesperson 1 · Negative · 10 · Customer · B

Related ▾
Automate ▾

General

Type ▾ Negative ▾

Salesperson ↑

Relation Type ↑

Relation Name ↑

Relation Description

→ 10	Customer	B	Customer B, Bath
------	----------	---	------------------

Salesperson 10 can now only see the Customers A, C, D.

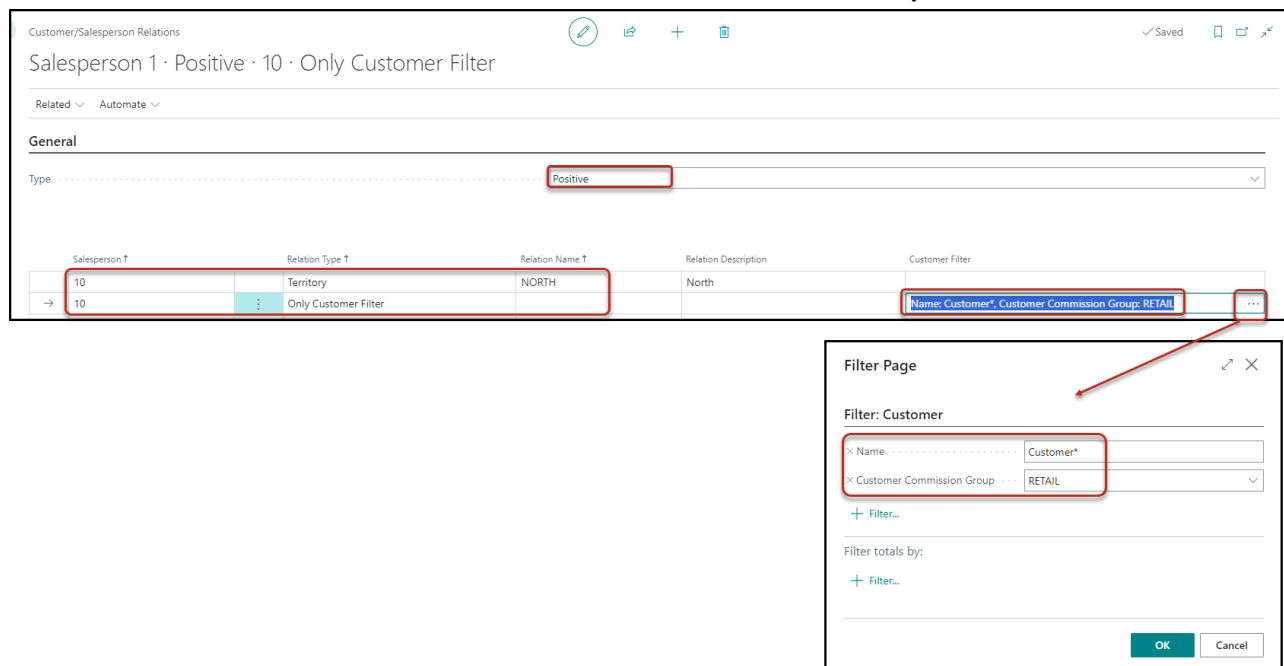
The **Negative** list for B will overrule the fact that Salesperson 10 is the Primary Salesperson for Customer B.

Customers										
NO.	NAME	PHONE	POSTCODE	CITY	DETAILS	OPEN	ORDERS	NEW ORDER	☆	»
I										
A	Customer A		B68 5TT	Bromsgrove	i		+			
C	Customer C		BS3 6KL	Bristol	i		+			
D	Customer D		CB3 7GG	Cambridge	i		+			

For Salesperson 20 and 30 nothing changes in comparison to SCENARIO 1.

SCENARIO 8

For Salesperson 10, you have a **Positive Customer/Salesperson Relation** for: **Territory NORTH** and an **Only Customer Filter** for field **Name Customer*** and **Customer Commission Group RETAIL**.



Salesperson 10 can now only see the Customers E, F, G (based on **Territory NORTH**), but also the Customers B, H, K (based on the **Only Customer Filter** for **Customer Commission Group RETAIL**).

Customers										
NO.	NAME	PHONE	POSTCODE	CITY	DETAILS	OPEN	ORDERS	NEW ORDER	☆	»
B	Customer B		BA24 6KS	Both	i		+			
E	Customer E		DK-8000	Arhus C	i		+			
F	Customer F		DK-5800	Nyborg	i		+			
G	Customer G		DK-2950	Vedbaek	i		+			
H	Customer H		NL-7202 BP	Zutphen	i		+			
K	Customer K		NL-1109 JB	Amsterdam	i		+			

Many possibilities:

Keep in mind however: the Salesperson that enters an Order on the TRIMIT Sales Agent Portal for a Customer based on positive and/or negative lists will also become the **Salesperson Code on the Sales Quote/Order after posting the Sales Portal Document in TRIMIT.**

This means that it will overrule the **Salesperson Code of the Customer.**

This also means that the TRIMIT Provision for the Commission will go to the Salesperson that entered the Sales Quote/Order and not to the Primary Salesperson (Salesperson Code) on the Customer Card.

The TRIMIT Provision for the Commission of Salesperson 2 and Salesperson 3 of a Customer will not be affected by the positive/negative lists of TRIMIT Multiple Salesperson Relationships.