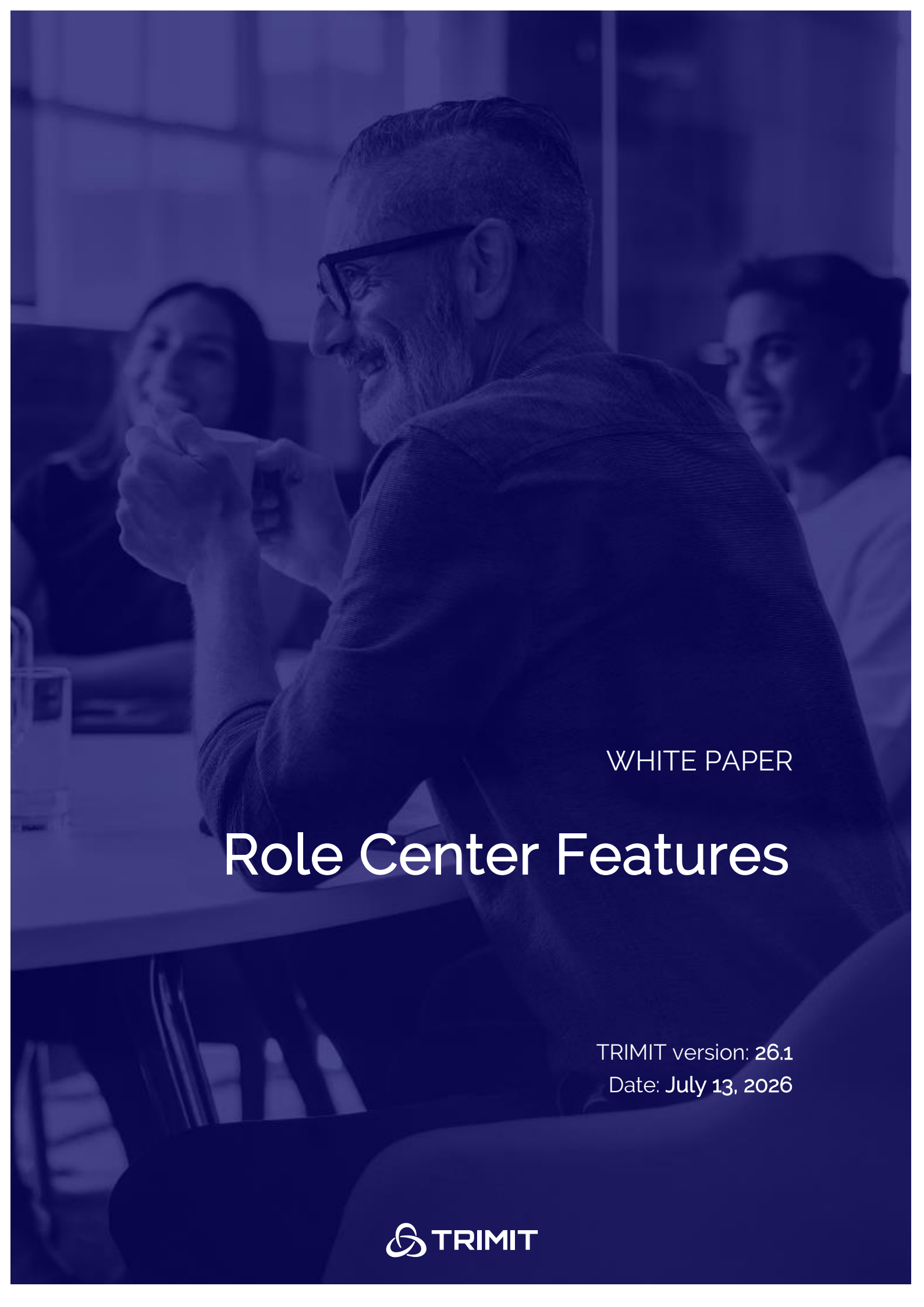




WHITE PAPER

Role Center Features

TRIMIT version: 26.1

Date: July 13, 2026

Table of Contents

Role Center Features	1
Introduction	5
Components	5
Introduction of TRIMIT Profiles (Roles)	7
Role Center Setup	8
FastTab Small Business	8
Activities, Set Up Cues	10
FastTab PDM	10
FastTab Customer Service	13
TRIMIT Profiles (Roles)	16
Differences between TRIMIT and Business Central Profiles (Roles)	16
Search	17
My Actions	17
My Masters	17
TRIMIT Help	17
Cue Filters on Order Line Level	19
Profile (Role) TRIMIT CRM	21
Activities	21
My Role Activities	22
Menus	22
Actions	23
Possible Insights (ListPart Page)	24
Profile (Role) TRIMIT Customer Service	25
Activities	25
My Role Activities	26
Menus	27
Actions	27
Possible Insights (ListPart Pages)	29
Profile (Role) TRIMIT PDM/ Design	30
Activities	30
Menus	31
Actions	32
Possible Insights (ListPart Pages)	32
Profile (Role) TRIMIT Portal Administrator	33
Activities	33
My Role Activities	35

Menus.....	35
Actions.....	36
Possible Insights (ListPart Page).....	36
Profile (Role) TRIMIT Production.....	37
Activities.....	37
My Role Activities.....	38
Menus.....	39
Actions.....	40
Possible Insights (ListPart Pages).....	42
Profile (Role) TRIMIT Small Business.....	43
Activities.....	43
Menus.....	46
Actions.....	48
Possible Insights (ListPart Pages).....	50
Profile (Role) TRIMIT Shop Floor Terminal.....	51
Possible Insights (ListPart Pages).....	51
Profile (Role) Purchasing Agent.....	51
TRIMIT ListPart Pages.....	52
My Actions / Page Actions.....	52
My Actions – via a Role Center.....	52
Page Actions – via many Pages.....	55
My Masters.....	56
My Collections.....	57
My Setup.....	59
My VarDim Types.....	59
TRIMIT Search Function.....	60
Account Schedule Request.....	63
Fields of the Account Schedule Setup.....	63
Sales Statistics.....	66
My Role Activities.....	67
Setup My Cues.....	67
Description of the Fields.....	67
Activities, Set Up Cue Indicator.....	70
Extra Options for My Role Activities.....	70
Some Examples.....	71
Conclusion.....	73

Introduction

When installing the TRIMIT App, several TRIMIT specific **Profiles (Roles)** will be added.

When installing the TRIMIT Shop Floor App also one extra TRIMIT specific Profile (Role Center) will be added.

In these Profiles we have many extra features to improve user experience, and to make it easier for users to find the programs they need and to be able to add extra elements (links to programs, new Indicators, Cues and ListPart Pages) to a TRIMIT Role Center, so no customization is necessary to get the best user experience for the user while working with TRIMIT.

See [Designing Role Centers - Business Central | Microsoft Learn](#) for more standard Business Central (BC) information regarding the Role Centers.

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 26.1 for Business Central W1 BC28.X.

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 Role Center Features contains the following objects:

The tables

6036514 trm Page Actions
6036730 trm Production Cue
6036800 trm Role Center Setup
6036801 trm PDM Cue
6036802 trm Customer Service Cue
6036803 trm Small Business Cue
6036804 trm CRM Cue
6036805 trm My Cue
6036806 trm My Cue Setup
6038161 trm ConnectPortal Cue
6036828 trm My VarDim Types
6036829 trm My Collections
6036830 trm My Masters

The pages

6036301 trm PDM Processor Role Center
6036302 trm Cust Service Role Center
6036303 trm Small Bus. Role Center
6036304 trm Shop Floor Role Center
6036305 trm CRM Role Center
6036306 trm Production Role Center
6036330 trm PDM Processor Activities
6036331 trm Cust. Service Activities
6036332 trm Small Business Activities
6036333 trm CRM Processor Activities

The pages

6036335 trm Prod. Processor Activities
6036336 trm My Role Activities
6036337 trm My Cue Setup
6036339 trm My VarDim Types
6036340 trm My Collections
6036341 trm My Masters
6036342 trm Search Page
6036343 trm My Workflow Activities
6036344 trm Search Sales
6036345 trm My Actions
6036346 trm My Activities
6036347 trm My Setup
6036507 trm Role Center Setup
6036520 trm Headline Role Center
6038160 trm ConnectPortal Role Center
6038161 trm Portal Activities

The codeunits

6036523 trm Open Help in TRIMIT
6038102 trm Portal Service Handler

PageExtension

6036681 trm Purch AgentRoleCenter Ext extends
9007 Purchasing Agent Role Center
6038402 trm Production Rolecenter Ext extends
*6036306 trm Production Role Center**

To show the information in the Role Centers, there are more tables, pages, etc. involved, but these are the specific objects regarding TRIMIT Role Center Features.

Introduction of TRIMIT Profiles (Roles)

Currently TRIMIT has added seven extra Profiles (Roles).

You can find them in the *Profiles (Roles)* list by using **Search Profiles**

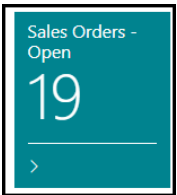
The TRIMIT Profiles (Roles) start all with *TRM_*

Profiles (Roles)							
Profiles (Roles): Custom filtered							
Profile ID ↑	Display Name	Source	Role Center ID	Enabled	Use as default profile	Show in Role Explorer	
TRM_CRM	TRIMIT CRM	TRIMIT	6036305	☒	☐	☒	
TRM_CS	TRIMIT Customer Service	TRIMIT	6036302	☒	☐	☒	
TRM_PDM	TRIMIT PDM / Design	TRIMIT	6036301	☒	☐	☒	
TRM_PORTAL	TRIMIT Portal Administrator	TRIMIT	6038160	☒	☐	☒	
TRM_PROD	TRIMIT Production	TRIMIT	6036306	☒	☐	☒	
TRM_SB	TRIMIT Small Business	TRIMIT	6036303	☒	☒	☒	
TRM_TERMINAL	TRIMIT Shop Floor Terminal	TRIMIT Shop Floor	6036304	☒	☐	☐	

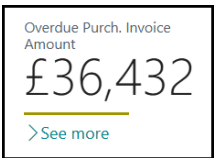
The first six TRIMIT Profiles (Roles) are added automatically when you install the **TRIMIT App**.

The *TRM_TERMINAL* will however only be added to the **Profiles (Roles)** when you also install the **TRIMIT Shop Floor App**.

Every Profile (Role) has its specific elements for a group of users with the same role in a Company.



When talking about a **Cue** in a Role Center we mean:
(BC calls them *Data Cues*).



When talking about an **Indicator** in a Role Center we mean:
(BC calls them *Wide Data Cues*).

My Customers			
Customer No. ↑	Name	Phone No.	Balance (LCY)
20000	Trey Research		2,345.63
30000	School of Fine Art		34,515.94
40000	Alpine Ski House		7,017.52
50000	Relecloud		6,762.38

When talking about a **ListPart Page** in a Role Center we mean:
(BC calls them *ListPart Page* or *CardPart Page*).

Role Center Setup

Via **Search Role Center Setup**, you can open the **Role Center Setup**.
These Parameters influence the content of some TRIMIT Profiles (Roles).

FastTab Small Business

Small Business

Show Sales This Month ☒ **1**

Show Overdue Sales Invoices ☒ **2**

Show Overdue Purchase Invoices ☒ **3**

Show Customers with Due Balance ☒ **4**

These Parameters can add some Indicators and Cues on the Role Center of **Profile (Role)**

TRM_SB – TRIMIT Small Business.

Keep in mind that setting these Parameters to **Yes**, will also influence the performance of opening the Role Center, because the Amounts/Quantities needs to be calculated.

CRONUS Role Center | Finance | CRM | Sales | Purchase | Product Design | Logistics | Production | Portals | Posted Documents | All Reports |

Customers | Vendors | Sales Orders | Complaints | Purchase Orders | Masters | Pick Documents

Headline

Click to learn more on MyTRIMIT with doc search and AI help

Activities

Sales This Month **1** £19,714 > See more

Overdue Sales Invoice Amount **2** £1,128,384 > See more

Overdue Purch. Invoice Amount **3** £36,432 > See more

Workflow

My Due Workflow 0 >

My Group Due Workflow 79 >

Finance

Sales Invoices Due 1 >

Purchase Invoices Due 0 >

Vendors - Pay on Hold 0 >

Customer Service

Sales Orders - Open 19 >

Open Complaints 0 >

Blocked Customers 0 >

Customers with Balance 10 **4** >

Purchase

Purchase Orders 19 >

Purchase Orders Confirm 0 >

Product Design

Masters with D... Workflow 155 >

Show Sales This Month (1)

This will show an Indicator of the total **Sales (LCY)** (Sales Amount excl. VAT) of all the Posted Sales Invoices and Posted Sales Credit Memos that were posted in the current Month – based on the Work Date. If you click on **>See more**, you will see a list of **Customer Ledger Entries**.

Customer Ledger Entries

Based on Work Date June 18, 2025

Views: All

Filter list by:
× Document Type
Invoice|Credit Memo
× Posting Date
06/01/25 | 06/18/25
+ Filter...

Posting Date	Document Date	Document Type	Document No.	Customer No.	Customer Name	Description	Curre... Code	Original Amount	Amount	Amount (LCY)	Sales (LCY)
6/18/2025	6/18/2025	Invoice	103298	10000	Adatum Corporation	Order 50003		17,995.00	17,995.00	17,995.00	14,396.00
6/15/2025	6/15/2025	Invoice	103297	30000	School of Fine Art	Order 0100001	USD	1,081.98	1,081.98	702.01	702.01
6/11/2025	6/11/2025	Invoice	103296	2000	The Fashion Store UK	Order 50001		1,574.56	1,574.56	1,574.56	1,259.65
6/11/2025	6/11/2025	Invoice	103295	3010	Office Supplies & Furni...	Order 0100002	EUR	1,249.75	1,249.75	807.09	807.09
6/9/2025	6/9/2025	Invoice	103294	30000	School of Fine Art	Order 0100001	USD	1,322.40	1,322.40	858.00	858.00
6/1/2025	6/1/2025	Invoice	103293	2000	The Fashion Store UK	Order 50001		2,114.41	2,114.41	2,114.41	1,691.53

The Filter for the **Document Type** is automatically set to *Invoice/Credit Memo*.

The Filter for the **Posting Date** is automatically set to the first Date of the current Month based on the **Work Date** and the last Posting Date of the Customer Ledger Entries in the current Month based on the **Work Date**.

Show Overdue Sales Invoices (2)

This will show the total **Remaining Amt. (LCY)** (Remaining Amount in Local Currency) of all the Posted Sales Invoices for which the **Due Date** is before the Work Date.

If you click on **>See more**, you will see a list of **Customer Ledger Entries**:

Customer Ledger Entries														
Based on Work Date June 18, 2025														
Views														
Filter list by:														
X Document Type														
Invoice														
X Due Date														
<=06/18/25														
X Open														
Yes														
X Remaining Amt. (LCY)														
<>0														
+ Filter...														
Posting Date	Document Date	Document Type	Document No.	Customer No.	Customer Name	Description	Curr. Code	Original Amount	Amount	Amount (LCY)	Sales (LCY)	Remaining Amount	Remaining Amt. (LCY)	Due Date
6/11/2025	6/11/2025	Invoice	103296	2000	The Fashion Store UK	Order S0001		1,574.56	1,574.56	1,574.56	1,259.65	1,574.56	1,574.56	6/11/2025
6/1/2025	6/1/2025	Invoice	103293	2000	The Fashion Store UK	Order S0001		2,114.41	2,114.41	2,114.41	1,691.53	2,114.41	2,114.41	6/1/2025
1/1/2025	1/1/2025	Invoice	103292	2020	Sportswear A/S	Order SH50078		35,057.20	35,057.20	35,057.20	35,057.20	35,057.20	35,057.20	2/1/2025
1/1/2025	1/1/2025	Invoice	103291	2010	The Shoe Store Europe	Order SH50077		15,810.00	15,810.00	15,810.00	15,810.00	15,810.00	15,810.00	2/1/2025
1/1/2025	1/1/2025	Invoice	103290	2040	Garment Company Ltd.	Order SH50076		20,410.00	20,410.00	20,410.00	20,410.00	20,410.00	20,410.00	1/31/2025
1/1/2025	1/1/2025	Invoice	103289	3000	The Furniture Shop UK	Order SH50075		79,771.50	79,771.50	79,771.50	63,817.20	79,771.50	79,771.50	1/1/2025
1/1/2025	1/1/2025	Invoice	103288	2030	The Surf Shop Ltd.	Order SH50074		29,123.25	29,123.25	29,123.25	23,298.60	29,123.25	29,123.25	1/1/2025
12/10/2024	12/10/2024	Invoice	103286	2020	Sportswear A/S	Order SH50072		8,764.30	8,764.30	8,764.30	8,764.30	8,764.30	8,764.30	1/10/2025
12/10/2024	12/10/2024	Invoice	103274	2010	The Shoe Store Europe	Order SH50060		23,715.00	23,715.00	23,715.00	23,715.00	23,715.00	23,715.00	1/10/2025
1/1/2025	1/1/2025	Invoice	103287	2000	The Fashion Store UK	Order SH50073		43,703.63	43,703.63	43,703.63	34,962.90	43,703.63	43,703.63	1/1/2025
12/10/2024	12/10/2024	Invoice	103262	2040	Garment Company Ltd.	Order SH50048		29,460.00	29,460.00	29,460.00	29,460.00	29,460.00	29,460.00	12/31/2024
12/10/2024	12/10/2024	Invoice	103250	3000	The Furniture Shop UK	Order SH50036		59,828.63	59,828.63	59,828.63	47,862.90	59,828.63	59,828.63	12/24/2024

Show Overdue Purchase Invoices (3)

This will show the total **Remaining Amt. (LCY)** (Remaining Amount in Local Currency) of all the Posted Purchase Invoices for which the **Due Date** is before the Work Date.

If you click on **>See more**, you will see a list of **Vendor Ledger Entries**:

Vendor Ledger Entries														
Based on Work Date June 18, 2025														
Views														
Filter list by:														
X Document Type														
Invoice														
X Due Date														
<=06/18/25														
X Open														
Yes														
X Remaining Amt. (LCY)														
<>0														
+ Filter...														
Posting Date	Document Date	Document Type	Document No.	External Doc. No.	Vendor No.	Vendor Name	Description	Curr. Code	Original Amount	Amount	Amount (LCY)	Remaining Amount	Remaining Amt. (LCY)	Due Date
3/11/2024	3/11/2024	Invoice	108202	107202	50000	Nod Publishers	Invoice 107202		-11,398.50	-11,398.50	-11,398.50	-11,398.50	-11,398.50	3/31/2024
3/10/2024	3/10/2024	Invoice	108200	107200	50000	Nod Publishers	Invoice 107200		-1,819.38	-1,819.38	-1,819.38	-1,819.38	-1,819.38	3/31/2024
3/14/2024	3/14/2024	Invoice	108206	107206	40000	Wide World Importers	Invoice 107206		-853.13	-853.13	-853.13	-853.13	-853.13	3/31/2024
3/13/2024	3/13/2024	Invoice	108205	107205	40000	Wide World Importers	Invoice 107205		-10,608.00	-10,608.00	-10,608.00	-10,608.00	-10,608.00	3/31/2024
3/7/2024	3/7/2024	Invoice	108197	107197	40000	Wide World Importers	Invoice 107197		-2,460.00	-2,460.00	-2,460.00	-2,460.00	-2,460.00	3/31/2024
3/15/2024	3/15/2024	Invoice	108208	107208	30000	Graphic Design Institute	Invoice 107208		-2,195.00	-2,195.00	-2,195.00	-2,195.00	-2,195.00	3/31/2024
3/14/2024	3/14/2024	Invoice	108207	107207	30000	Graphic Design Institute	Invoice 107207		-768.80	-768.80	-768.80	-768.80	-768.80	3/31/2024
3/13/2024	3/13/2024	Invoice	108204	107204	30000	Graphic Design Institute	Invoice 107204		-444.80	-444.80	-444.80	-444.80	-444.80	3/31/2024
3/8/2024	3/8/2024	Invoice	108198	107198	30000	Graphic Design Institute	Invoice 107198		-864.90	-864.90	-864.90	-864.90	-864.90	3/31/2024
3/12/2024	3/12/2024	Invoice	108203	107203	20000	First Up Consultants	Invoice 107203		-1,096.88	-1,096.88	-1,096.88	-1,096.88	-1,096.88	3/31/2024
3/9/2024	3/9/2024	Invoice	108199	107199	20000	First Up Consultants	Invoice 107199		-961.00	-961.00	-961.00	-961.00	-961.00	3/31/2024
3/7/2024	3/7/2024	Invoice	108196	107196	20000	First Up Consultants	Invoice 107196		-1,694.00	-1,694.00	-1,694.00	-1,694.00	-1,694.00	3/31/2024
3/10/2024	3/10/2024	Invoice	108201	107201	10000	Fabrikam, Inc.	Invoice 107201		-1,267.50	-1,267.50	-1,267.50	-1,267.50	-1,267.50	3/31/2024

Show Customers with Due Balance (4)

This will show a Cue with the number of Customers with a **Balance Due (LCY)**.

This Parameter will be filled by default with the **Show Customers with Due Balance** in the FastTab **Customer Service**. If it is set in the FastTab **Small Business**, it is also set for FastTab **Customer Service** and vice versa.

If you click on the Cue (Stack), you will see a list of **Customers**:

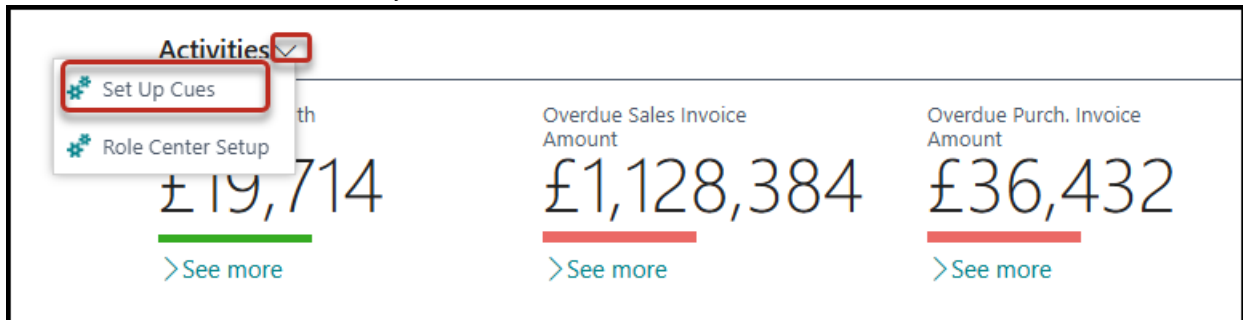
Customers									
Based on Work Date June 18, 2025									
Views									
Filter list by:									
X Balance Due (LCY)									
<>0									
+ Filter...									
Filter totals by:									
Date Filter: <=06/18/25									
Edit									
No. #	Name	Responsibility Center	Location Code	Phone No.	Contact	Allow Multiple Posting Groups	Balance (LCY)	Balance Due (LCY)	Sales (LCY)
2000	The Fashion Store UK	BLUE			Charley Nelson		193,071.35	193,071.35	317,617.28
20000	Trey Research				Helen Ray		2,345.63	2,345.63	47,171.60
2010	The Shoe Store Europe	BLUE			W.A. van Buren		134,385.00	134,385.00	300,390.00
2020	Sportswear A/S	BLUE			H.C. Andersen		78,878.70	78,878.70	140,228.80
2030	The Surf Shop Ltd.	2030			G. Rafferty		131,054.65	131,054.65	219,006.84
2040	Garment Company Ltd.	BLUE			Burt Reynolds		167,710.00	167,710.00	373,930.00
3000	The Furniture Shop UK	BLUE			Dave Hanson		378,914.65	378,914.65	638,172.00
30000	School of Fine Art				Meagan Bond		34,204.31	32,644.30	146,454.61
40000	Alpine Ski House				Ian Deberry		2,617.50	2,617.50	46,357.80
50000	Relecloud				Jesse Homer		6,762.38	6,762.38	54,482.70

Note

You can also add your own Indicators and Cues to the **TRIMIT Small Business Role Center**:
see [Customizing the TRIMIT Role Centers](#).

Activities, Set Up Cues

Via **Activities, Set Up Cues** you are also able to determine the Thresholds for the four Indicators/Cues based on the **Role Center Setup**, FastTab **Small Business**, as you can do for all the other Cues/Indicators that are already in the Role Center.



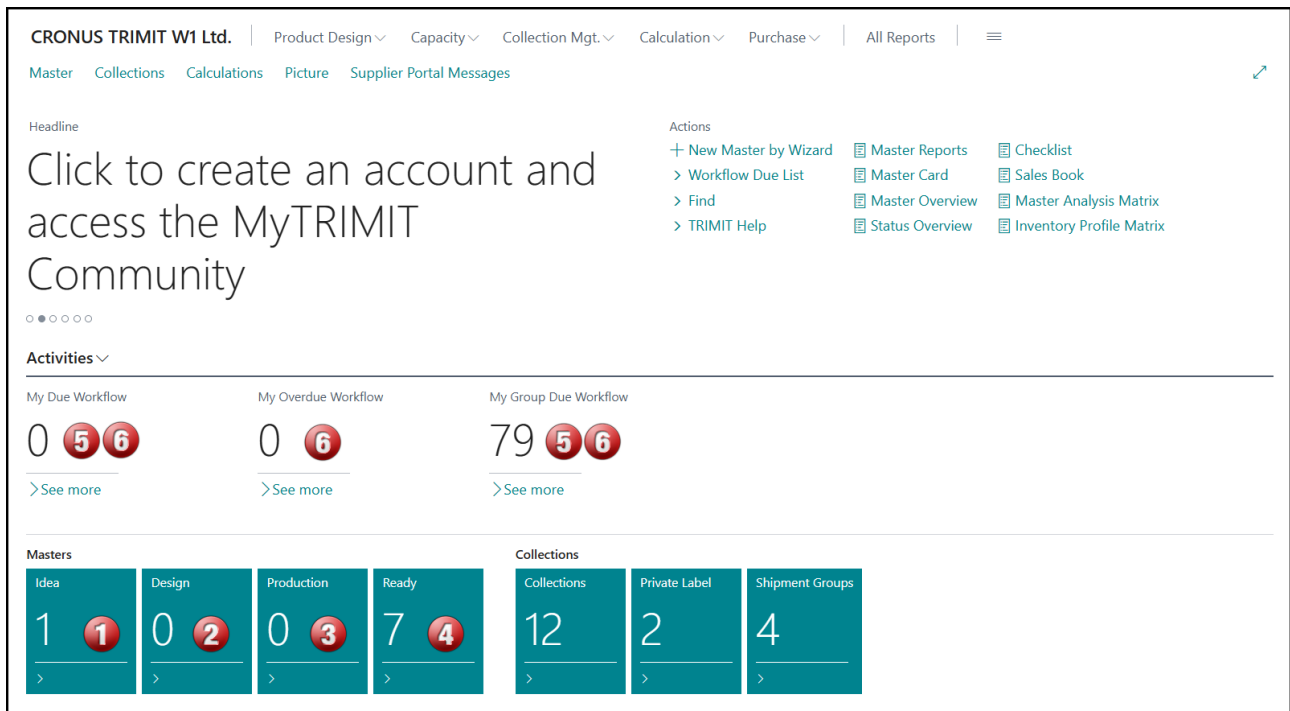
Cue Setup							
Edit List							
Cue Name	Low Range Style	Threshold 1	Middle Range Style	Threshold 2	High Range Style	Personalized	
Sales This Month	Unfavorable	5,000.00	Ambiguous	10,000.00	Favorable	☒	☒
Overdue Purch. Invoice Amount	Favorable	0.00	Ambiguous	15,000.00	Unfavorable	☒	☒
Overdue Sales Invoice Amount	Favorable	0.00	Ambiguous	10,000.00	Unfavorable	☒	☒
Customers with Due Balance	Favorable	0.00	Ambiguous	10.00	Unfavorable	☒	☒
New Users	None	0.00	None	0.00	None	☐	☐
Portal Purchase Documents with Errors	None	0.00	None	0.00	None	☐	☐
Portal Sales Documents with Errors	None	0.00	None	0.00	None	☐	☐
Warehouse Receipts	None	0.00	None	0.00	None	☐	☐
Open Pick Documents	None	0.00	None	0.00	None	☐	☐

FastTab PDM

PDM					
Status Code Filter Idea	IDEA	1	Status Code Filter Ready	READY INHOUSE	4
Status Code Filter Design	DESIGN APPROVED	2	Starting Date Formula Due	CD-2Y	5
Status Code Filter Production	PRODUCTION INTRANS	3	Ending Date Formula Due	CD+7D	6

These Parameters influence the Indicators and Cues on the Role Center of **Profile (Role)**

TRM_PDM – TRIMIT PDM/Design.



Status Code Filter Idea (1)

In this Parameter, you can enter a **Status Code** Filter for the first Masters Cue in the **Profile (Role)** *TRM_PDM* called *Idea*.

I.e.: If you want to show the number of Masters with **Status Code** *IDEA*, you simply enter *IDEA* in this Parameter.

Status Code Filter Design (2)

In this Parameter, you can enter a **Status Code** Filter for the second Masters Cue in the **Profile (Role)** *TRM_PDM* called *Design*.

I.e.: If you want to show the number of Masters with **Status Code** *APPROVED* or *DESIGN*, you simply enter *APPROVED/DESIGN* in this Parameter.

Status Code Filter Production (3)

In this Parameter, you can enter a **Status Code** Filter for the third Masters Cue in the **Profile (Role)** *TRM_PDM* called *Production*.

I.e.: If you want to show the number of Masters with **Status Code** *PRODUCTION*, you simply enter *PRODUCTION* in this Parameter.

Status Code Filter Ready (4)

In this Parameter, you can enter a **Status Code** Filter for the fourth Masters Cue in the **Profile (Role)** *TRM_PDM* called *Ready*.

If you want to show the number of with **Status Code** *READY* or without a **Status Code**, you simply enter *READY/* in this Parameter.

Clicking on the Cues (1-4) will show a list of Masters with the **Status Codes** based on the entered Filter.

Master List										
Master List: All 🔍 📄 New Edit List Delete Edit View Home Reports Actions Related Reports Automate Fewer options										
Bill of Materials Measurement Chart Care Label Additional Info Additional Comments VarDim Master Attributes Inventory Profile Product Information (PIR) Workflow Composition Sustainability Additional Tags Copy Values Collections Item List Statistics Image Management										
Item Type	No. ↑	Description	Status Code ▼	Brand Code	Season Code	Collection No.	Group Master	BOM	Templ... Creati... a Master	Templ... Sales Line
→ Finished Goods	2000	Olivia Trousers	READY	FASHION		SS-CY		Yes	☒	☐
Finished Goods	2010	Amelia Trousers	READY	FASHION				No	☒	☐
Finished Goods	2020	Isla Trousers	READY	FASHION		SS-CY		Yes	☒	☐
Finished Goods	2030	Ella Trousers	READY	FASHION		SA		No	☒	☐
Finished Goods	2120	Sophia Shirt	READY	FASHION	02-SUMMER	SS-CY		Yes	☐	☐
Finished Goods	2620	Hazel Shirt	READY	FASHION	02-SUMMER			No	☐	☐
Finished Goods	2640	Heaven Shirt	READY	FASHION	02-SUMMER			No	☐	☐

The **Status Code** that can be used for these Parameters can be set up via **Search Status Codes**.

Status Code List

Search

+ New

Edit List

Delete

More options

Status Code	Description	Status Sorting ↑	Purchase Requisition, Available	Purchase Order, Available	Purchase Blanket Order, Available	Purchase Invoice, Available	Purchase Credit Memo, Available	Sales Quote, Available	Sales Order, Available	Sales Blanket Order, Available	Sales Invoice, Available	Sales Credit Memo, Available	Sales Error when No Available Quantity
→ IDEA	Idea/Design	10	☒	☒	☒	☒	☐	☐	☐	☐	☐	☐	☐
DESIGN	Design	20	☒	☒	☒	☒	☐	☒	☒	☒	☐	☐	☐
APPROVED	Approved	30	☒	☒	☒	☒	☐	☒	☒	☒	☐	☐	☐
READY	Ready	40	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☐
PRODUCTION	In Production	50	☒	☒	☐	☐	☐	☒	☒	☒	☐	☐	☐
INTRANS	In Transit	60	☐	☐	☐	☒	☒	☒	☒	☒	☐	☐	☐
INHOUSE	In House	70	☐	☒	☐	☒	☒	☒	☒	☒	☒	☒	☐
NO-SALES	Sales Only Available Until Jan. 31	80	☒	☒	☒	☒	☒	☐	☒	☐	☒	☒	☐
NO-PURCHASE	Purchase Only Available Until Jan. 31	90	☐	☒	☐	☒	☒	☒	☒	☒	☒	☒	☐
AVAILABLE	Sales Only If Available Quantities	100	☐	☐	☐	☐	☐	☐	☒	☐	☒	☒	☒
BLOCKED	Blocked	110	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

The concept behind this setup is that the Masters are first in the development phase (**Status Code IDEA**). At a certain moment, the Masters are in the Approval phase until they get **Status Code APPROVED**. After approval, the Salesmen Samples are in production (**Status Code PRODUCTION** and **INTRANS**). As soon as these Samples have been received, the actual Sales process can start (**Status Code READY** and **INHOUSE**). From that moment the Design process is done.

NOTE

Of course, you can give your own interpretations to design phases and can make your own Status Codes accordingly. You can also decide that some phases are not specifically design phases but used further down the life cycle of a product. By personalization of the Role Center, you can also Hide/Show the existing Cues from the Role Center just as in standard BC.

For adding extra phases, you can now create your own Indicators and Cues if required, for instance, a Cue **BLOCKED** in which Masters end up, if they are not valid anymore.

This will be discussed in the chapter [Customizing the TRIMIT Role Centers](#).

Starting Date Formula Due / Ending Date Formula Due (5 / 6)

For the Indicators of **My Due Workflow**, **My Overdue Workflow** in the Role Center of **TRM_PDM**, you can enter a **Date Formula** to determine which TRIMIT Workflow Steps of the User (**Responsible ID**) should be shown in this Cue.

The Indicator **My Group Due Workflow** will be based on the **Workflow User Group** in the User Setup, and the User Group (**Responsible ID**) in the TRIMIT Workflow Steps.

I.e., If you want to see all the Steps that should have been approved on the Work Date or should be approved in the coming week you could enter **CD-2Y and CD+7D**.

If the **Work Date** is *June 18, 2025*, you will see the Activities that should have been approved with a **Deadline** between *June 18, 2023*, and *June 25, 2025*.

The Indicator **My Due Activities** will show the TRIMIT Workflow Steps that are not **Closed** with a **Deadline** between the **Starting Date Formula Due** and the **Ending Date Formula Due** that have **Responsible ID** the current User ID.

The Indicator **My Overdue Activities** will show the TRIMIT Workflow Steps that are not **Closed** with a **Deadline** before the **Starting Date Formula Due** that have **Responsible ID** the current User ID.

The Indicator **My Group Due Activities** will show the TRIMIT Workflow Steps that are not **Closed** with a **Deadline** between the **Starting Date Formula Due** and the **Ending Date Formula Due** that have **Responsible ID** for the Workflow User Group of the current User ID.

Relation	Relation No.	Name	Deadline	Responsible ID Type	Responsible ID	Step No.	Description	Comm...	Avail...	Clos...	Closed by	Assign Status Code
Master	2000	Olivia Trousers	6/25/2024	User Group	DESIGN	10	Idea (Story Board)	No			User	原稿
Master	2000	Olivia Trousers	7/9/2024	User Group	DESIGN	20	Design	No			User	
Master	2000	Olivia Trousers	8/13/2024	User Group	DESIGN	40	Quality Check Proto Sample	No			User	APPROVED
Master	2000	Olivia Trousers	9/24/2024	User Group	DESIGN	60	Quality Check Fit Sample	No			User	
Master	2010	Amelia Trousers	6/16/2024	User Group	DESIGN	10	Idea (Story Board)	No			User	IDEA
Master	2010	Amelia Trousers	6/16/2024	User Group	DESIGN	20	Design	No			User	
Master	2010	Amelia Trousers	8/4/2024	User Group	DESIGN	40	Quality Check Proto Sample	No			User	APPROVED
Master	2010	Amelia Trousers	9/15/2024	User Group	DESIGN	60	Quality Check Fit Sample	No			User	
Master	2010	Amelia Trousers	9/22/2024	User Group	PURCHASE	70	Production Salesmen Sampl...	No			User	
Master	2020	Isla Trousers	6/25/2024	User Group	DESIGN	10	Idea (Story Board)	No			User	IDEA
Master	2020	Isla Trousers	7/9/2024	User Group	DESIGN	20	Design	No			User	
Master	2020	Isla Trousers	8/13/2024	User Group	DESIGN	40	Quality Check Proto Sample	No			User	APPROVED
Master	2020	Isla Trousers	9/24/2024	User Group	DESIGN	60	Quality Check Fit Sample	No			User	
Master	2030	Ella Trousers	6/25/2024	User Group	DESIGN	10	Idea (Story Board)	No			User	IDEA

FastTab Customer Service

Customer Service

Starting Date Formula To Ship : CD-7D Default Search Date Start : CD-30D

Ending Date Formula To Ship : CD+7D Show Customers with Due Balance : ☒

These Parameters influence the Cues on the Role Center of **Profile (Role) TRM_CS – TRIMIT Customer Service**.

CRONUS Role Center | Sales | Product Design | Price Parameters | Posted Documents | All Reports

Sales Orders | Sales Return Orders | Sales Credit Memos | Complaints | Customers | Sales Statistics Setup

Headline

Click to learn more on MyTRIMIT with doc search and AI help

Activities

My Due Workflow: 0

My Group Due Workflow: 0

Customers

With Due Balance: 10

Blocked: 0

Blocked with Orders: 0

Orders on Bloc... Customers: 0

Open Sales Orders

Sales Quotes - Open: 2

Sales Orders - Open: 19

Sales Orders in Process

To Ship: 0

Delayed: 30

Ready for Shipping: 0

Ready for Invoicing: 0

Starting Date Formula To Ship / Ending Date Formula To Ship

For the Cue of **To Ship** that shows the number of Sales Orders for which Sales Lines can be shipped. You can enter a Date Formula to determine between which Dates the **Shipment Date** should be to be shown in **To Ship**.

The Cue **Delayed** shows the number of Sales Orders for which Sales Lines should have been shipped on the **Starting Date Formula to Ship** based on the **Shipment Date**.

I.e., if you want to see all the Sales Orders for which lines should be shipped last week or should be shipped next week you can enter *CD-7D* and *CD+7D*.

I.e.: If the Work Date is *June 18, 2025*, you will see the Orders for which the Lines have Shipment Dates between *June 11, 2025*, and *June 25, 2025*, in **To Ship**, and Orders for which the Lines have Shipment Dates before *June 11, 2025*, in **Delayed**.

NOTE

Standard Microsoft Dynamics 365 Business Central does not look at the Shipment Date of the Sales Lines but only at the Shipment Date on the Sales Header! TRIMIT looks at the Shipment Date on the Lines.

The screenshot shows the 'Sales Orders' page in Microsoft Dynamics 365 Business Central. The 'Views' pane on the left has the 'Delayed' view selected. The main table displays a list of sales orders. The 'Details' pane on the right shows customer statistics for Adatum Corporation.

No.	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Sales Channel	Order Type	Collection No.
101001	10000	Adatum Corporation				
101002	10000	Adatum Corporation				
101003	30000	School of Fine Art				
101004	40000	Alpine Ski House				
101005	10000	Adatum Corporation	Y-3			
101006	10000	Adatum Corporation	Y-4			
101007	10000	Adatum Corporation	Y-5			
101008	10000	Adatum Corporation	W-1			
101009	10000	Adatum Corporation	SVC-1			
S0002	3000	The Furniture Shop UK				
S0004	2000	The Fashion Store UK				
S0005	10000	Adatum Corporation				
S0006	2000	The Fashion Store UK				
S0007	10000	Adatum Corporation				
S0008	2000	The Fashion Store UK				
S0009	3000	The Furniture Shop UK				
S0010	3000	The Furniture Shop UK				

Customer Statistics

Customer No.	Balance (LCY)	Balance (LCY) As Vendor
10000	17,995.00	0.00

Sales

Outstanding Orders (LCY)	Shipped Not Invoiced (LCY)	Outstanding Invoices (LCY)
48,910.28	0.00	14,679.38

Payments

Payments (LCY)	Refunds (LCY)	Last Payment Receipt Date
181,359.05	0.00	3/15/2025

Total (LCY)

Total (LCY)	Credit Limit (LCY)	Overdue Amounts (LCY)	Total Sales (LCY)	Invoiced Prepayment Amo...
81,584.66	0.00	0.00	20,275.60	0.00

Customer Details

Default Search Start Date

If you enter a Date Formula in this Field, it will become the default **Date Limit for Posting Documents** when searching Documents via the TRIMIT Search function that can be used in all the TRIMIT Profiles (Roles). If this field is not filled, the default will be set to *Work Date - go Days*.

The screenshot shows the 'CRONUS Role Center' page in Microsoft Dynamics 365 Business Central. The 'Actions' pane on the right shows the 'Search' button highlighted.

CRONUS Role Center

Sales | Product Design | Price Parameters | Posted Documents | All Reports

Sales Orders | Sales Return Orders | Sales Credit Memos | Complaints | Customers | Sales Statistics Setup

Headline

Click to see the latest news from TRIMIT

Actions

- + New Sales Order
- + New Complaint
- + New Sales Quote
- + New Sales Invoice
- + New Sales Credit Memo
- + New Customer
- > Sales Statistics
- > Tasks
- > Prices
- > Item Inventory
- > Master Inventory Profile
- > Find
- Navigate
- Search

I.e.: If you want to look at Posted Documents as of 30 days ago, and have entered *CD-30D*, with a **Work Date** of *June 18, 2025*, it will show *May 19, 2025*

Search Page

General

Item Search Master Search

Who Ordered

By Item By Master

Date Limit for Posted Documents

Date 5/19/2025

Sales

Customer Search Posted Sales Invoice S... ..

Sales Order Search Posted Sales Credit M... ..

Posted Sales Shipmen... ..

Purchase

Vendor Search Posted Purchase Invoi... ..

Purchase Order Search Posted Purchase Cred... ..

Posted Purchase Rece... ..

Show Customers with Due Balance

This will show a Cue with the number of Customers with a **Balance Due (LCY)**.
If it is set to *Yes* in FastTab *Customer Service*, it is also set to *Yes* for FastTab *Small Business* and vice versa. If you click on the Cue (Stack), you will see a list of **Customers**:

Customers

Based on Work Date June 18, 2025

Customers: All + New Manage Home New Document Customer Prices & Discounts Report Actions Related Reports Queries Automate Fewer options

Register Customer Payments Send Email Apply Template

Views

All

My Customers

Filter list by:
X Balance Due (LCY)
<>0
+ Filter...

Filter totals by:
Date Filter: 06/18/25
Edit

No. #	Name	Responsibility Center	Location Code	Phone No.	Contact	Allow Multiple Posting Groups	Balance (LCY)	Balance Due (LCY)	Sales (LCY)	Payments (LCY)
2000	The Fashion Store UK	品以成			Charley Nelson	☒	193,071.35	193,071.35	317,617.28	203,950.25
20000	Trey Research				Helen Ray	☐	2,345.63	2,345.63	47,171.60	56,618.93
2010	The Shoe Store Europe		BLUE		W.A. van Buren	☐	134,385.00	134,385.00	300,390.00	162,684.90
2020	Sportswear A/S		BLUE		H.C. Andersen	☐	78,878.70	78,878.70	140,228.80	60,123.07
2030	The Surf Shop Ltd.		2030		G. Rafferty	☐	131,054.65	131,054.65	219,006.84	142,703.96
2040	Garment Company Ltd.		BLUE		Burt Reynolds	☐	167,710.00	167,710.00	373,930.00	206,220.00
3000	The Furniture Shop UK		BLUE		Dave Hanson	☐	378,914.65	378,914.65	638,172.00	418,800.41
30000	School of Fine Art				Meagan Bond	☐	34,204.31	32,644.30	146,454.61	112,250.30
40000	Alpine Ski House				Ian Deberry	☐	2,617.50	2,617.50	46,357.80	43,740.30
50000	Relecloud				Jesse Homer	☐	6,762.38	6,762.38	54,482.70	61,341.02

TRIMIT Profiles (Roles)

Differences between TRIMIT and Business Central Profiles (Roles)

In this paragraph, generic differences between TRIMIT Profiles (Roles) and standard Business Central Profiles (Roles) are discussed. These differences will be shown based on the differences between Profiles (Roles) *TRIMIT Small Business* and the *Sales Order Processor*.

In this paragraph, we will only focus on generic differences that are valid for all TRIMIT and Business Central Role Centers. A more detailed description of the individual Profiles (Roles) is discussed in the next paragraphs when specific Profiles (Roles) are discussed.

a. TRIMIT Small Business Profile (Role)

CRONUS Role Center | Finance | CRM | Sales | Purchase | Product Design | Logistics | Production | Portals | Posted Documents | All Reports

Customers | Vendors | Sales Orders | Complaints | Purchase Orders | Masters | Pick Documents

Headline

Click to learn more on MyTRIMIT with doc search and AI help

TRIMIT Small Business

Activities

Sales This Month: £19,714

Overdue Sales Invoice Amount: £1,128,384

Overdue Purch. Invoice Amount: £36,432

Workflow

My Due Workflow: 0

My Group Due Workflow: 79

Finance

Sales Invoices Due: 1

Purchase Invoices Due: 0

Vendors - Payable (in trade): 0

Customer Service

Sales Orders - Open: 19

Open Complaints: 0

Blocked Customers: 0

Customers with Open Invoices: 10

Purchase

Purchase Orders - Open: 19

Purchase Orders - Confirmed: 0

Product Design

Masters with Draft Workflow: 155

Logistics

Open Pick Documents: 0

Sales Orders Delivered: 30

Sales Orders To Ship: 0

Upcoming Purchase Orders: 18

Portals

Portal Sales Documents with Errors: 0

Portal Purchase Documents with Errors: 0

Product Videos

Product Videos

My Role Activities

My Actions

Check Material Shortage List

Sales Orders

Create Collection

Create VariDim Type

Customer - Sales List

Replacement Call List

My Customers

Customer No.	Name	Phone No.	Balance (LCY)
20000	Trey Research		2,345.63
30000	School of Fine Art		34,204.31
40000	Alpine Ski House		2,617.50
50000	Relecloud		6,762.38

My Vendors

Vendor No.	Name	Phone No.
10000	Fabrilkam, Inc.	
20000	First Up Consultants	
30000	Graphic Design Institute	
40000	Wide World Importers	
50000	Nood Publishers	

b. Sales Order Processor Profile (Role)

CRONUS Role Center | Sales Orders | Shipping | Compliance | CRM | Customers | Sales Journals | Cash Receipt Journals | Transfer Orders

Get started

Hi, meet Business Central!

Sales Order Processor

Activities

My Customers

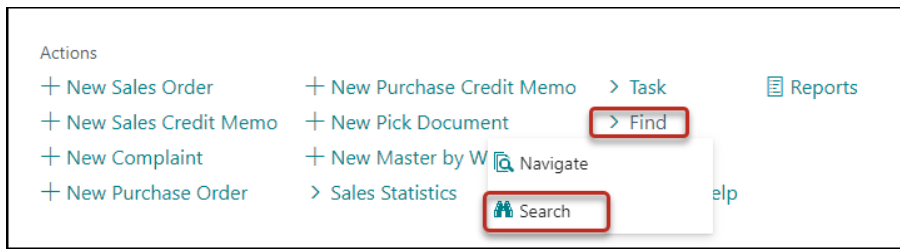
Customer No.	Name	Phone No.	Balance (LCY)
20000	Trey Research		2,345.63
30000	School of Fine Art		34,204.31
40000	Alpine Ski House		2,617.50
50000	Relecloud		6,762.38

My Vendors

Vendor No.	Name	Phone No.
10000	Fabrilkam, Inc.	
20000	First Up Consultants	
30000	Graphic Design Institute	
40000	Wide World Importers	
50000	Nood Publishers	

Search

TRIMIT has added a Search function in the TRIMIT Profiles (Roles) (via **> Find, Search**). The Search function will be described in [TRIMIT Search Function](#).



My Actions

Furthermore, you see in the TRIMIT Role Centers a **ListPart Page** called **My Actions** (shown in [blue](#) frame). This TRIMIT specific **ListPart Page** enables the user to execute objects that are specifically dedicated to the user itself or to all users. **My Actions** are described in [My Actions / Page Actions](#).

My Masters

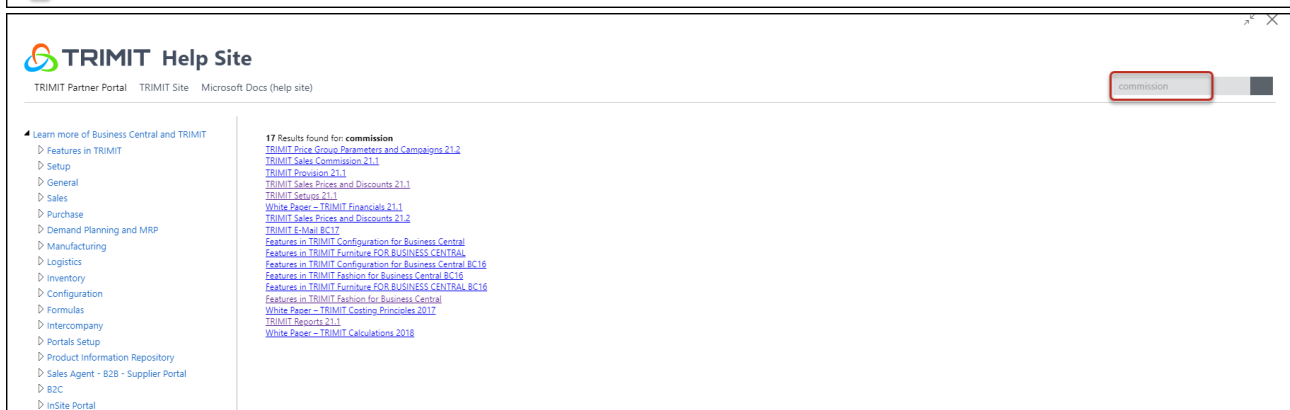
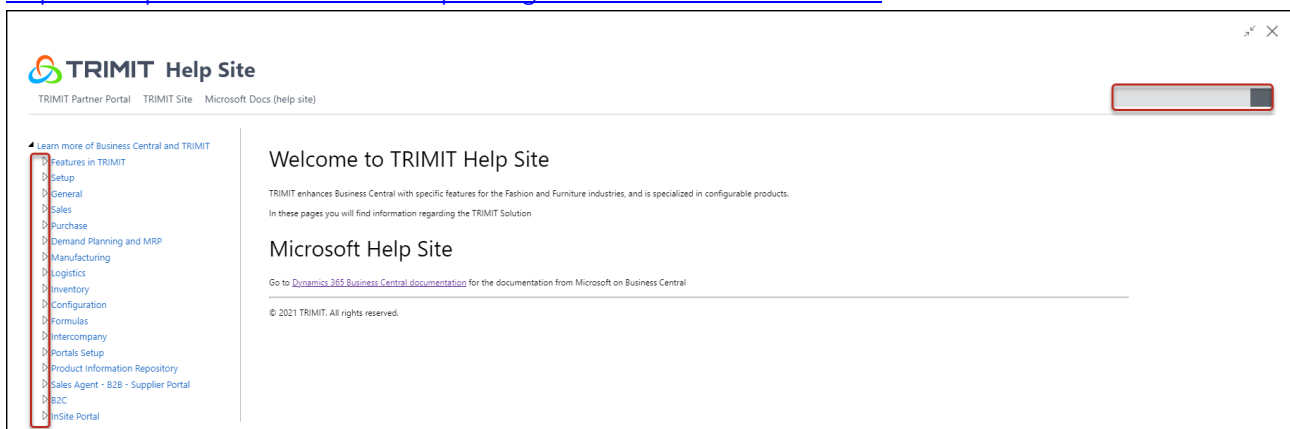
In the TRIMIT Profiles you can include the **ListPart Page** called **My Masters**. You can add it yourself via *Personalize*, although you can also use the standard Business Central **ListPart Page My Items**, although it is not common to manage products on Item level in TRIMIT.

TRIMIT Help

Clicking on **TRIMIT Help** (shown in the [green](#)), will open a specific website:

For TRIMIT Installations until May 9, 2025:

<https://help-bc.trimit.com/main.aspx?lang=en-US&content=index.html>

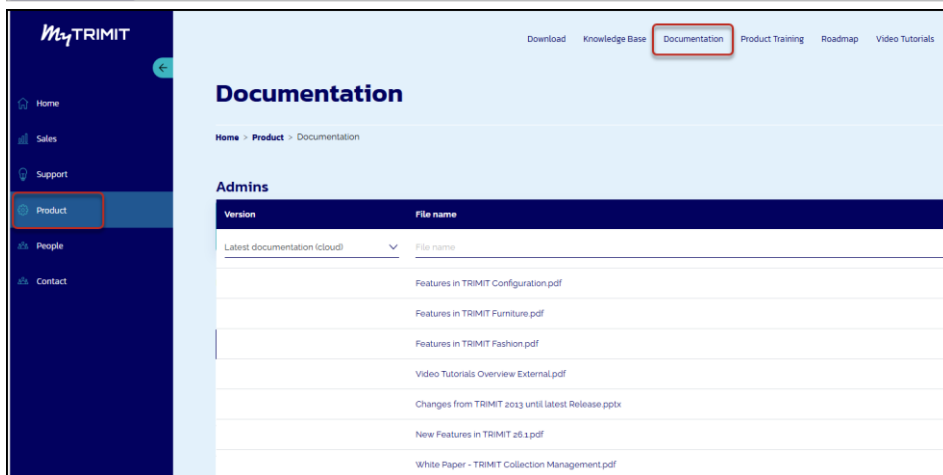
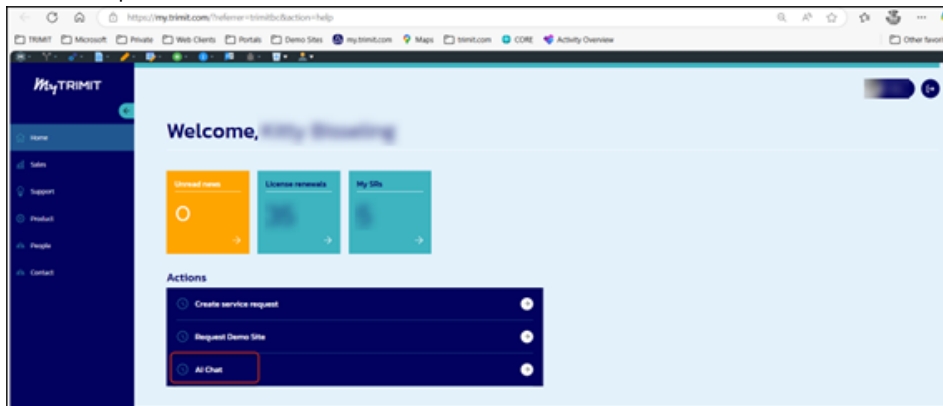


Under each of the Topics, you can find TRIMIT White Papers (only in English), to describe the specific functionality of TRIMIT. These White Papers have been written for our Partners and will not describe

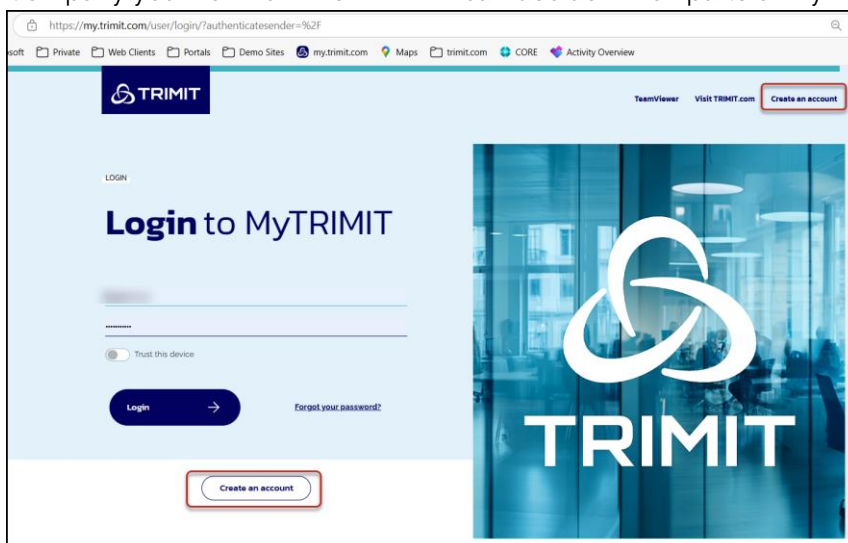
standard Business Central fields/functionality. Only the newest versions of the White Papers will be visible via this page. Older versions of the White Papers can only be found via our Partner Portal. Using the **Search** in the top right corner, you can find all the White Papers in which your Search-text is available.

For TRIMIT Installations as of May 9, 2025

The **TRIMIT Help** in the TRIMIT Role Centers will be redirected to <https://my.trimit.com/> where you can ask your questions via the **AI Chat** or go to **Product/Documentation** to see the available White Papers, Installation Guides and (New) Feature Documents.

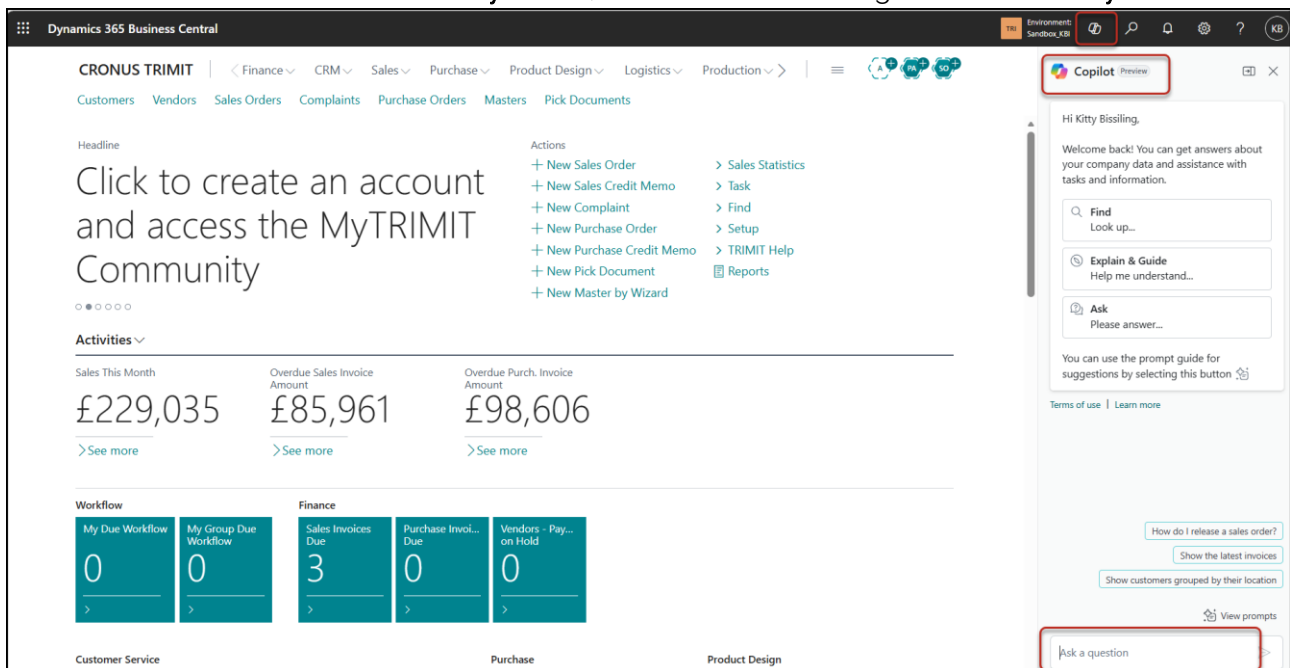


Therefore, make sure you create an Account on [MyTRIMIT](https://my.trimit.com/) by using your E-Mail Address of the Company you work for. Then TRIMIT can decide which parts of MyTRIMIT you get access.



For Cloud Installations – using Copilot

Using the **Copilot** function, and asking your questions, the answer will also be based on the TRIMIT documentation that can be found on **MyTRIMIT**, but now without having an account on **MyTRIMIT**.

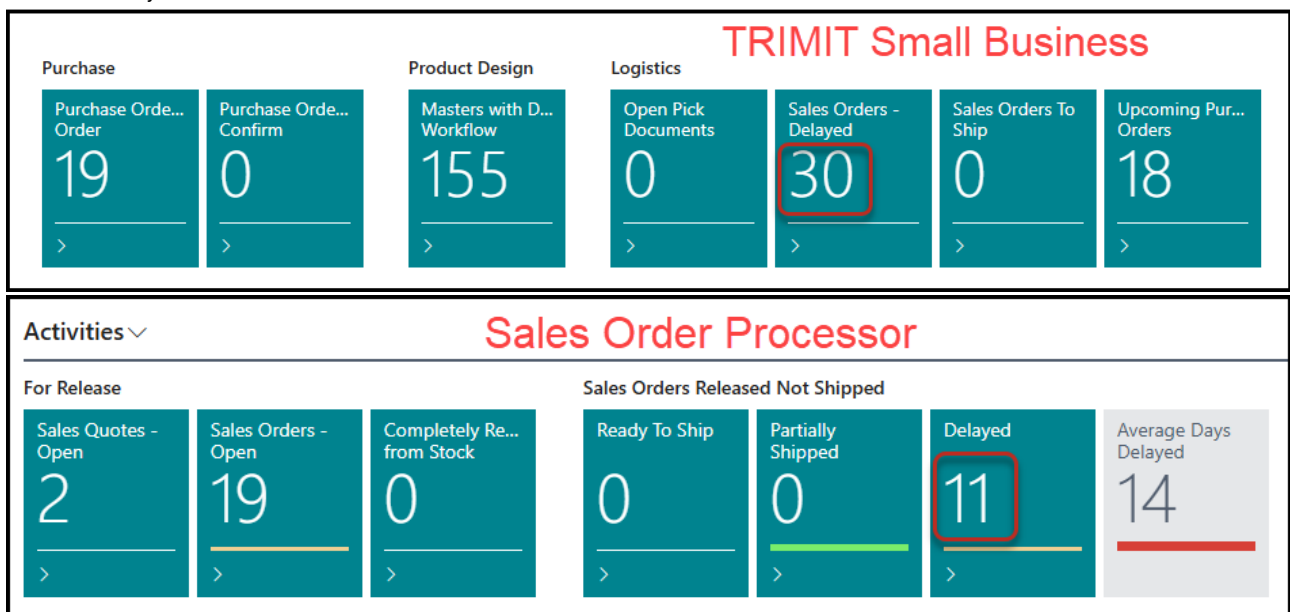


The screenshot shows the Dynamics 365 Business Central interface. The main area displays a message to create a MyTRIMIT account. The right sidebar features the Copilot chat window, which is currently inactive. A red box highlights the 'Ask' button and the 'Ask a question' input field at the bottom of the Copilot window.

Cue Filters on Order Line Level

Another difference is not visible, but not less important. This has to do with Cues. In TRIMIT as in Business Central filters divide documents into different Cues. However, when a Shipment Date or an Expected Receipt Date is involved the BC Cues look at the Date in the Order Header while the TRIMIT Cues look at the Date in the Order Line.

And BC only takes the *Released* Orders into account.



The screenshot shows the TRIMIT Small Business interface. The 'Sales Order Processor' section is highlighted, showing various cues and their values. The 'Delayed' cue is highlighted with a red box, showing a value of 11. Other cues include 'Purchase Order' (19), 'Product Design' (155), 'Logistics' (0), 'Sales Orders - Delayed' (30), 'Sales Orders To Ship' (0), 'Upcoming Pur...' (18), 'Sales Quotes - Open' (2), 'Sales Orders - Open' (19), 'Completely Re... from Stock' (0), 'Ready To Ship' (0), 'Partially Shipped' (0), and 'Average Days Delayed' (14).

Let us assume that the **Work Date** in the example above is *June 18, 2025*. The **Shipment Date** on the Sales Order Header is *June 2, 2025*, and the **Status** is *Open*. This Order will be neglected for the **Delayed** Cue of BC. BC also completely ignores the fact that there might be Sales Order Lines that already have been delayed: **Shipment Date** before *June 18, 2025*, where the **Shipment Date** in the Order Header might have a **Shipment Date** of *June 25, 2025*.

For this reason, the TRIMIT Cue criteria look at the Order Line – even if the **Status** is *Open*. This means also that Sales Orders could be in several Cues: in **Sales Orders - Delayed** because of some Lines and in **Sales Orders To Ship** because of some Lines.

NOTE

It is especially important to realize that due to different filter criteria the standard BC Cues and the TRIMIT Cues may not have the same number even when they seem to represent the same.

TRIMIT has also provided some specific Cues depending on TRIMIT features.
They will be described in the next paragraphs.

Profile (Role)TRIMIT CRM

Let us have a closer look at the **Profile (Role)** for *TRIMIT CRM (TRM_CRM)*. This Profile (Role) can be used as Role Center for Salespersons that are in contact with Customers and their Quotes, Orders, Complaints and Payments, and keep track of Opportunities. There is no equivalent Profile (Role) in standard BC. Some parts of this profile are generic for all TRIMIT Role Centers and are described in paragraph [Differences between TRIMIT and Business Central Profiles \(Roles\)](#).

Profile (Role) TRIMIT CRM has several Activity Groups, Cues, Indicators, Actions and ListPart Pages as shown in the picture below

The basic Filter for all Cues is the User as Salesperson.

The screenshot displays the TRIMIT CRM Role Center interface. At the top, there's a navigation bar with tabs for Marketing, Sales, Posted Documents, and All Reports. Below this is a 'Headline' section with the text 'This is Business Central running with the TRIMIT Apps.' and a list of actions including '+ New Contact', '+ New Sales Order', '+ New Opportunity', '+ New Sales Credit Memo', '+ New Sales Quote', '+ New Complaint', '+ Follow-up', '+ Find', '+ Sales Reports', '+ Product Reports', and '+ TRIMIT Help'. The main content area is divided into several sections: 'Activities' with four indicators (My To-dos: 0, My Due Activities: 0, My Due Workflow: 0, My Group Due Workflow: 79), 'Opportunities' with two indicators (My Opportunity...: 0, My Opportunity...: 0), 'Sales' with two indicators (My Sales Quotes: 0, My Open Complaints: 0), and 'Payments' with three indicators (Blocked Custo...: 0, Customers wit...: 0, Overdue Sales: 0). Below these are 'My Role Activities' and 'Insights' sections. The 'Insights' section includes 'My Actions' and 'My Customers' tables.

Activities

Indicators

➔ My To-dos

In this Indicator you see the number of all **To-dos** that are not Closed yet and that are to be followed up by the current User ID.

The **To-Dos** is a standard BC Functionality that can be related to *Contacts*, *Salespersons*, *Teams*, *Opportunities* and *Segments*.

Clicking on **>See more** will show a list of the **Task List**.

➔ My Due Activities

In this Indicator you see the number of all **TRIMIT Activities** that are not Closed yet until the current **Work Date** and that are to be followed up by the current User ID.

However, the Due Period can be manipulated with the Date Formula in the field **Default Activity Due Date** in the **Marketing Setup**.

Clicking on **>See more** will show a list of these **My Activities**.

➔ My Due Workflow

In this Indicator you see the number of **TRIMIT Workflow Lines** that are not Closed yet, and that have a **Deadline** before the **Work Date** and a **Responsible ID** of the current User ID.

Clicking on **>See more** will show a list of the **My Workflow Activities**.

The TRIMIT Workflow Lines can be related to *Customer*, *Vendor*, *Collection*, *Shipment Group*, *Master*, *Sales Order*, *Purchase Order*, *Production Order*, *Production Collection Order*, *Complaint*, *Replacement*, *Container*, *Category* and *Item*.

→ My Group Due Workflow

In this Indicator you see the number of **TRIMIT Workflow Lines** that are not Closed yet, and that are to be followed up by the **Workflow User Group** in the User Setup of the current User ID with a **Deadline** before the **Work Date**.

Clicking on >See more will show a list of the **My Workflow Activities**.

Opportunities

TRIMIT has an Activity Group for **Opportunities** which contains the following Cues:

→ My Opportunities (-> 3 Months)

In this Cue you see a list of all open Opportunities that are related to you as a Salesperson that have an **Estimated Closing Date** of Work Date + 3 Months or earlier.

→ My Opportunities (3 Months ->)

In this Cue you see a list of all open Opportunities that are related to you as a Salesperson that has an **Estimated Closing Date** of Work Date + 3 Months or later.

Sales

TRIMIT has an Activity Group for **Sales** which contains the following Cues:

→ My Sales Quotes

In this Cue you see a list of all open Sales Quotes that are related to you as a Salesperson.

→ My Open Complaints

In this Cue you see a list of all open Complaints that are related to you as a Salesperson.

Payments

TRIMIT has an Activity Group for **Payments** which contains the following Cues:

→ Blocked Customers w/Orders

In this Cue you see a list of Customers with **Blocked** = *Ship, Invoice* or *All* and the current User ID as the Salesperson Code, which do have Sales Orders as the **Sell-to Customer**.

→ Customer w/Due Balance

In this Cue you will see a list of Customers that have **Balance Due (LCY)** as of the Work Date. Note that also Customers with an Overdue Credit Memo will be in the list. Only Customers for which the current User ID is the Salesperson Code will be shown at first.

→ Overdue Sales Invoices

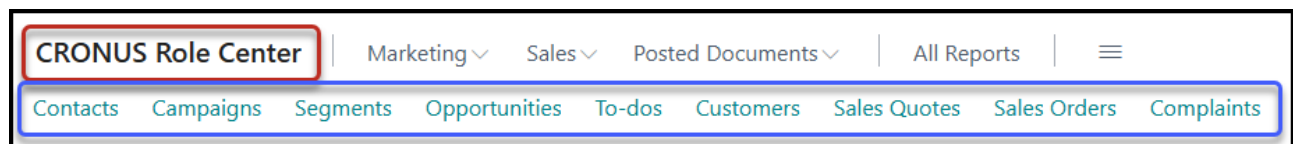
In this Cue you see a list of all **Customer Ledger Entries** with **Due Date** before the **Work Date** and which are still *Open*, for which the current User ID is the Salesperson Code.

My Role Activities

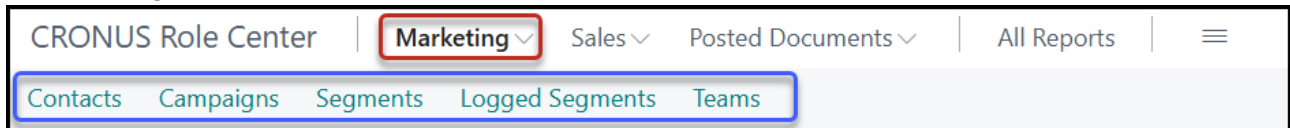
See Chapter [My Role Activities](#).

Menus

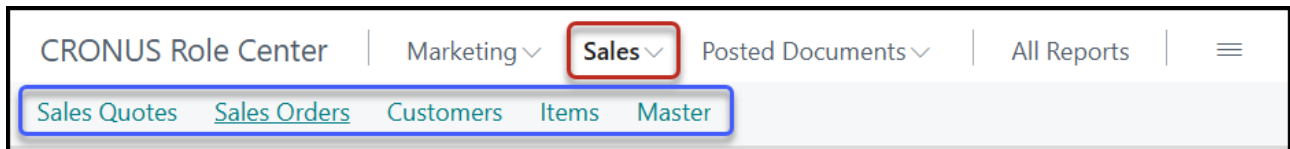
Home



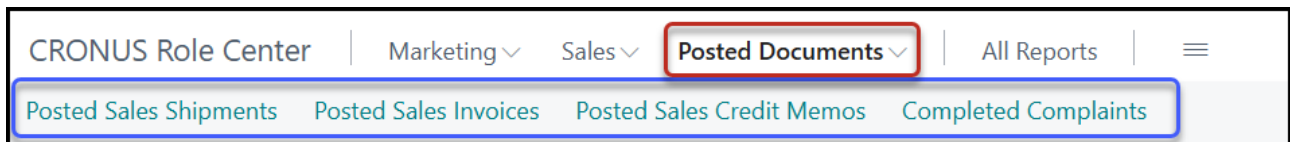
Marketing



Sales

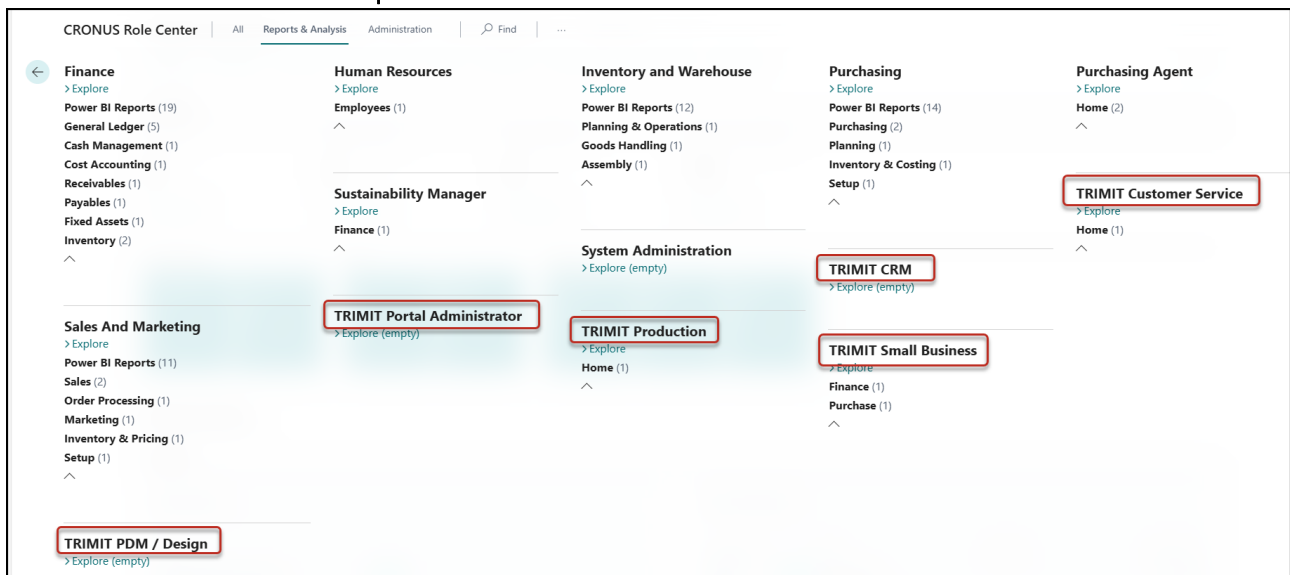


Posted Documents



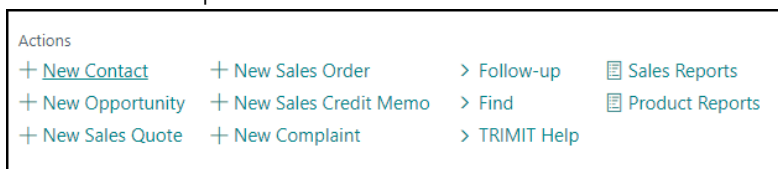
All Reports

This will show an overview of all objects of **Reports & Analysis** in all Profiles (Roles) that have a checkmark in **Show in Role Explorer**.

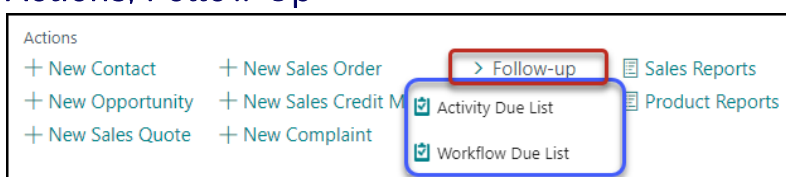


Actions

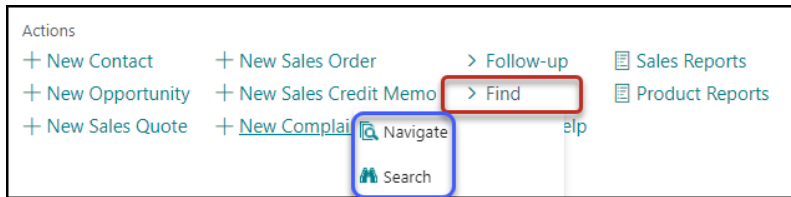
There are also special *Actions*.



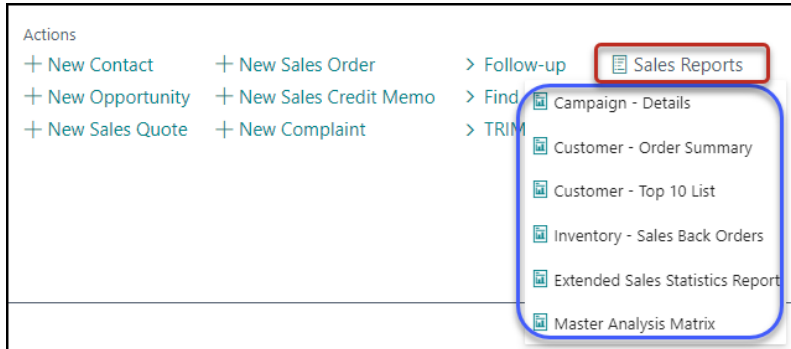
Actions, Follow Up



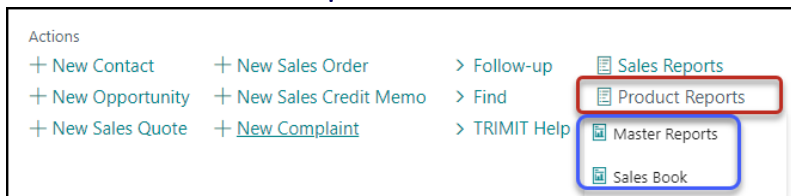
Actions, Find



Actions, Sales Reports

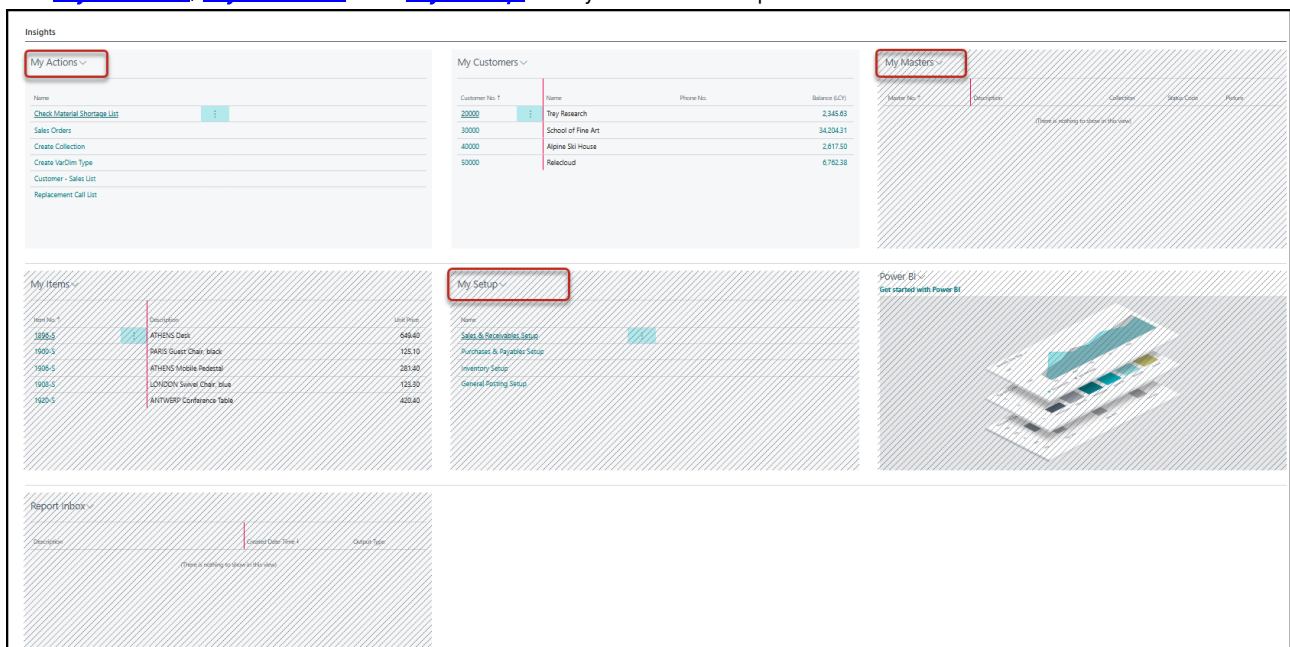


Actions, Product Reports



Possible Insights (ListPart Page)

The **ListPart Pages** that can be chosen have many similarities with standard BC **ListPart Pages**, besides the [My Actions](#), [My Masters](#) and [My Setup](#). They are TRIMIT specific.



Profile (Role) TRIMIT Customer Service

Let us have a closer look at the **Profile (Role)** for *TRIMIT Customer Service (TRM_CS)*. This Profile (Role) can be used as Role Center for users that are in contact with Customers and their Orders. This Role Center is the equivalent of the standard BC Profile (Role) *Sales Order Processor*, but apart from the differences described in paragraph [Differences between TRIMIT and Business Central Profiles](#), the **Profile (Role) TRIMIT Customer Service** has different Activity Groups, Cues, Indicators, Actions and ListPart Pages as shown in the picture below

The screenshot displays the TRIMIT Customer Service Role Center. At the top, there's a navigation bar with tabs: Sales Orders, Sales Return Orders, Sales Credit Memos, Complaints, Customers, and Sales Statistics Setup. Below this, a headline section says 'Click to learn more on MyTRIMIT with doc search and AI help'. To the right, there's an 'Actions' section with links like '+ New Sales Order', '+ New Sales Invoice', '+ New Complaint', '+ New Sales Credit Memo', '+ New Sales Quote', '+ New Customer', '+ Sales Statistics', '+ Tasks', '+ Prices', '+ Item Inventory Profile', '+ Master Inventory Profile', '+ TRIMIT Help', and '+ Reports'. Below the headline, there's a section for 'Activities' with two indicators: 'My Due Workflow' (0) and 'My Group Due Workflow' (0). Further down, a dashboard shows various status indicators: 'With Due Balance' (10), 'Blocked' (0), 'Blocked with Orders' (0), 'Orders on Blo... Customers' (0), 'Open Sales Orders' (2), 'Sales Orders - Open' (19), 'To Ship' (0), 'Delayed' (30), 'Ready for Shipping' (0), 'Ready for Invoicing' (0), 'Open Complaints' (0), 'Orders from Complaints' (0), and 'Credit Memos ... Complaints' (0). At the bottom, there's a section for 'My Role Activities' and 'Insights'. The 'Insights' section includes 'My Actions' and 'My Customers' table.

Customer No. T	Name	Phone No.	Balance (LCY)
20000	Trey Research		2,345.63
30000	School of Fine Art		34,204.31

Activities

Indicators

TRIMIT has an Activity Group for Tasks which contains the following Cues:

➔ My Due Workflow

In this Indicator you see the number of **TRIMIT Workflow Lines** that are not Closed yet, and that have a **Deadline** between the **Starting Date Formula To Ship** and **Ending Date Formula To Ship** from the [Role Center Setup](#), and a **Responsible ID** of the current User ID.

Clicking on **>See more** will show a list of the **My Workflow Activities**.

The TRIMIT Workflow Lines can be related to *Customer, Vendor, Collection, Shipment Group, Master, Sales Order, Purchase Order, Production Order, Production Collection Order, Complaint, Replacement, Container, Category* and *Item*.

➔ My Group Due Workflow

In this Indicator you see the number of **TRIMIT Workflow Lines** that are not Closed yet, and that are to be followed up by the **Workflow User Group** in the User Setup of the current User ID with a **Deadline** between the **Starting Date Formula To Ship** and **Ending Date Formula To Ship** from the [Role Center Setup](#).

Clicking on **>See more** will show a list of the **My Workflow Activities**.

Customers

TRIMIT has added an Activity Group for **Customers** which contains the following Cues:

➔ With Due Balance

This Cue will only be shown if **Show Customers with Due Balance** in the [Role Center Setup](#)

FastTab *Customer Service* is set to *Yes*.

In this Cue you will see a list of Customers that have a **Balance Due (LCY)** <> 0 until the **Work Date**. Note that also Customers with an Overdue Credit Memo will be in the list.

- ➔ **Blocked**

In this Cue you will see a list of Customers with **Blocked** is *Ship*, *Invoice* or *All*.

- ➔ **Blocked with Orders**

In this Cue you will see a list of Customers that you can also find in the previous Cue, but in this list only the Customers that have Orders in the Sales Orders List (**No. of Orders** <> 0).

- ➔ **Orders on Blocked Customers**

In this Cue you will see a list of Sales Orders belonging to the Customers in the Cue **Blocked with Orders**. You will not be able to post these Orders.

Open Sales Orders

TRIMIT has also added an Activity Group for **Open Sales Orders** which contains the following Cues:

- ➔ **Sales Quotes – Open**

In this Cue you see a list of Sales Quotes with **Status** *Open*. The moment the Quote gets **Status** *Released* it will vanish from this list until it is reopened again.

- ➔ **Sales Orders – Open**

Same as above, but then for Sales Orders instead of Sales Quotes.

Sales Orders in Process

TRIMIT has also added an Activity Group for **Sales Orders in Process** which contains the following Cues:

- ➔ **To Ship**

In this Cue you see a list of **Sales Orders** with Sales Order Lines with an Outstanding Quantity to be shipped on or before the **Work Date**.

However, the Due Period can be manipulated with the Date Formulas in the [Role Center Setup](#).

- ➔ **Delayed**

In this Cue you see a list of Sales Orders with Sales Order Lines with an Outstanding Quantity that had to be shipped earlier than the day before the Work Date.

However, the Overdue Date can be manipulated with the Date Formulas in the [Role Center Setup](#).

- ➔ **Ready for Shipping**

In this Cue you see a list of Sales Orders in which the TRIMIT Boolean **Ready for Shipping** is activated. You can find this Boolean on the FastTab *Shipping* of the Sales Order.

- ➔ **Ready for invoicing**

In this Cue you see a list of Sales Orders in which the TRIMIT Boolean **Ready for Invoicing** is activated. You can find this Boolean on the FastTab *Invoicing* of the Sales Order.

Complaints

TRIMIT has also added an Activity Group for **Complaints** which contains the following Cues:

- ➔ **Open Complaints**

In this Cue you see a list of all TRIMIT Complaints that have not been completed.

- ➔ **Orders from Complaints**

In this Cue you see a list of all Sales Orders that are a follow-up from TRIMIT Complaints. In that case, the TRIMIT Boolean **Complaint** contains a checkmark. This Boolean can be found on the Sales Order FastTab *Misc. Param*.

- ➔ **Credit Memos from Complaints**

In this Cue you see a list of all Sales Credit Memos that are a follow-up from TRIMIT Complaints. In that case, the TRIMIT Boolean **Complaint** contains a checkmark. This Boolean can be found on the Sales Credit Memo FastTab *Misc. Param*.

My Role Activities

See Chapter [My Role Activities](#).

Menus

Home

CRONUS Role Center

Sales ▾Product Design ▾Price Parameters. ▾Posted Documents ▾All Reports | ≡

Sales OrdersSales Return OrdersSales Credit MemosComplaintsCustomersSales Statistics Setup

Sales

CRONUS Role Center

Sales ▾Product Design ▾Price Parameters. ▾Posted Documents ▾All Reports | ≡

Sales QuotesSales OrdersSales Blanket OrdersSales InvoicesSales Return OrdersSales Credit MemosComplaintsCustomers

Product Design

CRONUS Role Center

Sales ▾Product Design ▾Price Parameters. ▾Posted Documents ▾All Reports | ≡

ItemsMasters

Price Parameters

CRONUS Role Center

Sales ▾Product Design ▾Price Parameters. ▾Posted Documents ▾All Reports | ≡

Customer Price GroupPrice Group ParametersSales Line Discount Types

Posted Documents

CRONUS Role Center

Sales ▾Product Design ▾Price Parameters. ▾Posted Documents ▾All Reports | ≡

Posted Sales ShipmentsPosted Return ReceiptsPosted Purchase ReceiptsCompleted Complaints
Posted Sales InvoicesPosted Sales Credit MemosPosted Purchase Invoices

All Reports

This will show an overview of all objects of **Reports & Analysis** in all Profiles (Roles) that have a checkmark in **Show in Role Explorer**. See [All Reports](#).

Actions

There are also special *Actions*.

Actions

+ New Sales Order

+ New Complaint

+ New Sales Quote

+ New Sales Invoice

+ New Sales Credit Memo

+ New Customer

> Sales Statistics

> Tasks

> Prices

> Item Inventory Profile

> Master Inventory Profile

> Find

> TRIMIT Help

📄 Reports

Actions, Sales Statistics

Actions

+ New Sales Order

+ New Complaint

+ New Sales Quote

+ New Sales Invoice

+ New Sales Credit Memo

+ New Customer

> Sales Statistics

Extended Sales Statistics

Sales Analytics

> Prices

> Item Inventory Profile

> Master Inventory Profile

> Find

> TRIMIT Help

Reports

Actions, Tasks

Actions

+ New Sales Order

+ New Complaint

+ New Sales Quote

+ New Sales Invoice

+ New Sales Credit Memo

+ New Customer

> Sales Statistics

> Tasks

Workflow Due List

Item Journals

Sales Journals

Cash Receipt Journals

> Prices

> Item Inventory Profile

> Master Inventory Profile

> Find

> TRIMIT Help

Reports

Actions, Prices

Actions

+ New Sales Order

+ New Complaint

+ New Sales Quote

+ New Sales Invoice

+ New Sales Credit Memo

+ New Customer

> Sales Statistics

> Tasks

> Prices

Sales Prices

Sales Line Discounts

Sales Price Worksheet

> Item Inventory Profile

> Master Inventory Profile

> TRIMIT Help

Reports

Actions, Reports

Actions

+ New Sales Order

+ New Complaint

+ New Sales Quote

+ New Sales Invoice

+ New Sales Credit Memo

+ New Customer

> Sales Statistics

> Tasks

> Prices

> Item Inventory Profile

> Master Invoice

> Find

> TRIMIT Help

Reports

Extended Sales Statistics Report

Customer - Order Summary

Customer - Top 10 List

Inventory - Sales Back Orders

Master Analysis Matrix

Inventory Profile Matrix

Possible Insights (ListPart Pages)

The **ListPart Pages** that can be chosen have many similarities with standard BC **ListPart Pages**, besides the [My Actions](#), [My Masters](#) and [My Setup](#). They are TRIMIT specific.

Insights

My Actions

Name

Check Material Shortage List

1

Sales Orders

Create Collection

Create Var/Ord Type

Customer - Sales List

Replacement Call List

My Customers

Customer No. 1	Name	Phone No.	Balance (USD)
20000	Tey Research		2,345.63
30000	School of Fine Art		34,254.31
40000	Alpine Ski House		2,617.59
50000	Relecloud		6,782.38

My Masters

Master No. 1	Description	Collection	Status Code	Picture
(There is nothing to show in this view.)				

My Setup

Name

Sales & Receivables Setup

1

Purchase & Payables Setup

Inventory Setup

General Forming Setup

Power BI

Get started with Power BI

Report Inbox

Description	Created Date/Time	Output Type
(There is nothing to show in this view.)		

Profile (Role) TRIMIT PDM/ Design

Let us have a closer look at the **Profile (Role)** for *TRIMIT PDM/Design (TRM_PDM)*. This Profile (Role) can be used as Role Center for users involved in the Design of Products and Product Management. There is no equivalent Profile (Role) in standard BC. Some parts of this profile are generic for all TRIMIT Role Centers and are described in paragraph [Differences between TRIMIT and Business Central Profiles](#). **Profile (Role) TRIMIT PDM/Design** has several Activity Groups, Cues, Indicators, Actions and ListPart Pages as shown in the picture below

Activities

Indicators

TRIMIT has an Activity Group for Tasks which contains the following Cues:

→ My Due Workflow

In this Indicator you see the number of **TRIMIT Workflow Lines** that are not Closed yet, and have a **Deadline** between the **Starting Date Formula Due** and **Ending Date Formula Due** from the [Role Center Setup](#), and a **Responsible ID** of the current User ID.

Clicking on **>See more** will show a list of the **My Workflow Activities**.

The TRIMIT Workflow Lines can be related to *Customer, Vendor, Collection, Shipment Group, Master, Sales Order, Purchase Order, Production Order, Production Collection Order, Complaint, Replacement, Container, Category* and *Item*.

→ My Overdue Workflow

In this Cue you see a list of **TRIMIT Workflow Lines** that are not Closed yet, and have a **Deadline** before the **Starting Date Formula Due** from the [Role Center Setup](#), and a **Responsible ID** of the current User ID.

→ My Group Due Workflow

In this Indicator you see the number of **TRIMIT Workflow Lines** that are not Closed yet, and that are to be followed up by the **Workflow User Group** in the User Setup of the current User ID with a **Deadline** between the **Starting Date Formula Due** and **Ending Date Formula Due** from the [Role Center Setup](#).

Clicking on **>See more** will show a list of the **My Workflow Activities**.

Masters

TRIMIT has added an Activity Group for **Masters** which contains the following Cues:

- IDEA
- DESIGN
- PRODUCTION
- READY

The purpose of these Cues is to define different stages within the Design Process. The user has the possibility to define his own stages by connecting a **Status Code** Filter to one of these stages.

This can be setup as described in the [Role Center Setup](#)

Collections

TRIMIT has also added an Activity Group for **Collections** which contains the following Cues:

→ Collections

In this Cue you see a list of Collections that are not dedicated to a specific Customer or Country. Collections are described in detail in the *White Paper – TRIMIT Collection Management*.

→ Private Label

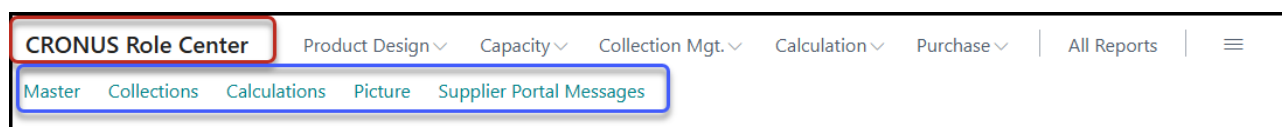
In this Cue you see a list of Collections that are dedicated to a specific Customer or Country. These are called Private Label Collections. This feature is in more detail described in the *White Paper – TRIMIT Collection Management*.

→ Shipment Groups

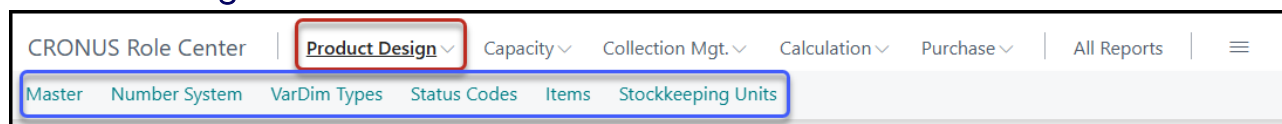
In this Cue you see a list of Shipment Groups (that are not connected as Periods to the Collections). Masters can be attached to a particular Shipment Group. This feature is described in detail in the *White Paper – TRIMIT Collection Management*.

Menus

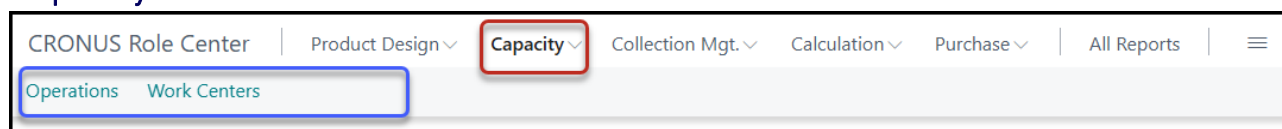
Home



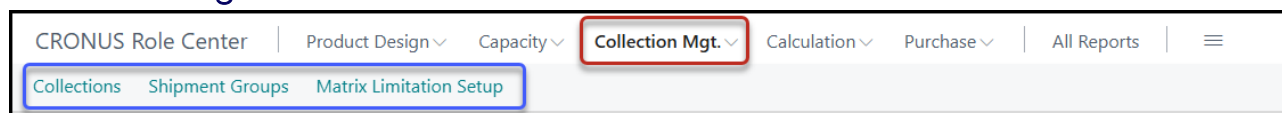
Product Design



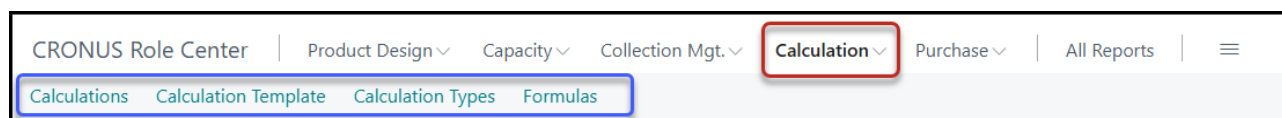
Capacity



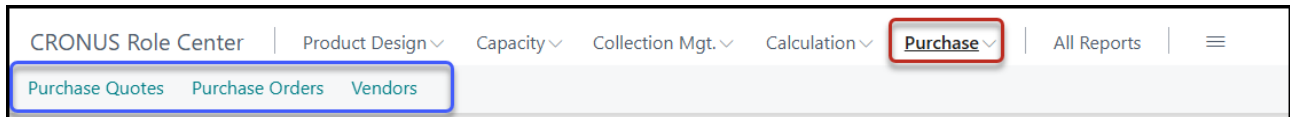
Collection Mgt.



Calculation



Purchase

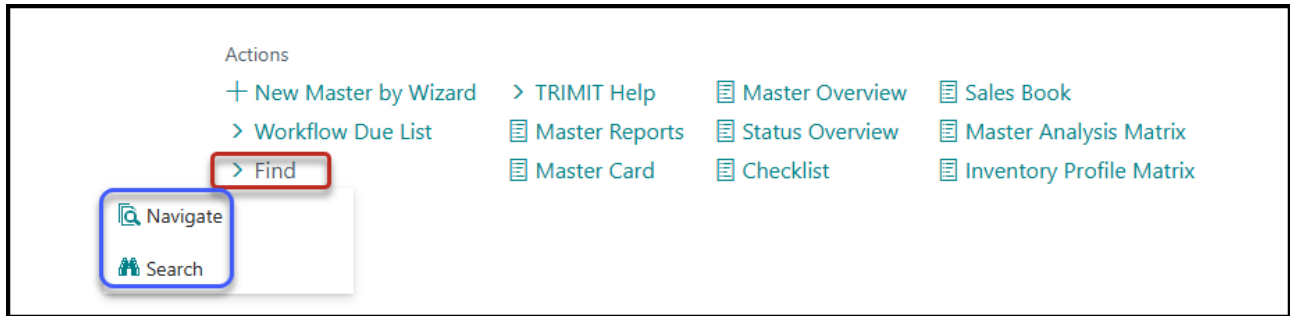


All Reports

This will show an overview of all objects of **Reports & Analysis** in all Profiles (Roles) that have a checkmark in **Show in Role Explorer**. See [All Reports](#).

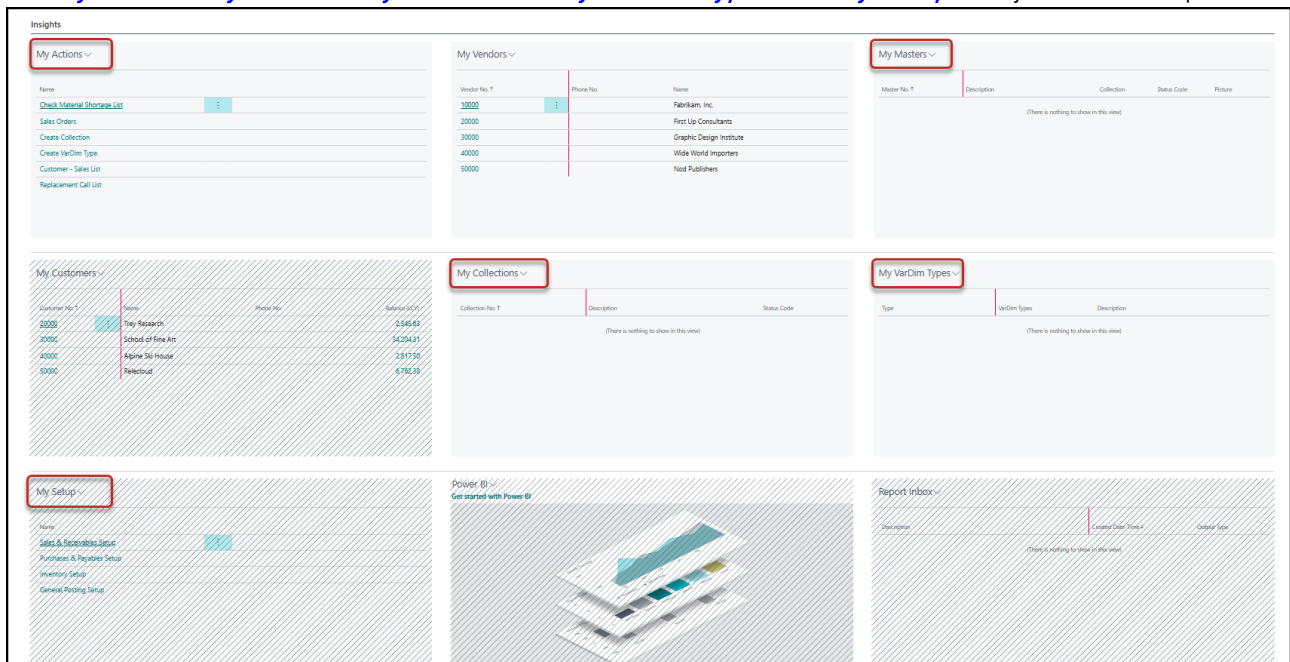
Actions

There are also special *Actions*.



Possible Insights (ListPart Pages)

The **ListPart Pages** that can be chosen have many similarities with standard BC **ListPart Pages**, besides the [My Actions](#), [My Masters](#), [My Collections](#), [My VarDim Types](#) and [My Setup](#). They are TRIMIT specific.



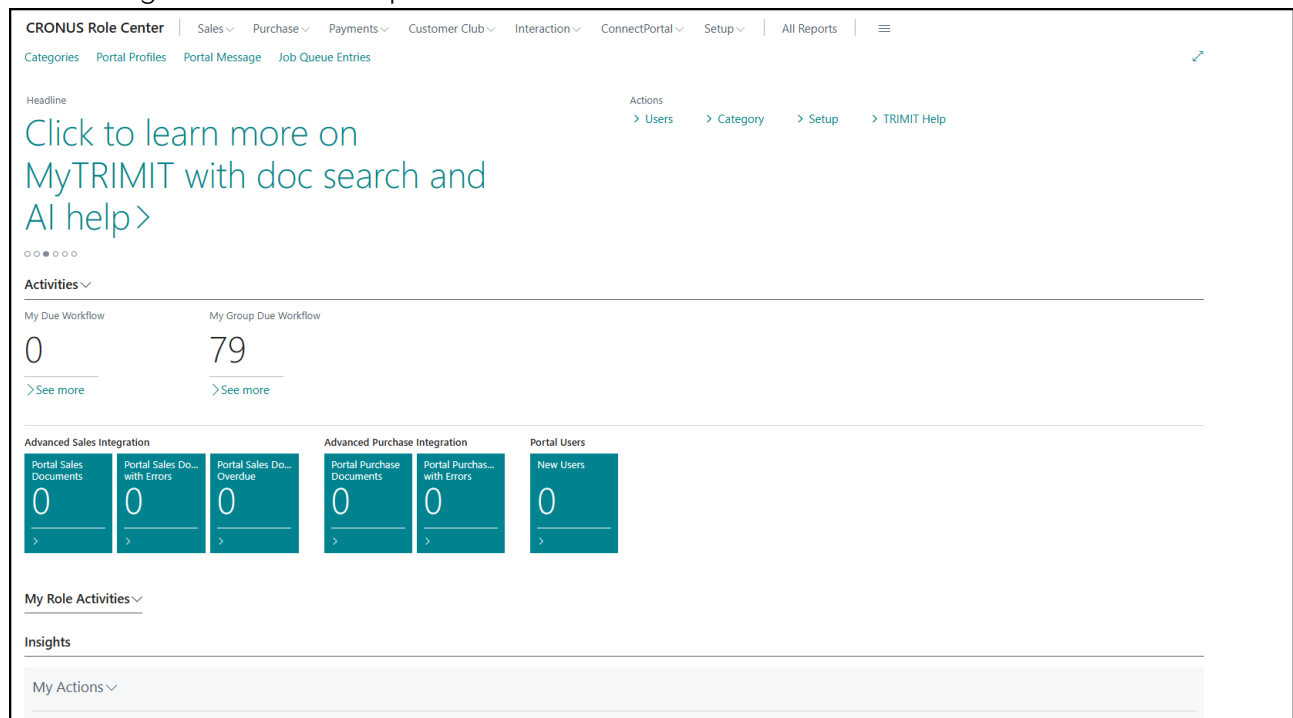
Profile (Role) TRIMIT Portal Administrator

Let us have a closer look at the **Profile (Role)** for *TRIMIT Portal Administrator (TRM_PORTAL)*. This Profile (Role) can be used as Role Center for the administrators of the TRIMIT e-commerce, i.e., to check if all Orders from the B2B Webshop and SalesAgent have been submitted correctly, but also for all the setups needed for TRIMIT e-commerce.

There is no equivalent Profile (Role) in standard BC.

Apart from the differences described in paragraph [Differences between TRIMIT and Business Central Profiles](#).

Profile (Role) *TRIMIT Portal Administrator* has several Activity Groups, Cues, Indicators, Actions and ListPart Pages as shown in the picture below



Activities

Indicators

➔ My Due Workflow

In this Indicator you see the number of **TRIMIT Workflow Lines** that are not Closed yet, and that have a **Deadline** before the **Work Date** and a **Responsible ID** of the current User ID.

Clicking on **>See more** will show a list of the **My Workflow Activities**.

The TRIMIT Workflow Lines can be related to *Customer, Vendor, Collection, Shipment Group, Master, Sales Order, Purchase Order, Production Order, Production Collection Order, Complaint, Replacement, Container, Category* and *Item*.

➔ My Group Due Workflow

In this Indicator you see the number of **TRIMIT Workflow Lines** that are not Closed yet, and that are to be followed up by the **Workflow User Group** in the User Setup of the current User ID with a **Deadline** before the **Work Date**.

Clicking on **>See more** will show a list of the **My Workflow Activities**.

Advanced Sales Integration

TRIMIT has added an Activity Group for **Advanced Sales Integration** which contains the following Cues:

➔ Portal Sales Documents

In this Cue, a list of all the open **Portal Sales Documents** is shown. They represent the Web Orders received (from B2B or SalesAgent) and not 'posted' yet to become 'normal' Sales Quotes/Orders in TRIMIT. You cannot change the Portal Sales Document, only perform various Actions before it ends up being 'posted'. Altering the document during the process could cause data inconsistency.

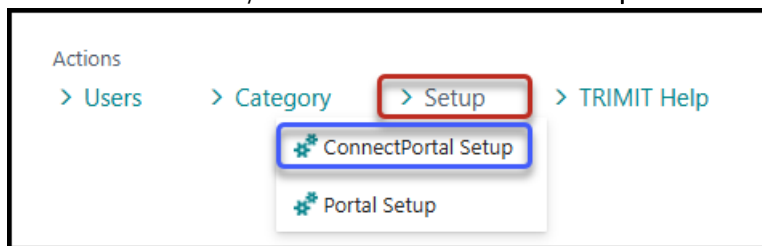
➔ Portal Sales Documents with Errors

In this Cue, a list of all the open **Portal Sales Documents with Errors** is shown. They represent the web orders received (from B2B or SalesAgent) and not 'posted' yet to become 'normal' Sales Quotes/Orders in TRIMIT that contain errors like i.e., Item not part of Collection anymore or Item does not exist anymore. You cannot change the Portal Sales Document, only perform various Actions before it ends up being 'posted'. Altering the document during the process could cause data inconsistency.

➔ Portal Sales Doc., Overdue

In this Cue, a list of all the open **Portal Sales Documents** is shown that are **Overdue**. It is possible to set a Date Formula, which determines the Sales Documents (from B2B or SalesAgent) to be Overdue.

This Date Formula can be set on *ConnectPortal Setup* page (to be found via *Setup, ConnectPortal Setup* in this Role Center) in field **Open Orders Date Formula**



i.e., setting *-2D* enables showing Sales Documents, in *Portal Documents Overdue* page, which **Creation Date** or **Changed Date** is older than 2 days from Work Date.

Note

Sales Quotes/Orders from the TRIMIT B2B Webshop and TRIMIT Sales Agent, will only show up in the Portal Sales Documents if **Instant Posting ASI** in the appropriate **Portal Profile** is set to *No*. Sales Orders from the TRIMIT B2C Webshop will never be shown in the Portal Sales Documents; they will always become 'normal' Sales Orders immediately.

Advanced Purchase Integration

TRIMIT has added an Activity Group for **Advanced Purchase Integration** which contains the following Cues:

➔ Portal Purchase Documents

In this Cue, a list of all the open **Portal Purchase Documents** is shown. They represent the changed Purchase Quotes/Orders on the TRIMIT Web Supplier. You cannot change the Portal Purchase Document, only perform various Actions before it ends up being 'posted' (taken into 'normal' Purchase Quotes/Orders). Altering the document during the process could cause data inconsistency.

➔ Portal Purchase Documents with Errors

In this Cue, a list of all the open **Portal Purchase Documents with Errors** is shown. They represent the changed Purchase Quotes/Orders on the TRIMIT Web Supplier and not 'posted' yet to become 'normal' Purchase Quotes/Orders that contain errors like i.e., Item not part of Collection anymore or Item does not exist anymore. You cannot change the Portal Purchase Document,

only perform various actions before it ends up being posted. Altering the document during the process could cause data inconsistency.

Note

Quotes/Orders from the TRIMIT Web Supplier, will only show up in the **Portal Purchase Documents** if the Supplier has changed the **Promised Receipt Date** and/or **Quantity to Receive** of the Purchase Quote Lines or Purchase Order Lines, and has updated the Quote/Order.

Portal Users

TRIMIT has added an Activity Group for **Portal Users** which contains the following Cue:

➔ New Users

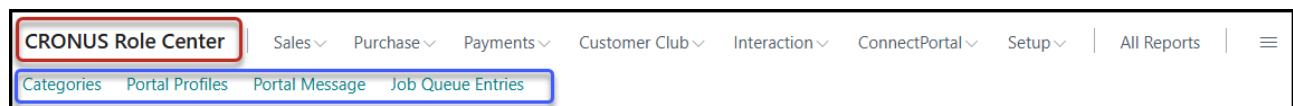
The Cue **New Users** gives you an overview of new Users that have been registered in TRIMIT e-commerce that needs to be assigned to the correct Customer, Vendor, and/or Salesperson.

My Role Activities

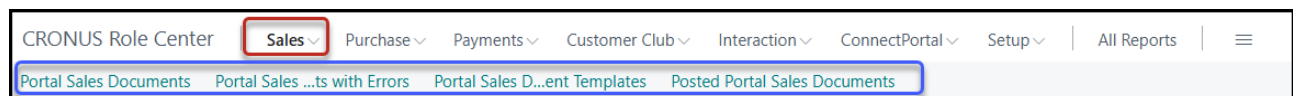
See Chapter [My Role Activities](#).

Menus

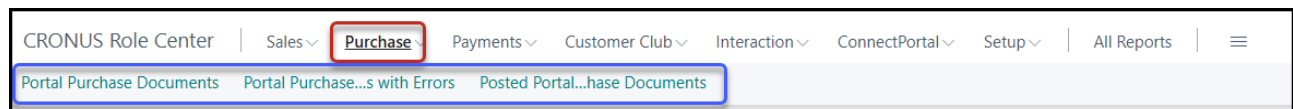
Home



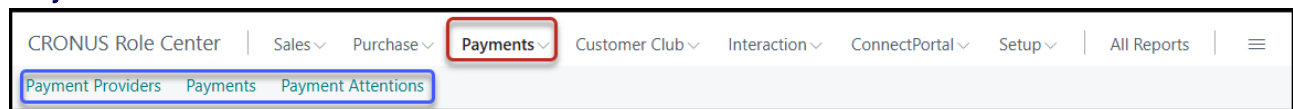
Sales



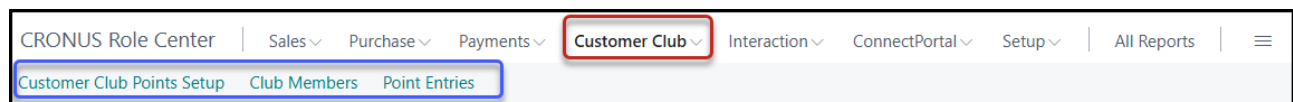
Purchase



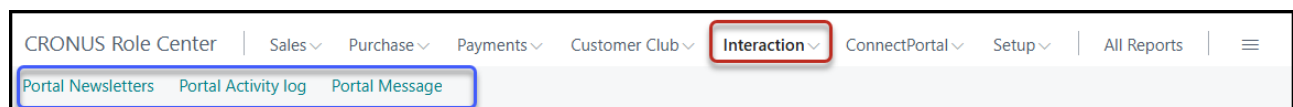
Payments



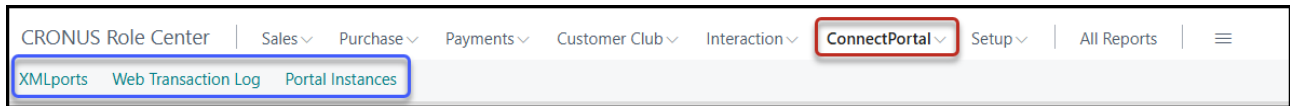
Customer Club



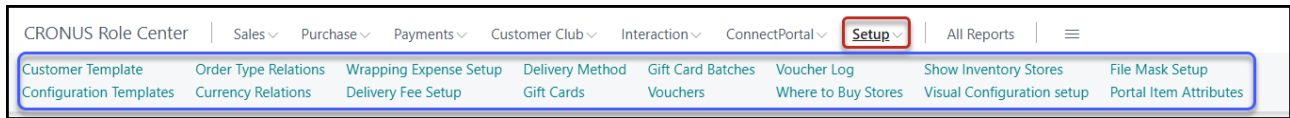
Interaction



ConnectPortal



Setup

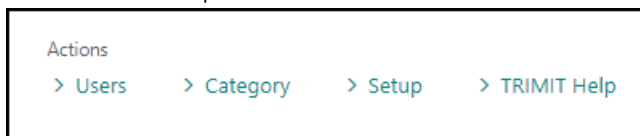


All Reports

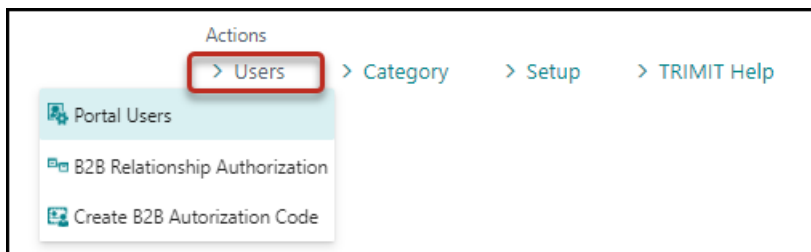
This will show an overview of all objects of **Reports & Analysis** in all Profiles (Roles) that have a checkmark in **Show in Role Explorer**. See [All Reports](#).

Actions

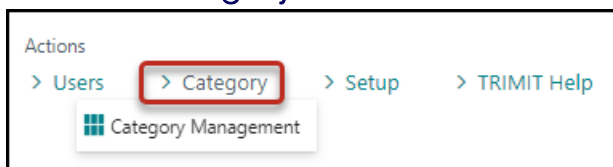
There are also special *Actions*.



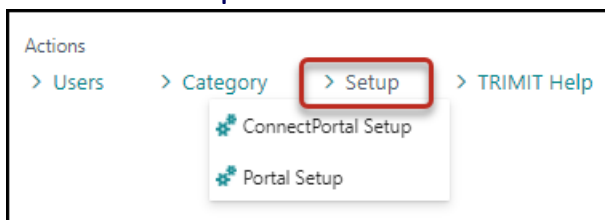
Actions, Users



Actions, Category



Actions, Setup



Possible Insights (ListPart Page)

The **ListPart Pages** that can be chosen have many similarities with standard Business Central **ListPart Pages**, besides the [My Actions](#). That is TRIMIT specific.

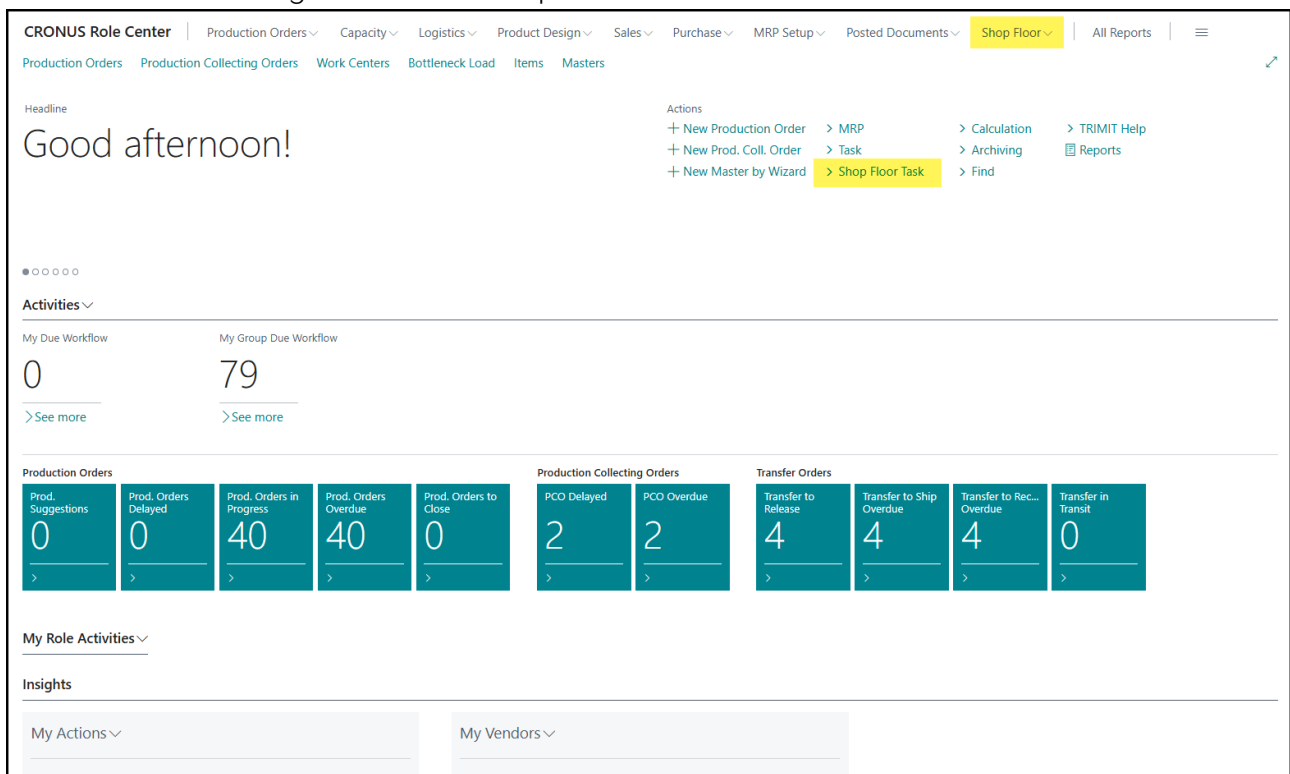


Profile (Role) TRIMIT Production

Let us have a closer look at the **Profile (Role)** for *TRIMIT Production (TRM_PROD)*. This Profile (Role) can be used as the Role Center for employees that are working with Production Orders / Production Process.

We also included the setups/functionality of **TRIMIT Shop Floor** (yellow highlighted in the pictures in this paragraph). This will only be visible if you also installed the **TRIMIT Shop Floor App**.

This Role Center might be compared with the standard BC Profile (Role) Center *Manufacturing Manager*, but apart from the differences described in paragraph [Differences between TRIMIT and Business Central Profiles](#), the **Profile (Role) TRIMIT Production** has different Activity Groups, Cues, Indicators, Actions and ListPart Pages as shown in the picture below



Activities

Indicators

➔ My Due Workflow

In this Indicator you see the number of **TRIMIT Workflow Lines** that are not Closed yet, and that have a **Deadline** before the **Work Date** and a **Responsible ID** of the current User ID.

Clicking on **>See more** will show a list of the **My Workflow Activities**.

The TRIMIT Workflow Lines can be related to *Customer, Vendor, Collection, Shipment Group*,

Master, Sales Order, Purchase Order, Production Order, Production Collection Order, Complaint, Replacement, Container, Category and Item.

➔ **My Group Due Workflow**

In this Indicator you see the number of **TRIMIT Workflow Lines** that are not Closed yet, and that are to be followed up by the **Workflow User Group** in the User Setup of the current User ID with a **Deadline** before the **Work Date**.

Clicking on **>See more** will show a list of the **My Workflow Activities**.

Production Orders

TRIMIT has an Activity Group for **Production Orders** which contains the following Cues:

➔ **Prod. Suggestions**

In this Cue you see a list of (TRIMIT) Production Orders with:

Document Type *Suggestion*.

➔ **Prod. Orders Delayed**

In this Cue you see a list of (TRIMIT) Production Orders with:

Document Type *Order*, **Status** *New* and **Start Date** before or at the Work Date.

➔ **Prod. Orders in Progress**

In this Cue you see a list of (TRIMIT) Production Orders with:

Status *Released* or *Partly Finished*.

➔ **Prod. Orders Overdue**

In this Cue you see a list of (TRIMIT) Production Orders with:

End Date before or at the Work Date and **Status** is *New*, *Planned*, *Released* or *Partly Finished*.

➔ **Prod. Orders to Close**

In this Cue you see a list of (TRIMIT) Production Orders with:

Status *Finished*.

Production Collecting Orders

➔ **PCO Delayed**

In this Cue you see a list of Production Collecting Orders with:

Status *New* or *Planned* and a **Start Production Date** before or at the Work Date.

➔ **PCO Overdue**

In this Cue you see a list of Production Collecting Orders with:

End Date before or at the Work Date and **Status** is *New*, *Planned*, *Released* or *Partly Finished*.

Transfer Orders

➔ **Transfer to Release**

In this Cue you see a list of Transfer Orders with **Status** *Open*.

➔ **Transfer to Ship Overdue**

In this Cue you see a list of Transfer Orders with **Quantity Shipped** is *0 (zero)* and **Shipment Date** before or at the Work Date.

➔ **Transfer to Receive Overdue**

In this Cue you see a list of Transfer Orders with **Quantity Received** is *0 (zero)* and **Receipt Date** before or at the Work Date.

➔ **Transfer in Transit**

In this Cue you see a list of Transfer Orders with **Quantity Shipped** $\neq$ *0 (zero)* and **Quantity Received** is *0 (zero)*.

My Role Activities

See Chapter [My Role Activities](#).

Menus

Home

CRONUS Role Center

Production Orders

Capacity

Logistics

Product Design

Sales

Purchase

MRP Setup

Posted Documents

Shop Floor

All Reports

Production Orders

Production Collecting Orders

Work Centers

Bottleneck Load

Items

Masters

Production Orders

CRONUS Role Center

Production Orders

Capacity

Logistics

Product Design

Sales

Purchase

MRP Setup

Posted Documents

Shop Floor

All Reports

Production Suggestions

Production Orders

Production Collecting Orders

Production Journal

Production Series

Task Numbers

Capacity

CRONUS Role Center

Production Orders

Capacity

Logistics

Product Design

Sales

Purchase

MRP Setup

Posted Documents

Shop Floor

All Reports

Operations

Work Centers

Work Center Groups

Logistics

CRONUS Role Center

Production Orders

Capacity

Logistics

Product Design

Sales

Purchase

MRP Setup

Posted Documents

Shop Floor

All Reports

Sales Orders

Purchase Orders

Partially Delivered

Transfer Orders

Pick Document (Lines)

Pick Document per Order

Containers

Product Design

CRONUS Role Center

Production Orders

Capacity

Logistics

Product Design

Sales

Purchase

MRP Setup

Posted Documents

Shop Floor

All Reports

Masters

Items

Stockkeeping Units

Number System

VarDim Types

Sales

CRONUS Role Center

Production Orders

Capacity

Logistics

Product Design

Sales

Purchase

MRP Setup

Posted Documents

Shop Floor

All Reports

Sales Orders

Blanket Sales Orders

Complaints

Items

Customers

Purchase

CRONUS Role Center

Production Orders

Capacity

Logistics

Product Design

Sales

Purchase

MRP Setup

Posted Documents

Shop Floor

All Reports

Purchase Quotes

Purchase Orders

Blanket Purchase Orders

Vendors

Items

Supplier Portal Messages

MRP Setup

CRONUS Role Center

Production Orders

Capacity

Logistics

Product Design

Sales

Purchase

MRP Setup

Posted Documents

Shop Floor

All Reports

MRP Batch Log

MRP Job Queue

MRP Setup List

MRP Limitations

Posted Documents

CRONUS Role Center

Production Orders

Capacity

Logistics

Product Design

Sales

Purchase

MRP Setup

Posted Documents

Shop Floor

All Reports

Closed Production Orders

Production Order Archive

Posted Sales Shipments

Posted Warehouse Receipts

Item Registers

Closed Prod. Coll. Orders

Production Col...Order Archive

Posted Purchase Receipts

Posted Pick Documents

Shop Floor

CRONUS Role Center

Production Orders

Capacity

Logistics

Product Design

Sales

Purchase

MRP Setup

Posted Documents

Shop Floor

All Reports

Tasks

Active Tasks

Employee

Employee Groups

Teams

Shop Floor Rotation

Selection Groups

Terminal Menu

All Reports

This will show an overview of all objects of **Reports & Analysis** in all Profiles (Roles) that have a checkmark in **Show in Role Explorer**. See [All Reports](#).

Actions

There are also special *Actions*.

Actions

+ New Production Order

> MRP

> Calculation

> TRIMIT Help

+ New Prod. Coll. Order

> Task

> Archiving

📄 Reports

+ New Master by Wizard

> Shop Floor Task

> Find

Actions, MRP

Actions

+ New Production Order

> MRP

> Calculation

> TRIMIT Help

+ New P

📄 Actions

> Archiving

📄 Reports

+ New N

📄 By Items

> Find

📄 By Sales Lines

📄 By Production Orders

📄 By Production Collecting Orders

Actions, Task

Actions

+ New Production Order

> MRP

> Calculation

> TRIMIT Help

+ New Prod. Coll. Order

> Task

> Archiving

📄 Reports

+ New Master

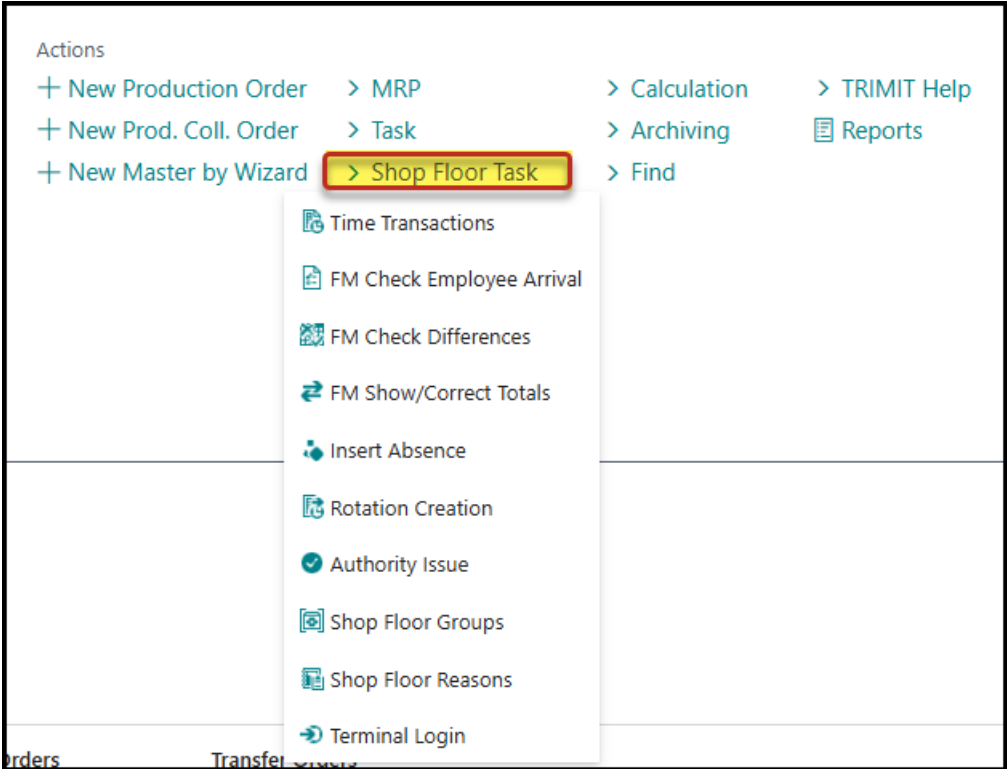
📄 Edit Production Journal or Task

> Find

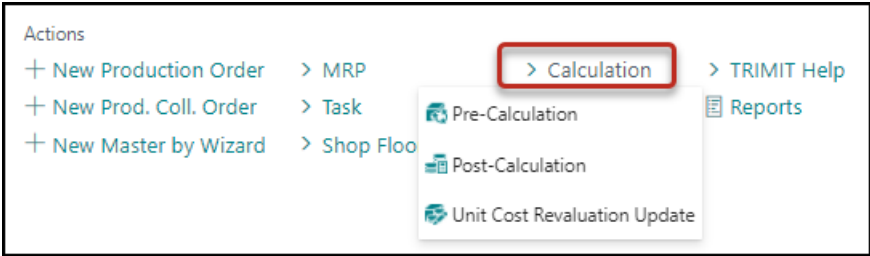
📄 Edit Item Journals

📄 Workflow Due List

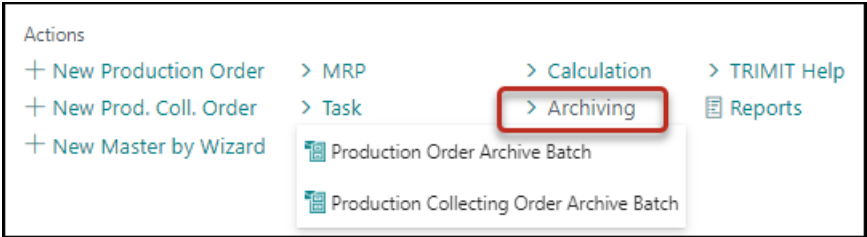
Actions, Shop Floor Task



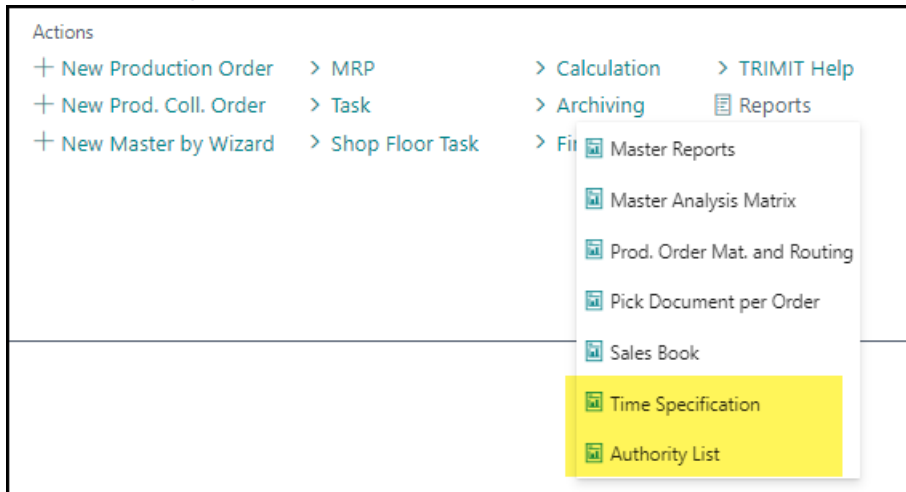
Actions, Calculation



Actions, Archiving

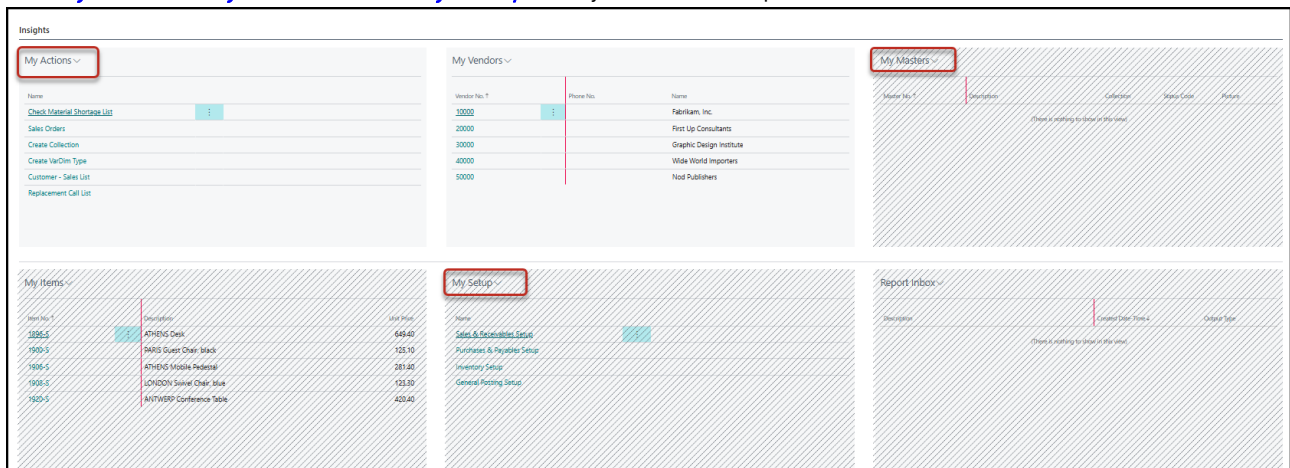


Actions, Reports



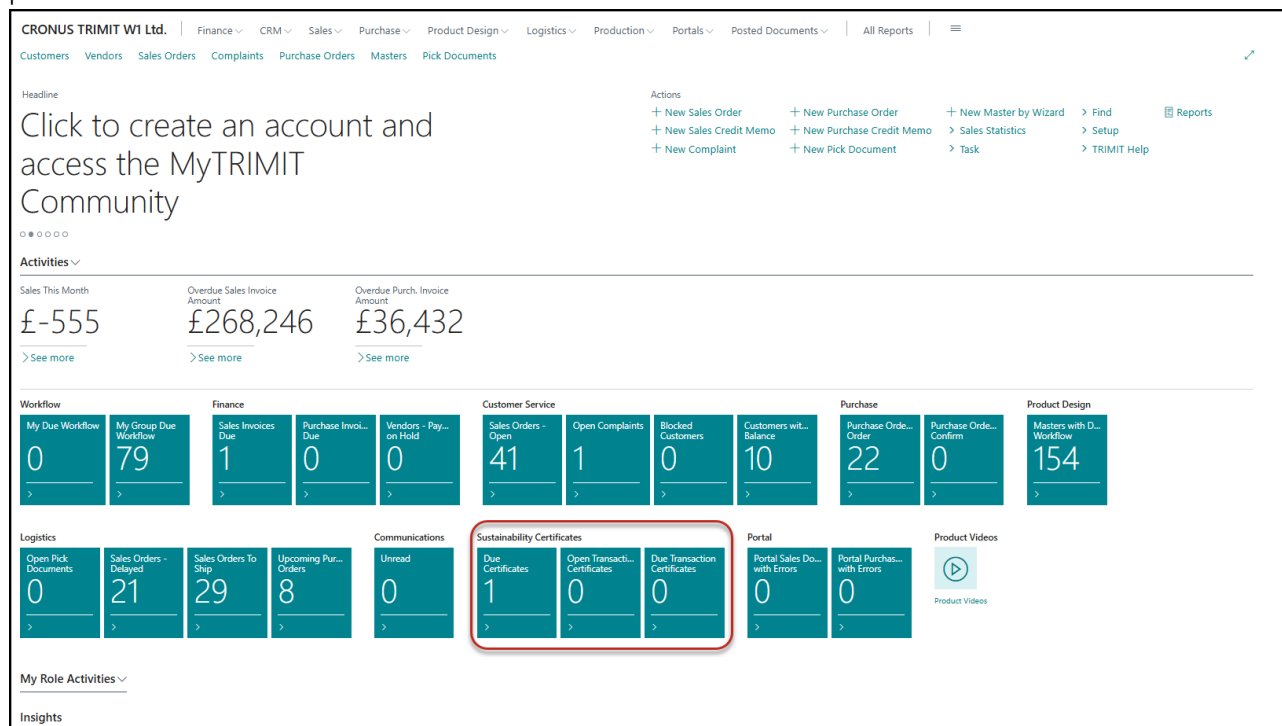
Possible Insights (ListPart Pages)

The **ListPart Pages** that can be chosen have many similarities with standard BC **ListPart Pages**, besides the [My Actions](#), [My Masters](#), and [My Setup](#). They are TRIMIT specific.



Profile (Role) TRIMIT Small Business

Let us have a closer look at the **Profile (Role)** for *TRIMIT Small Business (TRM_SB)*. This Profile (Role) can be used as a basis for Role Centers for users that do activities for more than one department. This is primarily the case in small businesses but not exclusively. This Role Center is the equivalent of the standard BC Profile (Role) *President – Small Business*, but apart from the differences described in paragraph [Differences between TRIMIT and Business Central Profiles](#) the **Profile (Role) TRIMIT Small Business** has different Activity Groups, Cues, Indicators, Actions and ListPart Pages as shown in the picture below.



As you can see, there are more Activity Groups than usual, and they cover most activities within a company. The user can personalize this Role Center by *Show/Hide* existing Cues and ListPart Pages with only those Activity Groups that are of his interest but is also able to create his own Indicators and Cues via [My Role Activities](#).

NOTE

For Demo purposes, this **Profile (Role) TRIMIT Small Business** can be used best as a Role Center for Wholesale companies, but for Production companies the **Profile (Role) TRIMIT Production** might be better, to show the most frequently used data, processes, reports.

Activities

Indicators

→ Sales This Month

This will only be shown if **Show Sales This Month** in the [Role Center Setup](#) is set to *Yes*. This will show an Indicator of the total **Sales (LCY)** (Sales Amount excl. VAT) of all the Posted Sales Invoices and Posted Sales Credit Memos that were posted in the current Month – based on the Work Date. If you click on **>See more**, you will see a list of **Customer Ledger Entries**.

→ Overdue Sales Invoice Amount

This will only be shown if **Show Overdue Sales Invoices** in the [Role Center Setup](#) is set to **Yes**. This will show the total **Remaining Amt. (LCY)** (Remaining Amount in Local Currency) of all the Posted Sales Invoices for which the **Due Date** is before the Work Date.

If you click on **>See more**, you will see a list of **Customer Ledger Entries**:

→ Overdue Purch. Invoice Amount

This will only be shown if **Show Overdue Purchase Invoices** in the [Role Center Setup](#) is set to **Yes**.

This will show the total **Remaining Amt. (LCY)** (Remaining Amount in Local Currency) of all the Posted Purchase Invoices for which the **Due Date** is before the Work Date.

If you click on **>See more**, you will see a list of **Vendor Ledger Entries**:

Workflow

TRIMIT has an Activity Group for TRIMIT Workflows which contains the following Cues:

→ My Due Workflow

In this Cue you see a list of not Closed TRIMIT Workflow Lines with:

Deadline before the **Work Date** and a **Responsible ID** of the current User ID.

The TRIMIT Workflow Lines can be related to *Customer, Vendor, Collection, Shipment Group, Master, Sales Order, Purchase Order, Production Order, Production Collection Order, Complaint, Replacement, Container, Category* and *Item*.

→ My Group Due Workflow

In this Cue you see a list of not Closed TRIMIT Workflow Lines with:

Deadline before the **Work Date** and a **Responsible ID** that is the **Workflow User Group** in the User Setup of the current User ID

Finance

The Activity Group **Finance** contains the following Cues:

→ Sales Invoices Due

In this Cue you see a list of open Customer Ledger Entries with:

Document Type is *Invoice* or *Credit Memo*, **Open** is **Yes** and **Due Date** between the **Starting Date Formula to Ship** and the **End Date Formula to Ship** in the [Role Center Setup](#).

→ Purchases Invoices Due

In this Cue you see a list of open Vendor Ledger Entries with:

Document Type is *Invoice* or *Credit Memo*, **Open** is **Yes** and **Due Date** between the **Starting Date Formula to Ship** and the **End Date Formula to Ship** in the [Role Center Setup](#).

→ Vendors – Payments on Hold

In this Cue you see a list of Vendors is shown on which the field **Blocked** has the value *Payment*.

Customer Service

The Activity Group **Customer Service** contains the following Cues:

→ Sales Orders – Open

In this Cue you see a list of Sales Orders is shown with **Status** is *Open* and **All Shipped and Invoiced** is *No*.

→ Open Complaints

In this Cue you see a list of all TRIMIT Complaints that have not been completed.

→ Blocked Customers

In this Cue you see a list of Customers with **Blocked** is *Ship, Invoice* or *All*.

→ Customers with Due Balance

This Cue will only be shown if **Show Customers with Due Balance** on the FastTab *Small Business* in the [Role Center Setup](#) is set to **Yes**.

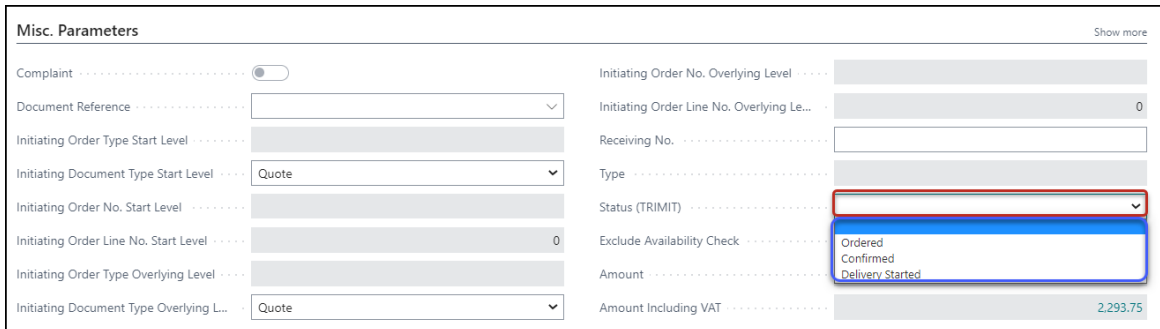
In this Cue you see a list of Customers that have **Balance Due (LCY)** $\neq 0$ as of the Work Date. Note that also Customers with a **Balance Due (LCY)** $\neq 0$ on Credit Memos will be in the list.

Purchase

The Activity Group **Purchase** contains the following Cues:

→ Purchase Orders to Order

In this Cue you see a list of Purchase Orders that have **All Received and Invoiced** is *No* and **Status (TRIMIT)** is *<empty>*. This field can be found in the FastTab *Misc. Param.* of the Purchase Orders.



Misc. Parameters Show more

Complaint	☐	Initiating Order No. Overlying Level	
Document Reference		Initiating Order Line No. Overlying Le...	0
Initiating Order Type Start Level		Receiving No.	
Initiating Document Type Start Level	Quote	Type	
Initiating Order No. Start Level		Status (TRIMIT)	Ordered Confirmed Delivery Started
Initiating Order Line No. Start Level	0	Exclude Availability Check	
Initiating Order Type Overlying Level		Amount	
Initiating Document Type Overlying L...	Quote	Amount Including VAT	2.293.75

→ Purchase Orders to Confirm

In this Cue you see a list of Purchase Orders that have **All Received and Invoiced** is *No* and **Status (TRIMIT)** is *Ordered*. As soon as the supplier has confirmed the Order, the user can change this **Status (TRIMIT)** into *Confirmed*. The Purchase Order will then not be shown anymore in this Cue.

Product Design

The Activity Group **Product Design** contains the following Cues:

→ Masters with Due Workflow

In this Cue you see a list of Masters that have Workflow Lines with a **Deadline** before the Work Date and have not been Approved so far.

Logistics

The Activity Group **Logistics** contains the following Cues:

→ Open Pick Documents

In this Cue you see a list of Open Pick Documents is shown on which the field **Status** is *<empty>*.

→ Sales Orders – Delayed

In this Cue you see a list of Sales Orders with Sales Order Lines with an Outstanding Quantity that had to be shipped earlier than the day before the Work Date. However, the date comparison can be manipulated with the **Starting Date Formula to Ship** in the [Role Center Setup](#).

→ Sales Orders To Ship

In this Cue you see a list of Sales Orders with Sales Order Lines with an Outstanding Quantity that had to be shipped on the Work Date or the day before. However, the date comparison can be manipulated with the **Starting Date Formula to Ship** in the [Role Center Setup](#).

→ Upcoming Purchase Orders

In this Cue you see a list of Purchase Orders is presented, which have Outstanding Quantity on the Purchase Order lines and are supposed to be received on Work Date or before.

Communication

The Activity Group **Communications** contains the following Cues:

→ Unread

In this Cue you see a list of Unread Communications between customers of the TRIMIT B2B Webshop and your company.

Sustainability Certificates

The Activity Group **Sustainability Certificates** will only be shown if you also installed the **TRIMIT Sustainability App** and contains the following Cues:

- ➔ **Due Certificates**
In this Cue you see a list of the Scope Certificates for with the **Valid to Date** is before the Work Date + 1 Day.
- ➔ **Open Transaction Certificates**
In this Cue you see a list of the Transaction Certificates that are not Approved yet.
- ➔ **Due Transaction Certificates**
In this Cue you see a list of the Transaction Certificates that are not Approved yet and for which the **Deadline Transaction Certificate** is before the Work Date + 1 Day.

Portal

The Activity Group **Portal** contains the following Cues:

- ➔ **Portal Sales Doc. Error**
In this Cue, you see a list of all the open **Portal Sales Documents with Errors**. They represent the web orders received (from B2B or SalesAgent) and not 'posted' yet to become 'normal' Sales Quotes/Orders in TRIMIT that contain errors like i.e., Item not part of Collection anymore or Item does not exist anymore. You cannot change the Portal Sales Document, only perform various Actions before it ends up being 'posted'. Altering the document during the process could cause data inconsistency.
- ➔ **Portal Purch. Doc Error**
In this Cue, you see a list of all the open **Portal Purchase Documents with Errors**. They represent the changed Purchase Quotes/Orders on the TRIMIT Web Supplier and not 'posted' yet to become 'normal' Purchase Quotes/Orders that contain errors like i.e., Item not part of Collection anymore or Item does not exist anymore. You cannot change the Portal Purchase Document, only perform various actions before it ends up being posted. Altering the document during the process could cause data inconsistency.

Note

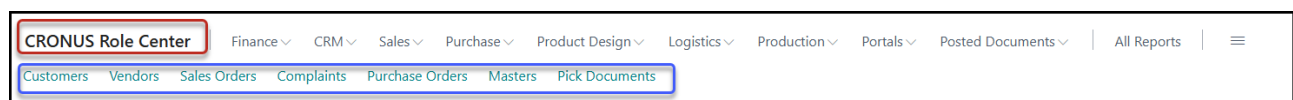
Quotes/Orders from the TRIMIT Web Supplier, will only show up in the **Portal Purchase Documents** if the Supplier has changed the **Promised Receipt Date** and/or **Quantity to Receive** of the Purchase Quote Lines or Purchase Order Lines, and has updated the Quote/Order.

My Role Activities

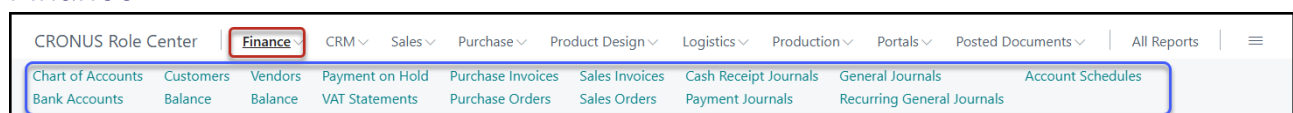
See Chapter [My Role Activities](#).

Menus

Home



Finance



CRM

CRONUS Role Center | Finance | CRM | Sales | Purchase | Product Design | Logistics | Production | Portals | Posted Documents | All Reports |

Contacts Customers Campaigns Segments Opportunities To-dos

Sales

CRONUS Role Center | Finance | CRM | Sales | Purchase | Product Design | Logistics | Production | Portals | Posted Documents | All Reports |

Sales Orders Shipped Not Invoiced Sales Quotes Sales Invoices Sales Credit Memos Complaints Items Customers Item Journals Sales Journals Cash Receipt Journals

Purchase

CRONUS Role Center | Finance | CRM | Sales | Purchase | Product Design | Logistics | Production | Portals | Posted Documents | All Reports |

Purchase Orders Purchase Quotes Purchase Credit Memos Items Purchase Journals
Partially Delivered Purchase Invoices Vendors Purchase Analysis Reports Supplier Portal Messages

Product Design

CRONUS Role Center | Finance | CRM | Sales | Purchase | Product Design | Logistics | Production | Portals | Posted Documents | All Reports |

Masters Items Collections Shipment Groups Matrix Limitation Setup Pictures VarDim Types Calculations Supplier Portal Messages

Logistics

CRONUS TRIMIT W1 Ltd. | Finance | CRM | Sales | Purchase | Product Design | Logistics | Production | Portals | Posted Documents | All Reports |

Sales Orders Purchase Orders Transfer Orders Partially Received Pick Document (Lines) Pick Document per Order Containers

Production

CRONUS Role Center | Finance | CRM | Sales | Purchase | Product Design | Logistics | Production | Portals | Posted Documents | All Reports |

Production Orders Production Collecting Orders Production Journal MRP Setup List MRP Limitations

Portals

CRONUS Role Center | Finance | CRM | Sales | Purchase | Product Design | Logistics | Production | Portals | Posted Documents | All Reports |

Portal Profiles Portal Activity log Categories Portal Sales ...ts with Errors Portal Purchase Documents Posted Portal...hase Documents
Portal Newsletter Portal Message Portal Sales Documents Posted Portal Sales Documents Portal Purchase...s with Errors Supplier Portal Messages

Posted Documents

CRONUS Role Center | Finance | CRM | Sales | Purchase | Product Design | Logistics | Production | Portals | Posted Documents | All Reports |

Posted Sales Shipments Completed Complaints Posted Purchase Credit Memos G/L Registers Customer Ledger Entries
Posted Sales Invoices Posted Purchase Receipts Posted Warehouse Receipts G/L Entries Vendor Ledger Entries
Posted Sales Credit Memos Posted Purchase Invoices Posted Pick Documents VAT Entries Item Ledger Entries

All Reports

This will show an overview of all objects of **Reports & Analysis** in all Profiles (Roles) that have a checkmark in **Show in Role Explorer**. See [All Reports](#).

Actions

There are also special *Actions*.

Actions

+ New Sales Order

+ New Sales Credit Memo

+ New Complaint

+ New Purchase Order

+ New Purchase Credit Memo

+ New Pick Document

+ New Master by Wizard

> Sales Statistics

> Task

> Find

> Setup

> TRIMIT Help

Reports

Actions, sales statistics

Actions

+ New Sales Order

+ New Sales Credit Memo

+ New Complaint

+ New Purchase Order

+ New Purchase Credit Memo

+ New Pick Document

+ New Master by Wizard

> Sales Statistics

> Task

> Find

> Setup

> TRIMIT Help

Reports

Extended Sales Statistics

Sales Analytics

Actions, Task

Actions

+ New Sales Order

+ New Sales Credit Memo

+ New Complaint

+ New Purchase Order

+ New Purchase Credit Memo

+ New Pick Document

+ New Master by Wizard

> Sales Statistics

> Task

Reports

Workflow Due List

Activity Due List

Edit General Journal

Edit Payment Journal

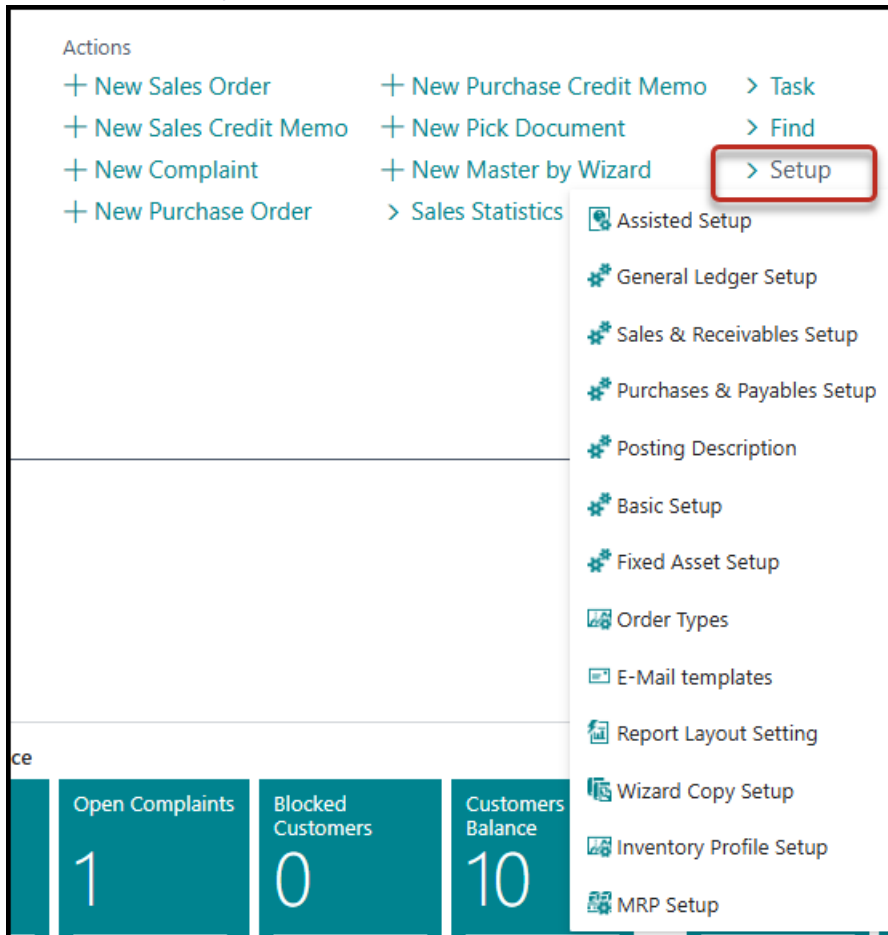
Edit Cash Receipt Journal

Edit Item Journals

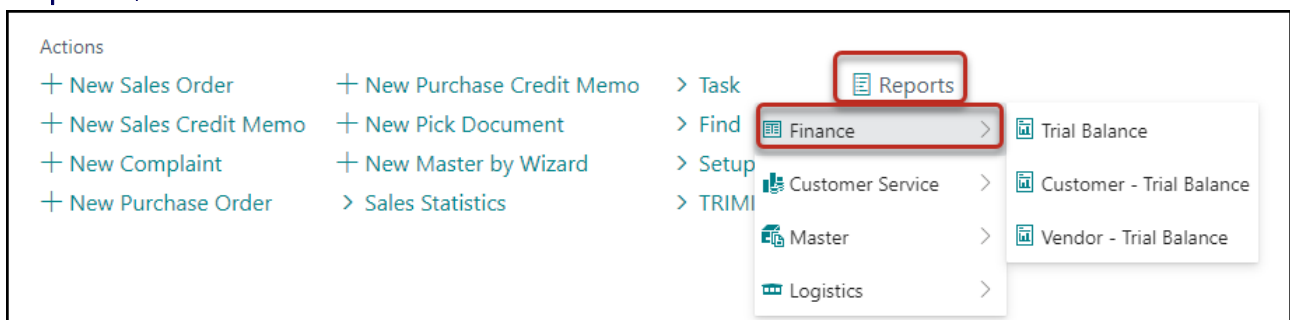
MRP Actions

Replacement

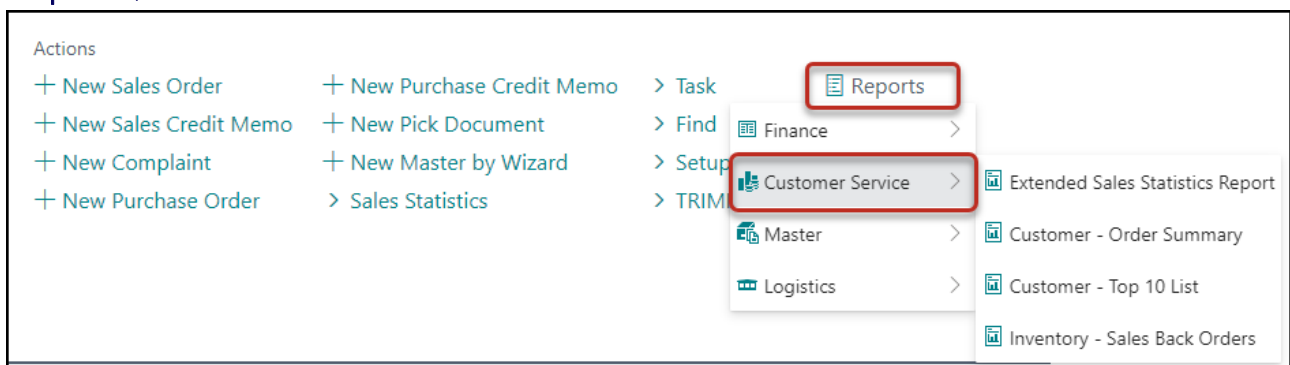
Actions, Setup



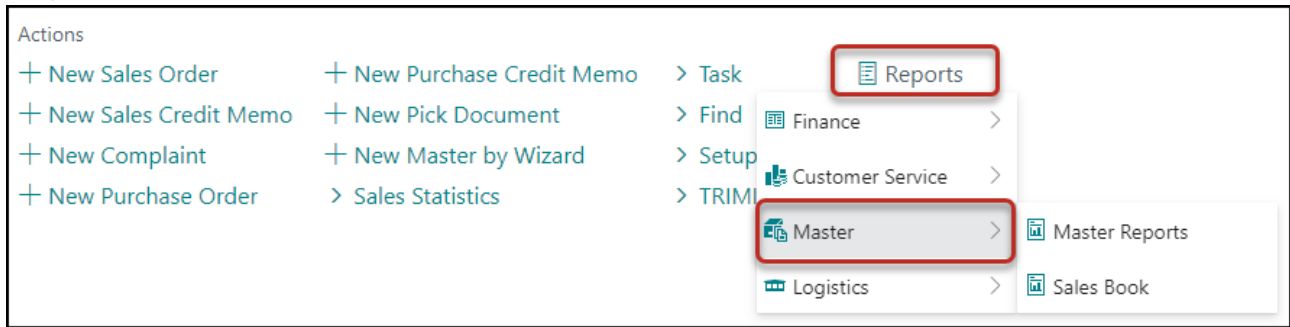
Reports, Finance



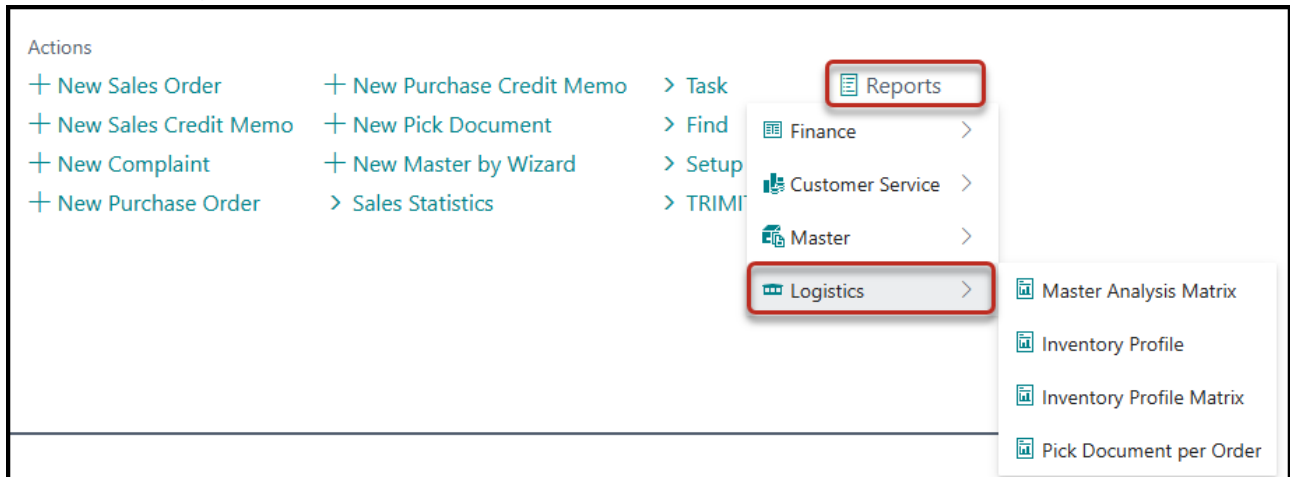
Reports, Customer Service



Reports, Master

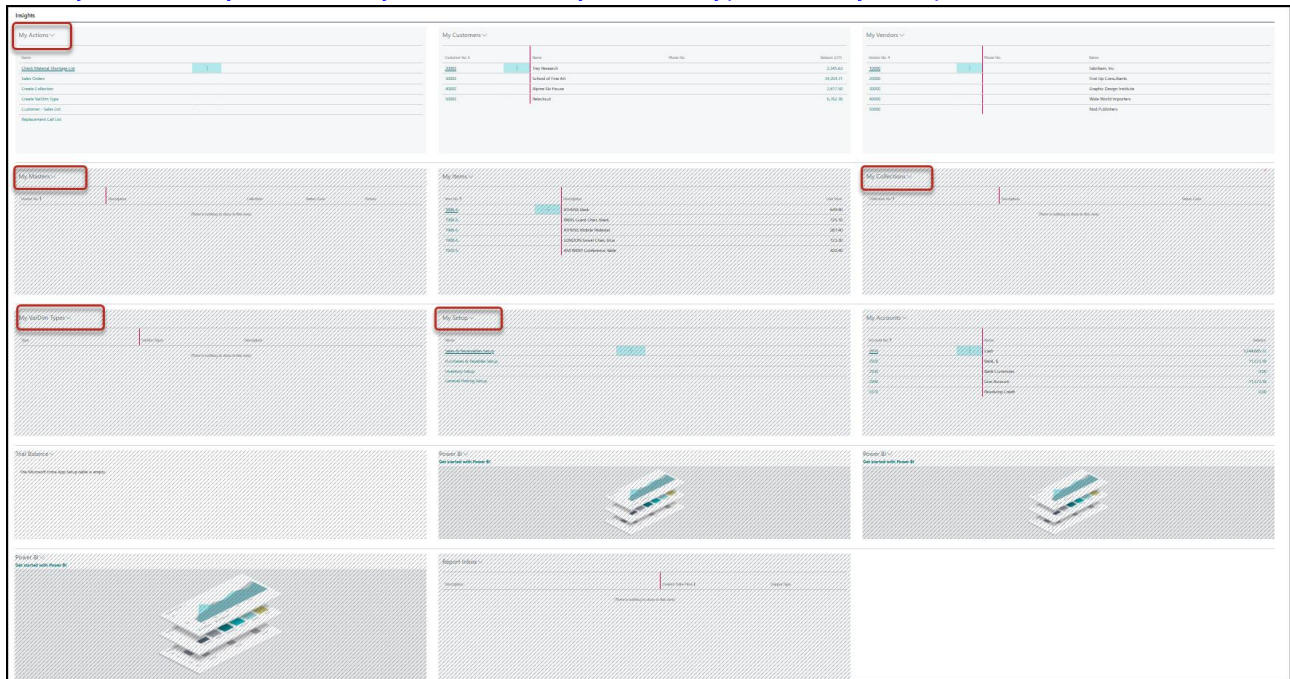


Reports, Logistics



Possible Insights (ListPart Pages)

The **ListPart Pages** that can be chosen have many similarities with standard BC **ListPart Pages**, besides the [My Actions](#), [My Masters](#), [My Collections](#), [My VarDim Types](#) and [My Setup](#). They are TRIMIT specific.



Profile (Role) TRIMIT Shop Floor Terminal

Let us have a closer look at the **Profile (Role)** for *TRIMIT Shop Floor Terminal (TRM_TERMINAL)*.

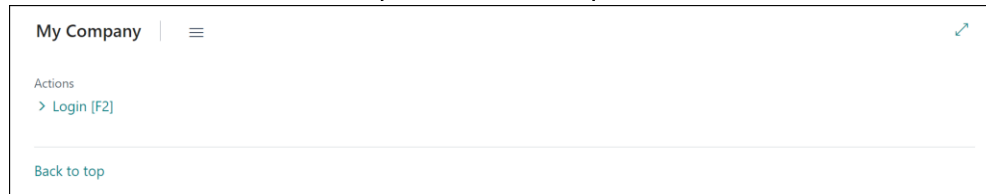
This Profile (Role) will only be applicable if you installed the **TRIMIT Shop Floor App**.

This Profile (Role) can be used as Role Center for users that register Time spent on Operations of Production Orders by using TRIMIT Shop Floor.

There is no equivalent profile in standard BC. There are not even Activities Profile (Role) as shown below.

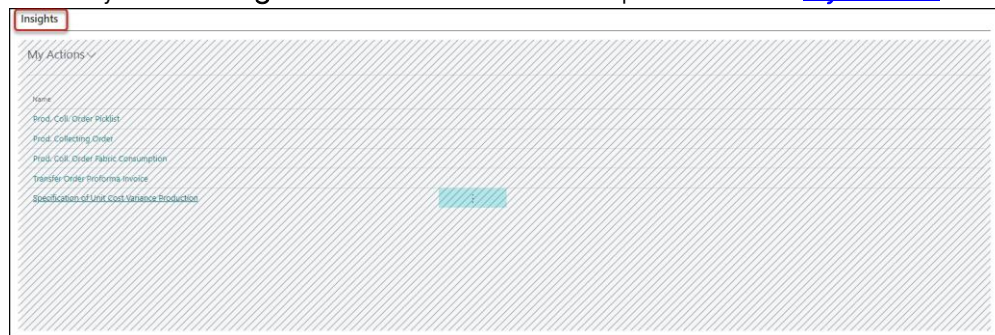
The user can only click **Login** (or press **F2**) to open the Terminal to register Time.

For more details see *White Paper – TRIMIT Shop Floor*



Possible Insights (ListPart Pages)

The only **ListPart Page** that can be chosen is the specific TRIMIT [My Actions](#).

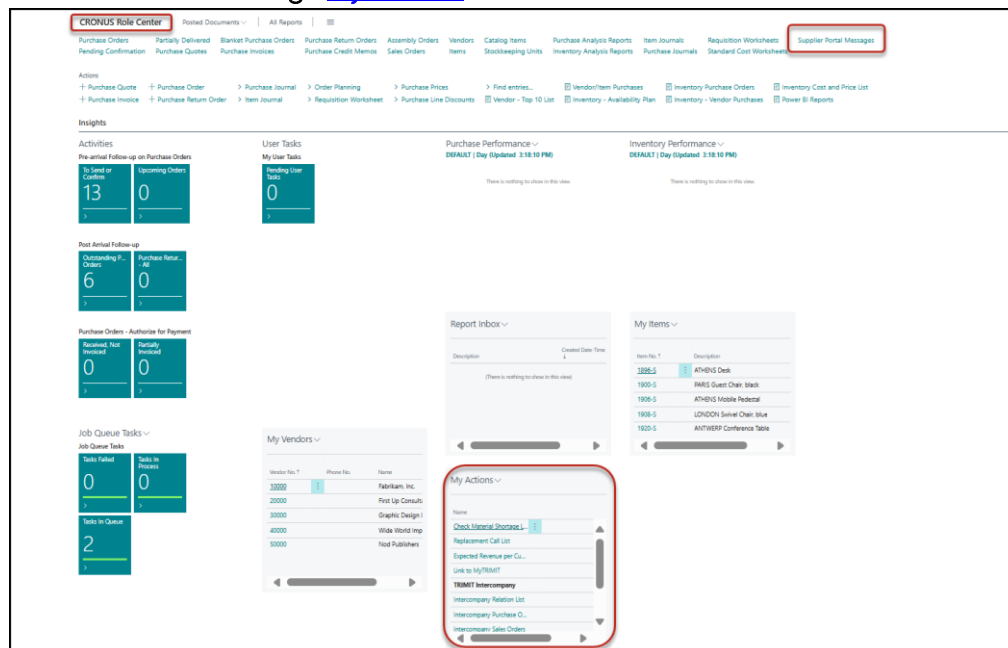


Profile (Role) Purchasing Agent

Although this is a standard BC **Profile (Role)**, TRIMIT has added some extras:

Supplier Portal Messages in the *Home Menu* of the Role Center.

The TRIMIT **ListPart Page** [My Actions](#).



TRIMIT ListPart Pages

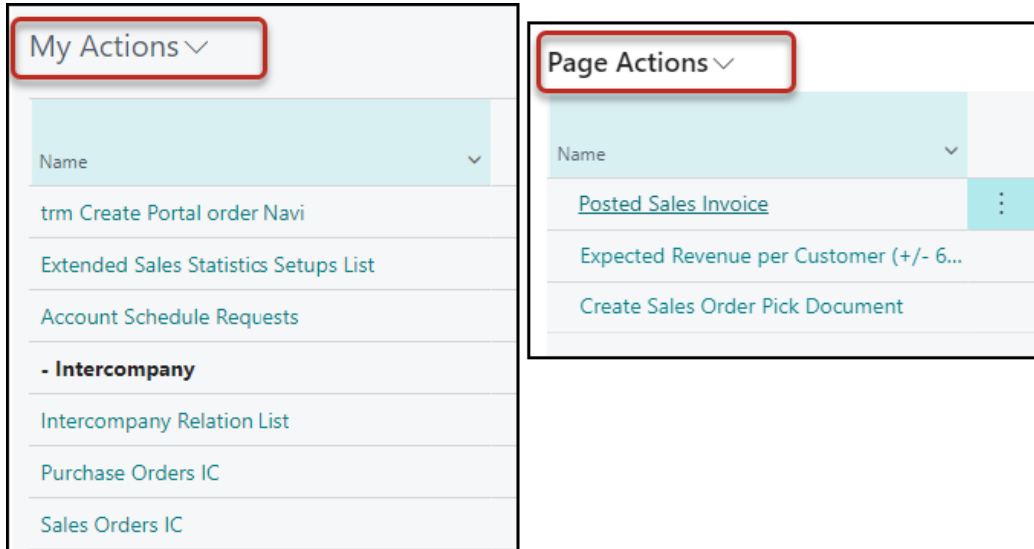
My Actions / Page Actions

TRIMIT has introduced a ListPart Page in which you can define specific **Actions**.

On the TRIMIT Role Centers, this ListPart Page is called ***My Actions***.

On other pages, a FactBox is called ***Page Actions***.

In these Lists, a user has the possibility to create a list of Actions of different types.



The purpose of these Lists is to avoid customizing the pages.

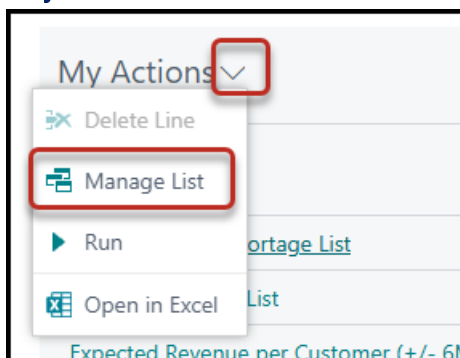
The Actions can be run by clicking on the chosen Action.

For instance: when you click on *Intercompany Relation List* the Page opens with the **Intercompany Relations** of TRIMIT.

By creating an Action List, a user can choose the Actions that he needs the most without adding them to the Role Center/Pages itself. This also keeps the solution upgradeable, and a user can do himself what normally should be done by development.

This will be elaborated in the paragraphs below.

My Actions – via a Role Center



A user can create his own Actions in the ListPart Page ***My Actions*** in a TRIMIT Role Center by clicking on **Manage List**.

The **Edit Page Actions** page opens . In this list, a user can add the Actions he wants.

Type	No. / Link	Name	All Users	Only Current Company	Generic Filters	Company Name ▼
Report	6037040	Check Material Shortage List	☒	☐	Report Request Defined	
Report	6037123	Replacement Call List	☒	☐	Report Request Defined	
Sales Statistics	CUSTOMEREX	Expected Revenue per Customer (+/- 6M)	☒	☐		
Link	https://my.trimit.com/	Link to MyTRIMIT	☒	☐		
Header		TRIMIT Intercompany	☐	☐		
Page	6036678	Intercompany Relation List	☐	☒		CRONUS Role Center
Page	6036554	Intercompany Purchase Orders	☐	☐		
Page	6036553	Intercompany Sales Orders	☐	☒		CRONUS Role Center
Header		Misc.	☐	☐		
PDM Report Set	ALL	All Reports	☐	☐		
→ Page	9305	Sales Orders pending Approval	☐	☐	Status: Pending Approval	

Default Collapse

With a checkmark in this field, the user can determine that the Lines beneath this Action of **Type Header** should be collapsed by default.

If so; removing the checkmark, will expand the Lines again.

Type

Actions can be of different **Types** (red frame in above picture). These will be discussed below:

Header

Actions of the **Type Header** are not real Actions. This Type can be used to add free text (**bold font**) into the list by filling the **Name** field. In the above picture, the *Headers* are used to divide the Actions into different Types of Actions, but every user is free if and how he wants to use the *Headers*.

Report

With **Type Report**, you can select a Report **No.** in the **No./Link** field from the Report List. The Object Caption of the Report will show up in the field **Name** but can be changed.

Codeunit

With **Type Codeunit**, you can select a Codeunit **No.** in the **No./Link** field from the Codeunit List. The Object Caption of the Codeunit will show up in the field **Name** but can be changed.

XMLport

With **Type XMLport**, you can select an XMLport **No.** in the **No./Link** field from the XMLport List. The Object Caption of the XMLport will show up in the field **Name** but can be changed.

Page

With the Action **Type Page**, you can select a Page **No.** in the **No./Link** field from the Page List. The Object Caption of the Page will show up in the field **Name** but can be changed.

Note

You are also able to look in detail at the **Search Table Lines** by using Page **6037208 Search Table Lines** in your **My Actions** ListPart Page in a TRIMIT Role Center.

And you can use any Filter, like i.e., **Table ID** to look for specific Search Table Lines.

Statistics Overview

This option can only be used if you also have one of the TRIMIT e-commerce sites (B2B, SalesAgent, Web Supplier).

With the Action **Type** *Statistics Overview*, you can select a Statistics Overview **Code** in the **No./Link** field. The **Name** of the **Code** will show up in the field **Name** but can be changed.

When clicking afterwards in the **My Actions** on the name, it will open a webpage with the selected Statistics in the Statistics Overview.

For more information see *White Paper – TRIMIT Extended Sales Statistics*.

Sales Statistics

Sales Statistics is a tool developed by TRIMIT that enables the user to export Sales Statistical data to, for instance, Excel. This feature is discussed in [Sales Statistics](#).

With the Action **Type** *Sales Statistics*, you can select an Extended Sales Statistics **Setup No.** in the **No./Link** field from the Extended Sales Statistics Setup List.

The **Name** of the **Setup No.** will show up in the field **Name** but can be changed.

Account Schedule Request

Account Schedule Request is a tool developed by TRIMIT that enables the user to run a standard BC Account Schedule Report. This feature is discussed in [Account Schedule Request](#).

PDM Report Set

With the **Type** *PDM Report Set*, you can select a PDM Report Set **No.** from the List in the **No./Link** field. The Description of the PDM Report Set will show up in the field **Name** but can be changed.

For more details regarding **PDM Report Set** see *White Paper – TRIMIT PDM Report Set*.

Link

With **Type** *Link*, you can enter a URL to open a website. In that case, the URL needs to be filled in **No./Link**.

Change Log

With **Type** *Change Log*, the Change Log Entries can be shown of the record you are standing on, so this option is not suited for the **My Actions** as well as for the **Page Actions**.

You do not have to enter a **No./Link** or a **Name**.

All Users

With a checkmark in this field, you can determine that this Action is applicable for all Users, and not only for the user that created this Action (see **blue** frame in the previous picture).

Without a checkmark in this field, it means that only the user that created this Action will see it in his My/Page Actions.

Only Current Company

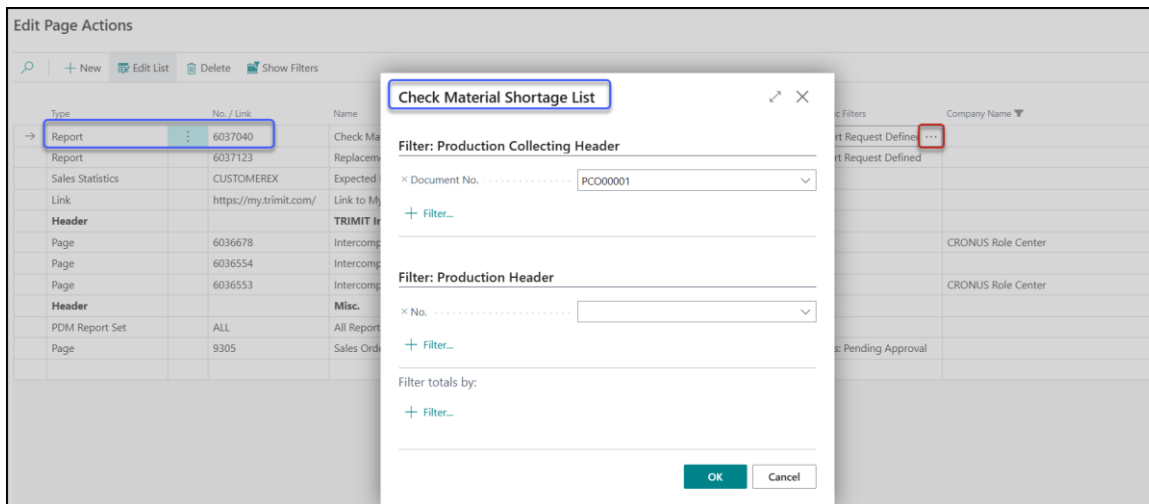
With a checkmark in this field, you can determine that this Action will only be in the My/Page Actions for the current company; in that case the field **Company Name** will be filled automatically with the **Name** of the current company (see **green** in the previous picture).

Without a checkmark in this field, it means that this Action will be in the My/Page Actions in any Company of the database.

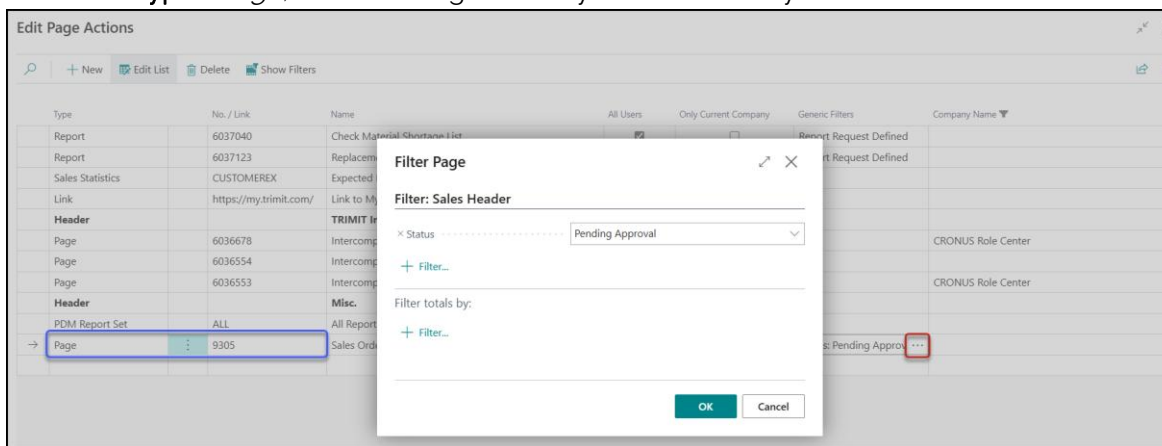
Generic Filters

Generic Filters can only be used for **Type** *Report* and *Page*.

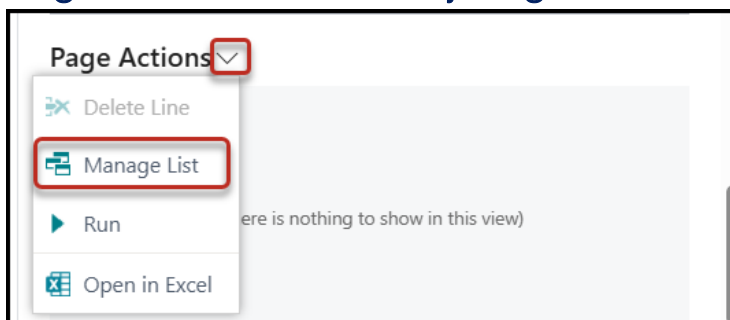
In case of **Type** = *Report*, when clicking on the ... it will open the Options page for the Report, and you can enter the Options and Filters for this Report.



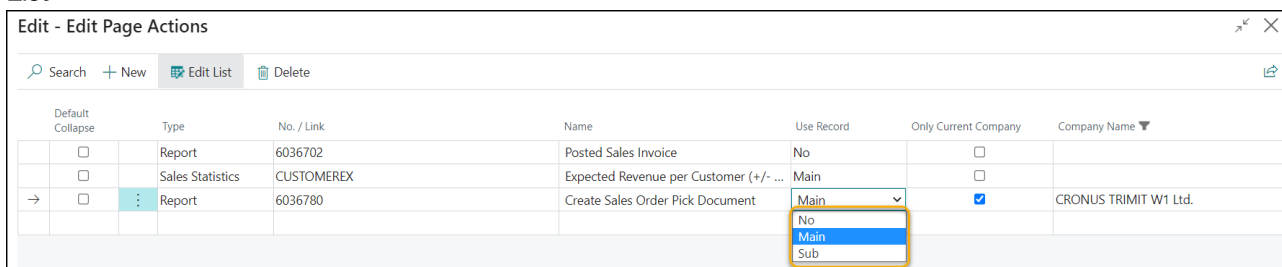
In case of **Type = Page**, when clicking on the ... you can enter any Filter on the Main Table of the page.



Page Actions – via many Pages



A user can create his own Actions in the FactBox **Page Actions** in many pages, by clicking on **Manage List**.



The **Edit Page Actions** page opens. In this list, a user can add the Actions he wants. See [My Actions – via a Role Center](#) for most of the fields.

Use Record

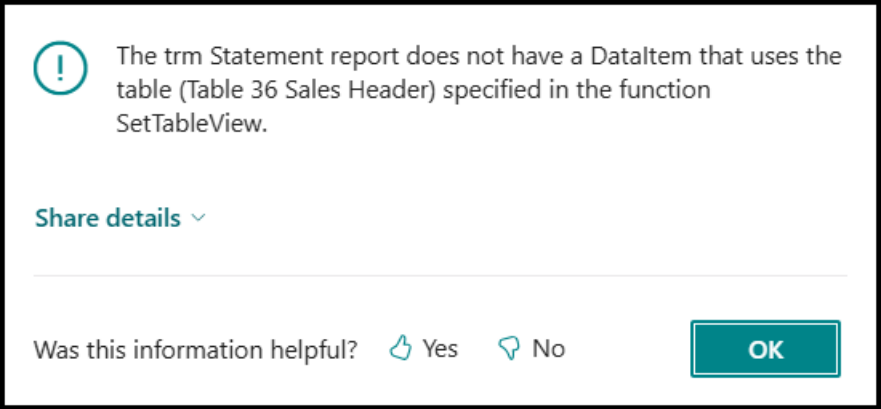
This field is only applicable in the **Page Actions** which can be added to many Pages (or might already be shown as a FactBox by default) and is not applicable in the **My Actions** in the Role Centers of TRIMIT.

If a specific Action needs to be run on a List or Page, there are three options:

1. The Action is a generic.
2. The Action is specific depending on the main record.
3. The Action is specific depending on the sub record.

To establish this TRIMIT has introduced the field **Use Record** (see orange in previous picture.)

The **Use Record** field has four options:

No	The Action is executed regardless which Record is selected.
Yes	The Action is executed for the record you are standing on in a List. I.e., for the Page Actions in the Customer Card or List. This also means that the Main Table for your Action needs to be this specific Customer to use the fields of it in your Action.
Main	The Action is executed on the Main record of the selected line/record. I.e., for the Page Actions in the Sales Order, this would be the Sales Header. This also means that the Main Table for your Action needs to be Table 36 Sales Header to use the fields of it for your Action, otherwise you will get an error message when you want to Run your Action: I.e.:  The dialog box contains an exclamation mark icon, the text "The trm Statement report does not have a Dataltem that uses the table (Table 36 Sales Header) specified in the function SetTableView.", a "Share details" link with a dropdown arrow, and a feedback section with "Was this information helpful?" followed by "Yes" and "No" buttons with thumbs up and down icons, and an "OK" button.
Sub	The Action is executed on the Sub record of the selected line/record. I.e., for the Page Actions in the Sales Order, this would be the Sales Line you are standing on. This also means that the Main Table for your Action needs to be Table 37 Sales Line to use the fields of it for your Action, otherwise you will get an error message when you want to Run your Action.

My Masters

You can create your own List of Masters in the ListPart Page **My Masters** in a TRIMIT Role Center by clicking on **Manage List**. These are the Masters that you are working on, or that are important to you. The List is specific for the **User ID** that created the records in this list.

My Masters

Delete Line

Manage List

Open

New

Open in Excel

My Masters - ADMIN · 2010

Master No. ↑	Description	Collection	Status Code	Picture
→ 2010	Amelia Trousers		READY	
2100	Lily Blouse	SS-CY		
2310	Freya Dress	FW-CY		
				+

In the ListPart Page clicking on the **Master No.** will open the Master Card.

My Masters ▾

Master No. ↑	Description	Collection	Status Code	Picture
2010	Amelia Trousers		READY	
2100	Lily Blouse	SS-CY		
2310	Freya Dress	FW-CY		

And now you are also able to see the list of *My Masters* as a separate View in the regular Masters List.

Masters: My Masters ▾

Views: All, **My Masters**

Filter list by: × My Master Exist
Yes ▾

+ Filter...

Filter totals by...

Item Type	No. ↑	Description	Status Code	Brand Code	Season Code	Collection No.	Group Master	BOM
Finished Goods	2010	Amelia Trousers	READY	FASHION				No
Finished Goods	2100	Lily Blouse		FASHION	02-SUMMER	SS-CY		Yes
Finished Goods	2310	Freya Dress		FASHION	02-SUMMER	FW-CY		No

My Collections

You can create your own List of Collections in the ListPart Page *My Collections* in a TRIMIT Role Center by clicking on **Manage List**. These are the Collections that you are working on, or that are important to you. The List is specific for the **User ID** that created the records in this list.

My Collections ▾

- Delete Line
- Manage List**
- Card
- Master Relations
- Delivery Periods
- Workflow
- Variant Overview
- Calculation Overview
- New
- Open in Excel

My Collections - ADMIN · FW-CY

Collection No. ↑	Description	Status Code
→ FW-CY	Fall/Winter Current Year	
SS-CY	Spring Summer Current Year	

In the ListPart Page clicking on the **Collection No.** will open the **Collection Master Relations** page, in which you can add Masters to the Collection.

My Collections ▾		
Collection No. ↑		Description
SS-CY	⋮	Spring Summer Current Year
FW-CY		Fall/Winter Current Year

After the **My Collections** list is filled, you are able to click on:

- ➔ **Card** will open the **Collection Card**.
- ➔ **Master Relations** will open the **Collection Master Relations**, in which you can also add Masters.
- ➔ **Delivery Periods** will open the **Delivery Periods** of the Collection you are standing on, in which you can also add the Delivery Periods for the Collection.
- ➔ **Workflow** will open the **Workflow** of the Collection, in which you are also able to create the Workflow.
- ➔ **Variant Overview** will open the **Master Variant Overview** of the Collection you are standing on, in which you get a Matrix of Masters/Colors that are in the Collection.
- ➔ **Calculation Overview** will open the **Calculation Overview** of the Collection you are standing on, in which you are also able to create/maintain Calculations for all the Masters in the Collection.

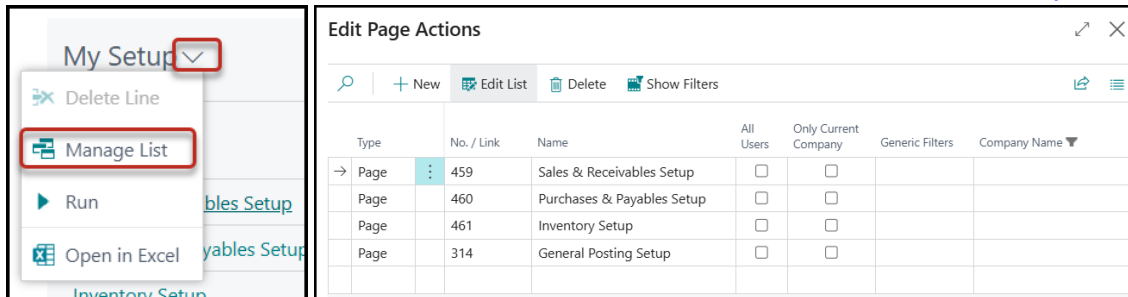
And now you are also able to see the list of **My Collection** as a separate View in the regular Collections List.

Collections: My Collections ▾		🔍	📄	+ New ▾	🗑️ Delete	✎ Edit List	🔗 Master Relations	📅 Delivery Periods	🔧 VarDim Type Subsets	📇 Card
Views		Collection No. ↑ Description Brand Code Season Code Delivery Description First Start Sales Delivery Period								
All	×	FW-CY	⋮	Fall/Winter Current Year				Q3-FALL		–
My Collections	⋮	SS-CY		Spring Summer Current Year				01-SPRING		2/3/2025
Active										
Inactive										
Filter list by:										

For more information regarding Collections, see *White Paper – TRIMIT Collection Management*.

My Setup

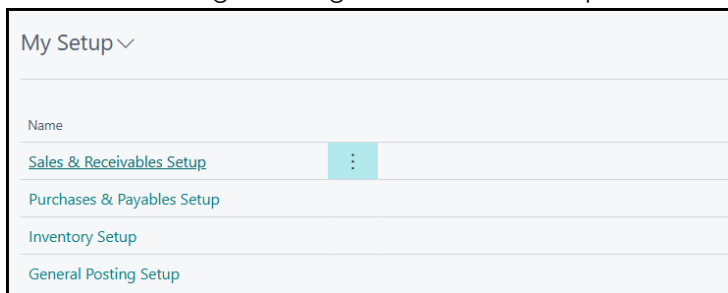
You can create your own List of Setups in the ListPart Page **My Setup** in a TRIMIT Role Center by clicking on **Manage List**. These are the Setups that are important to you. However, it is up to you to determine which Pages, Reports, etc. are important for you to see in this specific ListPart Page; the possibilities are actually the same as in the ListPart Page **My Actions**.



The screenshot shows the 'My Setup' dropdown menu with options: Delete Line, Manage List (highlighted), Run, and Open in Excel. To the right is the 'Edit Page Actions' table.

Type	No. / Link	Name	All Users	Only Current Company	Generic Filters	Company Name ▼
→ Page	459	Sales & Receivables Setup	☐	☐		
Page	460	Purchases & Payables Setup	☐	☐		
Page	461	Inventory Setup	☐	☐		
Page	314	General Posting Setup	☐	☐		

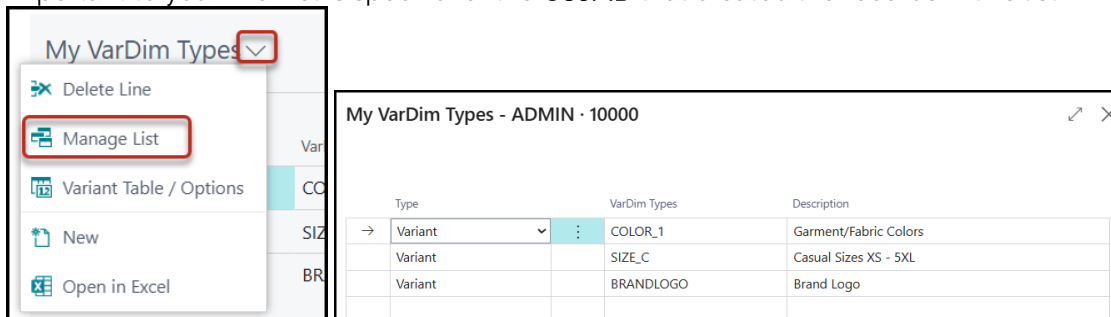
In the ListPart Page clicking on the **Name** will open the Card, Report, etc., depending on the **Type**.



The screenshot shows the 'My Setup' dropdown menu with a list of setups: Sales & Receivables Setup, Purchases & Payables Setup, Inventory Setup, and General Posting Setup. The 'Sales & Receivables Setup' item is highlighted with a blue bar and a vertical ellipsis menu icon.

My VarDim Types

You can create your own List of VarDim Types in the ListPart Page **My VarDim Types** in a TRIMIT Role Center by clicking on **Manage List**. These are the VarDim Types that you are working on, or that are important to you. The List is specific for the **User ID** that created the records in this list.



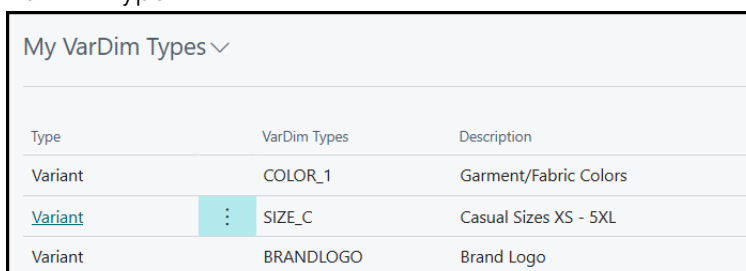
The screenshot shows the 'My VarDim Types' dropdown menu with options: Delete Line, Manage List (highlighted), Variant Table / Options, New, and Open in Excel. To the right is the 'My VarDim Types - ADMIN - 10000' table.

Type	VarDim Types	Description
→ Variant	COLOR_1	Garment/Fabric Colors
Variant	SIZE_C	Casual Sizes XS - 5XL
Variant	BRANDLOGO	Brand Logo

After the **My VarDim Types** list is filled, you are able to click on:

- ➔ **Variant Table/Options** which will open the **VarDim Variant Option** page to see the Variants.

In the ListPart Page clicking on the **Type** if it is *Variant*, will open the **VarDim Variant Option** page, in which you can add Options (i.e., Colors, Sizes, Wood Types, etc.) to the VarDim Type.



The screenshot shows the 'My VarDim Types' dropdown menu with a list of VarDim Types: Variant, Variant, and Variant. The 'Variant' item is highlighted with a blue bar and a vertical ellipsis menu icon.

And now you are also able to see the list of *My VarDim Types* as a separate View in the regular VarDim Types List.

The screenshot shows the 'VarDim Types' interface. On the left, a sidebar lists various views: 'All', 'My VarDim Types' (highlighted with a red box), 'VarDim Master', 'Composition', 'Care Label', 'Additional Info', 'Measurement Chart', and 'Assortment'. The main area displays a table of VarDim types. The table has columns: Type, No. ↑, VarDim Variant, VarDim Type Name, Dimen..., Limited Usage, VarDim Attribute Name, and Filter C. The data rows are as follows:

Type	No. ↑	VarDim Variant	VarDim Type Name	Dimen...	Limited Usage	VarDim Attribute Name	Filter C
Variant	BRANDLOGO	31	Brand Logo	No			
Variant	COLOR_1	10	Garment/Fabric Colors	No	VarDim Ma...	TRIMIT_COLOR	
Dimension	MES_BODY		Measure Body Length (cm)	No			
Variant	SIZE_C	20	Casual Sizes XS - 5XL	No	VarDim Ma...	TRIMIT_SIZE	

TRIMIT Search Function

TRIMIT has included a new **Search** Function, which makes it possible for the user to find Documents much easier than in standard Business Central. The Search Functions can be found in the Actions of the specific TRIMIT Profiles (Roles).

The screenshot shows the 'CRONUS Role Center' interface. At the top, there are navigation tabs: Finance, CRM, Sales, Purchase, Product Design, Logistics, Production, Portals, and Posted Documents. Below these are sub-tabs: Customers, Vendors, Sales Orders, Complaints, Purchase Orders, Masters, and Pick Documents. The main area has a headline: 'Click to learn more on MyTRIMIT with doc search and AI help'. To the right, there is an 'Actions' menu with several options: '+ New Sales Order', '+ New Sales Credit Memo', '+ New Complaint', '+ New Purchase Order', '+ New Purchase Credit Memo', '+ New Pick Document', '+ New Master by Wizard', '> Sales Statistics', '> Task', '> Find' (highlighted with a red box), '> Setup', '> TRIMIT Help', and 'Reports'. Below the 'Find' option, there are two more options: 'Navigate' and 'Search' (highlighted with a red box).

If you click on the *Find, Search*, the following Page opens. In this Page, you can search very easily for all the entities shown. There is no need for using '@', '*' or any other symbol. This is illustrated below.

The screenshot shows the 'Search Page' interface. It has a header with a back arrow, a search icon, and a 'Saved' status. The page is divided into several sections: 'General', 'Who Ordered', 'Date Limit for Posted Documents', 'Sales', and 'Purchase'. Each section contains search fields and filters. The 'General' section has 'Item Search' and 'Master Search' fields. The 'Who Ordered' section has 'By Item' and 'By Master' fields. The 'Date Limit for Posted Documents' section has a 'Date' field with a date picker set to '5/19/2025'. The 'Sales' section has 'Customer Search', 'Sales Order Search', 'Posted Sales Invoice Search' (with a red box around the word 'fashion'), and 'Posted Sales Credit Memo Search'. The 'Purchase' section has 'Vendor Search', 'Purchase Order Search', 'Posted Purchase Invoice Search', and 'Posted Purchase Credit Memo Search'.

In each Field, (individually) you can enter a Filter and press **OK**:

Item Search	A list of Items will be shown based on the entered Filter.
Master Search	A list of Masters will be shown based on the entered Filter.
By Item	A list of Sales Document Lines will be shown with an Item in it based on the entered Filter.
By Master	A list of Sales Document Lines will be shown with a Master in it based on the entered Filter.
Date	This field will by default be filled with the Work Date – 90 Days. You can also use the field Default Search Date Start in the Role Center Setup to set this field. This field will limit the filtered Posted Sales-/Purchase Documents as described below.
Customer Search	A list of Customers will be shown based on the entered Filter.
Sales Order Search	A list of Sales Orders will be shown based on the entered Filter.
Posted Sales Shipment Search	A list of Posted Sales Shipments will be shown based on the entered Filter and the Date on the FastTab Date Limit for Posted Documents .
Posted Sales Invoice Search	A list of Posted Sales Invoices will be shown based on the entered Filter and the Date on the FastTab Date Limit for Posted Documents .
Posted Sales Credit Memo Search	A list of Posted Credit Memos will be shown based on the entered Filter and the Date on the FastTab Date Limit for Posted Documents .
Vendor Search	A list of Vendors will be shown based on the entered Filter.
Purchase Order Search	A list of Purchase Orders will be shown based on the entered Filter.
Posted Purchase Receipts Search	A list of Posted Purchase Receipts will be shown based on the entered Filter and the Date on the FastTab Date Limit for Posted Documents .
Posted Purchase Invoice Search	A list of Posted Purchase Invoices will be shown based on the entered Filter and the Date on the FastTab Date Limit for Posted Documents .
Posted Purchase Credit Memo Search	A list of Posted Credit Memos will be shown based on the entered Filter and the Date on the FastTab Date Limit for Posted Documents .

If for instance the field **Posted Sales Invoice Search** is filled with *fashion* the following list will pop-up:

No.	Custom... No.	Customer Name	Currency Code	Due Date	Amount	Amount Including VAT	Remaining Amount	Location Code	No. Printed	Clos
103296	2000	The Fashion Store UK		6/11/2025	1,259.65	1,574.56	1,574.56	BLUE	0	No
103293	2000	The Fashion Store UK		6/1/2025	1,691.53	2,114.41	2,114.41	BLUE	0	No

If there is only one result, the appropriate Card will be opened immediately.

It is also possible to use a part of the name of the Customer or Vendor in the other fields. This way it is possible to avoid entering Document Numbers.

This is illustrated with the following example:

Let us assume that the customer *The Fashion Store UK* calls and has a question about an Invoice. While talking on the phone the user can type *fashion* in the field **Posted Sales Invoice Search** as shown above and the result will be a list of **Posted Sales Invoices** of this Customer.

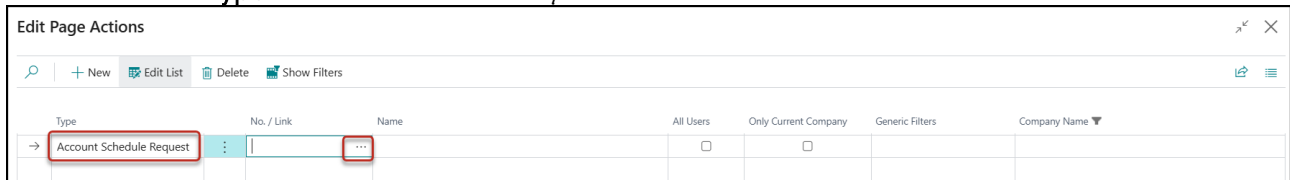
This way, searching for the required document goes amazingly fast. The next step is to select the right Invoice **No.** and click on it to open the Document.

Account Schedule Request

This Chapter describes how to create an Action of the **Type Account Schedule Request**. The purpose of this Action is to create an Account Schedule Report.

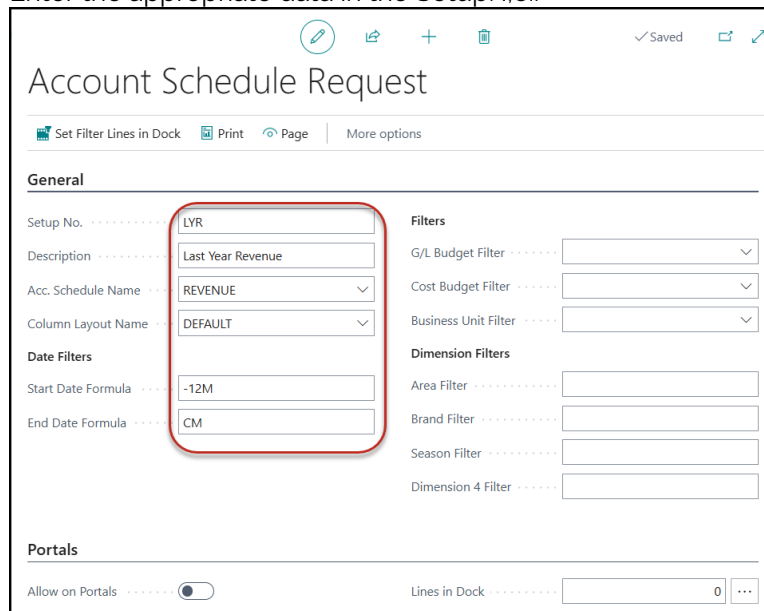
In order to create an Action of the **Type Account Schedule Request** the following steps need to be taken:

- Go to a **Page Actions** FactBox or to the **My Actions** ListPart Page.
- Click **Manage List**. The **My Actions** List opens
- Choose **Type Account Schedule Request**.



The screenshot shows the 'Edit Page Actions' window. At the top, there are buttons for '+ New', 'Edit List', 'Delete', and 'Show Filters'. Below is a table with columns: Type, No. / Link, Name, All Users, Only Current Company, Generic Filters, and Company Name. The 'Account Schedule Request' action is highlighted in the 'Type' column, and its corresponding 'No. / Link' is also highlighted.

- Drill down in the field **No./Link**. The **Account Schedule Setup List** opens.
- Click **+ New**. The **Account Schedule Setup** opens.
- Enter the appropriate data in the Setup, i.e.:



The screenshot shows the 'Account Schedule Request' setup form. The 'General' section is highlighted with a red box. It contains the following fields: Setup No. (LYR), Description (Last Year Revenue), Acc. Schedule Name (REVENUE), Column Layout Name (DEFAULT), Start Date Formula (-12M), and End Date Formula (CM). Other sections include 'Filters' (G/L Budget Filter, Cost Budget Filter, Business Unit Filter), 'Dimension Filters' (Area Filter, Brand Filter, Season Filter, Dimension 4 Filter), and 'Portals' (Allow on Portals toggle, Lines in Dock dropdown).

Fields of the Account Schedule Setup

Setup No. and Description

Here you enter the **No.** and **Description** of the Account Schedule Request.

Acc. Schedule Name and Column Layout Name

In these fields, you can select the appropriate **Account Schedule Name** and **Column Layout Name**. Both are standard BC and will not be described in detail here.

Start Date Formula and End Date Formula

With these Date Formulas you determine what the **Starting Date** and **Ending Date** is compared to the Date on which the **Account Schedule Request** Action is executed.

G/L Budget Filter, Cost Budget Filter, and Business Unit Filter

In these fields, you can enter the **G/L Budget**, **Cost Budget**, and **Business Unit** respectively if these filters are required. These are standard Business Central entities and will not be described in detail here.

Global Dimension Filters

In these fields, you can enter filters of **Global Dimension 1** and **Global Dimension 2**, which are set up in the Demo Company for *Brands* and *Seasons*.

Allow in Portals

With this field you can determine if this specific **Account Schedule Request** could also be chosen on the Portals. I.e., for the **InSite Portal**.

Lines in Dock

With this field, you can determine which Lines of the **Account Schedule Request** should be shown in the Dock on a Portal if **Allow in Portals** has been set to *Yes*.

- ➔ After entering appropriate data, click **OK** to return to *Account Schedule Requests* List:

Account Schedule Requests							
Setup No. ↑	Description	Acc. Schedule Name	Column Layout Name	Start Date Formula	End Date Formula	Allow on Portals	Filter in Dashboard
BALANCE	Balance	M-BALANCE	M-BALANCE	-CY	CY	☒	☒
REVENUE	Revenue	REVENUE	REVENUE	-CY	CY	☒	☒
LYR	Last Year Revenue	REVENUE	DEFAULT	-12M	CM	☐	☐

- ➔ Click **OK** button to go back to the **My Actions** page.
- ➔ Click **Close** to go back to the ListPart Page:

My Actions

Name

Last Year Revenue

- ➔ By double clicking on the **Name** (or click *My Actions, Run*), the appropriate Account Schedule Report can be created:

Account Schedule

Printer (Handled by the browser)

Options Show more

Layout

Acc. Schedule Name REVENUE

Column Layout Name DEFAULT

Filters

Starting Date 12/20/2020

Ending Date 12/31/2021

G/L Budget

Advanced

Send to... Print Preview Cancel

Revenues

12/20/2021
Page 1 / 1
ADMIN

Period: 12/20/20..12/31/21
My Company

Fiscal Start Date: 01/01/21
All amounts are in GBP.

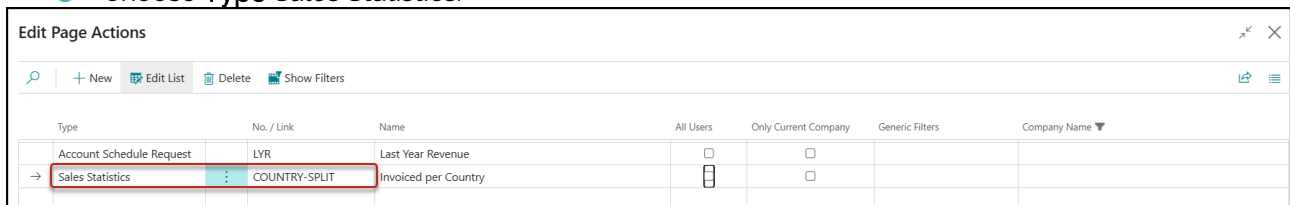
Description	Net Change Debit	Net Change Credit	Balance at Date Debit	Balance at Date Credit
REVENUE				
Sales of Retail				
Sales, Retail - Dom.		1,021.42		1,021.42
Sales, Retail - EU				
Sales, Retail - Export				
Job Sales Adjmt, Retail				
Sales of Retail, Total		1,021.42		1,021.42
Revenue Area 10..30, Total				
Revenue Area 40..85, Total				
Revenue, no Area code, Total		359.90		359.90
Revenue, Total		1,021.42		1,021.42

Sales Statistics

The purpose of Actions of the **Type Sales Statistic** is to export Sales related Statistical Data from TRIMIT for instance to Excel. This is limited to specific decimal figures, such as Quantities, Revenues, Budgets, etc. This will be described below. In this chapter is also described how to create and use Actions of this Type.

In order to create an Action of the **Type Statistic request** the following steps needs to be taken:

- ➔ Go to a **Page Actions** FactBox or to the **My Actions** ListPart Page.
- ➔ Click **Manage List**. The **My Actions** List opens
- ➔ Choose **Type Sales Statistics**.



Type	No. / Link	Name	All Users	Only Current Company	Generic Filters	Company Name ▼
Account Schedule Request	LYR	Last Year Revenue	☐	☐		
➔ Sales Statistics	COUNTRY-SPLIT	Invoiced per Country	☐	☐		

- ➔ Drill down in the field **No./Link**. The **Extended Sales Statistic Setup List** opens, and you can choose a specific **Setup No.**
- ➔ How to setup these **Setup No.** is in detail described in the *White Paper – TRIMIT Extended Sales Statistics*.

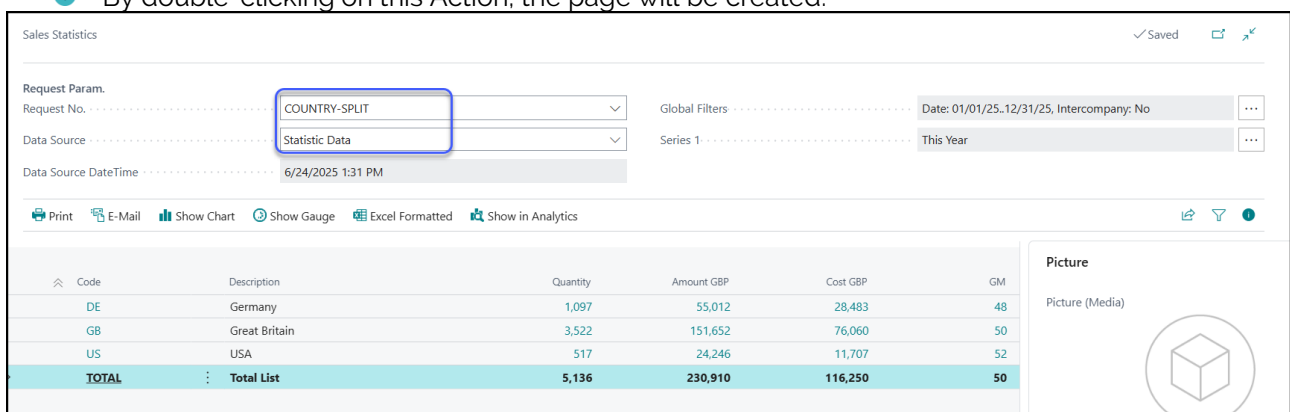
Let us assume that you want to create an overview on the screen in which you can compare the revenue versus the costs for different countries. This could be the **COUNTRY-SPLIT** setup.

- ➔ This Sales Statistic Setup No. is now visible in the Page Actions.



My Actions ▼	
Name	
Last Year Revenue	⋮
Invoiced per Country	

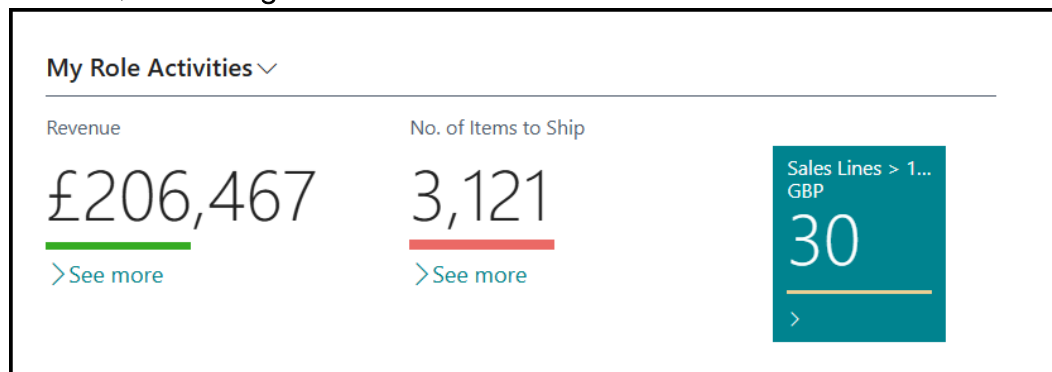
- ➔ By double-clicking on this Action, the page will be created:



Code	Description	Quantity	Amount GBP	Cost GBP	GM
DE	Germany	1,097	55,012	28,483	48
GB	Great Britain	3,522	151,652	76,060	50
US	USA	517	24,246	11,707	52
TOTAL	Total List	5,136	230,910	116,250	50

My Role Activities

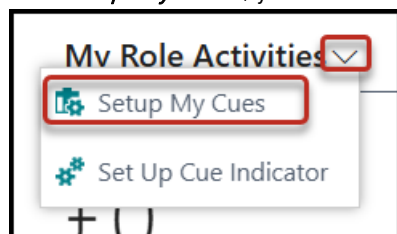
As described in the [Role Center Setup](#) you can already influence the TRIMIT Role Centers for **Small Business**, **PDM/Design** and **Customer Service**.



Setup My Cues

But in all the TRIMIT Role Centers, you also are able to add your own Indicators and Cues without any customization via the **My Role Activities** functionality in the TRIMIT Role Centers.

Via **Setup My Cues**, you can create your own Indicators and Cues:



My Cue Setup									
+ New Edit List Delete Show Filters Related Fewer options									
Caption	Tile Type	Calculation	Table/Statistics	DrillDown Page	Field to Sum	Unit/Curre... Symbol	Generic Filter	Company Filter	
Revenue	Indicator	Statistics	Open Orders per Country (+/- 1Y) (COUN...	0	Amount GBP	£	—		
→ No. of Items to Ship	Indicator	Sum	Sales Line (37)	0	Qty. to Ship (Base) (5418)		—		
Sales Lines > 1000 GBP	Standard	Count	Sales Line (37)	0			Amount: >1,000		

You can create a maximum of 10 own Cues (**Tile Type = Standard**) and 5 own Indicators (**Tile Type = Indicator**), and they will only be shown in the list to you based on your User ID and because you created them.

Description of the Fields

Caption

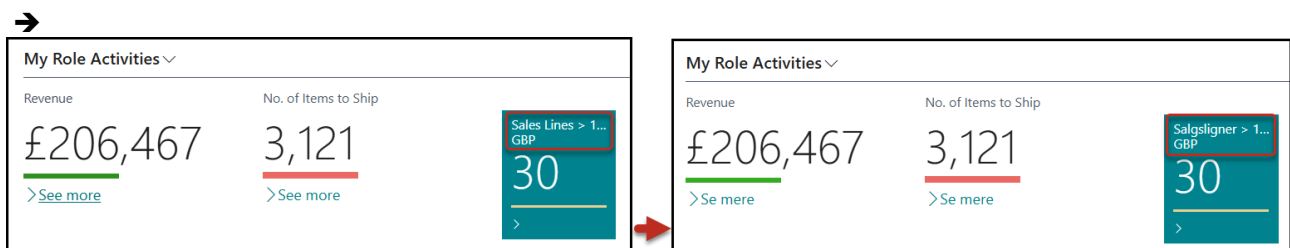
The name of the Cue/Indicator.

When clicking **Alt+Arrow Down**, you are also able to enter a **Language Code** related Caption.

The 'Caption Class My Actions' table shows the following data:

Language Code ↑	User Defined Caption
→ ENU	Sales Lines > 1000 GBP
DEU	Verkaufzeilen > 1000 GBP
NLD	Verkoopregels > 1000 GBP
DAN	Salgsligner > 1000 GBP

This will determine the Caption of the Cue based on the **Language** in the general **My Settings**.



English (United States)

Danish (Denmark)

My Settings - ADMIN

Role TRIMIT Small Business ...

Company CRONUS TRIMIT W1 Ltd. ...

Work Date 6/4/2025 ...

Region English (United States) ...

Language **Danish (Denmark)** ...

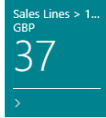
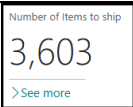
Time Zone (UTC+01:00) Amsterdam, Berlin, Bern, Ro... ...

Notifications Change when I receive notifications.

Tile Type

The **Tile Type** determines how the information should be shown.

You can choose between the following two options:

Standard	 The Cue will be shown as a Cue (Data Cue):
Indicator	 The Cue will be shown as an Indicator (Wide Data Cue):

Calculation

The **Calculation** you can choose depends on the **Tile Type**:

For **Tile Type Standard**, the **Calculation** is set to *Count*, and you cannot change it: it will always show the number of records based on the **Table/Statistics**, **Generic Filters**, and **Company Filter** of the **My Cue Setup**.

For **Tile Type Indicator**, you can choose between the following three options:

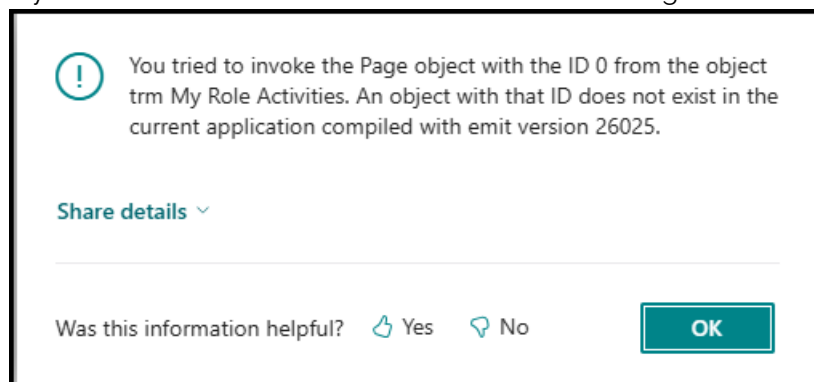
Count	The number of records based on the Table/Statistics (a Table) , General Filter , Company Filter
Statistics	The total value will be shown based on Table/Statistics (an Extended Sales Statistics Setup), Field to Sum , General Filter , Company Filter
Sum	The sum of the Field to Sum of the Table/Statistics (a Table), General Filter , Company Filter

Table/Statistics

If **Calculation** is set to *Count* or *Sum*, you can choose a **Table** for which you want to have the number of records or the sum of a specific **Field to Sum**.

If **Calculation** is set to *Statistics*, you can choose an **Extended Sales Statistics Setup** from which you want to see the total Value. Make sure that the **Data Source** of this Setup is set to *Statistic Data*.

If you choose a Table for which there is no default Page connected, you will get an error message like:



DrillDown Page

In case the **Table/Statistics** Table No. does not have a default Page connected, you must add a **DrillDown Page**, by adding this Field via *Personalize* and choosing the correct Page to show the records of the chosen **Table/Statistics**.

This Field can also be used if you want to use a different Page as the default Page to show the records. If this Field is not filled – showing *0 (zero)* – the default Page will be taken.

Field to Sum

If **Calculation** is *Statistics*, you can choose one of the options that can be chosen for the Columns of the **Table/Statistics**.

If **Calculation** is *Sum*, you can choose a Field in the **Table/Statistics** from which you want to see the sum.

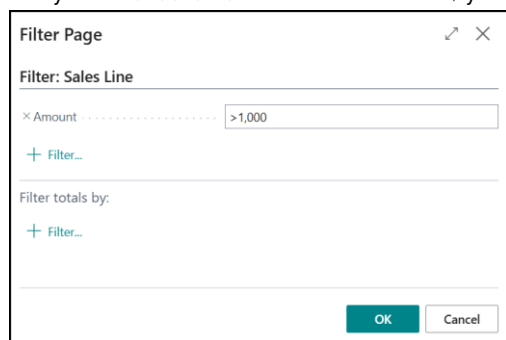
Unit/Currency Symbol

You can enter a **Unit of Measure** or a **Symbol** that you want to see for the Indicator

This is simply a Text. Therefore, no calculations are involved for different Unit of Measures or Currencies.

Generic Filter

Only for **Calculation** *Count* and *Sum*, you can enter Filters on the **Table/Statistics** Table. I.e.:



Company Filter

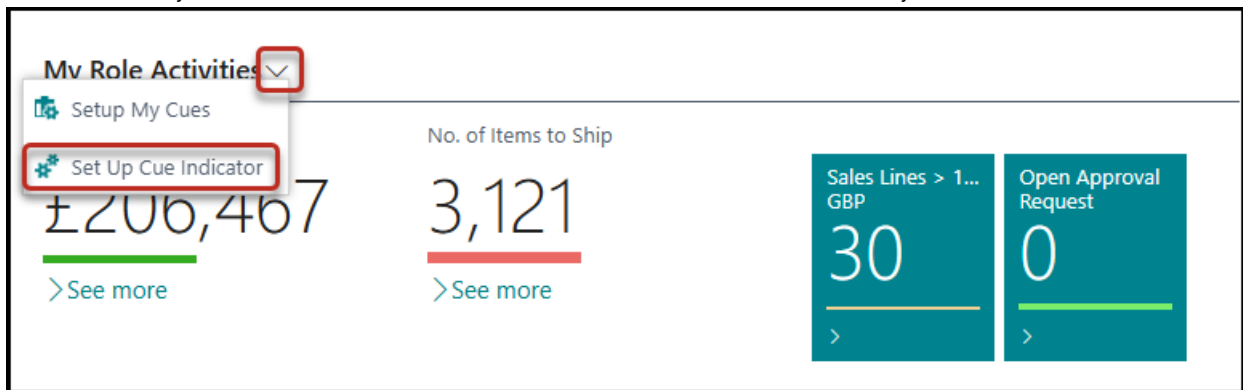
By default, the Cue Setup you created will be shown in all Companies.

Keep in mind that if you have a **Calculation** *Statistics*, the Cue will only be shown if the **Table/Statistics** is also available in the Company that you are in.

By entering a **Company Filter**, the Cue will only be shown in that specific Company.

Activities, Set Up Cue Indicator

Via **Activities, Setup Cue Indicator** you are also able to determine the Thresholds for your own Cues and Indicators, as you can do for all the other Cues/Indicators that are already in the Role Center.



Cue Setup							
Edit List							
Cue Name	Low Range Style	Threshold 1	Middle Range Style	Threshold 2	High Range Style	Personalized	
My Indicator 5	None	0.00	None	0.00	None	☐	
My Indicator 4	None	0.00	None	0.00	None	☐	
My Indicator 3	None	0.00	None	0.00	None	☐	
My Indicator 2	Favorable	1,000.00	Ambiguous	1,500.00	Unfavorable	☒	
My Indicator 1	Unfavorable	100,000.00	Ambiguous	150,000.00	Favorable	☒	
My Cue 10	None	0.00	None	0.00	None	☐	
My Cue 9	None	0.00	None	0.00	None	☐	
My Cue 8	None	0.00	None	0.00	None	☐	
My Cue 7	None	0.00	None	0.00	None	☐	
My Cue 6	None	0.00	None	0.00	None	☐	
My Cue 5	None	0.00	None	0.00	None	☐	
My Cue 4	None	0.00	None	0.00	None	☐	
My Cue 3	None	0.00	None	0.00	None	☐	
My Cue 2	Favorable	1.00	Ambiguous	10.00	Unfavorable	☒	
My Cue 1	Unfavorable	20.00	Ambiguous	100.00	Favorable	☒	

My Indicator 1 relates to the first Indicator that you see in this Company/Role Center.

My Indicator 2 relates to the second Indicator that you see in this Company/Role Center.

Etc.

My Cue 1 relates to the first Cue that you see in this Company/Role Center.

My Cue 2 relates to the second Cue that you see in this Company/Role Center.

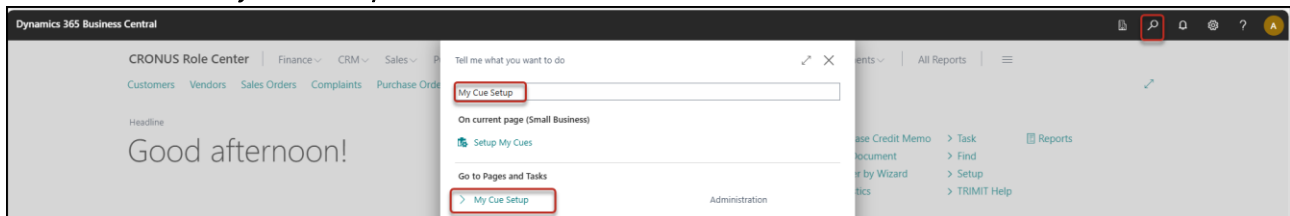
Etc.

Extra Options for My Role Activities

Via **My Role Activities** in the TRIMIT Role Center, you will only see the Cues and Indicators that you created yourself as a User and that were automatically registered as having **Limitation User** – a field that you can add to the page.

But you are also able to create **My Role Activities** for everyone, or for a specific TRIMIT Profile (Role).

In that case, find **My Cue Setup** via **Search**.



In the page **My Cue Setup**, there are also other fields that you can add via **Personalize** – in comparison to what you saw via **My Role Activity**:

My Cue Setup											
+ New Edit List Delete Show Filters Related Fewer options											
Limitation	User ID	Profile ID	Caption	Tile Type	Calculation	Table/Statistics	DrillDown Page	Field to Sum	Unit/Currency Symbol	Generic Filter	Company Filter
User	ADMIN	TRM_SB	Revenue	Indicator	Statistics	Open Orders per Country (+/- 1Y) (COUN...	0	Amount GBP	£		
User	ADMIN	TRM_SB	No. of Items to Ship	Indicator	Sum	Sales Line (37)	0	Qty. to Ship (Base) (5418)			
User	ADMIN	TRM_SB	Sales Lines > 1000 GBP	Standard	Count	Sales Line (37)	0			Amount: >1,000	

When you create the **My Cue Setup** Lines via the TRIMIT Role Center, the **Limitation** is automatically set to **User**, the **User ID** is automatically filled with the User ID of the User that created the Line, and the **Profile ID** is automatically filled with the Profile (Role) in which it was created.

In that case, the created Cues/Indicators will only be visible for the **User ID** but in all **Profiles (Roles)** that the **User ID** is choosing – even though the **Profile ID** is filled.

Limitation

But you can also create **My Cue Setup** for more people at once by taking the **Limitation** into the page via **Personalize**.

If set to **Profile**, the Cue/Indicator will be available for All Users of a specific **TRIMIT Profile (Role)**.

If set to **All**, the Cue/Indicator will be available for All Users in every **TRIMIT Profile (Role)**.

Of course, we are however still filtering on the [Generic Filters](#), and [Company Filter](#).

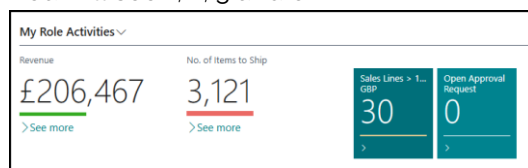
Some Examples

If **My Cue Setup** looks like:

My Cue Setup											
All + New Edit List Delete Show Filters Related Automate Fewer options											
Limitation	User ID	Profile ID	Caption	Tile Type	Calculation	Table/Statistics	DrillDown Page	Field to Sum	Unit/Currency Symbol	Generic Filter	Company Filter
User 1	ADMIN	TRM_SB	Revenue	Indicator	Statistics	Open Orders per Country (+/- 1Y) (L...	0	Amount GBP	£		
User 2	ADMIN	TRM_SB	No. of Items to Ship	Indicator	Sum	Sales Line (37)	0	Qty. to Ship (Base) (5418)			
User 3	ADMIN	TRM_SB	Sales Lines > 1000 GBP	Standard	Count	Sales Line (37)	0			Amount: > 1,000	
All 4	ADMIN	TRM_CS	Invoiced per Country	Indicator	Statistics	Invoiced per Country (COUNTRY-SP...	0	Amount GBP			
Profile 5	ADMIN	TRM_SB	Number of Sales Orders	Standard	Count	Sales Header (36)	0				CRONUS TRIMIT W1 Ltd.
All 6	ADMIN	TRM_SB	Open Approval Request	Standard	Count	Approval Entry (454)	654				CRONUS TRIMIT W1 Ltd.

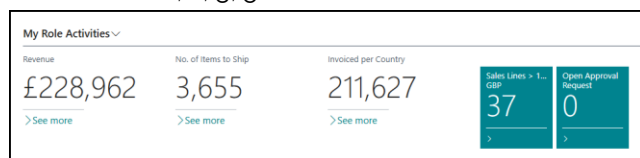
Example 1:

You are **User ID ADMIN**; you are in **Role Center TRM_SB** and in **Company CRONUS Role Center**.
You will see 1, 2, 3 and 6



Example 2:

You are **User ID ADMIN**; you are in **Role Center TRM_CS** and in **Company CRONUS TRIMIT W1 Ltd.**
You will see 1, 2, 3, 5 and 6



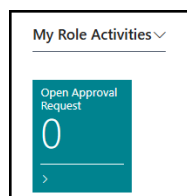
Example 3:

You are **User ID ADMIN**; you are in **Role Center TRM_SB** and in **Company CRONUS TRIMIT W1 Ltd.**
You will see 1, 2, 3, 4, 5 and 6



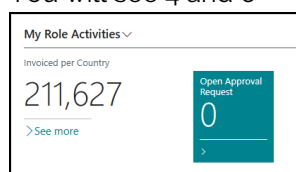
Example 4:

You are **User ID KBI**; you are in **Role Center TRM_SB** and in **Company CRONUS Role Center**.
You will see 6



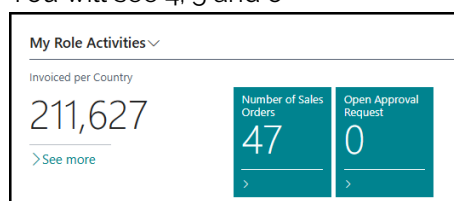
Example 5:

You are **User ID KBI**; you are in **Role Center TRM_CS** and in **Company CRONUS TRIMIT W1 Ltd.**
You will see 4 and 6



Example 6:

You are **User ID KBI**; you are in **Role Center TRM_SB** and in **Company CRONUS TRIMIT W1 Ltd.**
You will see 4, 5 and 6



Conclusion

In this document has extensively been described which features TRIMIT has added in order to enhance the way of working optimally with the TRIMIT Role Centers. This includes:

- ➔ TRIMIT Profiles (Roles)
- ➔ New ListPart Pages on TRIMIT Role Centers like *My Actions*
- ➔ New FactBox: *Page Actions*
- ➔ Account Schedule Requests and Statistic Requests
- ➔ Search Function
- ➔ TRIMIT Help
- ➔ My Role Activities / My Cue Setup

The function of these features is to improve the user experience of Business Central/TRIMIT on the condition that the solution stays upgradeable.

TRIMIT strongly believes that this is an incredibly good selling point and needs appropriate attention both in pre-sales as during implementation.