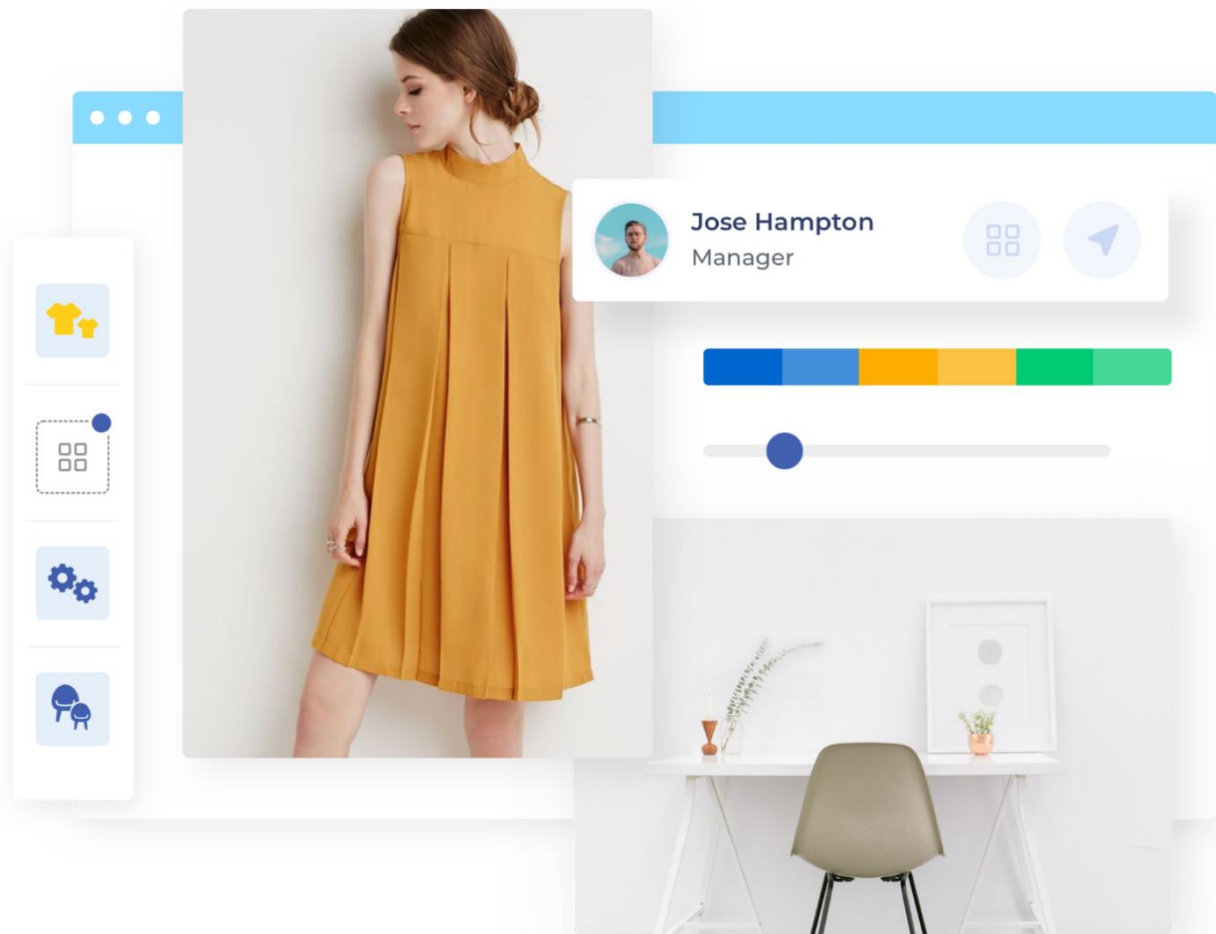


**WHITE PAPER**

PRODUCT SORTING ON B2C WEBSHOP

This document contains information about the product sorting functionality in TRIMIT B2C webshop

Date: 25-02-2021

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INTRODUCTION

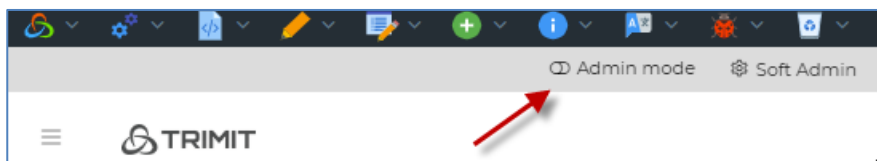
Products sorting on B2C webshop gives possibility to rearrange products on the Portals front-end without the need of apply sorting in the TRIMIT backend system. This feature can be useful for marketing purposes. Planned sorting on B2C webshop allows setting future dates for activation and deactivation of the sorting.

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).

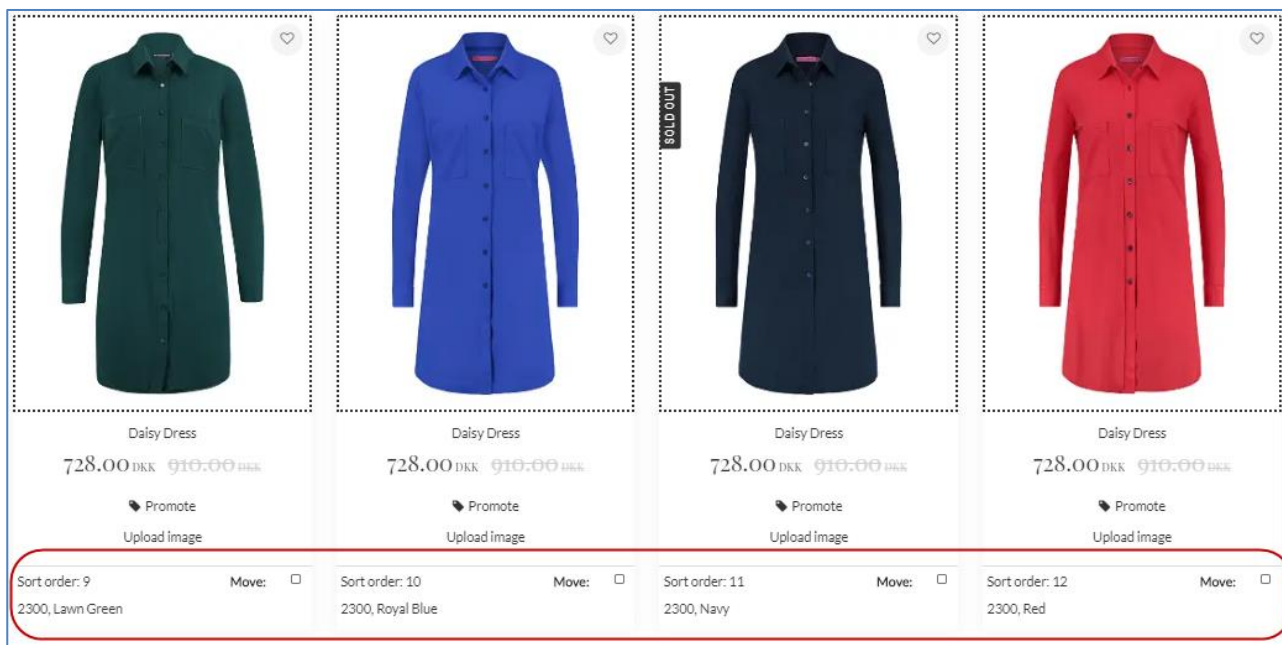
SORTING

Sorting functionality is available for admin users in Admin mode:



TRIMIT B2C product sorting functionality can be enabled in B2C soft admin in section Products (described below).

Sorting works for both master and first variant representation (i.e. color overview, can be changed in B2C Soft admin/ Products). Sorting is possible by drag and drop (single product) or by using sorting controls in the top of the category page (several products at the same time). Use **Selected to be moved** area in the top of the category page when Admin mode is enabled. Each product image will have additional section in the lower part:



Sorting in this way is possible within the entire category even if paging is applied.

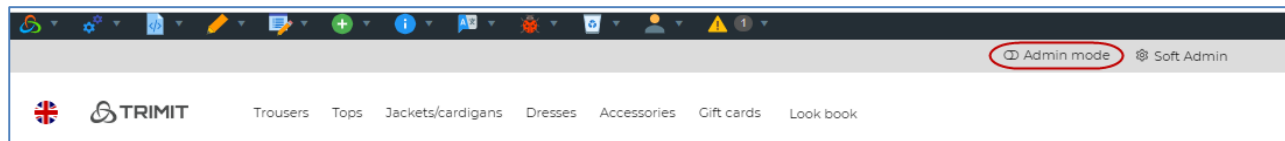
This product sorting section on the image above includes the following information:

- Sort order, e.g. "Sort order: 9" – meaning that this product has number 9 in the category's sort order
- Product number and color, e.g. "2300, Lawn Green" – in case of color overview on the category. And in case of matrix view – only matrix number will be shown
- Move: setting checkmark in this check box means that this product is marked for moving.

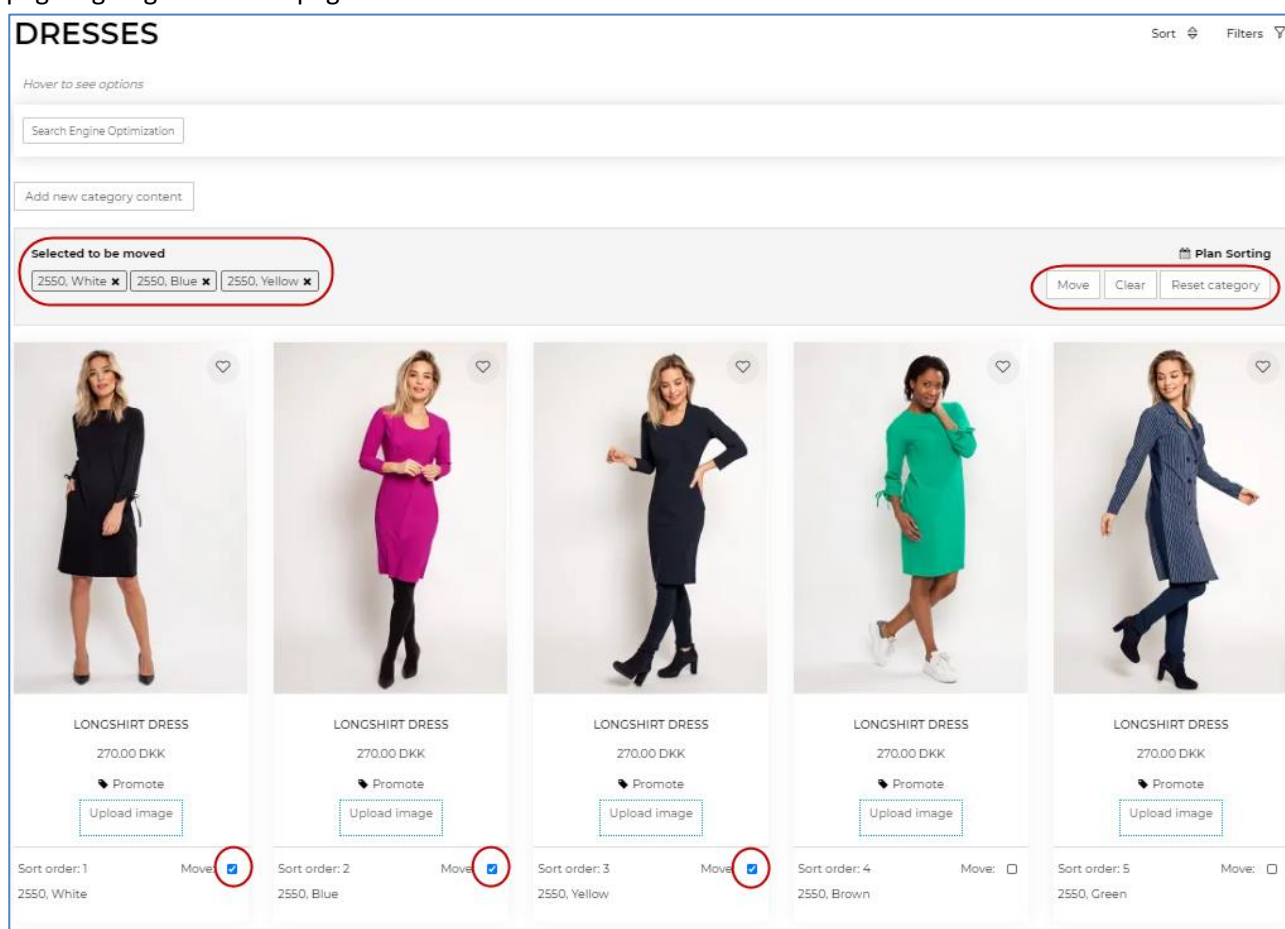
Use drag and drop by holding left mouse button on the needed product image on product overview page and dragging it across the products in the same category and then releasing the mouse button it is possible to place product in different location and thus changing the sorting order. Works only within the same category and the same category page (if paging is applied).

MOVING SEVERAL PRODUCTS

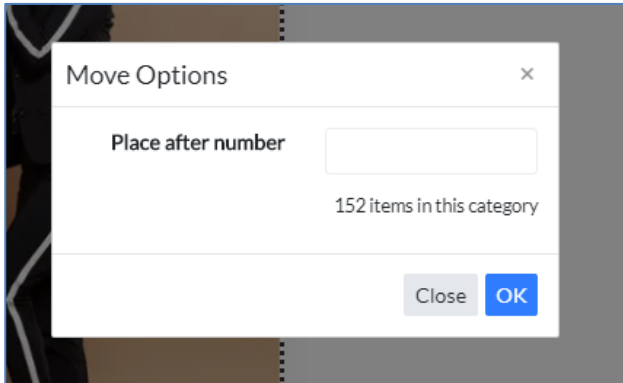
In case of one or several products must be moved within the same category then it is required to enable Admin mode.



Then, on category page, set check marks for the products that need to be moved. Each marked product will be reflected in **Selected to be moved** section in the top of the category page. Each button in the selected area has a text which is the same as shown in the *Move* section under the product image. This works per page – going to another page clears the selection.



It is possible to remove products from this area individually or altogether by clicking **Clear all from selected**. If desired products have been selected, then click **Move** – a new dialog window **Move Options** will appear:



Here it is required to type a product number (from the sort order on category page), after which the selected product(s) will be placed. If product must be placed on the first place within the category, then set *Place after number* = 0. Click OK to finish product movement. A message in a **Move Options** windows gives a hint about a number of items in the related category.

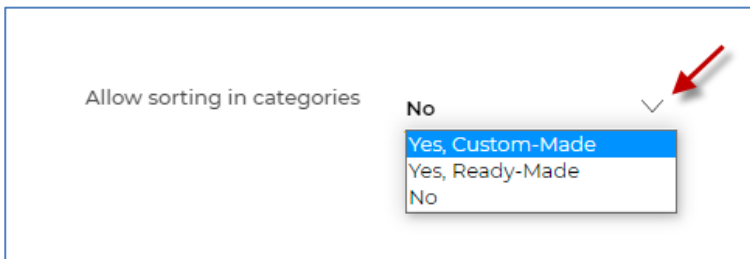
Button **Reset category** (in *Selected to be moved* section on category page) resets to category default (set in TRIMIT BC) sorting for the category. The button is only active if a sorting change has been made to the category.

NOTE:

Be aware that Sorting order for **Master** overview and **Color** overview is different and when switching the overview mode in B2C soft admin – the sorting will be disabled. Then it will be necessary to re-select the sorting method again, either **Yes, Custom-Made** or **Yes, Ready-Made**.

ACTIVATE SORTING

Sorting is activated in the Soft Admin on the page Products in the field **Allow sorting in categories**.



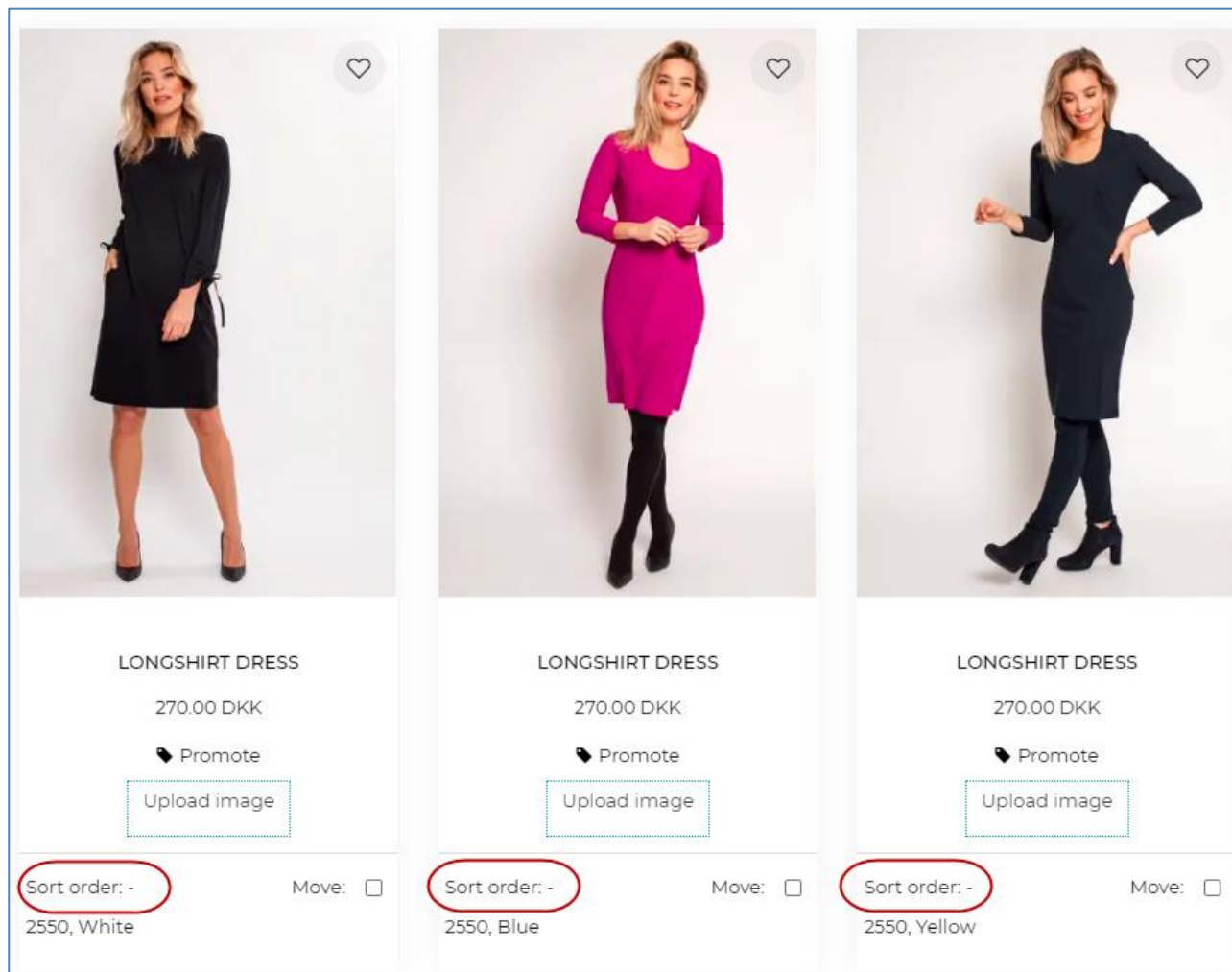
Available options: *Yes, Custom-Made*; *Yes, Ready-Made*; *No*.

YES, CUSTOM-MADE

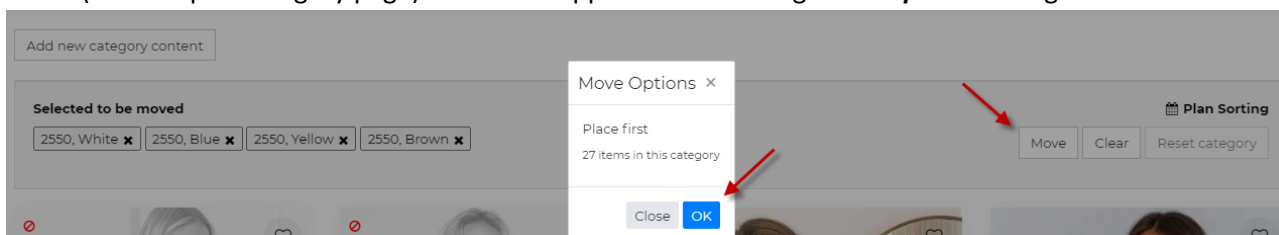
Setting to this option means that all the records in Modelyn table CustomData in group TRM-B2C-SORTING (indicated as TBS below) will be deleted. Now, if admin user moves the products in any of the categories - the new records will be created in TRM-B2C-SORTING (TBS). And the next time the schedule "Sorting on

Overview" will run it will maintain the existing records in TRM-B2B-SORTING and not overriding with sorting records from BC.

If sorting is set to Custom-made, then "Sort order" for all products under all categories is set to "-".



This restricts dragging and moving items within a category - only items with "Sort order" = "-" can be moved to items with "Sort order" = "<number>". Dragging items with "Sort order" = "<number>" to items with "Sort order" = "-" is not possible. As sorting in many cases is about moving product to the first places within the category then in this case selected products can be moved by setting Move=True and clicking Move (in the top of category page). There will appear the following **Move options** dialog.



Clicking OK in this dialog will set the sort order for the specified products and place them according to sorting – at the beginning of the category.

If a category does not have many products then it is possible to select all items in the category and click Move/OK, in this case all items will get "Sort order"=<number> and it will be possible to move. CustomData group records will also be updated with new records.

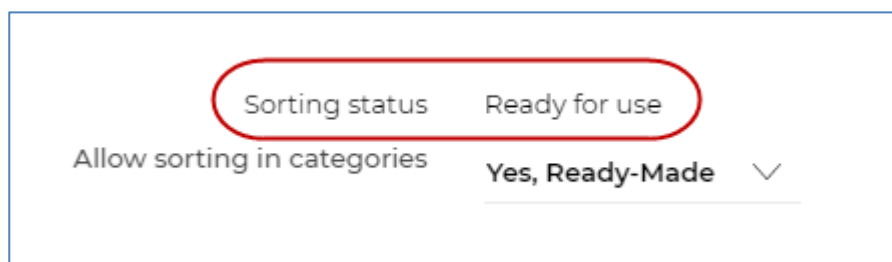
If Overview Mode is changed from "Expand to First Variant" to "Show Masters" or the other way around then the custom data in TRM-B2C-SORTING will persist until the Sort schedule is run (sorting data is deleted).

Clicking **Reset Sorting** (on Category page) – deletes all the records in TRM-B2C-SORTING and the sort order is reset. "Sort order" for all items is set to "-".

Custom made sorting was developed to unload the system, because in this case TBS group only holds sorting records of the products that were actually moved and not all the products on the web shop (like in Ready-made sorting).

YES, READY-MADE

As soon as "Allow sorting in categories" is set to "Yes, Ready-Made" – this initiates running Sorting schedule. When sync is finished "Sorting Status" will be set to "Ready for use", in B2C soft admin under Products.



If in Ready-made mode, each time changing the Overview Mode - it will disable sorting (Allow Sorting in categories = No). And the following message is displayed:

nightly-portals.trimit.dev says

There is data stored for Ready-Made sorting and another Overview Mode. It is only kept if you change the Overview Mode and select "Ready-Made" again. Dropdown can be used now.

OK

Cancel

Overview Mode

Show Masters

Which items are shown in a category

Show Only Items In Tt

Show available colors on Product Overview Page

Yes

Show color even if that color is not in stock

No

Allow sorting in categories

No

Setting it to Ready-made will activate running TBS sync. While data is updated, Sorting Status will be set to *Being prepared*:

Sorting status

Being prepared

Allow sorting in categories

Yes, Ready-Made

After data update is finished, Sorting Status is set to *Ready for use*.

Sorting status

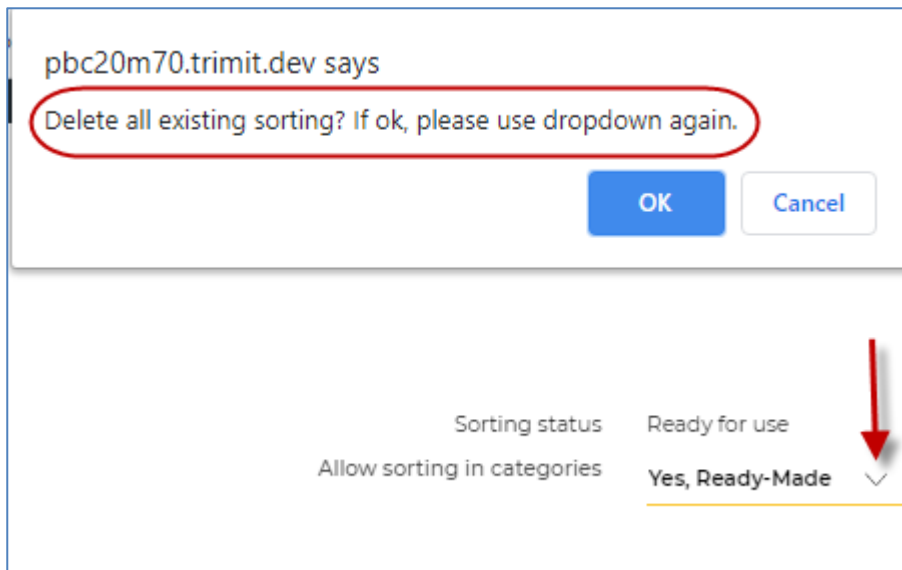
Ready for use

Allow sorting in categories

Yes, Ready-t

Setting it to **Yes, Custom-made** - it will delete all records in TBS group.
If Overview Mode is changed from "Expand to First Variant" to "Show Masters" or the other way around then all items get Sort order number updated after Sort schedule sync if finished.

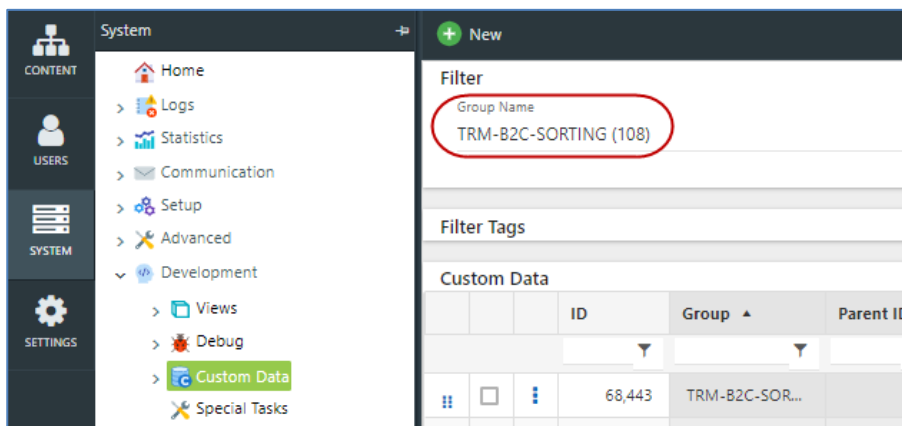
Changing value in Allow sorting in categories will show confirmation dialogs like follows:



In this case read instructions in the dialog and take corresponding action. In the example above, when changing from Ready-made to another setting, there will be a warning that all sorting data will be deleted. The sorting data can be populated again if sorting is set back to **Yes, Ready-Made**, or when running sorting schedule in this mode.

SCHEDULE AND MODELYN DATA

Schedule **Sorting on Overview** updates custom data in group TRM-B2C-SORTING in Modelyn database. This schedule is included in **Data Sync** job and thus follows its settings.



Since the B2C webshop can be set up to show items either expended to first variant or only masters, the data for sorting takes this into account.

In Ready-made mode, there is one parent row created for each category in the B2C. Each category can contain either masters or color variants as children, depending on Overview mode:

Custom Data								
			ID	Group ▲	Parent ID...	Order ...▲	Key	Children
			▼	▼	▼	▼	▼	▼
⋮	☐	⋮	3,354,489	TRM-B2C-SORTING		0	FE1B7A1E	31 children
⋮	☐	⋮	3,354,476	TRM-B2C-SORTING		0	CD25D62D	12 children
⋮	☐	⋮	3,354,468	TRM-B2C-SORTING		0	B928F712	7 children

Each parent has a number of children that can be used for sorting, the custom data sort order is used for display on the B2C, but divided by 100, so that 100 = 1, 200 = 2 and so on, see column **Order** below.

Expanded to first variant uses the master number and first variant as a **Key**

Custom Data									
			ID	Group ▲	Parent ID ...	Order...	Key	Children	Filter Parent
			▼	▼	▼	▼	▼	▼	
⋮	☐	⋮	68.409	TRM-B2C-SORTING	68.407	100	2300 20		(B2C_W_DRESSES)
⋮	☐	⋮	68.411	TRM-B2C-SORTING	68.407	200	2300 25		(B2C_W_DRESSES)
⋮	☐	⋮	68.412	TRM-B2C-SORTING	68.407	300	2300 60		(B2C_W_DRESSES)
⋮	☐	⋮	68.425	TRM-B2C-SORTING	68.407	400	2330 99		(B2C_W_DRESSES)
⋮	☐	⋮	68.424	TRM-B2C-SORTING	68.407	500	2330 65		(B2C_W_DRESSES)
⋮	☐	⋮	68.422	TRM-B2C-SORTING	68.407	600	2330 01		(B2C_W_DRESSES)
⋮	☐	⋮	68.421	TRM-B2C-SORTING	68.407	700	2320 75		(B2C_W_DRESSES)
⋮	☐	⋮	68.419	TRM-B2C-SORTING	68.407	800	2320 25		(B2C_W_DRESSES)
⋮	☐	⋮	68.418	TRM-B2C-SORTING	68.407	900	2310 99		(B2C_W_DRESSES)
⋮	☐	⋮	68.416	TRM-B2C-SORTING	68.407	1.000	2310 60		(B2C_W_DRESSES)
⋮	☐	⋮	68.415	TRM-B2C-SORTING	68.407	1.100	2300 75		(B2C_W_DRESSES)
⋮	☐	⋮	68.414	TRM-B2C-SORTING	68.407	1.200	2300 70		(B2C_W_DRESSES)
⋮	☐	⋮	68.413	TRM-B2C-SORTING	68.407	1.300	2300 65		(B2C_W_DRESSES)

Whereas master view uses the master number as a **Key**:

Custom Data									
			ID	Group ▲	Parent ID ...	Order...	Key	Children	Filter Parent
			▼	▼	▼	▼	▼	▼	
⋮	☐	⋮	68.410	TRM-B2C-SORTING	68.408	100	2300		(B2C_W_DRESSES MASTER)
⋮	☐	⋮	68.417	TRM-B2C-SORTING	68.408	200	2310		(B2C_W_DRESSES MASTER)
⋮	☐	⋮	68.420	TRM-B2C-SORTING	68.408	300	2320		(B2C_W_DRESSES MASTER)
⋮	☐	⋮	68.423	TRM-B2C-SORTING	68.408	400	2330		(B2C_W_DRESSES MASTER)

When using Custom-made setting – only items that were moved are represented as records and stored in this Custom Data group. In example below only four products were moved within one category and they are saved in TBS Custom Data group:

Group Name								
TRM-B2C-SORTING (5)								
Filter Tags								
Custom Data								
			ID	Group ▲	Parent ID...	Order ...▲	Key	Children
			3,299,1...	TRM-B2C-SORTING		0	75604E03	4 children
			3,299,1...	TRM-B2C-SORTING	3,299,1...	100	2550 01	
			3,299,1...	TRM-B2C-SORTING	3,299,1...	200	2550 20	
			3,299,1...	TRM-B2C-SORTING	3,299,1...	300	2550 30	
			3,299,1...	TRM-B2C-SORTING	3,299,1...	400	2550 40	

BC VS PORTAL SORTING

It is recommended to use either BC (alternative sorting on categories) or Portals sorting. Using both sorting methods in parallel can give misleading results.

COLLECTION ON B2C

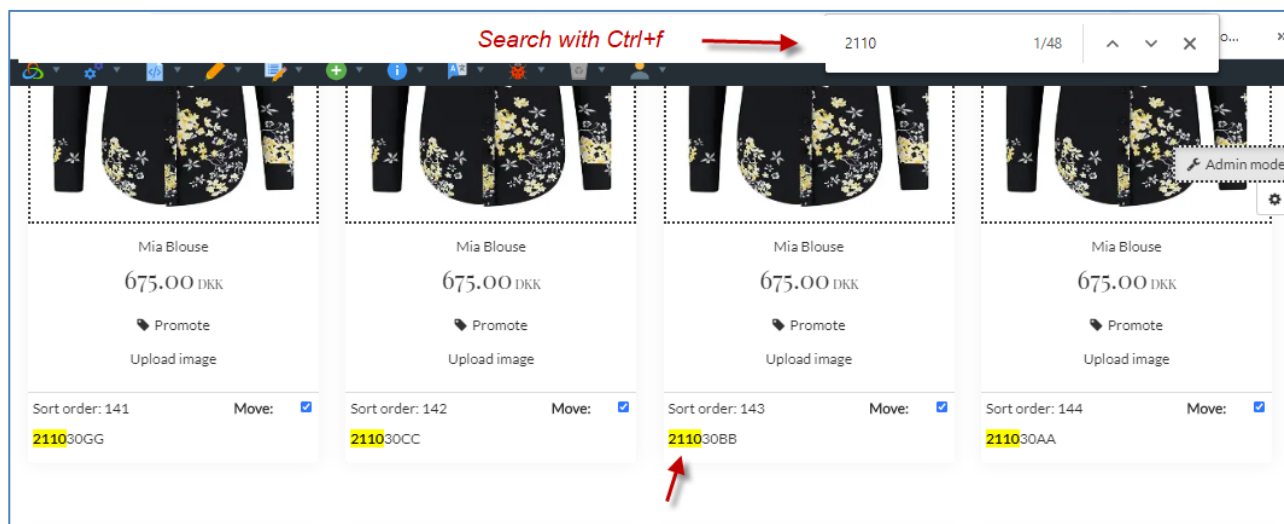
If collection is used in category structure, then it is still possible to sort products on category page. The sorting order is saved in Modelyn database and not affected by other actions like portals reboot, running schedules etc.

REARRANGE NON-PUBLISHED PRODUCTS

Even if a product is in B2C category structure but is not published, i.e. visible only for admin users (this can be done on master admin page in TRIMIT PIR), this product can still be rearranged with drag and drop functionality (also batch move of several unpublished products).

NOTE:

Product search on a category page – here can be used CTRL+F and all the related item numbers will be marked. Now it is easier to see and mark products for moving, see screen shot below



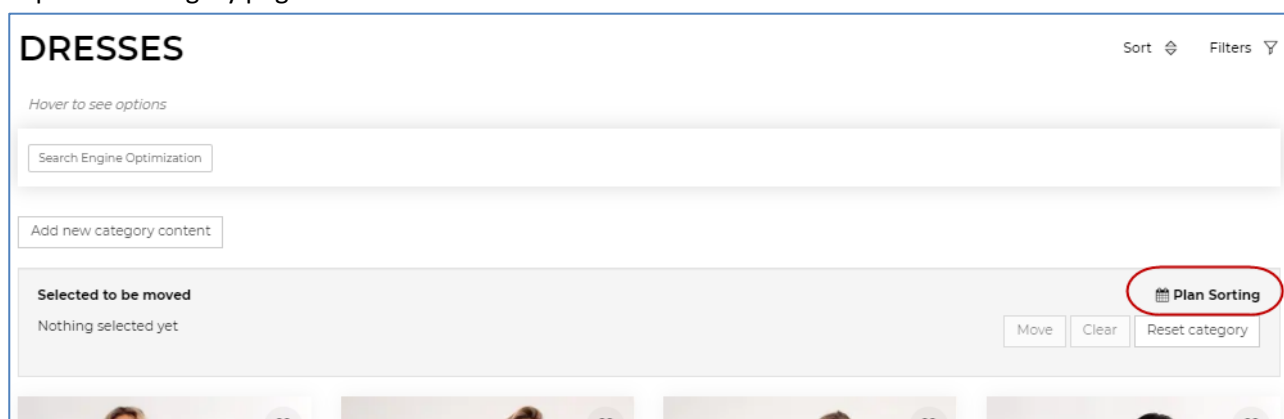
Removing the product from category structure and running the schedule synchronization removes the product from the category page on B2C webshop. The sorting order will be adjusted correspondingly (there will be no gaps in sorting numbers).

PLANNED SORTING

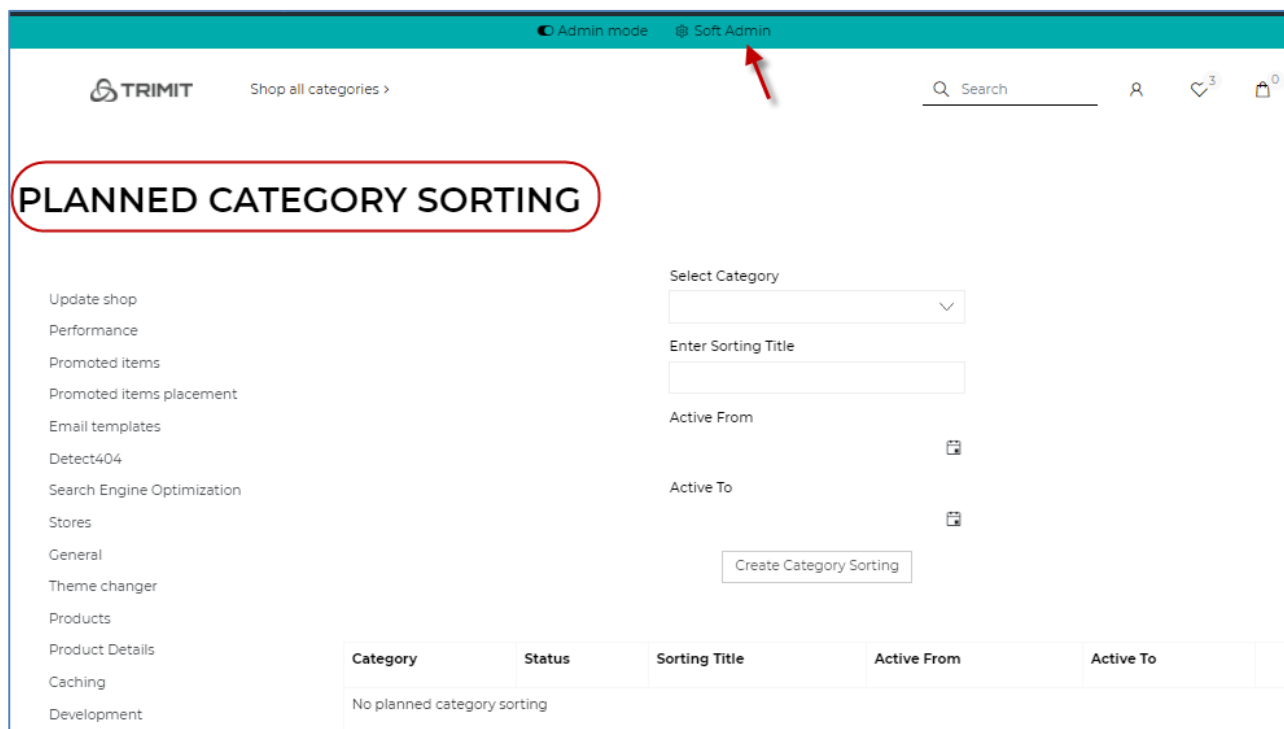
Planned sorting on B2C webshop gives possibility to sort products within categories unattended during certain period of time.

Planned sorting setup is available in B2C soft admin, in section Planned Category Sorting, and on the top of each category page when Admin mode is enabled.

Top of the category page:



In B2C soft admin:



PLANNED CATEGORY SORTING

Update shop
Performance
Promoted items
Promoted items placement
Email templates
Detect404
Search Engine Optimization
Stores
General
Theme changer
Products
Product Details
Caching
Development

Select Category

Enter Sorting Title

Active From

Active To

Create Category Sorting

Category	Status	Sorting Title	Active From	Active To
No planned category sorting				

DESCRIPTION OF FIELDS

SELECT CATEGORY

This drop-down field reflects all categories available on the B2C webshop. Select a category where you want to sort products. It is only possible to select child categories in this list even though parent categories are also shown.

ENTER SORTING TITLE

The name of the planned sorting. This name will be reflected in the table below

ACTIVE FROM

Select starting date for planned sorting. Only non-active planned sorting is editable.

ACTIVE TO

Select ending date for planned sorting.

Finish creation by clicking **Create Category Sorting**. Created planned sorting is displayed in the table below:

Category	Status	Sorting Title	Active From	Active To	
Dresses (Women)		Dresses Alt Sort	3/7/2021 1:00 AM	3/12/2021 1:00 AM	Edit Settings Edit Sorting Delete

DESCRIPTION OF CONTROLS

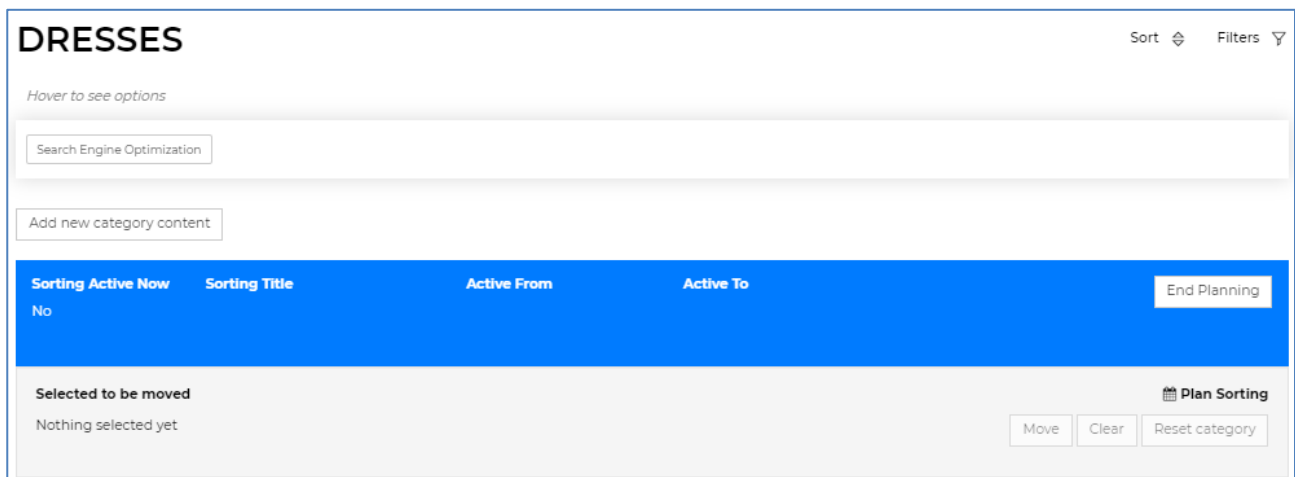
EDIT SETTINGS

Allows edit planned sorting settings like Sorting Title, Active From / To dates. Click Save when finished

EDIT SORTING

Allows arrange sorting on the selected category. Clicking this button redirects to the related category. The planned sorting bar in the top of the category page will colored in blue for non-active sorting (editable, i.e. products can be sorted) and in green for active sorting (non-editable, i.e. products cannot be sorted).

Non-active planned sorting:



DRESSES Sort  Filters 

Hover to see options

Search Engine Optimization

Add new category content

Sorting Active Now	Sorting Title	Active From	Active To	
No				End Planning

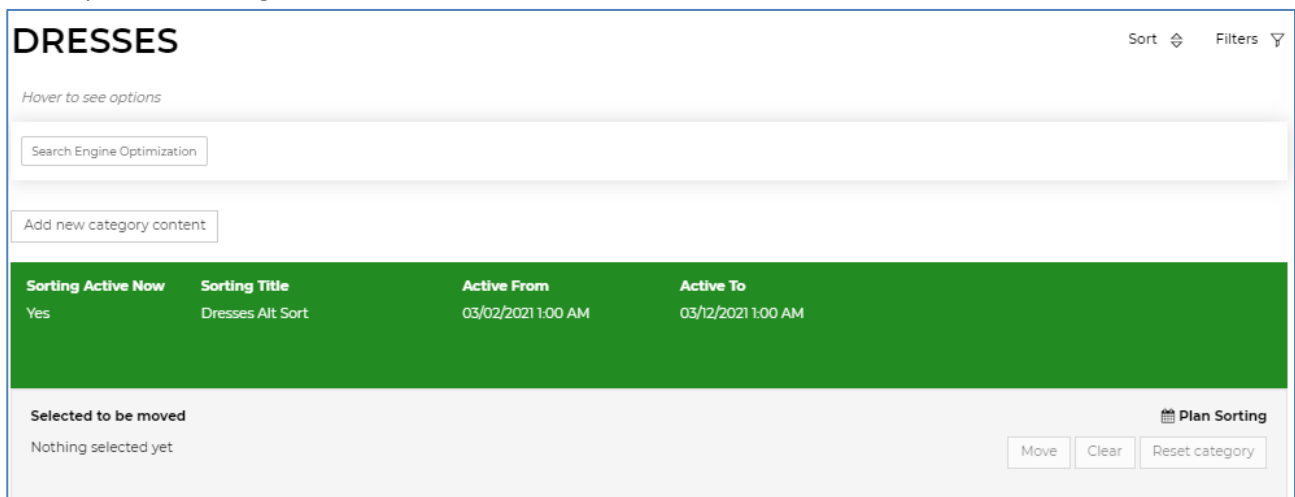
Selected to be moved
Nothing selected yet

Plan Sorting 

Move Clear Reset category

After sorting on the category is finished, click End Sorting in the right side of the blue bar.

Active planned sorting:



DRESSES Sort  Filters 

Hover to see options

Search Engine Optimization

Add new category content

Sorting Active Now	Sorting Title	Active From	Active To	
Yes	Dresses Alt Sort	03/02/2021 1:00 AM	03/12/2021 1:00 AM	

Selected to be moved
Nothing selected yet

Plan Sorting 

Move Clear Reset category

DELETE

Delete current planned sorting.

In order to see changes in the sorting setup are reflected it might be needed to clear the server cache

