WHITE PAPER

TRIMIT Order Type

TRIMIT version: 26.1

Date: July 3, 2026

TRIMIT

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Introduction

A Sales-/Purchase Document can get an **Order Type**, to determine i.e., the Masters/Items that can be sold/purchased, but also if an Availability Check should take place or how the Sales Prices should be determined by the system.
I.e., in an Order Type for pre-orders for a specific Collection, you might not want to have an Availability Check, but in an Order Type for after-sales for a specific Collection, you do not want to sell more than is Available.

It can also overrule general settings in the Sales & Receivables Setup or the Purchase & Payables Setup or TRIMIT e-commerce Portal Profiles.

Besides using Collections for specific Order Types, you can also set many Filters to determine which Masters/Items can be entered on a Sales-/Purchase Document with a specific Order Type.

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 261 for Business Central W1 BC28X**.
The pictures in this White Paper are based on the demo data for **TRIMIT 26.1**, which is based on Microsoft Dynamics 365 Business Central 2026 Release Wave 1, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

Components

TRIMIT Order Types contains the following objects:

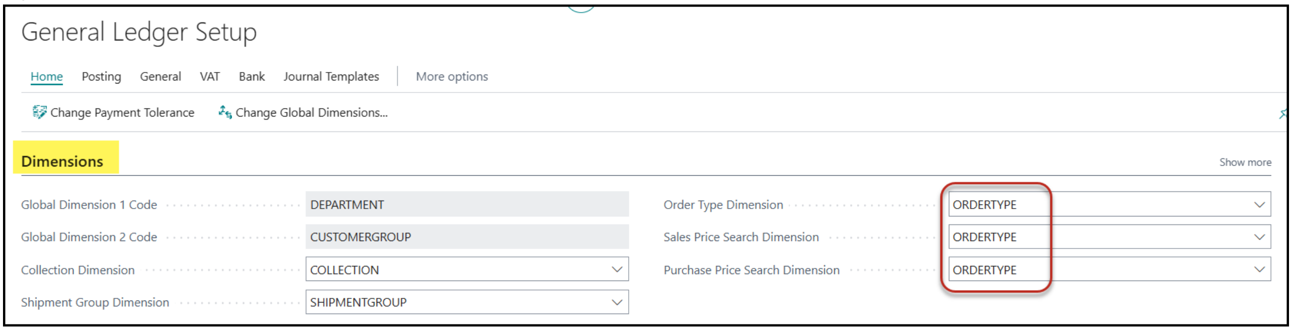
The tables	*6036683 trm Order Type*
The pages	*6036682 trm Order Type Card* *6036683 trm Order Types List*
The codeunits	*6036683 trm Order Type Handling*

The **Order Types** can be used in every Sales-/Purchase Document, but are the main objects used regarding the Order Types.

Setups

General Ledger Setup

Before creating **Order Types**, you need to decide if you want the **Order Type** to be a Financial Dimension as well.
This could be necessary if you want to use **Budgets** per Order Type or **Financial Reports** including the Order Types.
If so, you need to fill in the **Order Type Dimension** in the **General Ledger Setup** before creating the **Order Types**.

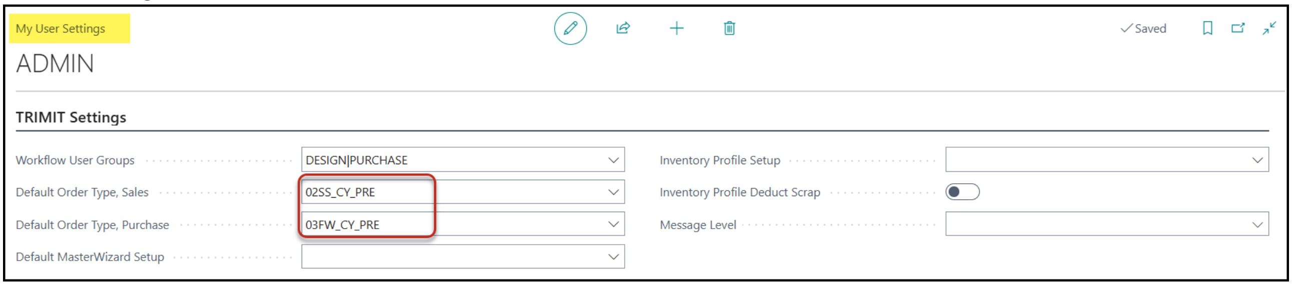


If filled, it means that when you create an **Order Type**, the system will automatically create a **Dimension Value** for the **Order Type Dimension** for you.

If you also want to be able to enter Sales Prices per Order Type, you need to fill in the **Sales Price Search Dimension** with the Dimension that you created for the Order Types.
If you also want to be able to enter Purchase Prices per Order Type, you need to fill in the **Purchase Price Search Dimension** with the Dimension that you created for the Order Types.

My User Settings

After you have created the **Order Types**, you can also set defaults in your **My User Settings.**
Therefore, this is specifically related to a User ID, which is determined by the user that fills in the **My User Settings.**

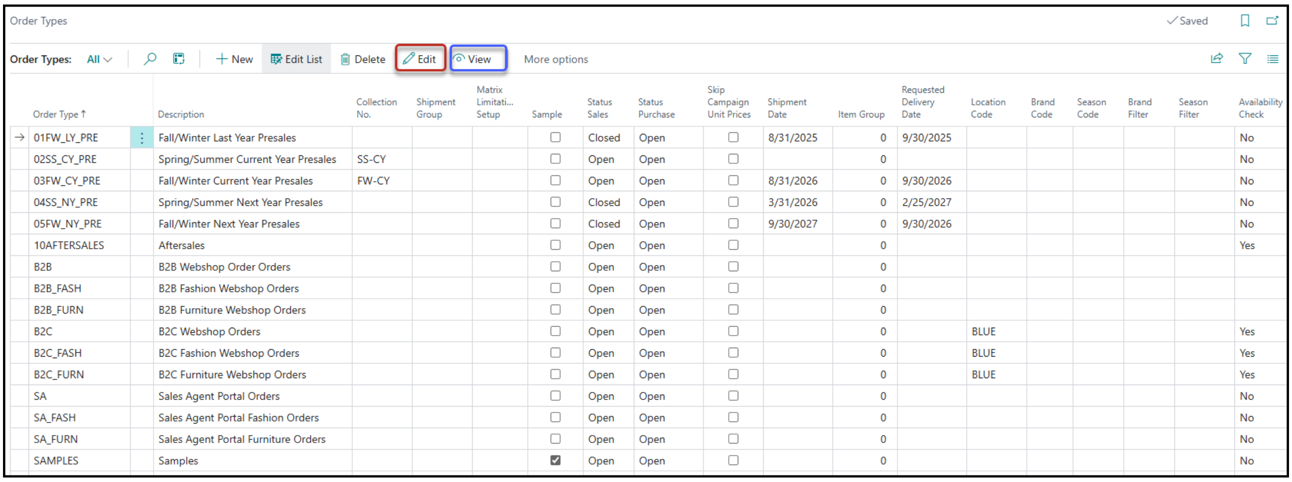


This means that if you create a Sales- or Purchase Document the **Order Type** will automatically be filled.

Order Type

One of the most important fields in the Sales-/Purchase Document Header to determine what can be sold/purchased regarding i.e., a Collection is the **Order Type**.
But also, without using Collections, there are many fields in the Order Type that will influence the behavior and default content for the Sales-/Purchase Header and Lines.

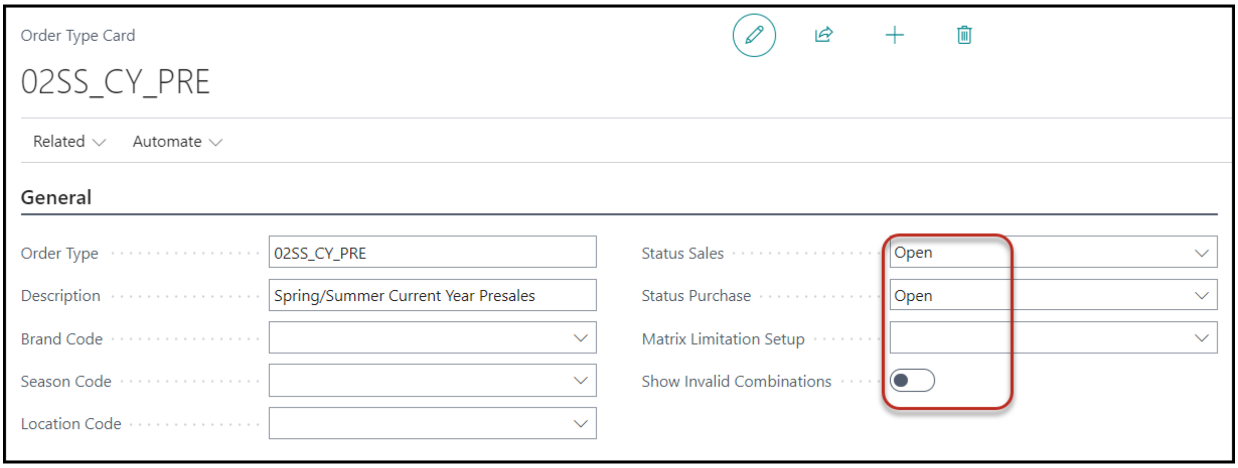
Via **Search** *Order Types*, you can open the list of the Order Types.



Order Type ↑	Description	Collection No.	Shipment Group	Matrix Limitati... Setup	Sample	Status Sales	Status Purchase	Skip Campaign Unit Prices	Shipment Date	Item Group	Requested Delivery Date	Location Code	Brand Code	Season Code	Brand Filter	Season Filter	Availability Check
01FW_LY_PRE	Fall/Winter Last Year Presales				☐	Closed	Open	☐	8/31/2025	0	9/30/2025						No
02SS_CY_PRE	Spring/Summer Current Year Presales	SS-CY			☐	Open	Open	☐		0							No
03FW_CY_PRE	Fall/Winter Current Year Presales	FW-CY			☐	Open	Open	☐	8/31/2026	0	9/30/2026						No
04SS_NY_PRE	Spring/Summer Next Year Presales				☐	Closed	Open	☐	3/31/2026	0	2/25/2027						No
05FW_NY_PRE	Fall/Winter Next Year Presales				☐	Closed	Open	☐	9/30/2027	0	9/30/2026						No
10AFTERSALES	Aftersales				☐	Open	Open	☐		0							Yes
B2B	B2B Webshop Order Orders				☐	Open	Open	☐		0							
B2B_FASH	B2B Fashion Webshop Orders				☐	Open	Open	☐		0							
B2B_FURN	B2B Furniture Webshop Orders				☐	Open	Open	☐		0							
B2C	B2C Webshop Orders				☐	Open	Open	☐		0		BLUE					Yes
B2C_FASH	B2C Fashion Webshop Orders				☐	Open	Open	☐		0		BLUE					Yes
B2C_FURN	B2C Furniture Webshop Orders				☐	Open	Open	☐		0		BLUE					Yes
SA	Sales Agent Portal Orders				☐	Open	Open	☐		0							No
SA_FASH	Sales Agent Portal Fashion Orders				☐	Open	Open	☐		0							No
SA_FURN	Sales Agent Portal Furniture Orders				☐	Open	Open	☐		0							No
SAMPLES	Samples				☑	Open	Open	☐		0							No

On the **Order Type Card** (click *Edit*) there are several fields regarding Collection Management.

FastTab General



Description of the Fields:

Order Type

The unique code for your **Order Type**.

Description

The Description for your Order Type.

Global Dimension 1 (Brand Code)

With a **Global Dimension 1** in the Order Type, you can also determine the **Global Dimension 1** for your Sales-/Purchase Document Header.

Global Dimension 2 (Season Code)

With a **Global Dimension 2** in the Order Type, you can also determine the **Global Dimension 2** for your Sales-/Purchase Document Header.

Location Code

You can fill in a **Location Code**, which will also become the **Location Code** for your Sales-/Purchase Document in which you select the Order Type.

Status Sales

Here you can choose *Open* or *Closed* to determine if this **Order Type** can be chosen in new Sales Documents.

Status Purchase

Here you can choose *Open* or *Closed* to determine if this **Order Type** can be chosen in new Purchase Documents.

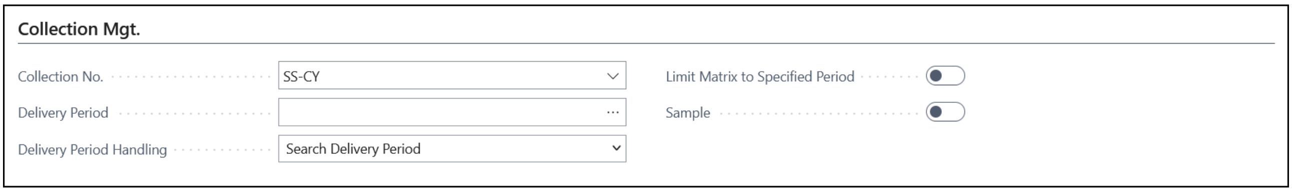
Matrix Limitation Setup

Here you can enter a **Matrix Limitation Setup** to filter the matrices of Masters that you select in a Sales-/Purchase Line based on the **VarDim Type Subset** of the Matrix Limitation Setup
For more information regarding the **Matrix Limitation Setup**: see ***White Paper – TRIMIT Collection Management.***

Show Invalid Combinations

A checkmark in this field makes sure that you will still see all the Y-Axis lines (i.e., Colors) in a Matrix in which there were quantities entered. In the columns you will see a Minus "-" sign if this specific Y-Axis is blocked (based on Matrix Limitation, Status Code, Valid Combinations or Collection)

FastTab Collection Mgt.



Description of the Fields:

Collection No.

Here you can enter **Collection No.** for this Order Type. This **Collection No.** will influence the Master/Items that can be selected in a new Sales-/Purchase Line with this specific Order Type.
If the chosen **Collection No.** also has Global Dimension 1 and/or 2, the Global Dimensions of the Collection will overwrite the Global Dimensions of the Order Type (i.e., Brand Code and Season Code) but afterwards they can be changed manually except for one situation.
If one of the Global Dimensions is used as **Collection Dimension**, it cannot be changed afterwards.

You cannot fill in this field if you have set the Collection Filter Type on the FastTab ***Filters*** to *Collection Filter.*

Delivery Period

Here you can enter a **Delivery Period** after you have entered a **Collection No.** This **Delivery Period** will influence the Master/Items that can be selected in a new Sales-/Purchase Line with this specific Order Type.

You can only choose the **Delivery Periods** that are connected to the **Collection No.**

You cannot enter a value into this field if either the **Shipment Date** Field on the FastTab ***Sales*** or the Shipment Group Filter Field on the FastTab ***Filters*** has been filled.

Delivery Period Handling

This field determines which Masters to be shown by a lookup from a Sales-/Purchase Line.
It is also essential to the **TRIMIT Collection Management** regarding the correlation between Collection No., Period Code (Delivery Period or Shipment Group) and Shipment Date of the Sales Line or Expected Receipt Date of the Purchase Line.
This field of the Order Type will overrule the Parameter in the **Sales & Receivables Setup** or **Purchase & Payables Setup**. If no **Order Type** will be used in a Sales-/Purchase Header, the Parameters in the Setups will always be applicable.
You can choose between the following four options:

<empty>	This option indicates that the **TRIMIT Collection Management** is deactivated. However, in combination with a **Collection No.** in the header of a Sales-/Purchase Document, only Masters related either directly to the **Collection No.** or to one of the related **Delivery Periods** would be shown by lookup and in the Matrix only the VarDim Variant Options related to the **Collection No.** or the related **Delivery Periods** will be displayed. In other words, you will have a filter by lookup but no Collection Management, so you will also be able to create Sales-/Purchase Lines with Masters which are not related to the **Collection No.**
Based on Setup	The behavior will be according to the Parameter **Delivery Period Handling** in the Sales & Receivables Setup (for Sales Documents) or the Purchase & Payables Setup (for Purchase Documents)
Search Delivery Period	***Search Delivery Period*** means that the program will automatically find the first possible **Delivery Period.** With this option, you should enter **Collection No.** and leave the **Delivery Period** Field empty of the Order Type. All Masters related to some of the **Delivery Periods** in the **Collection No.** will be shown by lookup and in the Matrix, the VarDim Variant Options related to the Delivery Periods will be displayed. If a Master is only related directly to **Collection No.**, it will also be shown by lookup. However, as soon as the Master has been related to **Delivery Periods** as well, it will only be available in those **Delivery Periods** and with the VarDim Variant Options related to those **Delivery Periods.** **Handling in Sales:** The **Period Code** of a Sales Line will be set as the first possible with a **Start Sales Delivery Period** equal to or later than the **Shipment Date** of the Sales Header. If the Master / Item is only related to a **Delivery Period** earlier than the Shipment Date of the Sales Header, the **Period Code** of the Sales Line will be set to this **Delivery Period,** but the **Shipment Date** on the Sales Line will be set to the Shipment Date of the Sales Header. The principle is that a Master related to a Delivery Period and with the specified VarDim Variant Options will also be available in all later Delivery Periods. The **Shipment Date** of the Sales Line will be transferred from the **Start Sales Delivery Period** of the **Delivery Period** table unless the **Requested Delivery Date** or **Promised Delivery Date** in the Sales Header is a later Date. In that case, that Date will be taken for the **Shipment Date** of the Sales Line.

	Handling in Purchase: The **Period Code** of the Purchase Line will be set as the first possible with an **End Purchase Delivery Period** equal to or later than the **Expected Receipt Date** of the Purchase Header. If the Master / Item is only related to a **Delivery Period** earlier than the Expected Receipt Date of the Purchase Header, the **Period Code** of the Purchase Line will be set to this **Delivery Period,** but the **Expected Receipt Date** on the Purchase Line will be set to the Expected Receipt Date of the Purchase Header. The principle is that a Master related to a Delivery Period and with the specified VarDim Variant Options will also be available in all later Delivery Periods. The **Expected Receipt Date** of the Purchase Line will be transferred from the **End Purchase Delivery Period** of the **Delivery Period** table unless the **Requested Receipt Date** or **Promised Receipt Date** in the Purchase Header is a later Date. In that case, this Date will be taken for the **Expected Receipt Date** of the Purchase Line.
Specify Delivery Period	***Specify Delivery Period*** means that you specify which **Delivery Period** to be used. With this option, enter **Collection No.** and **Delivery Period** or just enter **Collection No.** and leave **Delivery Period** field empty in this Order Type. All Masters related to the **Collection No.** (or to the **Collection/Delivery Code**) will be shown in the lookup, but in the Matrix, only the VarDim Variant Options related to the chosen Delivery Period will be displayed. However, be also aware of the influence of the **Limit Matrix to Specified Period** field in the **Order Type**. If a Master is only related directly to the Collection No. and the **Limit Matrix to Specified Period** field is *FALSE*, the Master will also be shown by lookup. However, as soon as the Master has been related to Delivery Periods as well, it will only be available in those Delivery Periods and with the VarDim Variant Options related to those Delivery Periods. And when this field is *FALSE,* VarDim Variant Options connected to earlier **Delivery Periods** will also be shown in the lookup. When the **Limit Matrix to Specified Period** field is *TRUE*, a Master only related directly to the Collection No. will not be available. If you do not specify the **Delivery Period** on the Order Type, a list of the possible **Delivery Periods** will pop up when you create a Sales-/Purchase Line enabling you to select one of them. If only one Delivery Period is available, it will automatically be used. The **Period Code** of the Sales Line will be set to the specified or selected and the **Shipment Date** will be transferred from the **Start Sales Delivery Period** of the **Delivery Period** table unless the **Shipment Date, Requested Delivery Date** or **Promised Delivery Date** in the Sales Header is a later Date. In that case, this Date will be taken for the **Shipment Date** of the Sales Line. The **Period Code** of the Purchase Line will be set to the specified or selected and the **Expected Receipt Date** will be transferred from the **End Purchase Delivery Period** of the **Delivery Period** table unless the **Expected Receipt Date, Requested Receipt Date** or **Promised Receipt Date** in the Purchase Header is a later Date. In that case, this Date will be taken for the **Expected Receipt Date** of the Purchase Line.

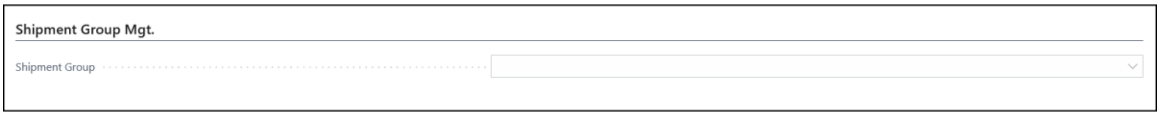
Limit Matrix to Specified Period

This field is only effective if the **Delivery Period Handling** is set to *Specify Delivery Period.*
If this field is *TRUE*, you will only be able to use Masters/Items related to the specified combination of **Collection No.** and **Delivery Period**. Therefore, if a Master/Item is only related directly to the Collection and not to any of its Delivery Periods, it will not be available for creation of Sales Lines / Purchase Lines.
If this field is *FALSE*, you will be able to use Masters/Items related to the specified combination of **Collection No.** and **Delivery Period** as well as Masters/Items related to earlier Delivery Periods.
If a Master/Item is only related directly to the Collection and not to any of its Delivery Periods, it will be available in all the Delivery Periods related to the **Collection**.

Sample

A checkmark in this field makes sure that only the connected Masters (or variants of Masters) that are connected to the Collection No. via **Sample Master Relations** or **Sample Delivery Periods** will be shown in the Matrix of a Sales-/Purchase Order.

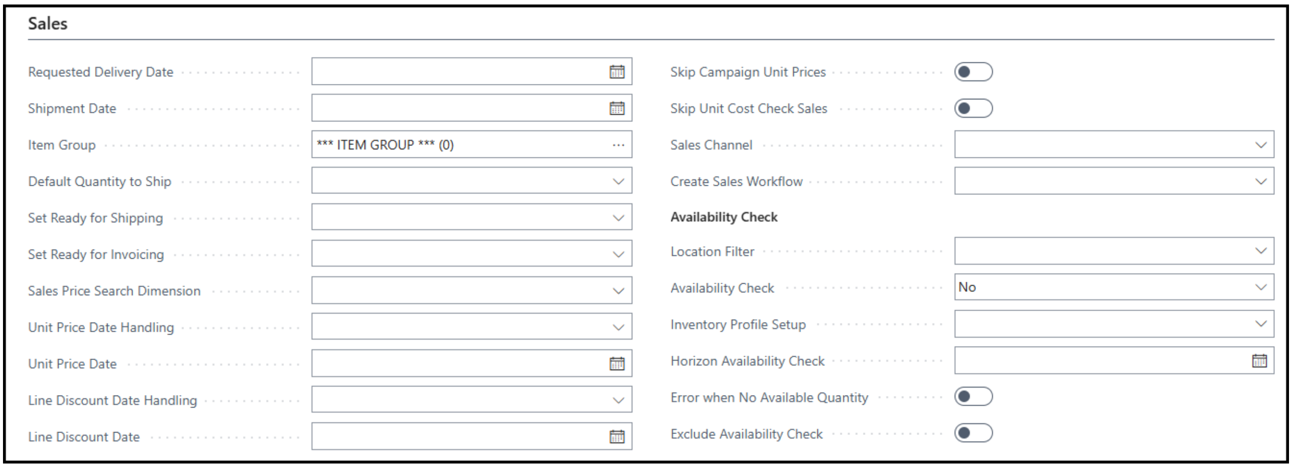
FastTab Shipment Group Mgt.



Shipment Group

Here you can enter a **Shipment Group** if you have not filled in the **Collection No.** (and **Delivery Period**) already on FastTab ***Collection Mgt.***
This **Shipment Group** will influence the Master/Items that can be selected in an Order with this specific Order Type.
You can only choose the **Shipment Groups** with **Type** = *Shipment Group* that are not connected to a **Collection No.**

FastTab Sales



Requested Delivery Date/Shipment Date

If you do not use **Collection No.** or **Shipment Group**, you can set a default **Requested Delivery Date** and/or **Shipment Date** for the Sales-/Purchase Document.

Item Statistics Group 2 (Item Group)

A value entered in this Field, will overwrite the **Item Statistics Group 2** of an Item in the Sales Line. This will influence the TRIMIT Sales Statistics.

Default Quantity to Ship

The option you choose determines the **Quantity to Ship** in a Sales Line.
You can choose between the following 3 options:

<empty>	Qty. to Ship will be filled with the **Quantity.**
Remainder	Qty. to Ship will be calculated based on **Quantity – Qty. Shipped**
Blank	Qty. to Ship will be *0 (zero)*

Set Ready for Shipping

The option you choose determines the **Ready for Shipping** in a Sales Header.
You can choose between the following 3 options:

<empty>	Ready for Shipping will be set to *FALSE.*
No	Ready for Shipping will be set to *FALSE.*
Yes	Ready for Shipping will be set to *TRUE.*

Set Ready for Invoicing

The option you choose determines the **Ready for Invoicing** in a Sales Header.
You can choose between the following 3 options:

<empty>	Ready for Invoicing will be set to *FALSE.*
No	Ready for Invoicing will be set to *FALSE.*
Yes	Ready for Invoicing will be set to *TRUE.*

Sales Price Search Dimension

This field in the Order Type will overrule the content in the corresponding Parameter of the **General Ledger Setup** to determine that specific Dimension related Sales Prices should be taken.

Unit Price Date Handling

With this field, you can determine which **Date** should be taken to compare with the **Starting Date** and **Ending Date** of the Sales Price Table.
The chosen option will then also be filled in the Sales Header, where it can be changed.
You can choose the following four options:

<empty>	The **Order Date** of the Sales Header will be compared with the **Starting-/Ending Date** of the Sales Price.
Order Date	The **Order Date** of the Sales Header will be compared with the **Starting-/Ending Date** of the Sales Price.
Shipment Date	The **Shipment Date** of the Sales Line will be compared with the **Starting-/Ending Date** of the Sales Price.
Setup Date	The field **Unit Price Date** of the Sales Header will be compared with the **Starting-/Ending Date** of the Sales Price.

Unit Price Date

When you select the **Unit Price Date Handling** *Setup Date*, you need to enter a specific Date to determine the right Unit Price in a Sales Line. The chosen Date will then also be filled in the Sales Header, where it can be changed.

Line Discount Date Handling

With this field, you can determine which **Date** should be taken to compare with the **Starting Date** and **Ending Date** of the Sales Discount Table. The chosen option will then also be filled in the Sales Header, where it can be changed.

You can choose the following four options:

<empty>	The **Order Date** of the Sales Header will be compared with the **Starting-/Ending Date** of the Sales Line Discount.
Order Date	The **Order Date** of the Sales Header will be compared with the **Starting-/Ending Date** of the Sales Line Discount.
Shipment Date	The **Shipment Date** of the Sales Line will be compared with the **Starting-/Ending Date** of the Sales Line Discount.
Setup Date	The field **Line Discount Date** of the Sales Header will be compared with the **Starting-/Ending Date** of the Sales Price.

Line Discount Date

When you select the **Line Discount Date Handling** *Setup Date*, you need to enter a specific Date to determine the right Line Discount in a Sales Line. The chosen Date will then also be filled in the Sales Header, where it can be changed.

Skip Campaign Unit Prices

A checkmark in this field determines that no Campaign Prices will be determined.

Skip Unit Cost Check Sales

A checkmark in this field will overrule the **Check Unit Cost** of the Sales & Receivables Setup and will not give a warning/message if the Unit Cost of the Item is *0 (zero)*.

Sales Channel

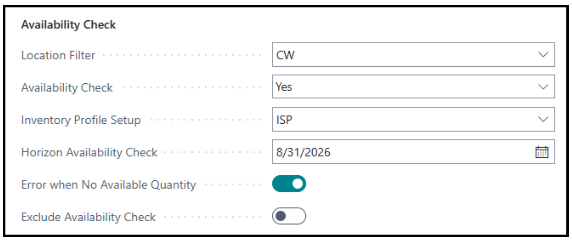
You can give every Sales Document a specific **Sales Channel**, which can be used in the TRIMIT Sales Statistics or for filtering.

Create Sales Workflow

In this field you can choose a **TRIMIT Workflow Template**. When adding the **Order Type** to a Sales Document, it will automatically create a TRIMIT Workflow for this Sales Document based on the **Create Sales Workflow** Template, where the **Deadlines** will be calculated based on the current Work Date.

Because the calculated **Deadlines** in the TRIMIT Workflow will be based on the Work Date, make sure that in your TRIMIT Workflow Templates, the "current day" (*0D)* is based on the Work Date, and other **Deadline Date Formulas** will be based on this.

Availability shown for your Sales Lines:



Location Filter

You can choose a **Location Code** to determine the Available Quantities for a Sales Line, based on the other fields regarding Availability.

Availability Check

The field **Availability Check** in the **Order Type** determines if an Availability Check should be carried out based on the **Inventory Profile Setup** and the **Horizon Availability Check**.

You can now choose between the following four options:

Skip	No Availability will take place in an Order when entering Quantities
Yes	An Availability Check will always take place in an Order when entering Quantities, considering the content of the parameter **Min. Cells Check on Demand** in the Sales & Receivables Setup
On Demand	An Availability Check can be asked for in an Order Line or Order Matrix, but will not take place automatically
Skip if No Transactions	An Availability Check will only take place if there are Transactions (Item Ledger Entries)

Error when No Available Quantity

If you want to prevent that users can enter a higher **Quantity** as is available, you can set a checkmark, so the user will get an error message, and need to change the **Quantity.**

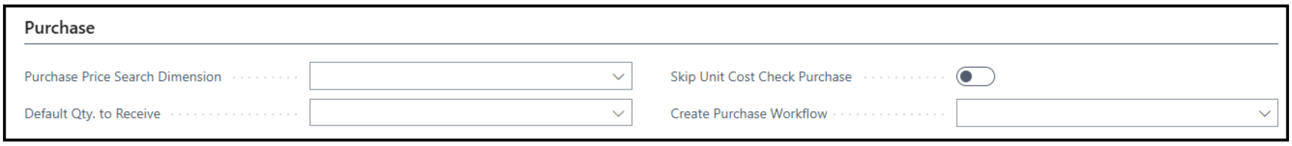
Exclude Availability Check

If the Sales-/Purchase Documents should not be included for calculating Availability, you can set a checkmark in this Field.

Formula Sales Header

This field is not shown by default; you need to add it to the page via ***Personalize***.
You can enter a Formula of **Type** *Sales Header,* which can influence the data in the Sales Header when you choose this Order Type.

FastTab Purchase



Purchase Price Search Dimension

The content of a **Purchase Price Search Dimension** will overrule the content in the corresponding Parameter of the **General Ledger Setup** to determine that specific Dimension related Purchase Prices should be taken.

Default Qty. to Receive

The option you choose determines the **Quantity to Receive** in a Purchase Line.
You can choose between the following 3 options:

<empty>	Qty. to Receive will be filled with the **Quantity.**
Remainder	Qty. to Receive will be calculated based on **Quantity – Qty. Received**
Blank	Qty. to Receive will be *0 (zero)*

Skip Unit Cost Check Purchase

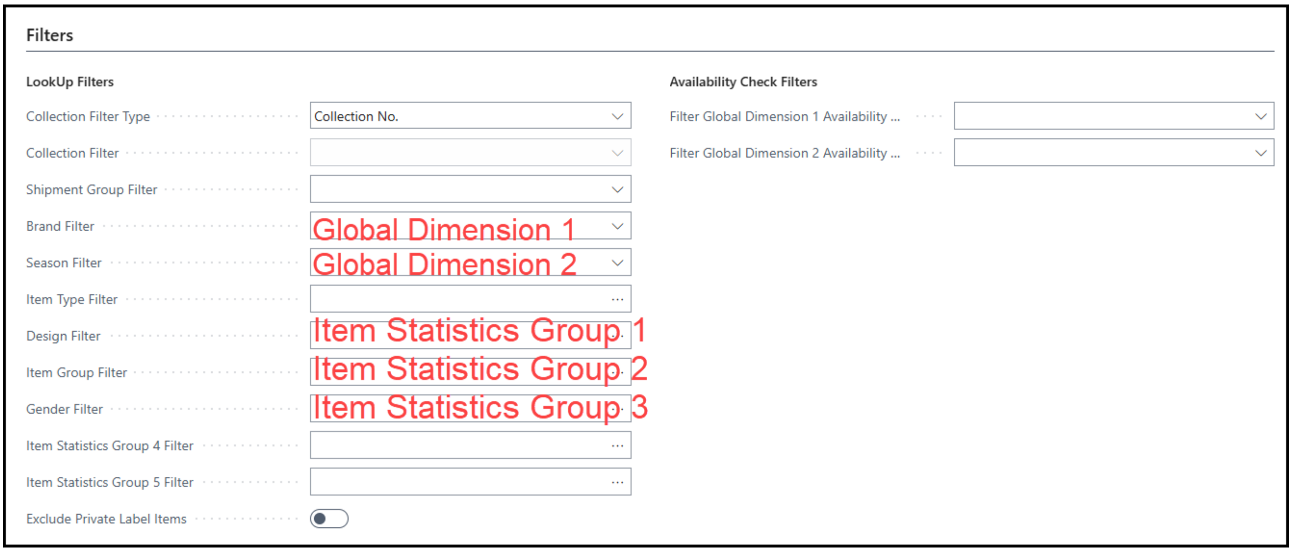
A checkmark in this field will overrule the **Check Unit Cost** of the Purchase & Payables Setup and will not give a warning/message if the Unit Cost of the Item is *0 (zero).*

Create Purchase Workflow

In this field you can choose a **TRIMIT Workflow Template**. When adding the **Order Type** to a Purchase Document, it will automatically create a TRIMIT Workflow for this Purchase Document based on the **Create Purchase Workflow** Template, where the **Deadlines** will be calculated based on the current Work Date.

Because the calculated **Deadlines** in the TRIMIT Workflow will be based on the Work Date, make sure that in your TRIMIT Workflow Templates, the "current day" (*0D)* is based on the Work Date, and other **Deadline Date Formulas** will be based on this.

FastTab Filters



The Filters on this FastTab will influence the lookup on the **No.** of a Sales-/Purchase Line if you have entered the Order Type in the Header.
Besides **Collection Filter Type** *Collection No.,* they will be checked with the fields in the Master Card.

Description of the Fields:

Collection Filter Type

With this field you can determine how you want to filter on **Collection No.**
You can choose the following two options:

Collection No.	You want to filter on the **Collection No.** that you entered on the FastTab *Collection Mgt.*: only Masters connected to this **Collection No.** (and their Delivery Periods) in the Master Relations of this **Collection No.** will be shown in the lookup.
Collection Filter	You want to filter on the **Collection Nos.** that you will enter in the next field **Collection Filter:** only Masters connected to these **Collection Nos.** (and their Delivery Periods) in the Collection Master Relations of these **Collection Nos.** will be shown in the lookup or only Masters that have field **Collection No.** filled with the Collections you enter in the **Collection Filter.**

Collection Filter

In this field a filter string for the **Collections** can be entered if **Collection Filter Type** is set to *Collection Filter.*
Thie Filter can be used in two ways:

1. There are **Collection Master Relations** in the system (regardless any Collection, so not only for the **Collection Filter** Collections!)
   This will limit the Masters that will be shown (and possible to enter) in the lookup for a Sales-/Purchase Line based on the **Collection Master Relations** to these Collections (and their Period Codes) of the **Collection Filter.**
2. There are no **Collection Master Relations** in the system at all (regardless any Collection, so not only for the **Collection Filter** Collections!)

The Parameter **Create Collection Relation Automatically** in the Inventory Setup is *FALSE*. This will limit the Masters that will be shown (and possible to enter) in the lookup for a Sales-/Purchase Line based on the field **Collection No.** in the Master Card.

Shipment Group Filter

In this field a filter string for the **Shipment Group** can be entered to limit the Masters that will be shown (and possible to enter) in the lookup for a Sales-/Purchase Line.
This filter will simply be checked with the field **Period Code** in the Master Card.
You can only enter this filter if no **Delivery Period** has been entered on the FastTab *Collection Mgt.*, no **Shipment Group** has been entered on the FastTab *Shipment Group Mgt.* and no **Shipment Date** on the FastTab *Sales*.

Exclude Private Label Items

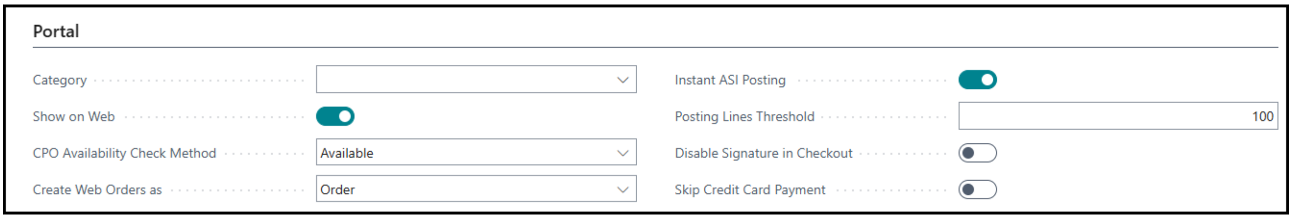
A checkmark in this field will exclude Masters with a checkmark in **Private Label** from the lookup on the field **No.** of a Matrix Sales-/Purchase Line if the Customer or Country of the Header does not fit.
Without a checkmark in this field, it will still show Masters that do have a checkmark in **Private Label** in the lookup on the field **No.** of a Matrix Sales-/Purchase Line, but when selecting or entering such a Private Label Master, you will get an error message.

A checkmark in this filed will have no influence on the Matrix if a Master in a Sales-/Purchase Line, but when entering a Quantity on a Cell that represents an Item with a checkmark in **Private Label** that does not fit the Customer or Country of the Order, you will get an error message.

Filter Global Dimension 1 or 2 Availability Check

If you enter a Global Dimension 1 (and/or 2) then the Availability Check will only be executed if the Sales Line will have this Global Dimension 1 (and/or 2)

FastTab Portal



Description of the Field

Category

You can choose a Highest Level of you Categories what you want to show in TRIMIT e-commerce, when choosing this specific Order Type.

Show on Web

By setting a checkmark in this field, you allow this Order Type to be shown as selectable in the *TRIMIT Sales Agent* and/or the *TRIMIT B2B Webshop*.

This can be especially important if you are using **TRIMIT Collection Management** because it will also influence the Masters/Items that can be selected on a Sales Order based on the fields of the Order Type as described earlier.

Create Web Orders as

You can choose between *Order* or *Quote*. It will overrule the default setting from the applicable Portal Profile.

Instant ASI Posting

Setting this field to *TRUE* activates Instant Posting of Portals Sales Documents in ASI – meaning that an Order on TRIMIT e-commerce will immediately be created as a Sales Quote or Sales Order when finalizing the Order on the Portal
It will overrule the setting in the applicable Portal Profile.
For more information regarding this field see *White Paper – TRIMIT Portals Advanced Sales Integration*.

Posting Lines Threshold

You can 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**.
It will overrule the setting in the applicable Portal Profile.
For more information regarding this field see *White Paper – TRIMIT Portals Advanced Sales Integration*.

Disable Signature in Checkout

In the applicable Portal Profile for TRIMIT e-commerce, you can set **Signature in Checkout** to *TRUE*, so a Signature must be entered for an e-commerce Order.
This can be overruled for a specific Order Type by setting **Disable Signature in Checkout** to *TRUE*.

Skip Credit Card Payment

Based on the Payment Terms of a Customer, in which you can set the **Credit Card Pmt. On Portal**, so the Customer can pay his e-commerce Order immediately.
The **Skip Credit Card Payment** overrules this, so for specific Order Types the customer does not have to pay immediately even though his Payment Terms might say so.