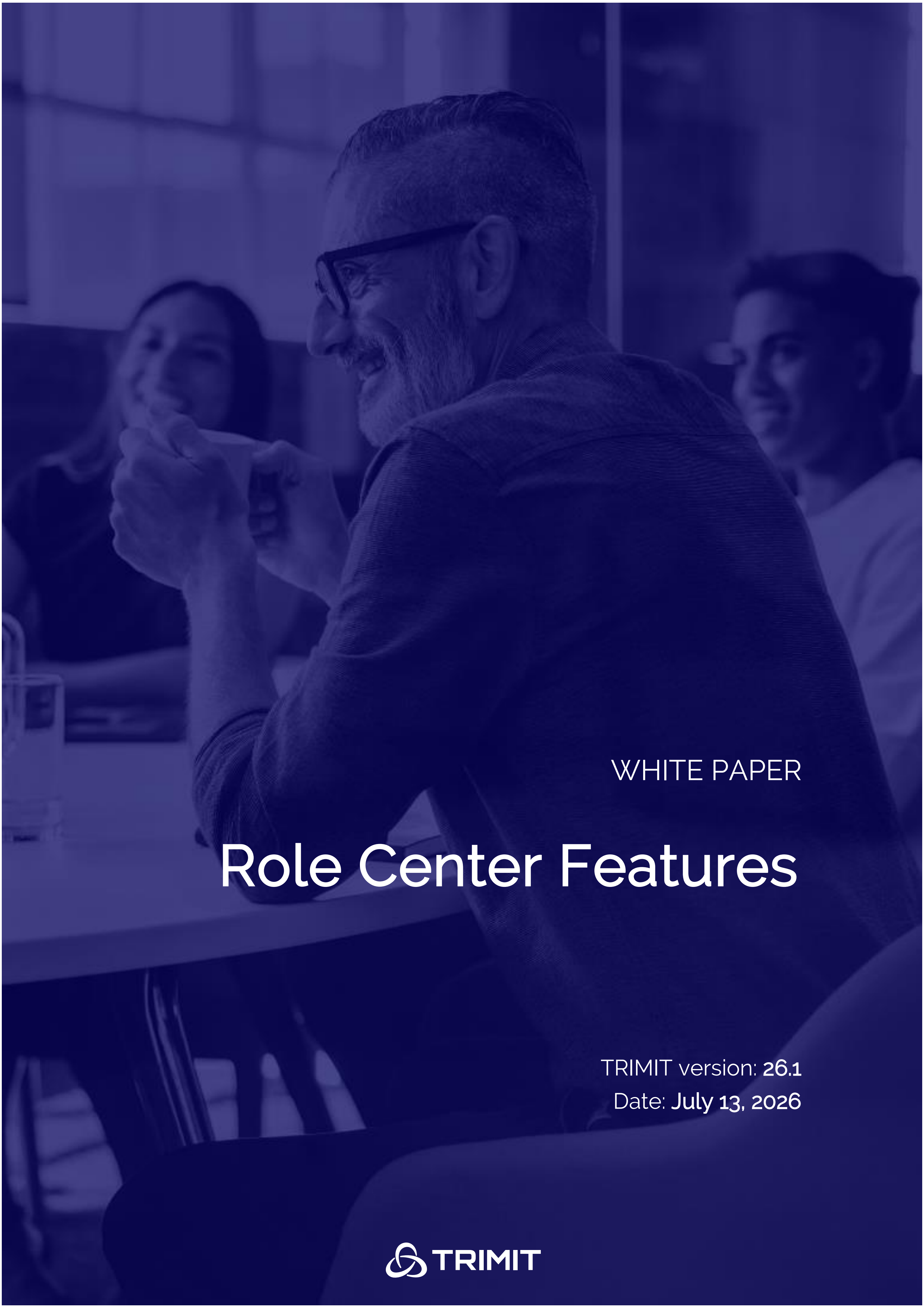


WHITE PAPER

Role Center Features

TRIMIT version: **26.1**
Date: **July 13, 2026**

TRIMIT

Table of Contents

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

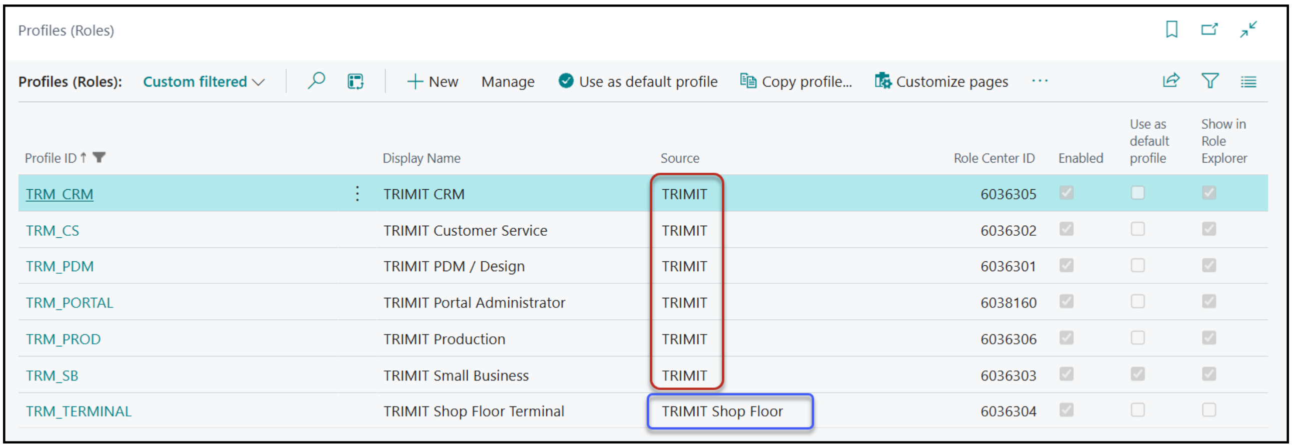
6036301 trm PDM Processor Role Center
6036302 trm Cust Service Role Center
6036303 trm Small Bus. Role Center
6036304 trm Shop Floor Role Center
6036305 trm CRM Role Center
6036306 trm Production Role Center
6036330 trm PDM Processor Activities
6036331 trm Cust. Service Activities
6036332 trm Small Business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

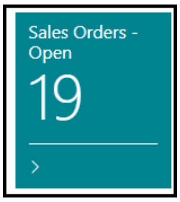
Currently TRIMIT has added seven extra Profiles (Roles).
You can find them in the ***Profiles (Roles)*** list by using **Search** *Profiles*
The TRIMIT Profiles (Roles) start all with *TRM_*



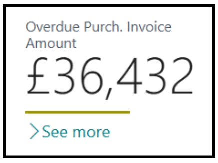
Profile ID	Display Name	Source	Role Center ID	Enabled	Use as default profile	Show in Role Explorer
TRM_CRM	TRIMIT CRM	TRIMIT	6036305	☑	☐	☑
TRM_CS	TRIMIT Customer Service	TRIMIT	6036302	☑	☐	☑
TRM_PDM	TRIMIT PDM / Design	TRIMIT	6036301	☑	☐	☑
TRM_PORTAL	TRIMIT Portal Administrator	TRIMIT	6038160	☑	☐	☑
TRM_PROD	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.

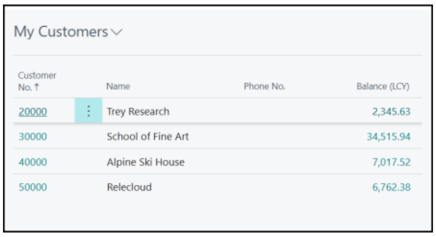
Every Profile (Role) has its specific elements for a group of users with the same role in a Company.

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*).

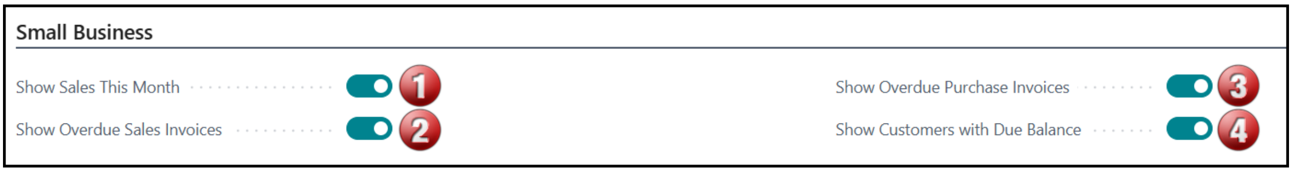
When talking about a **ListPart Page** in a Role Center we mean: 

(BC calls them *ListPart Page* or *CardPart Page*).

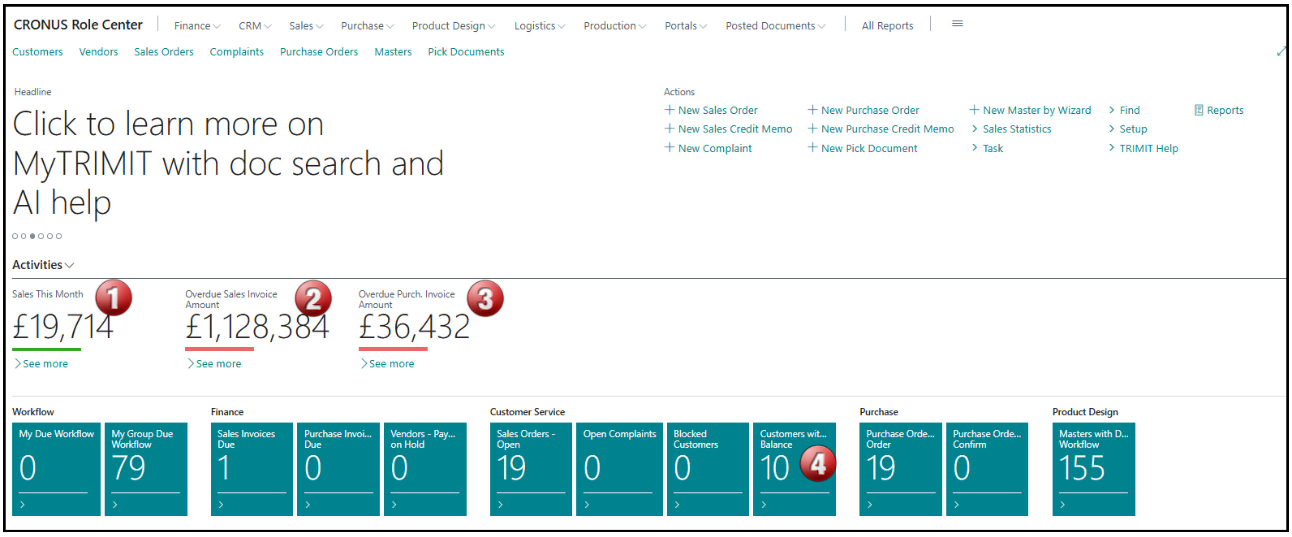
Role Center Setup

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

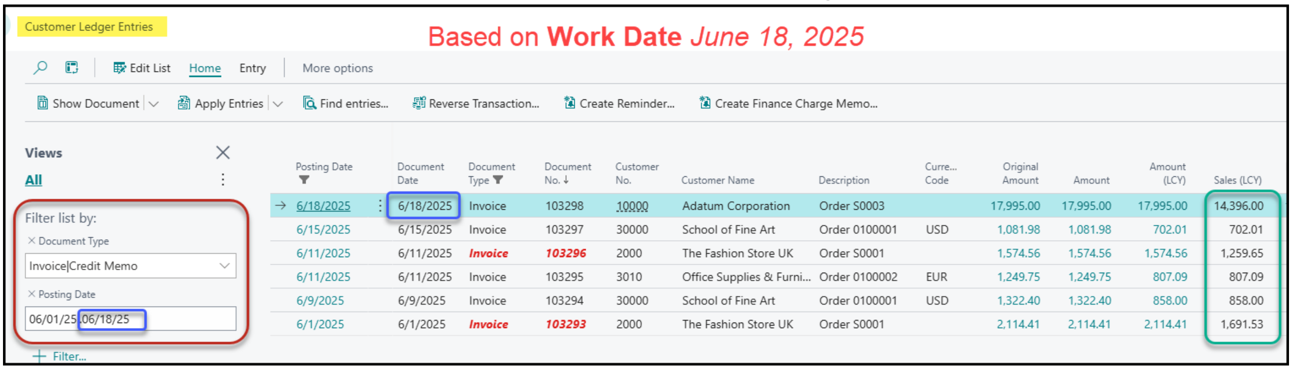


These Parameters can add some Indicators and Cues on the Role Center of **Profile (Role)** *TRM_SB – TRIMIT Small Business.*
Keep in mind that setting these Parameters to *Yes,* will also influence the performance of opening the Role Center, because the Amounts/Quantities needs to be calculated.



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.**

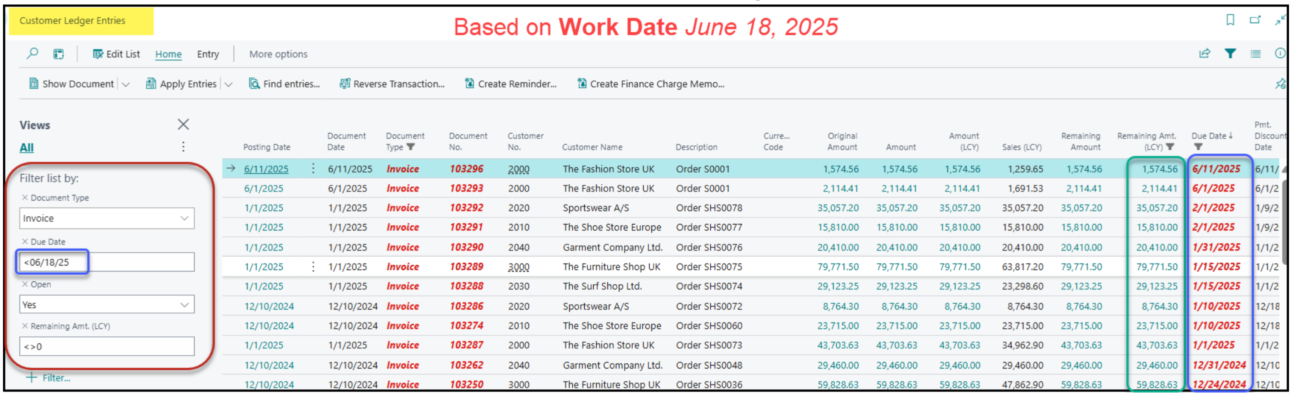


The Filter for the **Document Type** is automatically set to *Invoice/Credit Memo*.
The Filter for the **Posting Date** is automatically set to the first Date of the current Month based on the **Work Date** and the last Posting Date of the Customer Ledger Entries in the current Month based on the **Work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

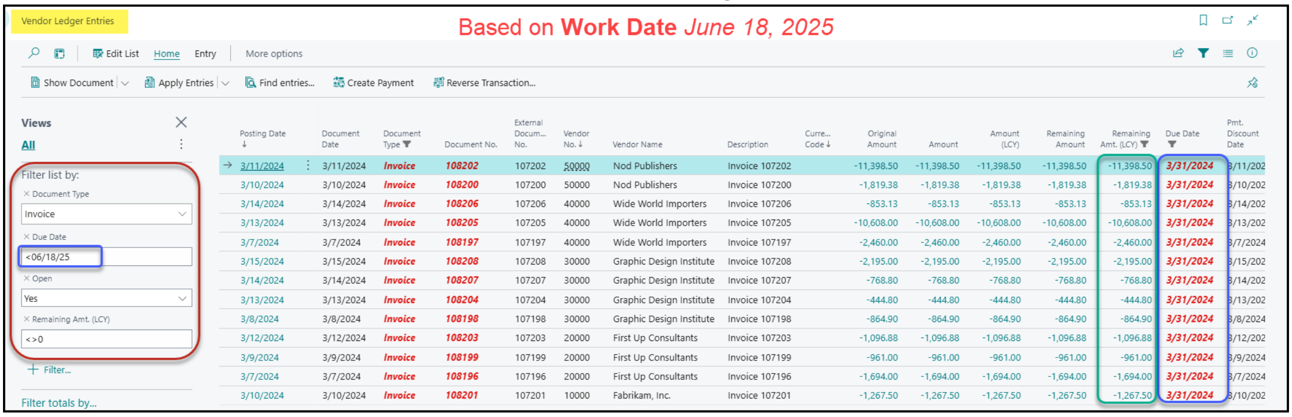
If you click on **>See more**, you will see a list of **Customer Ledger Entries**:



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**:

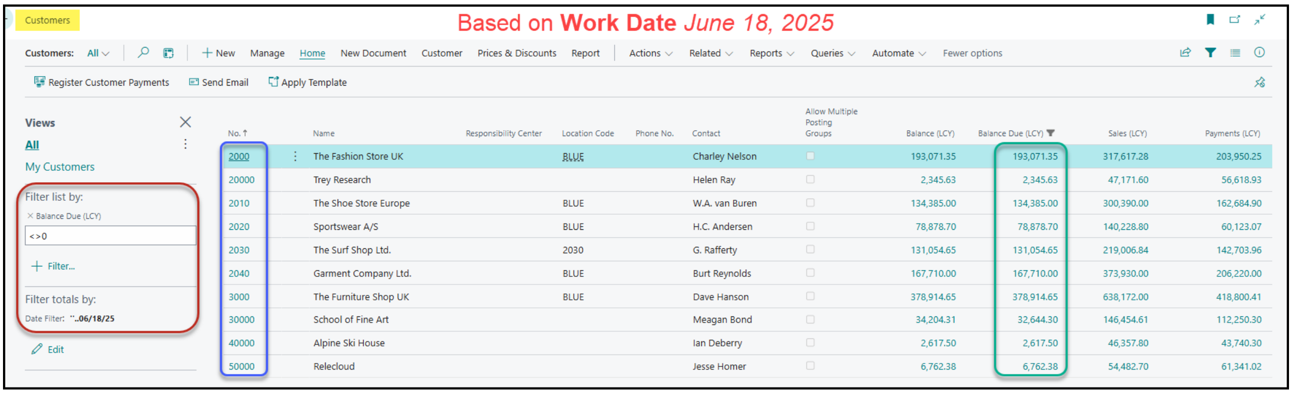


Show Customers with Due Balance (4)

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.

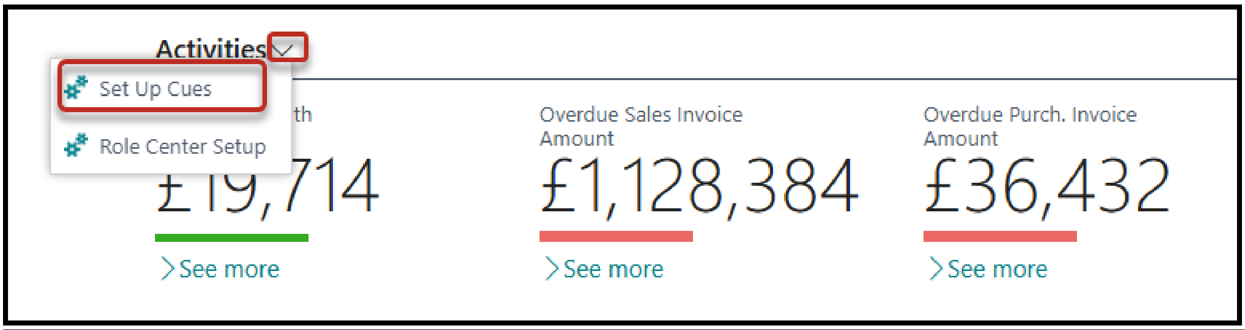
If you click on the Cue (Stack), you will see a list of **Customers**:



> **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

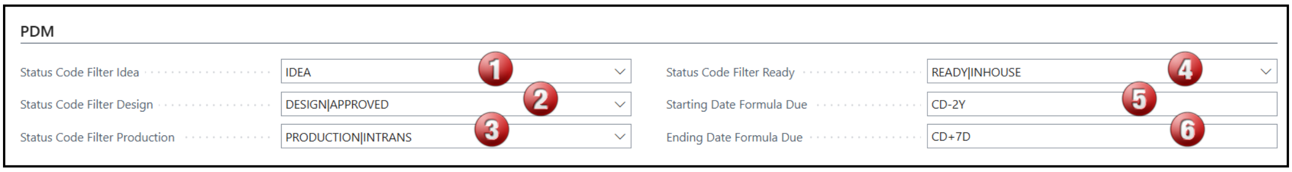
Via *Activities, Set Up Cues* you are also able to determine the Thresholds for the four Indicators/Cues based on the **Role Center Setup,** FastTab *Small Business,* as you can do for all the other Cues/Indicators that are already in the Role Center.



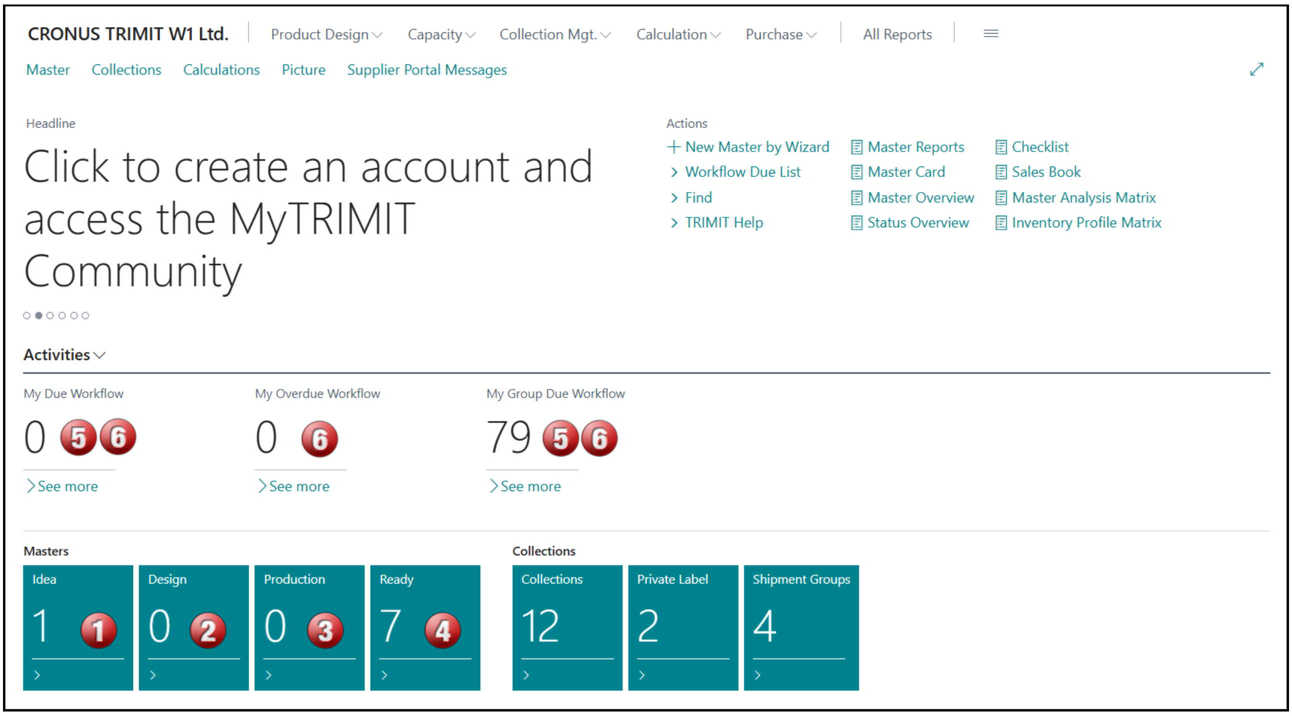
Cue Setup

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



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.*

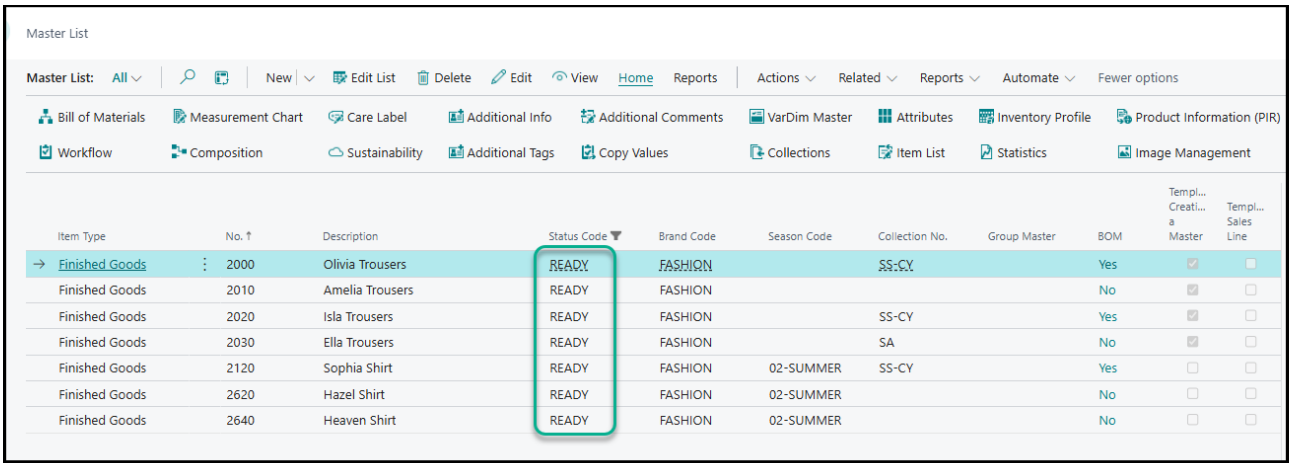
I.e.: If you want to show the number of Masters with **Status Code** *PRODUCTION*, you simply enter *PRODUCTION* in this Parameter.

Status Code Filter Ready (4)

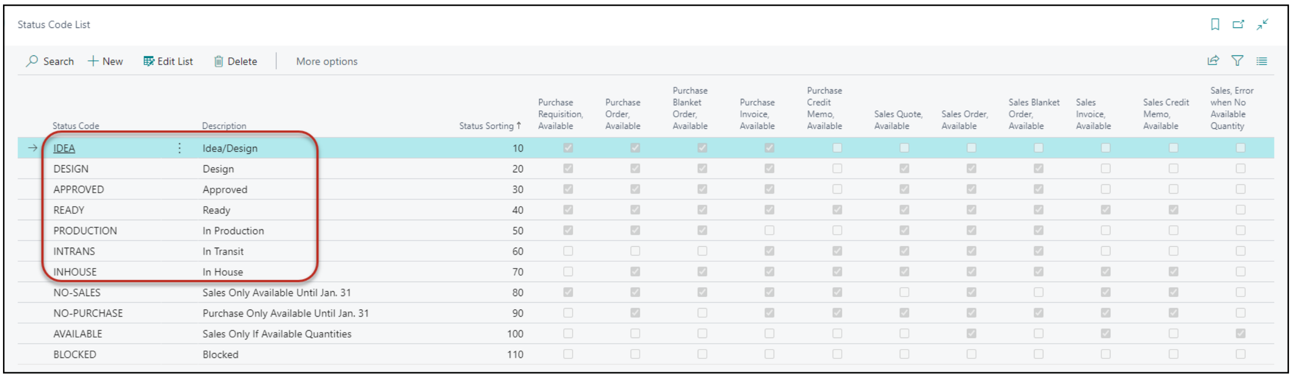
In this Parameter, you can enter a **Status Code** Filter for the fourth Masters Cue in the **Profile (Role)** *TRM_PDM* called *Ready.*

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.



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



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

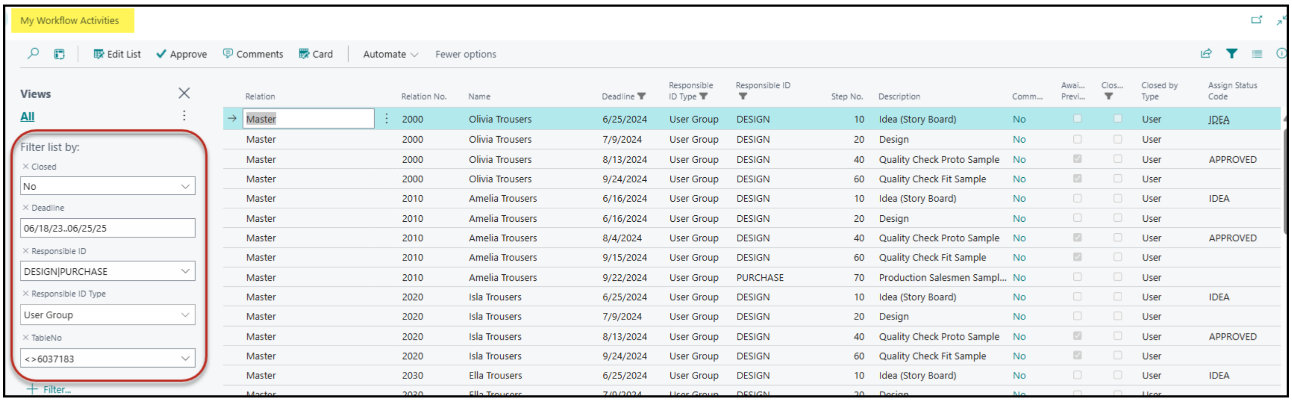
Of course, you can give your own interpretations to design phases and can make your own Status Codes accordingly. You can also decide that some phases are not specifically design phases but used further down the life cycle of a product. By personalization of the Role Center, you can also Hide/Show the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

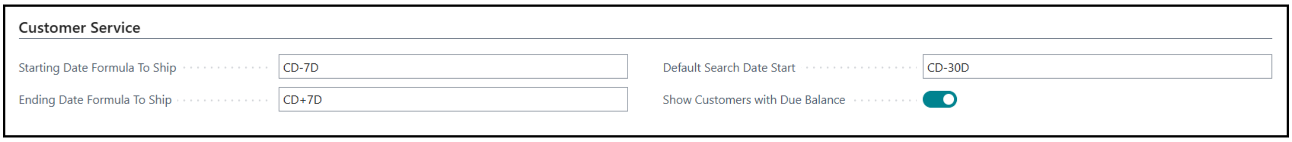
For the Indicators of **My Due Workflow, My Overdue Workflow** in the Role Center of *TRM_PDM*, you can enter a **Date Formula** to determine which TRIMIT Workflow Steps of the User (**Responsible ID**) should be shown in this Cue.
The Indicator **My Group Due Workflow** will be based on the **Workflow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

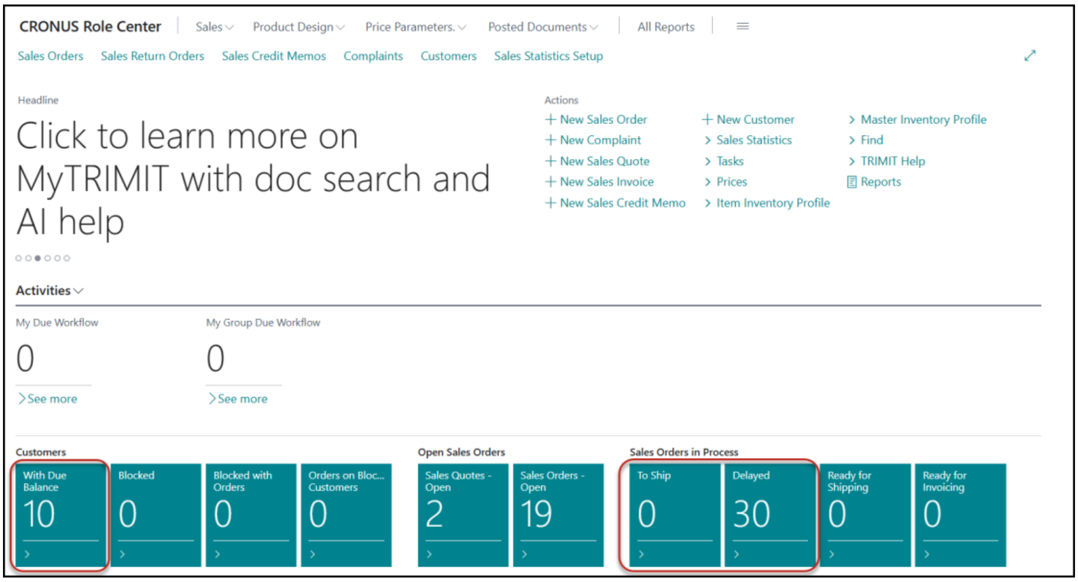
The Indicator **My Due Activities** will show the TRIMIT Workflow Steps that are not **Closed** with a **Deadline** between the **Starting Date Formula Due** and the **Ending Date Formula Due** that have **Responsible ID** the current User ID.
The Indicator **My Overdue Activities** will show the TRIMIT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



FastTab Customer Service



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

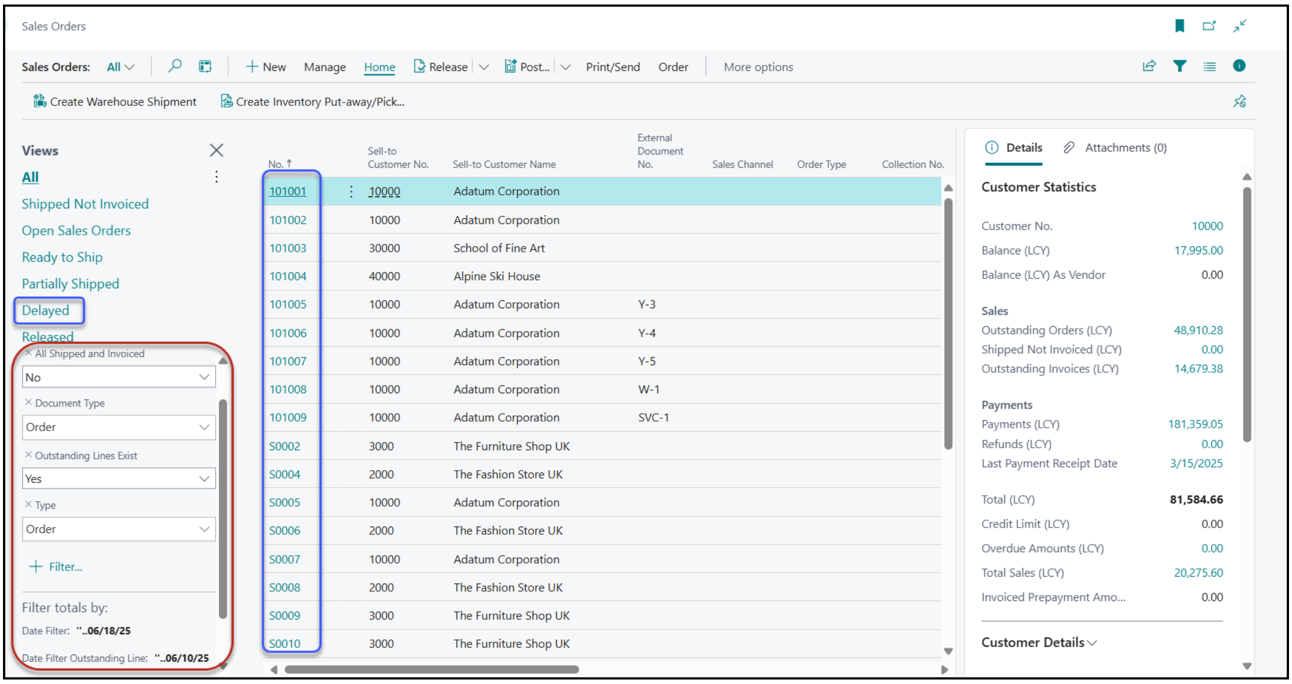


Starting Date Formula To Ship / Ending Date Formula To Ship

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**.

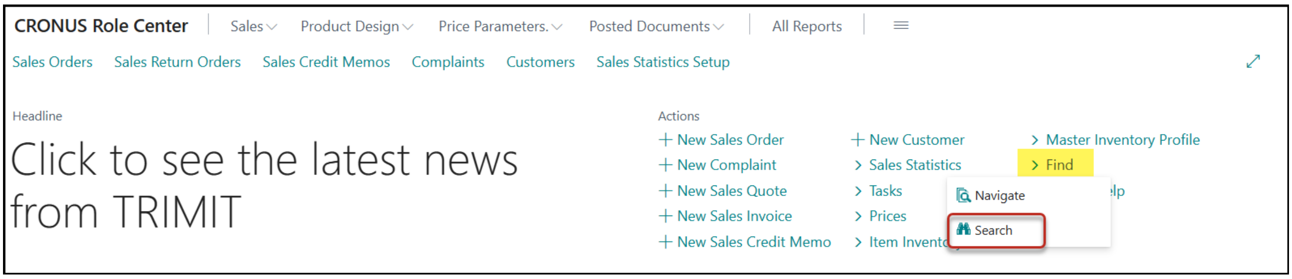
I.e., if you want to see all the Sales Orders for which lines should be shipped last week or should be shipped next week you can enter *CD-7D and CD+7D.*
I.e.: If the Work Date is *June 18, 2025*, you will see the Orders for which the Lines have Shipment Dates between *June 11, 2025*, and *June 25, 2025*, 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.

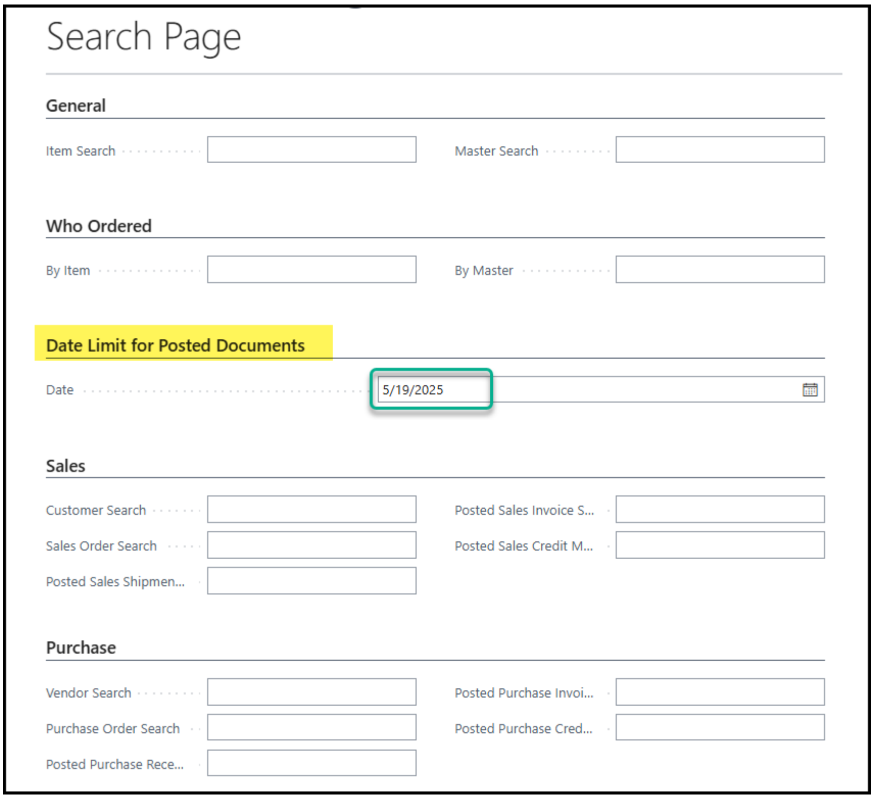


Default Search Start Date

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 – 90 Days*.

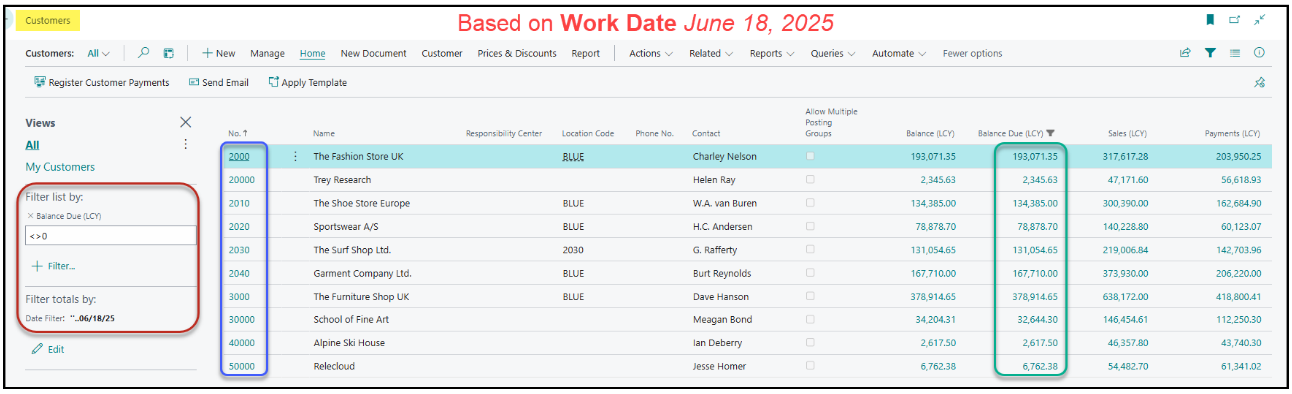


I.e.: If you want to look at Posted Documents as of 30 days ago, and have entered *CD-30D*, with a **Work Date** of *June 18, 2025*, it will show *May 19, 2025*



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**:



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		BLUE		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

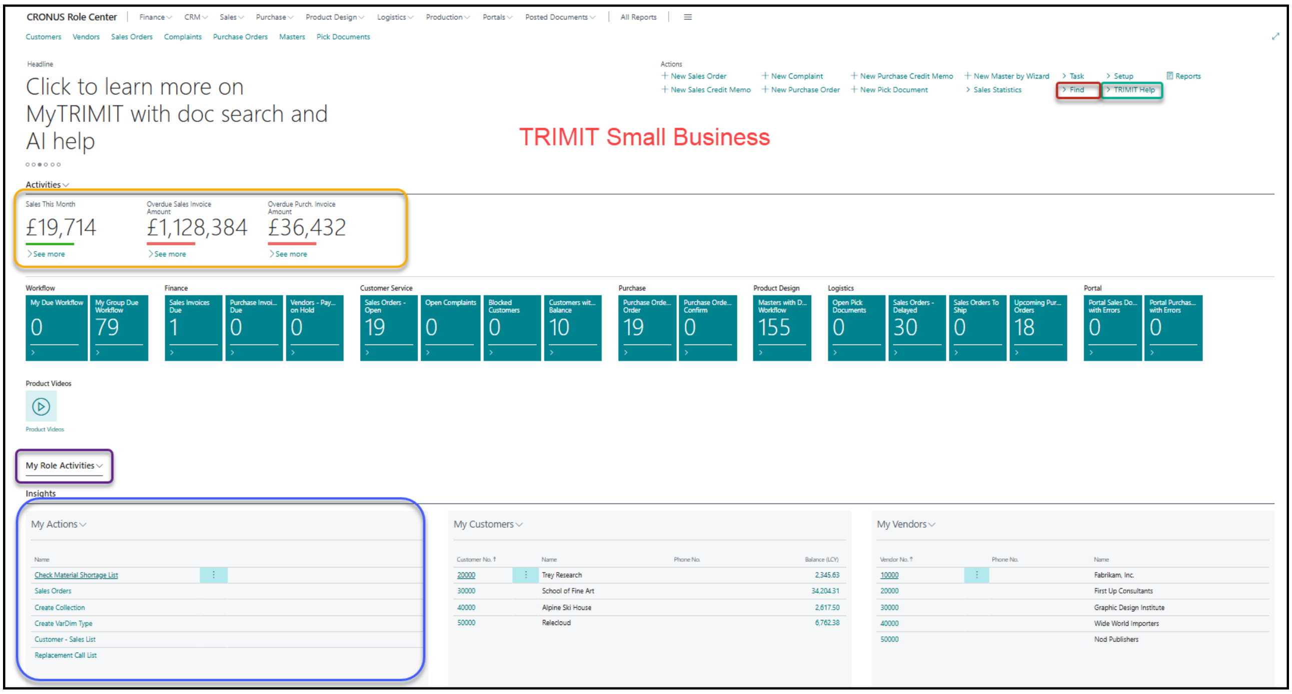
TRIMIT Profiles (Roles)

Differences between TRIMIT and Business Central Profiles (Roles)

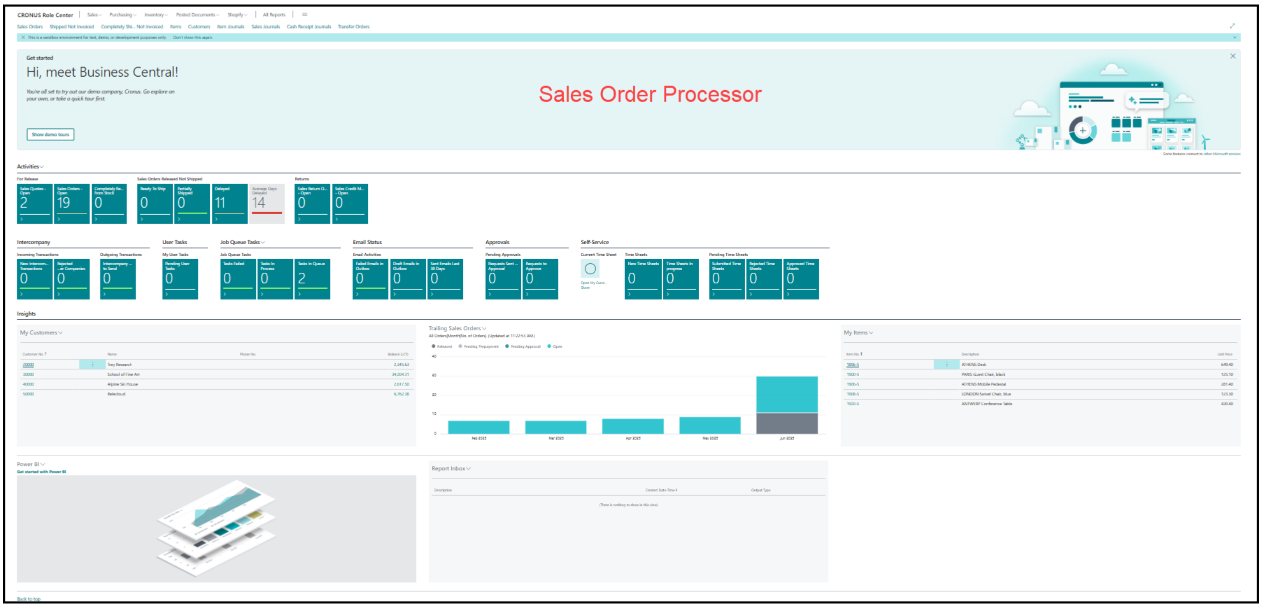
In this paragraph, generic differences between TRIMIT Profiles (Roles) and standard Business Central Profiles (Roles) are discussed. These differences will be shown based on the differences between Profiles (Roles) *TRIMIT Small Business* and the *Sales Order Processor*.

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)

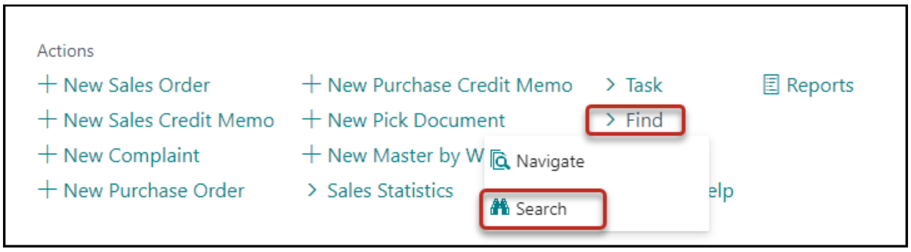


b. Sales Order Processor Profile (Role)



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

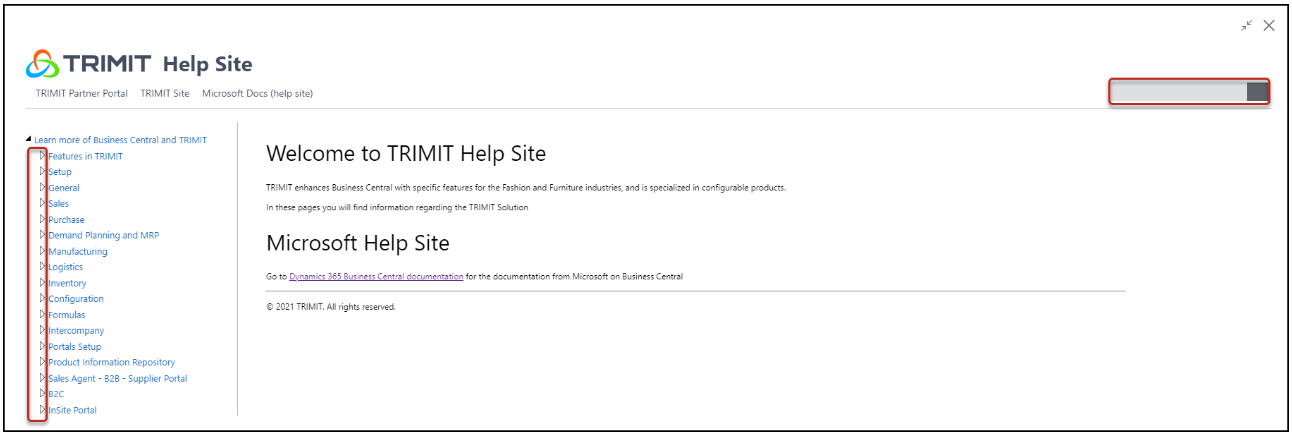
In the TRIMIT Profiles you can include the **ListPart Page** called **My Masters.** You can add it yourself via *Personalize*, although you can also use the standard Business Central **ListPart Page My Items**, although it is not common to manage products on Item level in TRIMIT.

TRIMIT Help

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

For TRIMIT Installations until May 9, 2025:

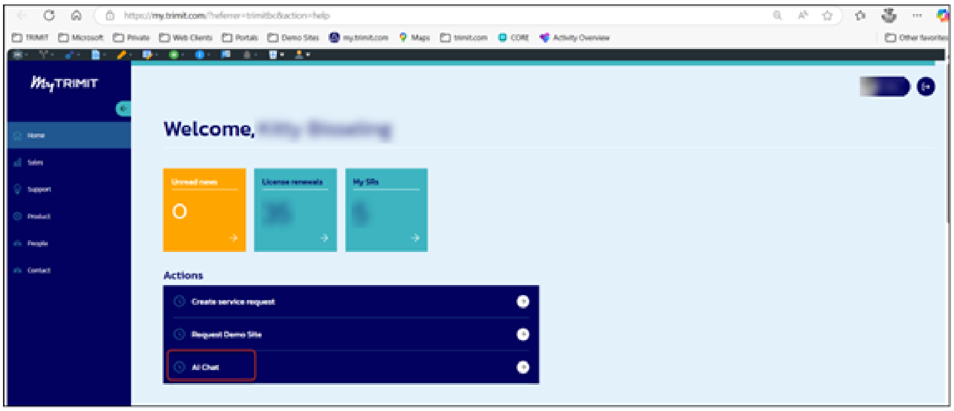
https://help-bc.trimit.com/main.aspx?lang=en-US&content=index.html

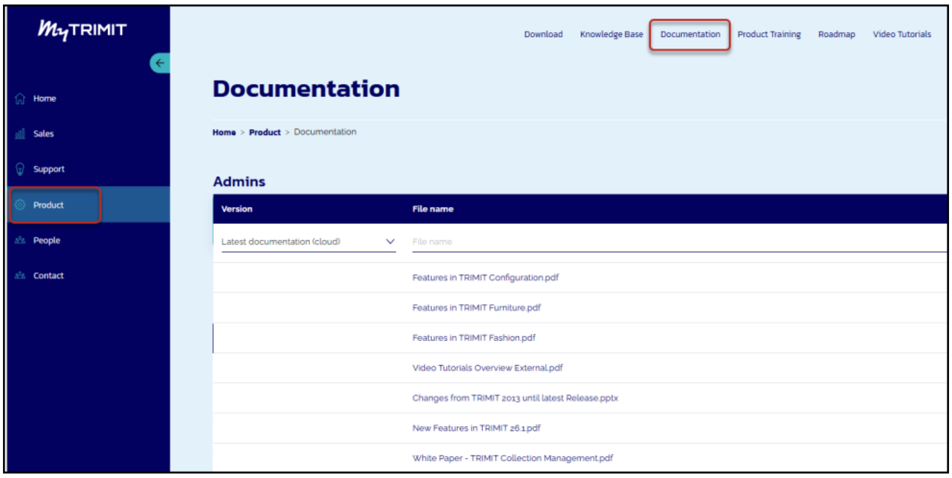


Under each of the Topics, you can find TRIMIT White Papers (only in English), to describe the specific functionality of TRIMIT. These White Papers have been written for our Partners and will not describe standard Business Central fields/functionality. Only the newest versions of the White Papers will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

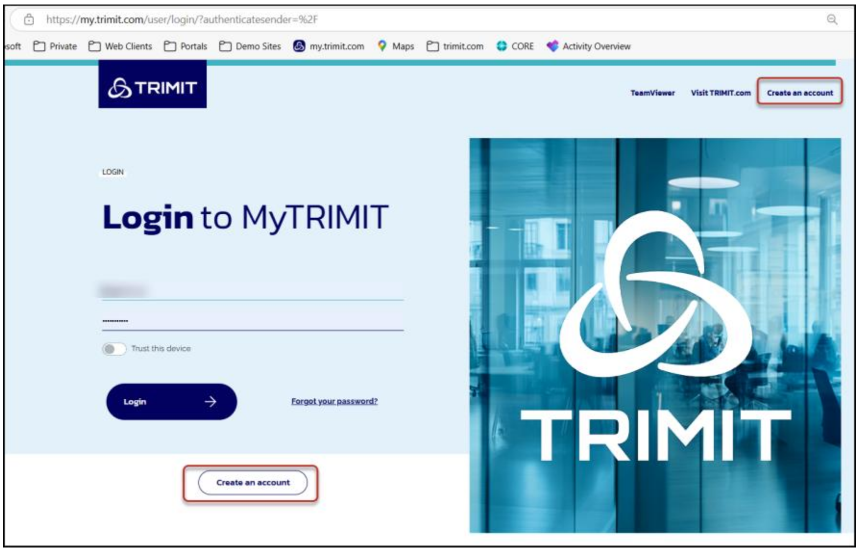
For TRIMIT Installations as of May 9, 2025

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.



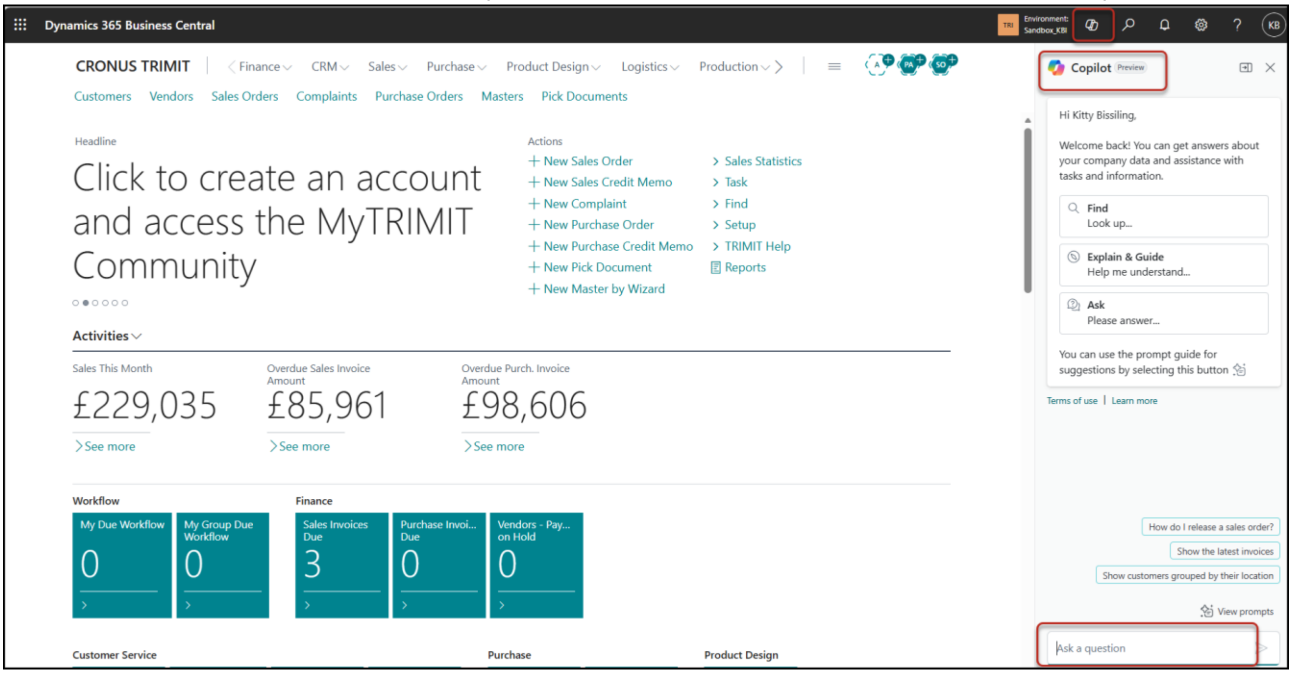


Therefore, make sure you create an Account on [MyTRIMIT](https://my.trimit.com/) by using your E-Mail Address of the Company you work for. Then TRIMIT can decide which parts of MyTRIMIT you get access.



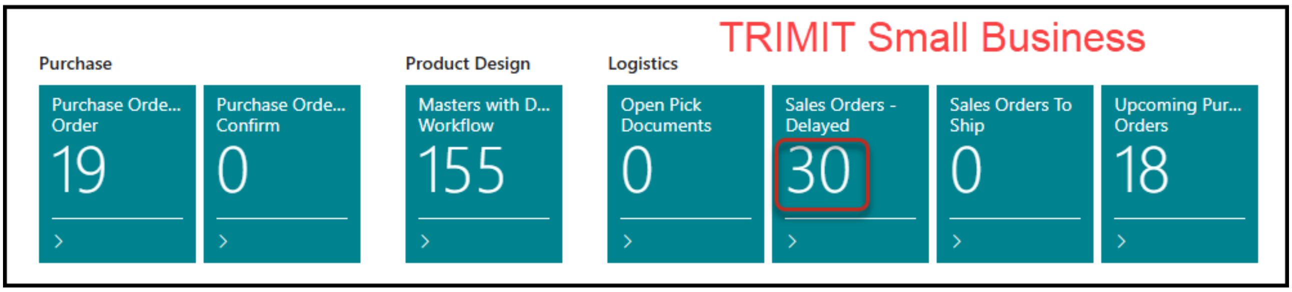
For Cloud Installations – using Copilot

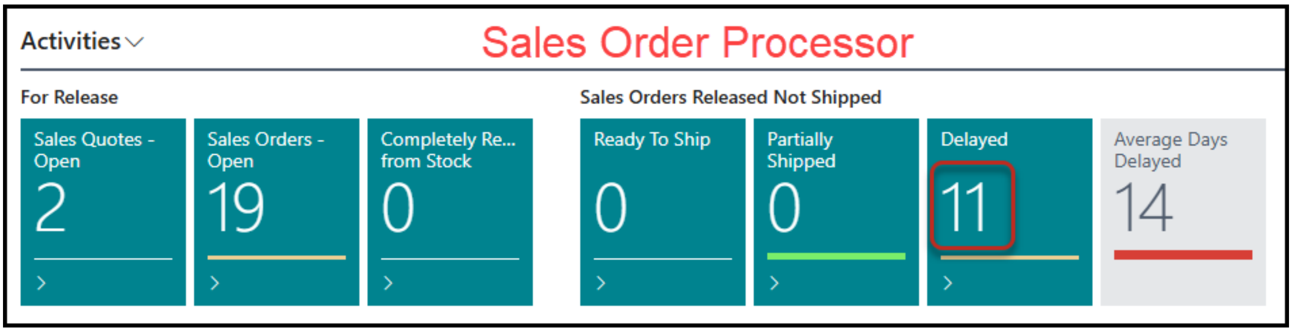
Using the **Copilot** function, and asking your questions, the answer will also be based on the TRIMIT documentation that can be found on **MyTRIMIT**, but now without having an account on **MyTRIMIT**.



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.





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*.

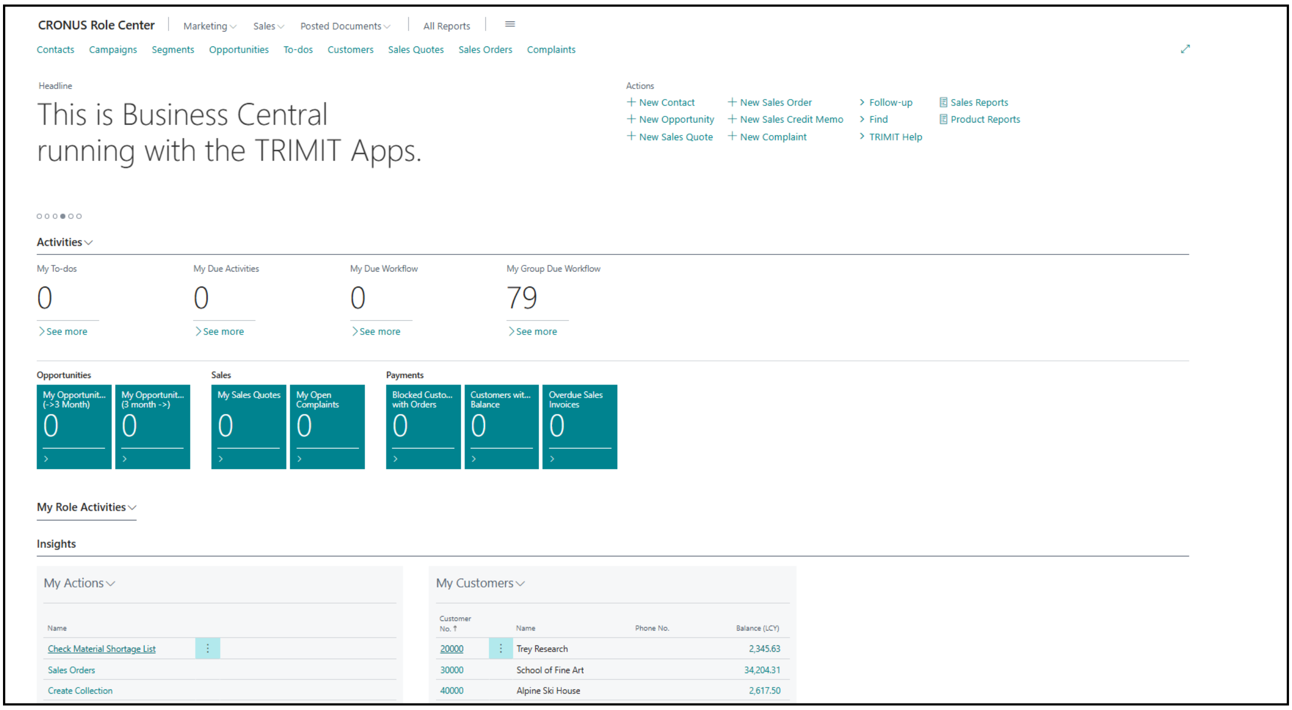
For this reason, the TRIMIT Cue criteria look at the Order Line – even if the **Status** is *Open*. This means also that Sales Orders could be in several Cues: in **Sales Orders - Delayed** because of some Lines and in **Sales Orders To Ship** because of some Lines.

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.



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**

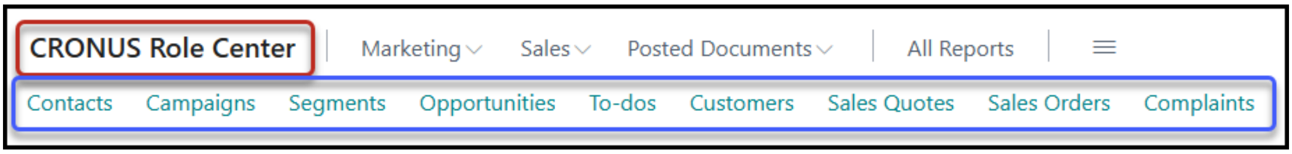
  In this Cue you see a list of all **Customer Ledger Entries** with **Due Date** before the **Work Date** and which are still *Open*, for which the current User ID is the Salesperson Code.

My Role Activities

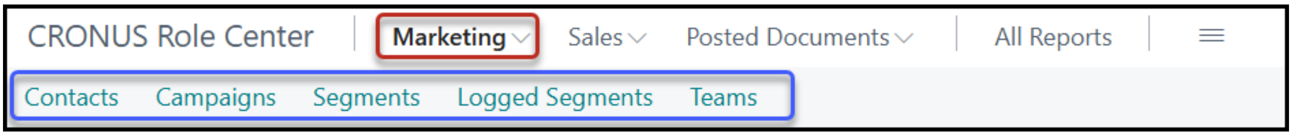
See Chapter [My Role Activities](#).

Menus

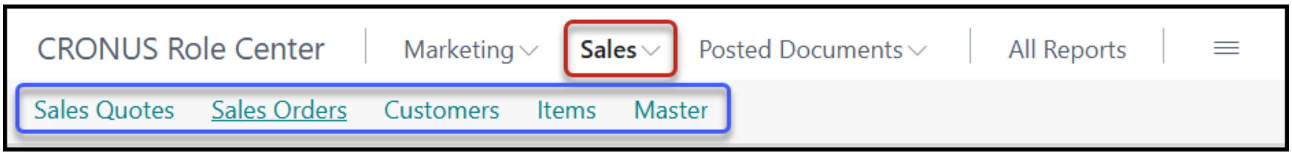
Home



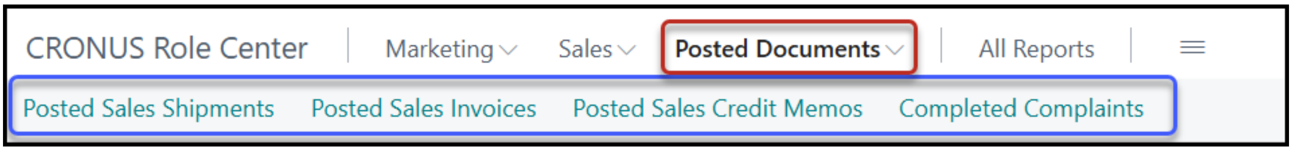
Marketing



Sales

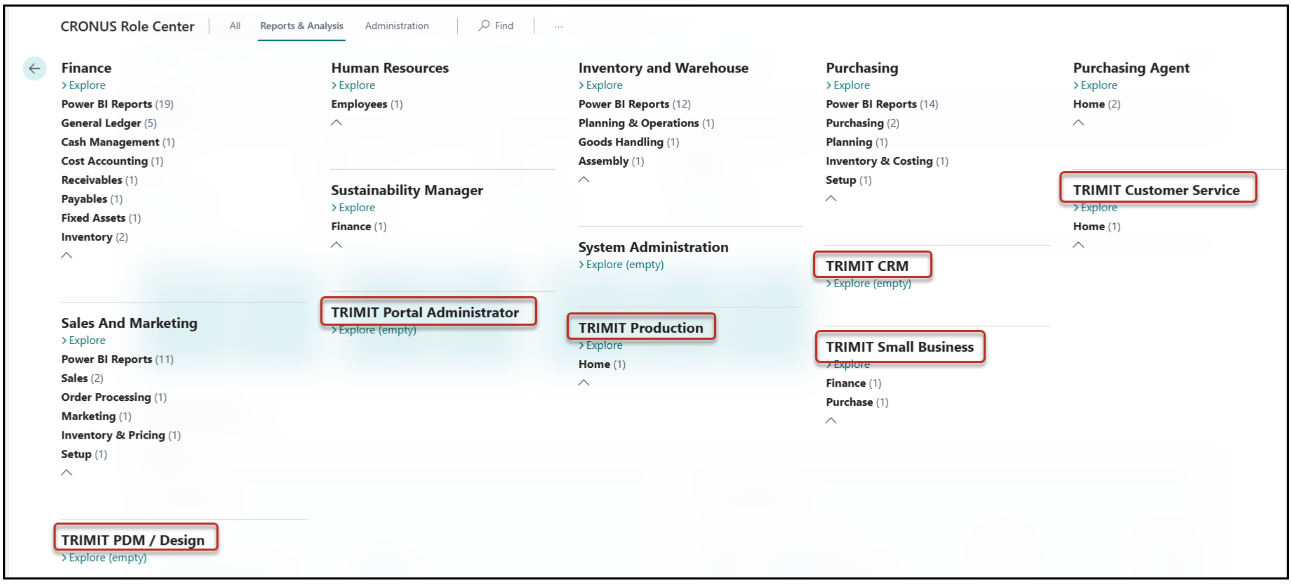


Posted Documents



All Reports

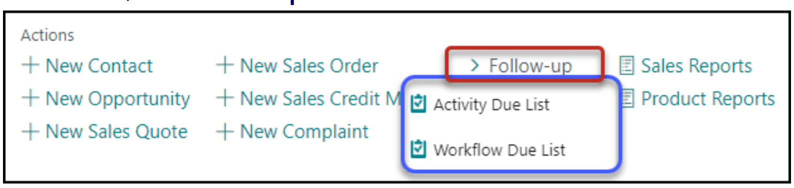
This will show an overview of all objects of **Reports & Analysis** in all Profiles (Roles) that have a checkmark in **Show in Role Explorer**.



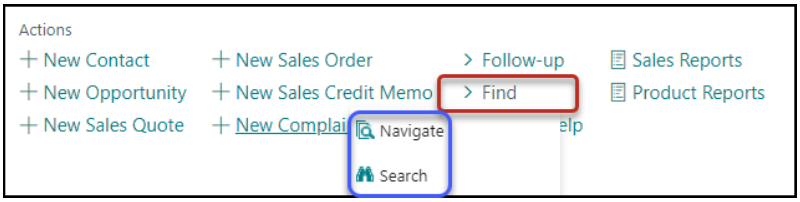
Actions

There are also special *Actions*.

Actions, Follow Up

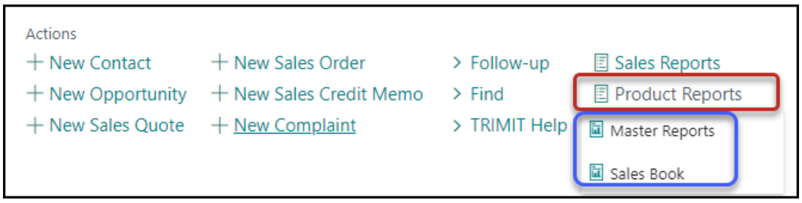


Actions, Find



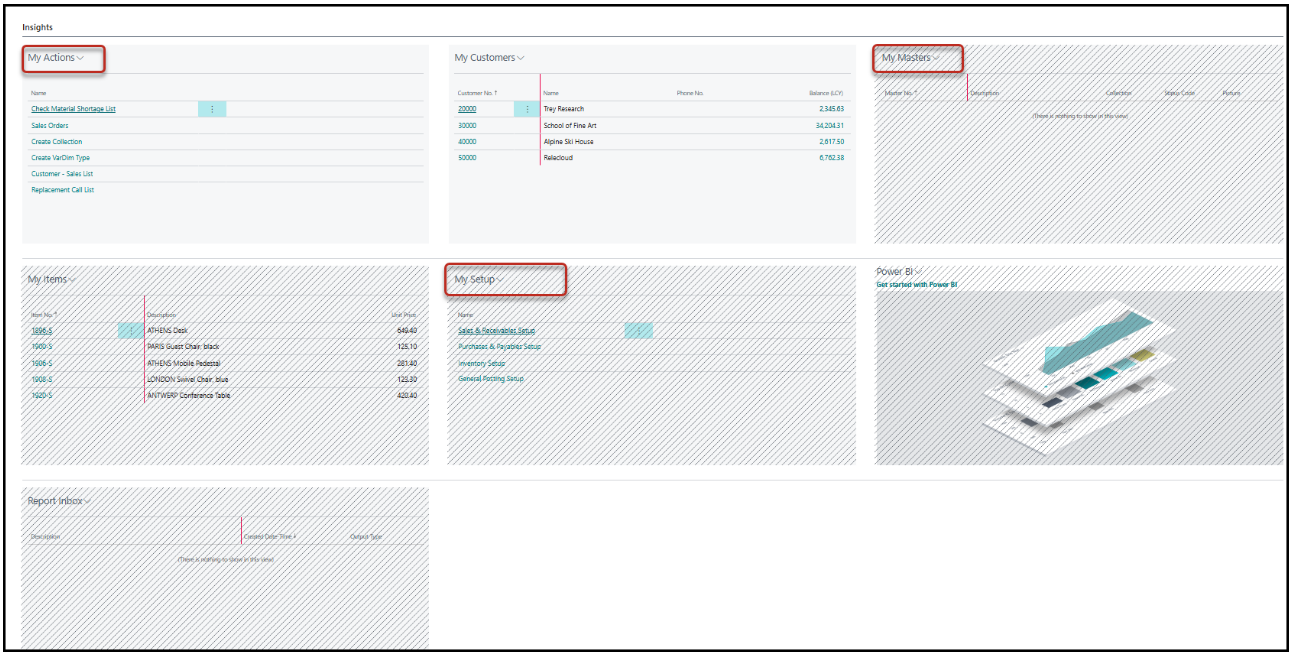
Actions, Sales Reports

Actions, Product Reports



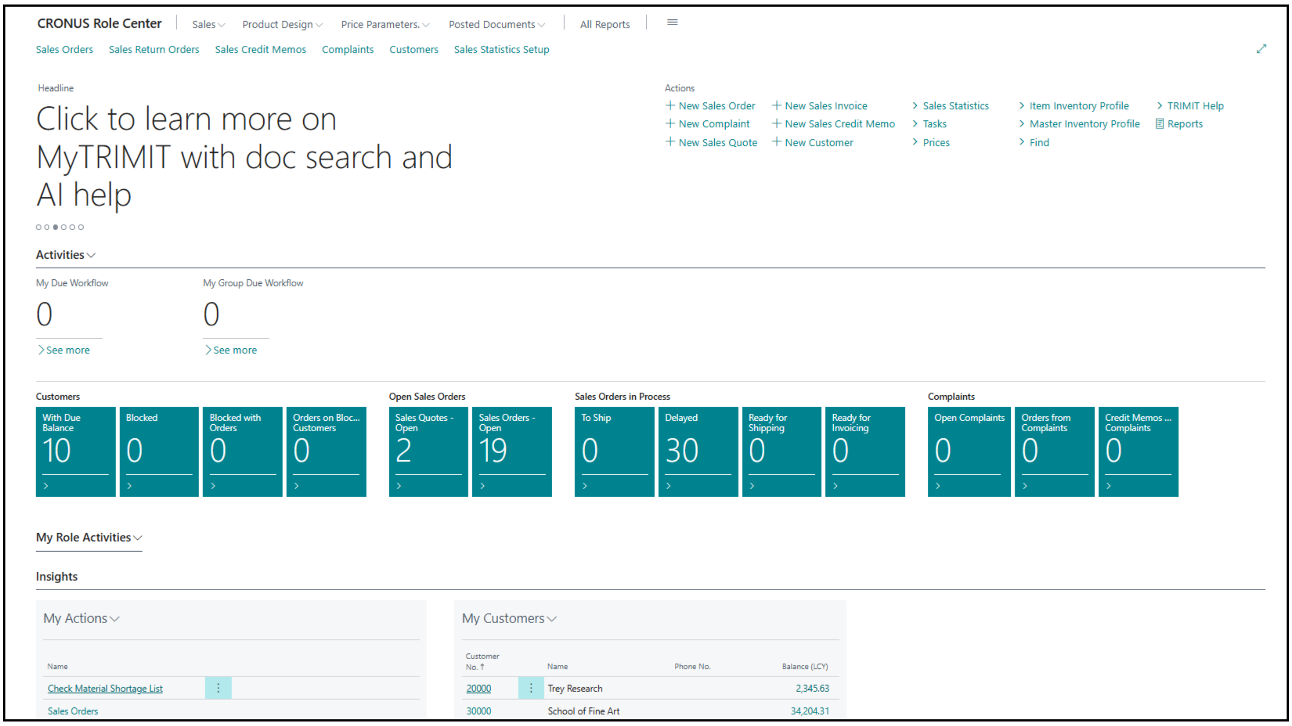
Possible Insights (ListPart Page)

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



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.

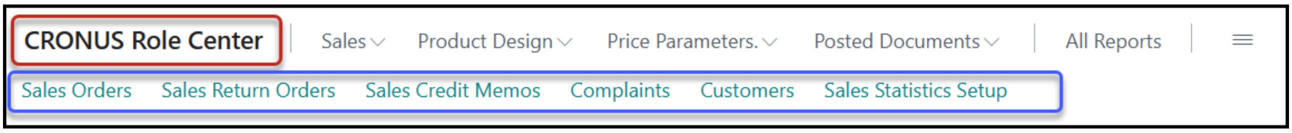
Complaints
TRIMIT has also added an Activity Group for **Complaints** which contains the following Cues:

- ### 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.*

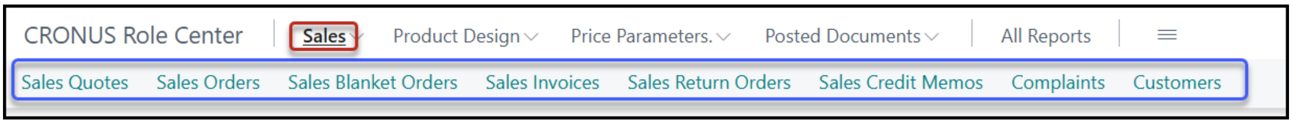
My Role Activities
See Chapter My Role Activities.

Menus

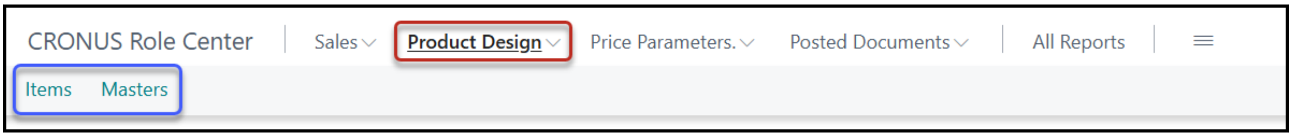
Home



Sales

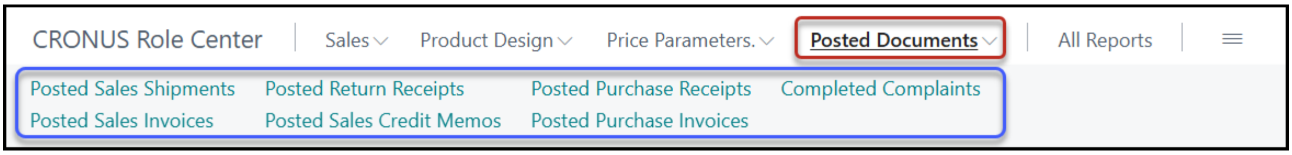


Product Design



Price Parameters

Posted Documents

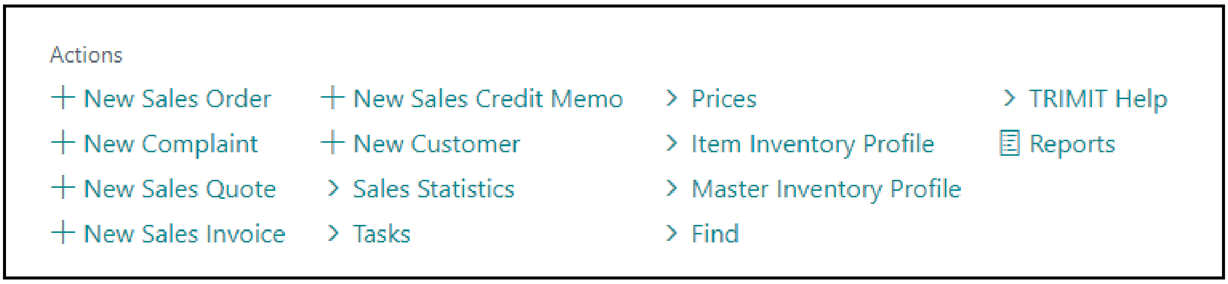


All Reports

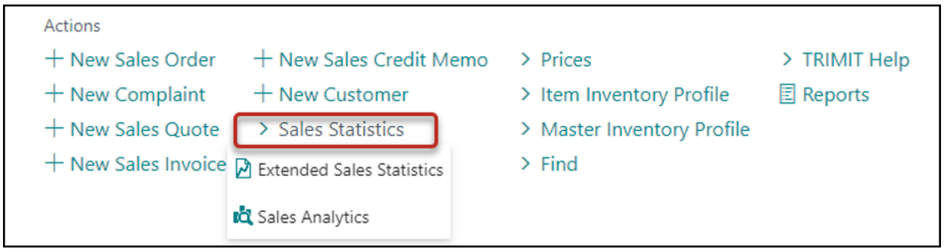
This will show an overview of all objects of **Reports & Analysis** in all Profiles (Roles) that have a checkmark in **Show in Role Explorer**. See All Reports.

Actions

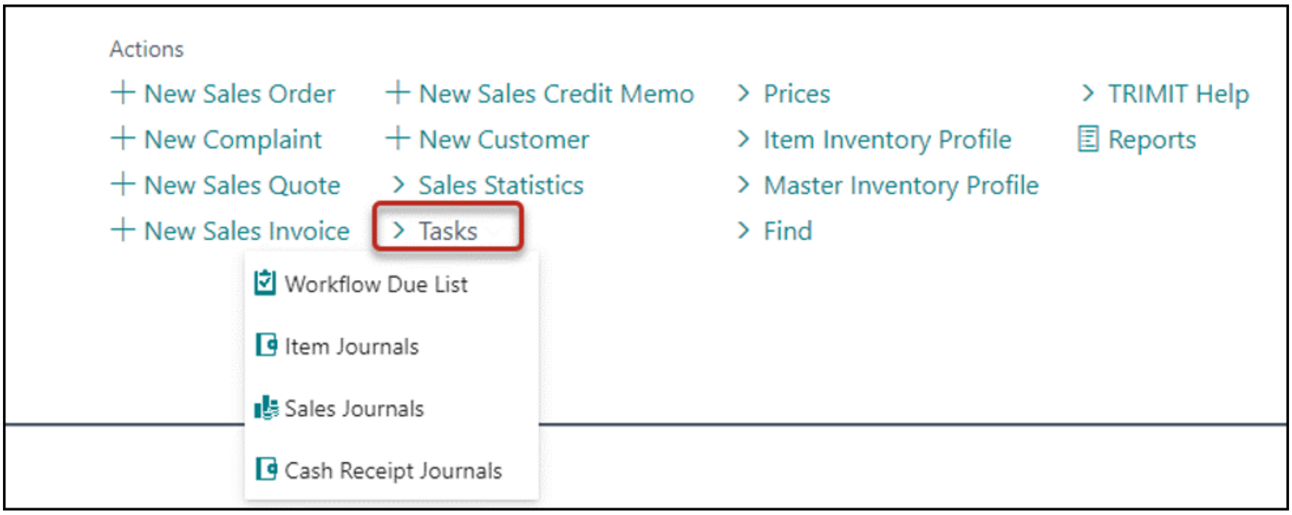
There are also special *Actions.*



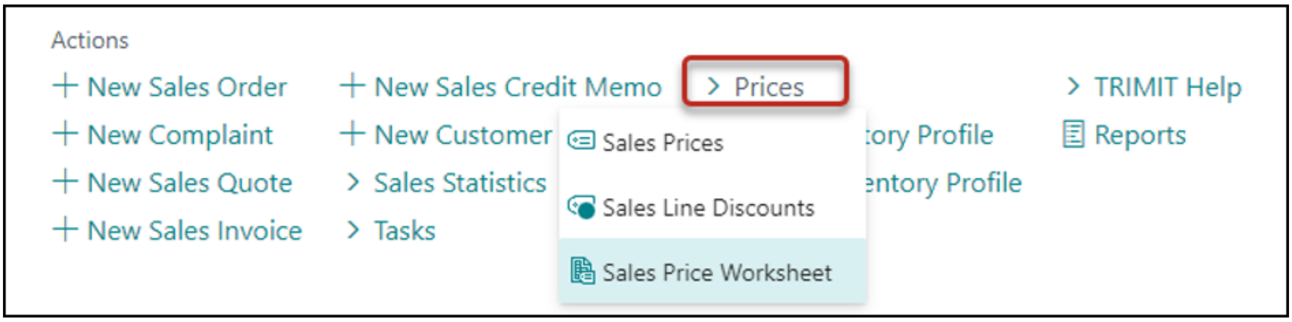
Actions, Sales Statistics



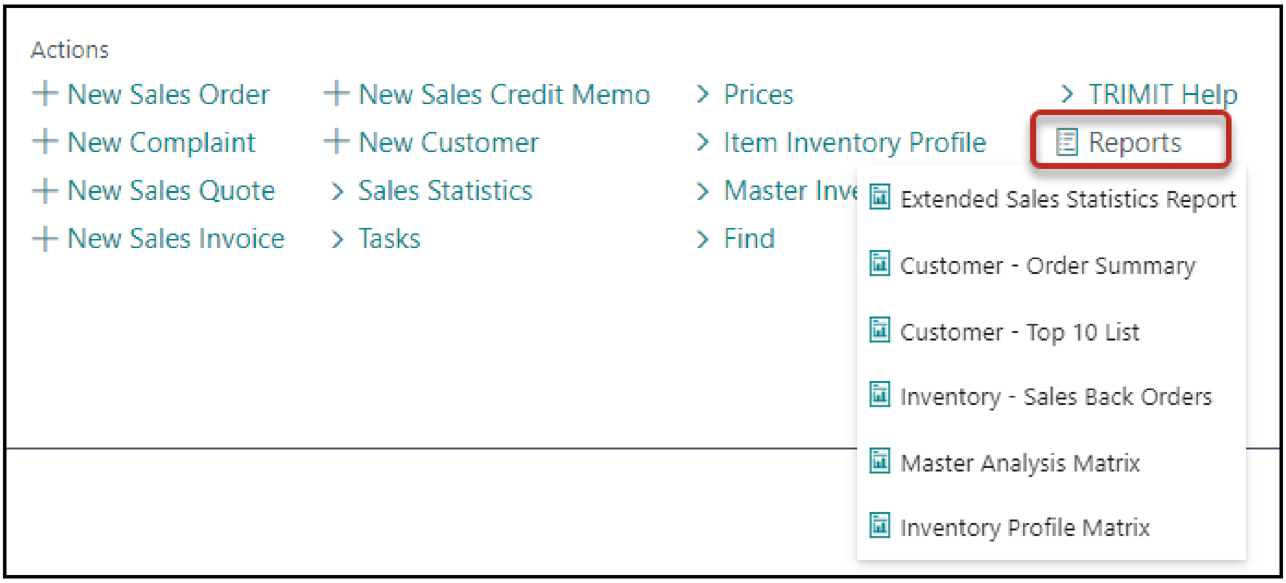
Actions, Tasks



Actions, Prices

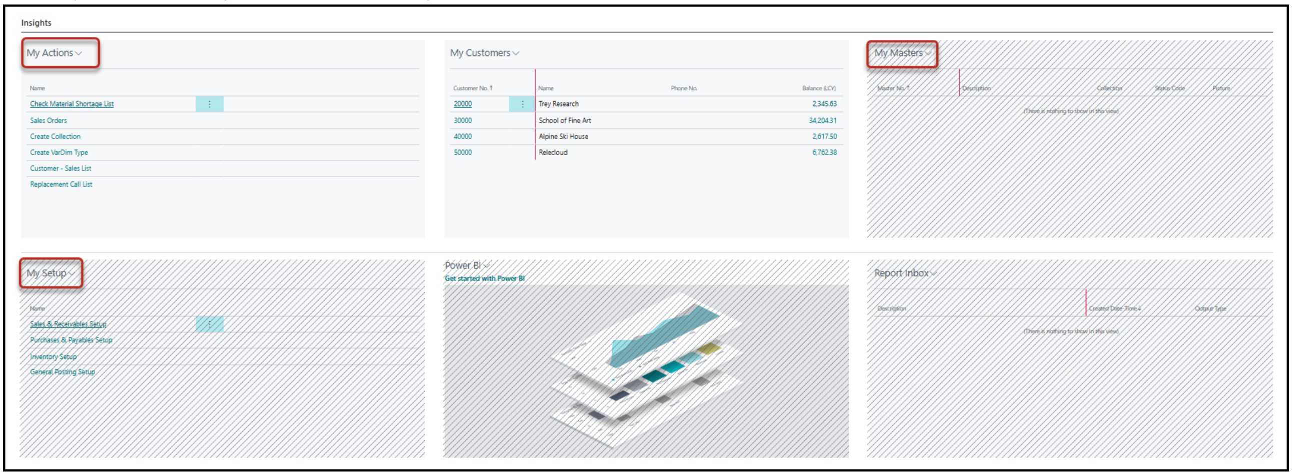


Actions, Reports



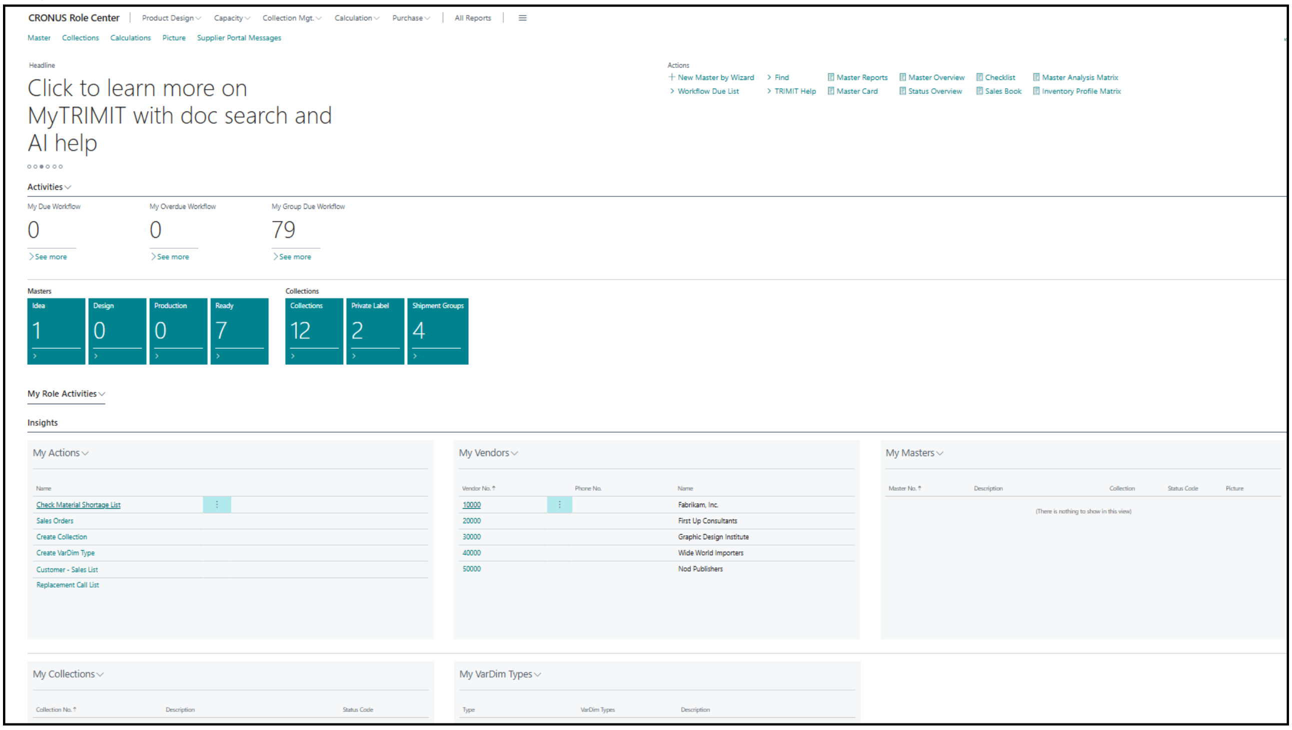
Possible Insights (ListPart Pages)

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 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]

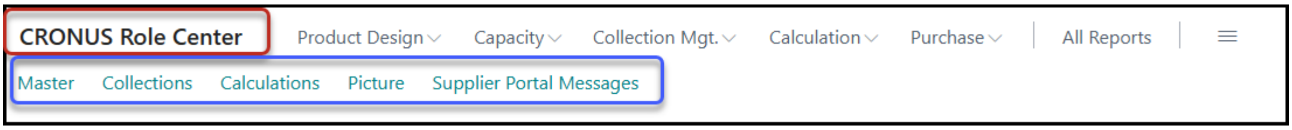
Collections

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

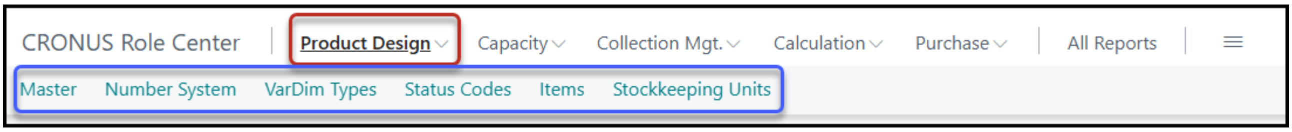
- ### Collections
  In this Cue you see a list of Collections that are not dedicated to a specific Customer or Country. Collections are described in detail in the *White Paper – TRIMIT Collection Management*.
- ### Private Label
  In this Cue you see a list of Collections that are dedicated to a specific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

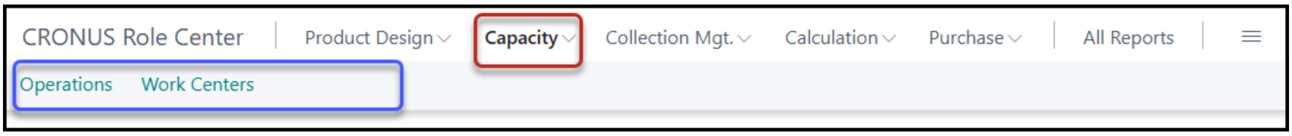
Home



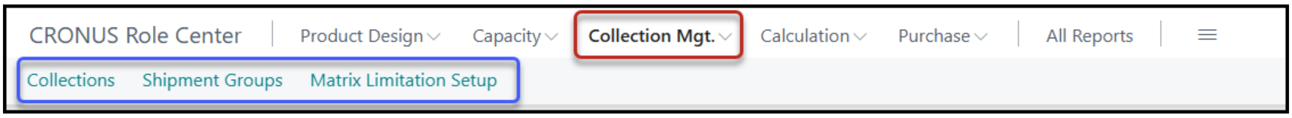
Product Design



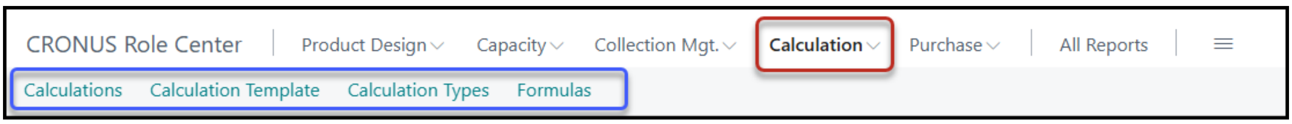
Capacity



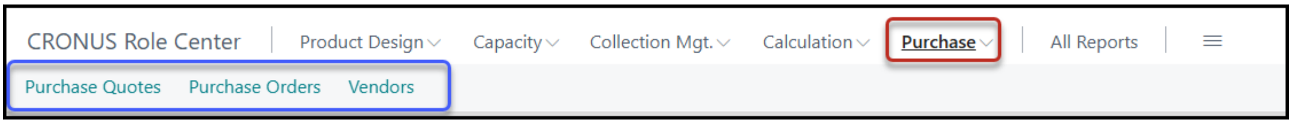
Collection Mgt.



Calculation



Purchase

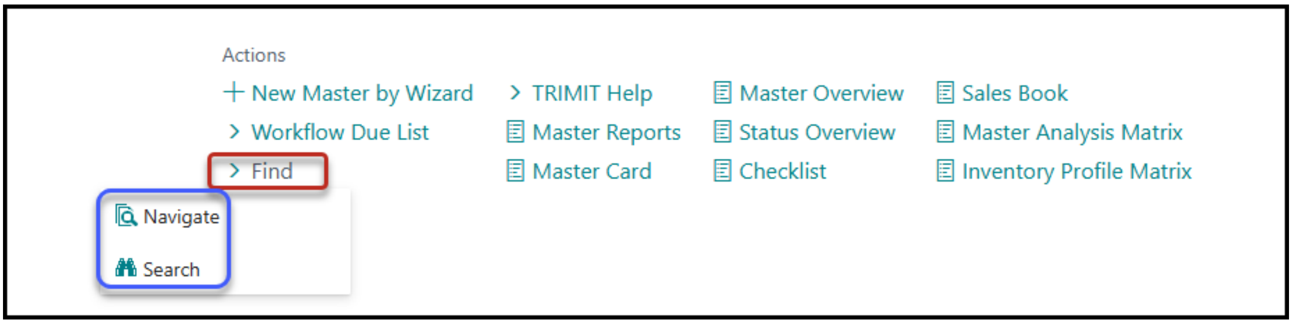


All Reports

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](#).

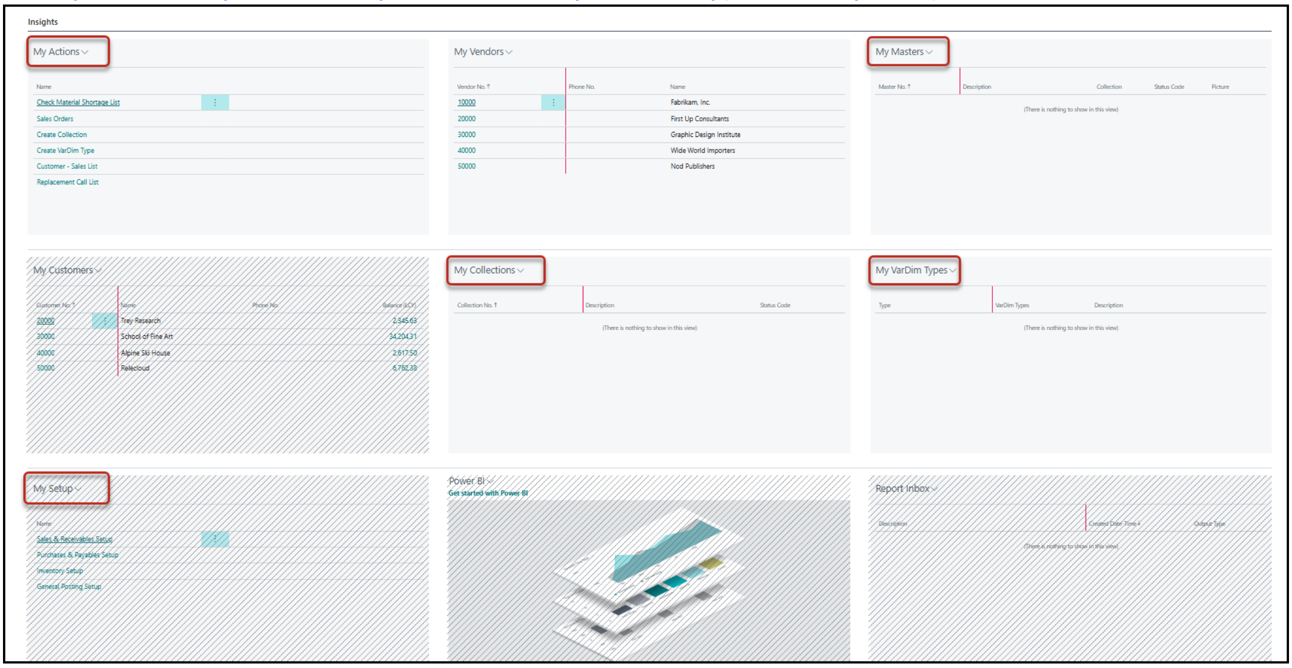
Actions

There are also special *Actions.*



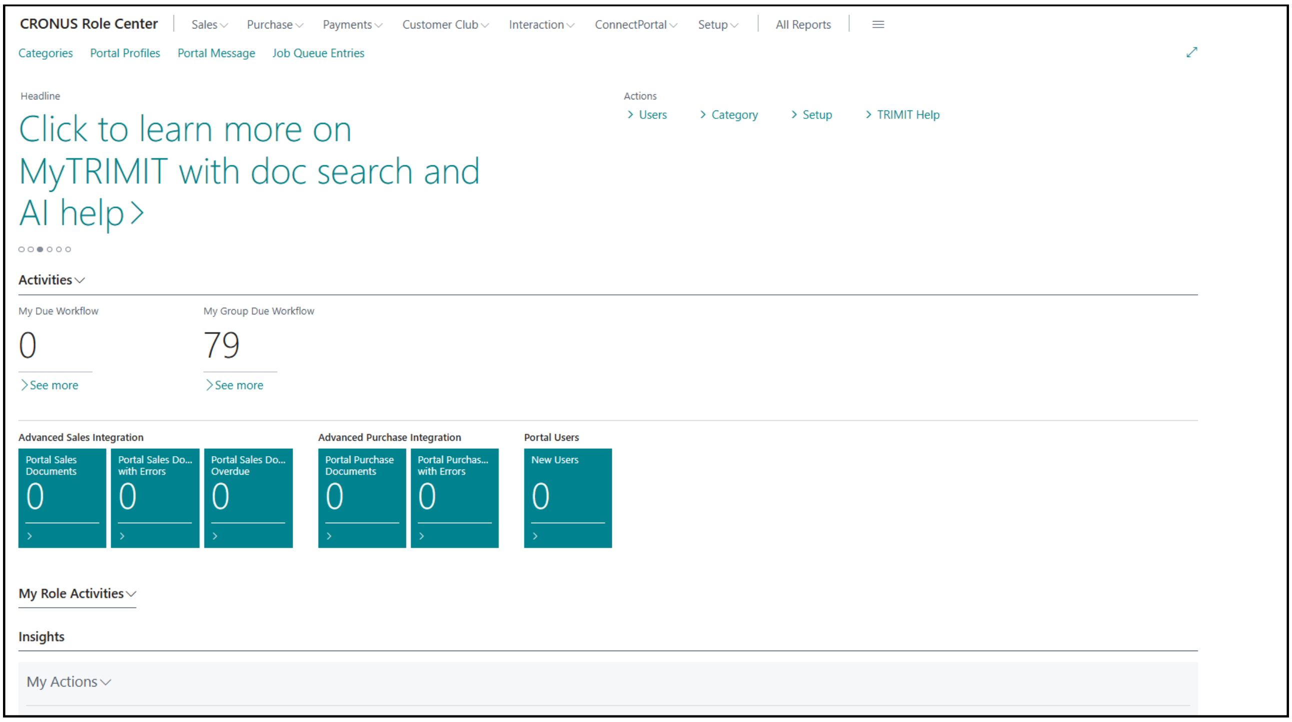
Possible Insights (ListPart Pages)

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*.

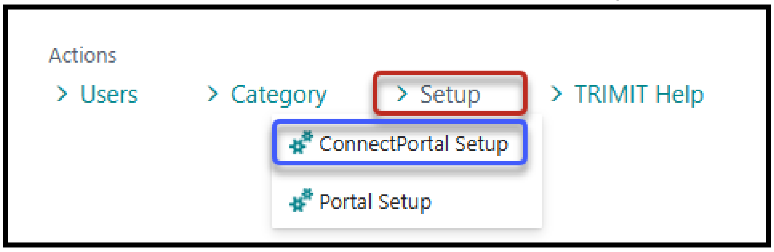
- ## My Group Due Workflow

  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

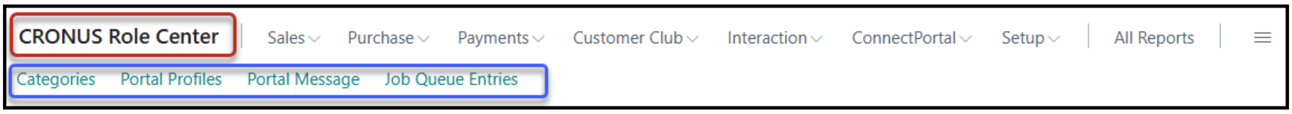
The Cue **New Users** gives you an overview of new Users that have been registered in TRIMIT e-commerce that needs to be assigned to the correct Customer, Vendor, and/or Salesperson.

My Role Activities

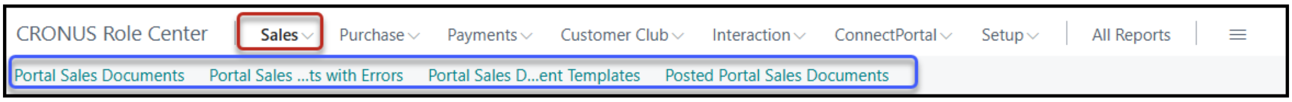
See Chapter [My Role Activities](#).

Menus

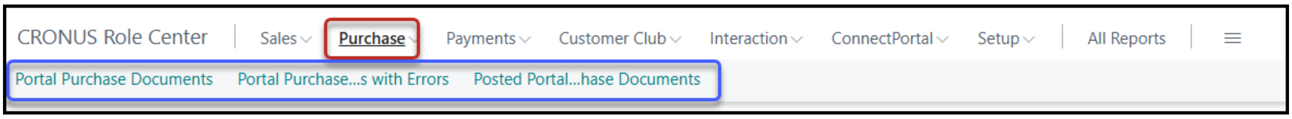
Home



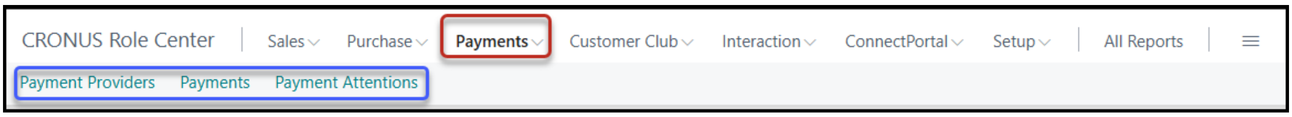
Sales



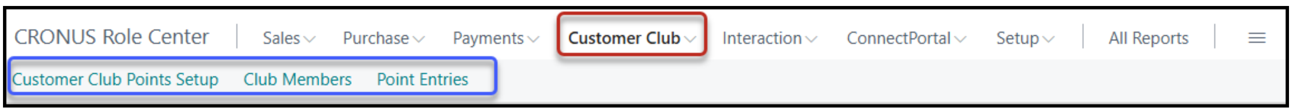
Purchase



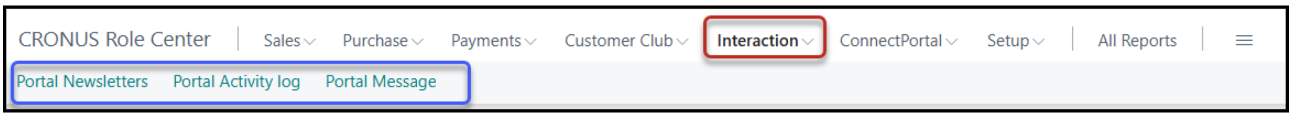
Payments



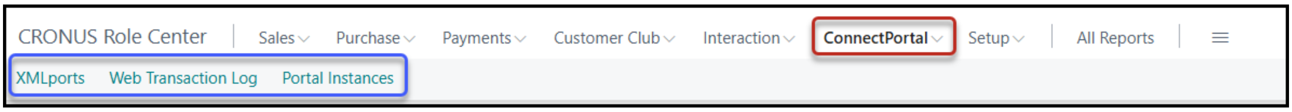
Customer Club



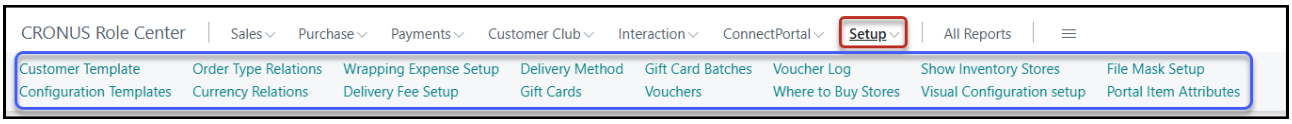
Interaction



ConnectPortal



Setup



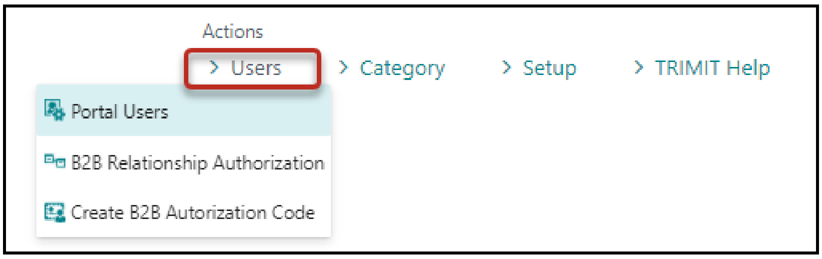
All Reports

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

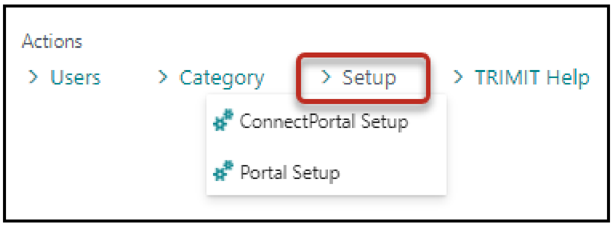
There are also special *Actions.*

Actions, Users



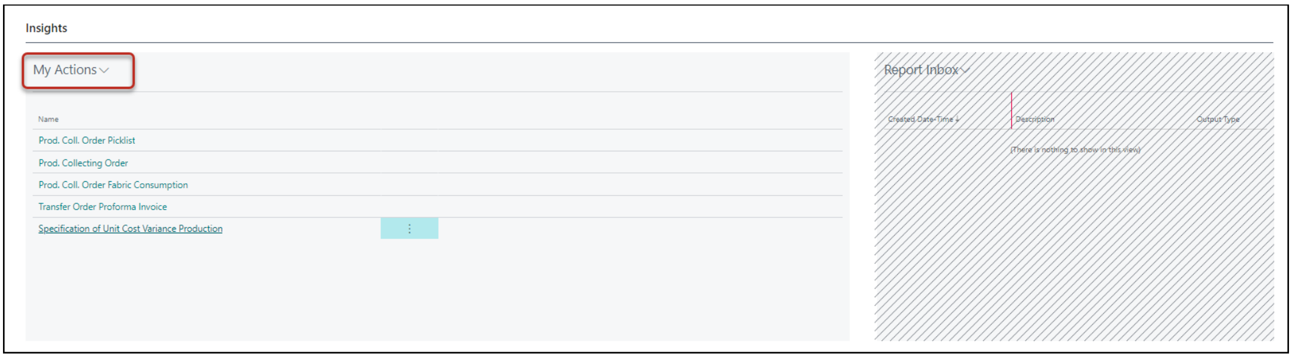
Actions, Category

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.

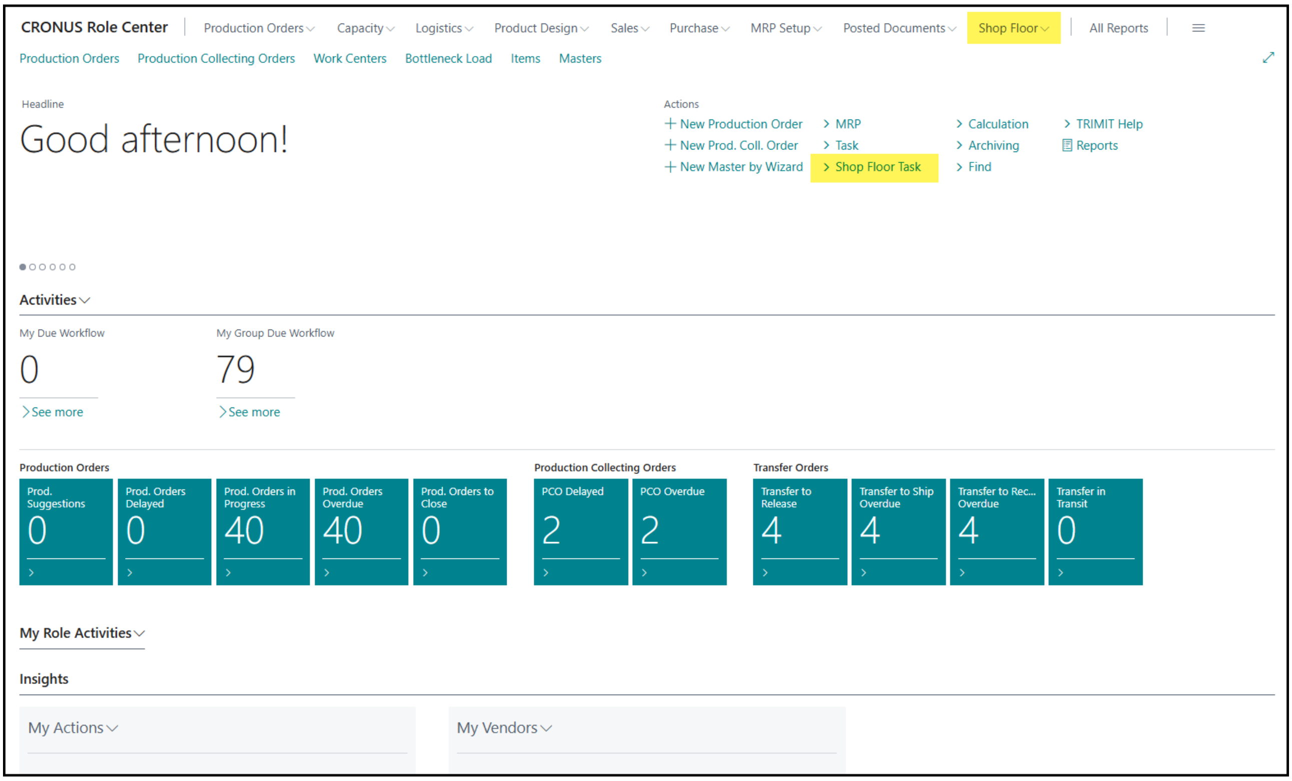


Profile (Role) TRIMIT Production

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

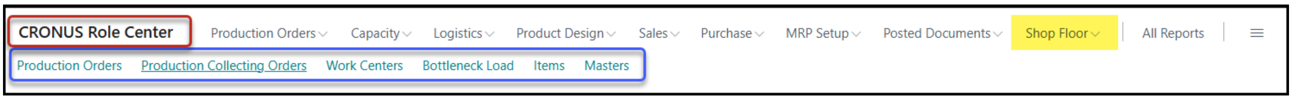
- ### Transfer to Release
  In this Cue you see a list of Transfer Orders with **Status** *Open*.
- ### Transfer to Ship Overdue
  In this Cue you see a list of Transfer Orders with **Quantity Shipped** is *0 (zero)* and **Shipment Date** before or at the Work Date.
- ### Transfer to Receive Overdue
  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** <> *0 (zero)* and **Quantity Received** is *0 (zero)*.

My Role Activities

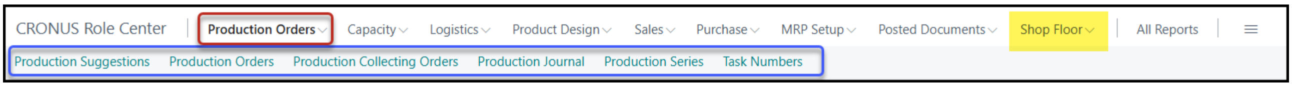
See Chapter My Role Activities.

Menus

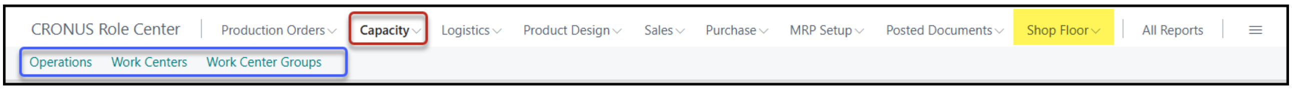
Home



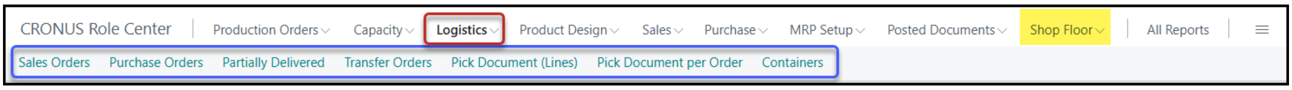
Production Orders



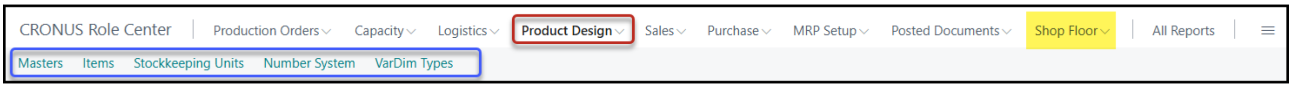
Capacity



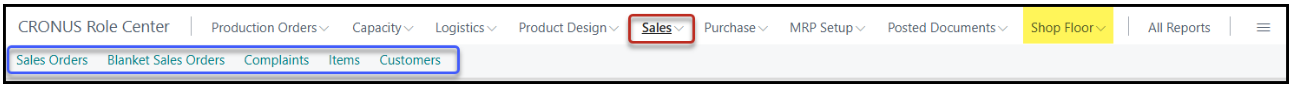
Logistics



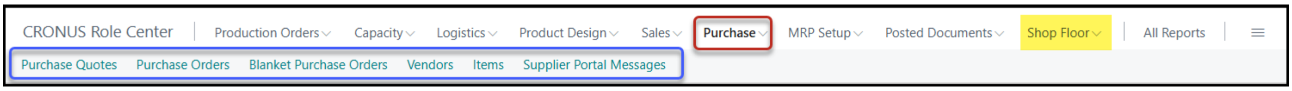
Product Design



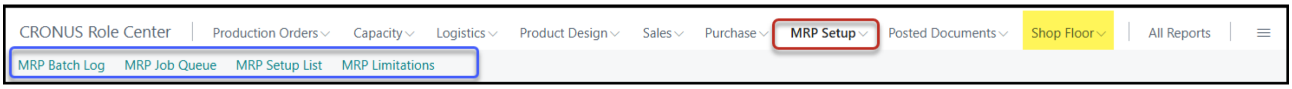
Sales



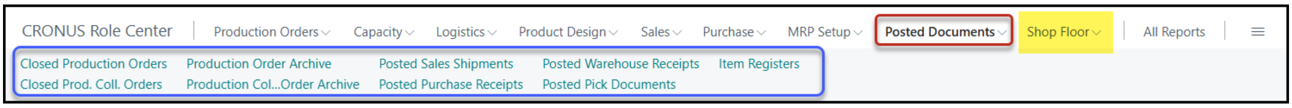
Purchase



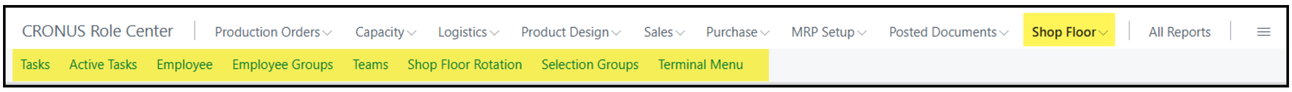
MRP Setup



Posted Documents



Shop Floor

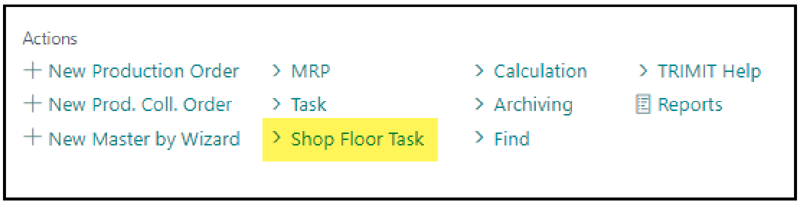


All Reports

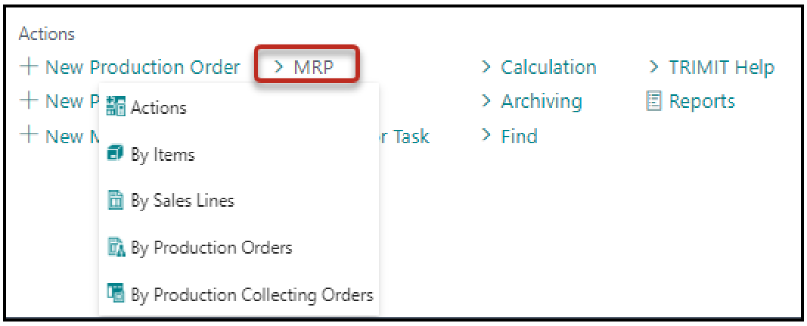
This will show an overview of all objects of **Reports & Analysis** in all Profiles (Roles) that have a checkmark in **Show in Role Explorer**. See All Reports.

Actions

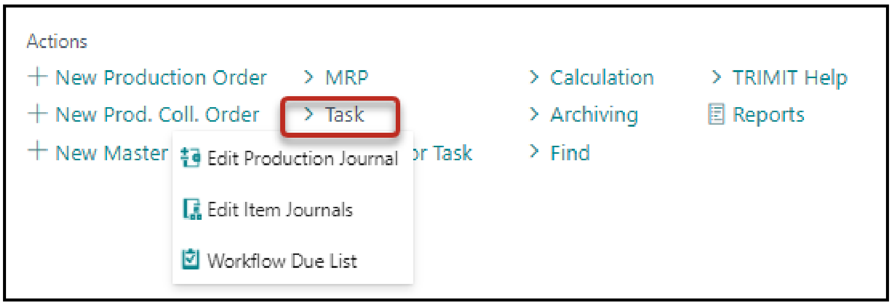
There are also special *Actions.*



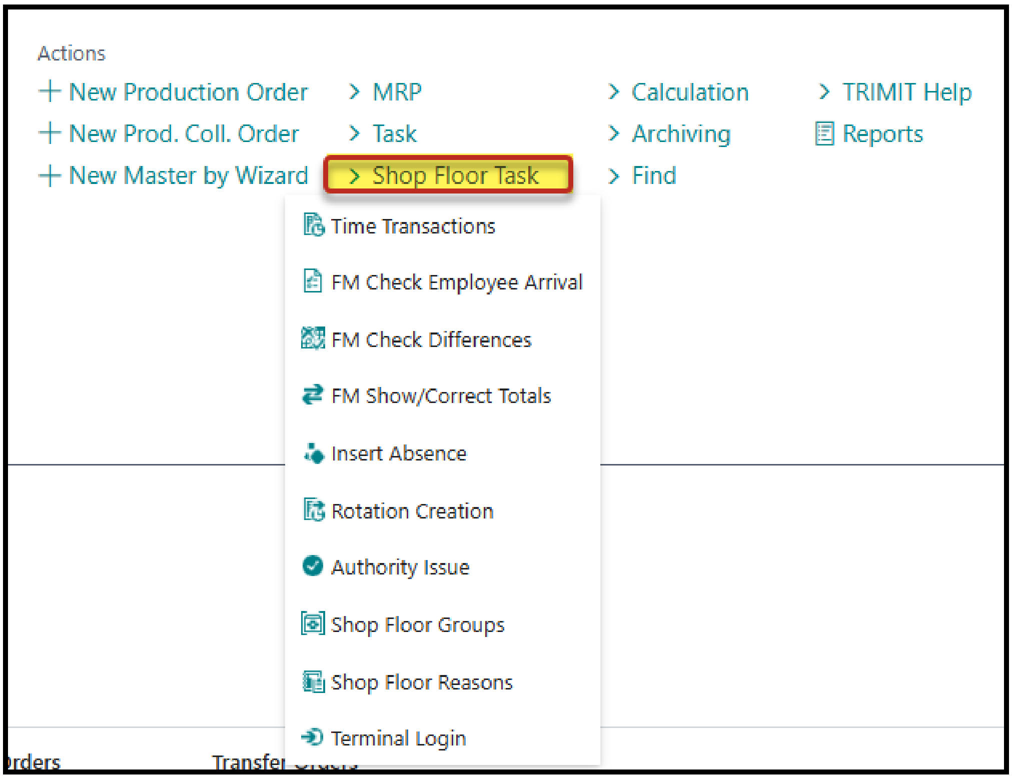
Actions, MRP



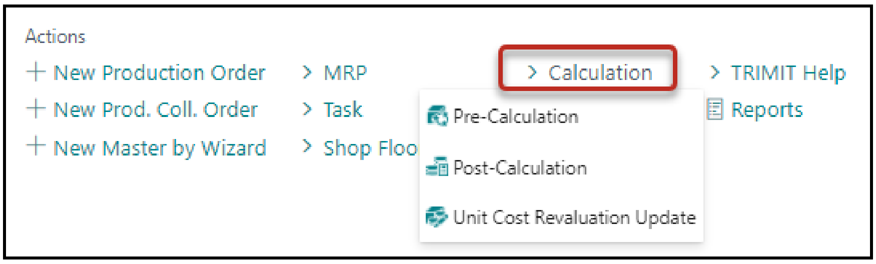
Actions, Task



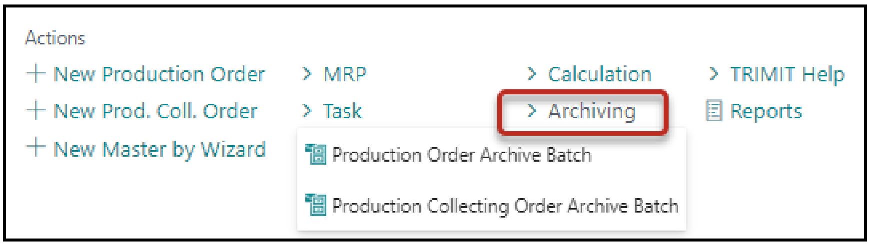
Actions, Shop Floor Task



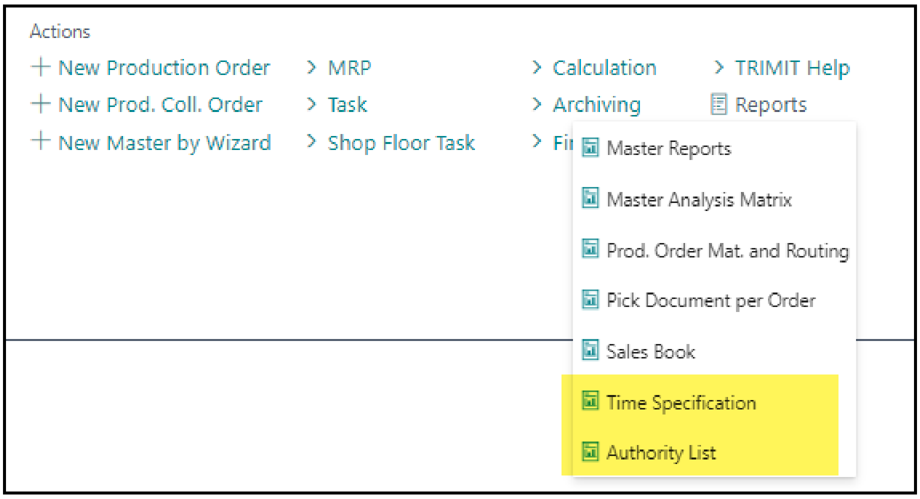
Actions, Calculation



Actions, Archiving

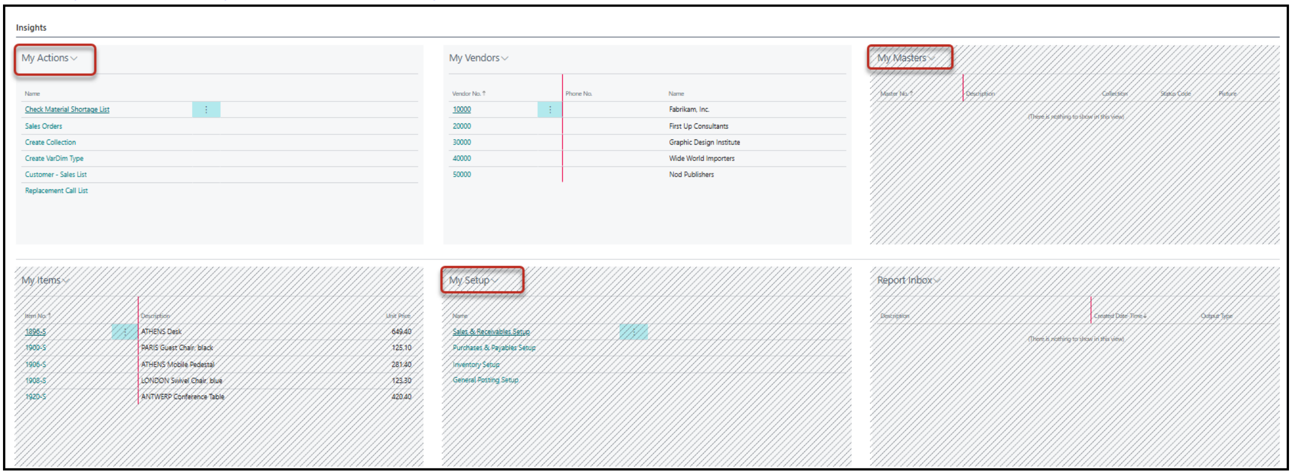


Actions, Reports



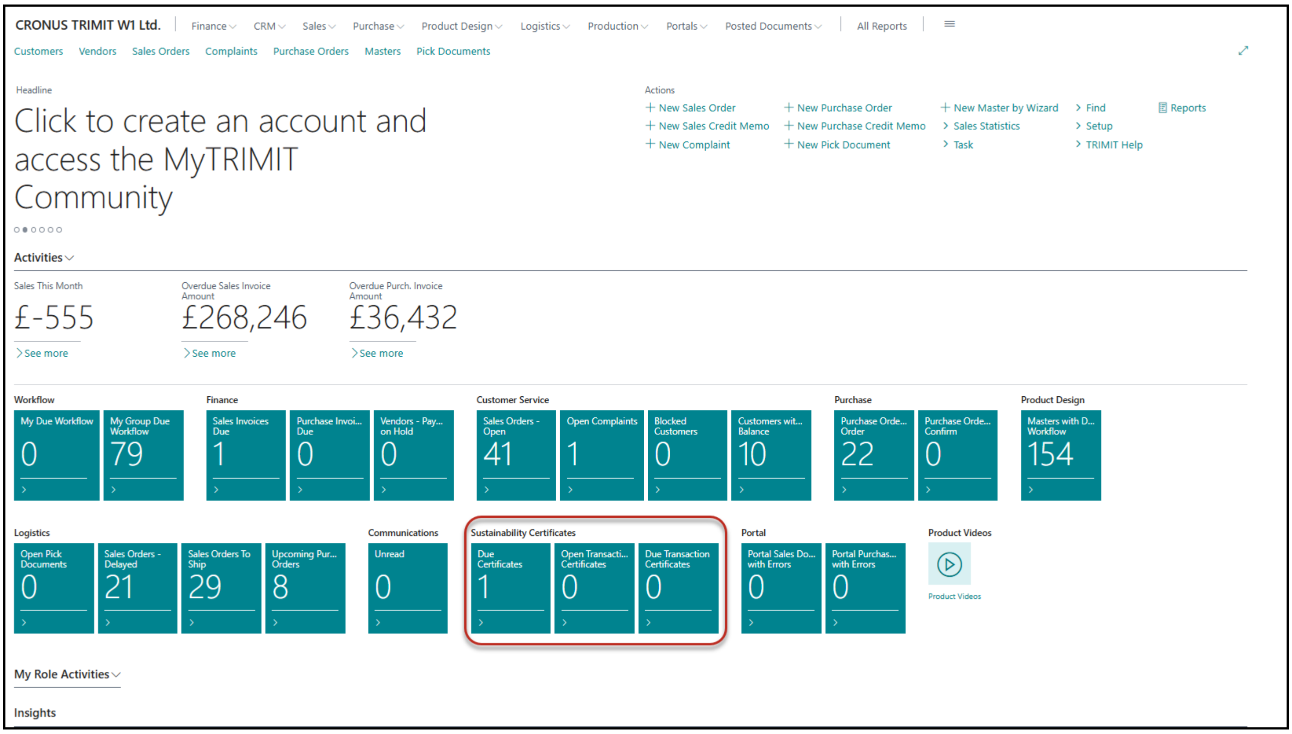
Possible Insights (ListPart Pages)

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

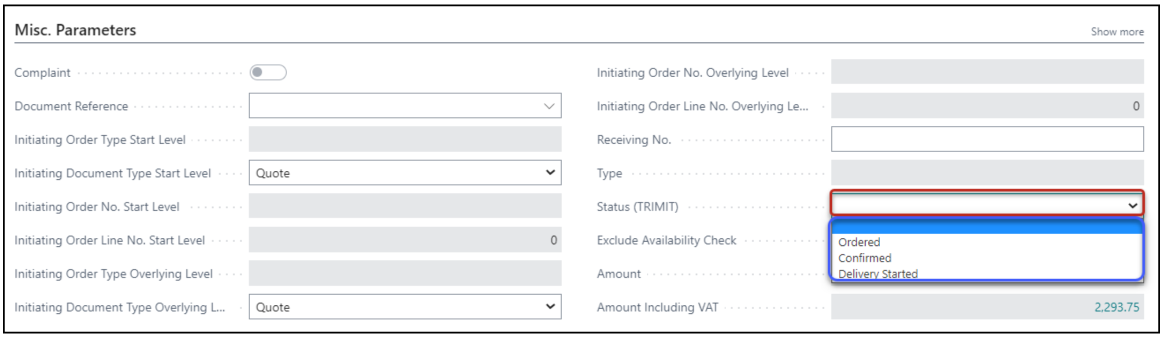
This Cue will only be shown if **Show Customers with Due Balance** on the FastTab ***Small Business*** in the Role Center Setup.is set to *Yes.*
In this Cue you see a list of Customers that have **Balance Due (LCY)** *<> 0* as of the Work Date.
Note that also Customers with a **Balance Due (LCY)** *<> 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.



- ### 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.

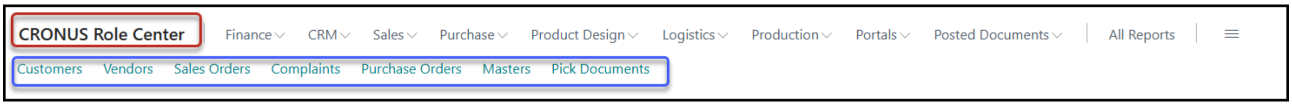
> **Note**
> Quotes/Orders from the TRIMIT Web Supplier, will only show up in the **Portal Purchase Documents** if the Supplier has changed the **Promised Receipt Date** and/or **Quantity to Receive** of the Purchase Quote Lines or Purchase Order Lines, and has updated the Quote/Order.

My Role Activities

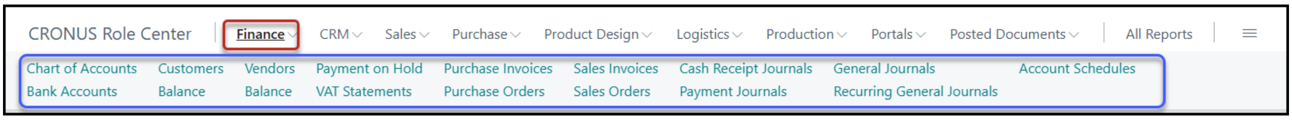
See Chapter My Role Activities.

Menus

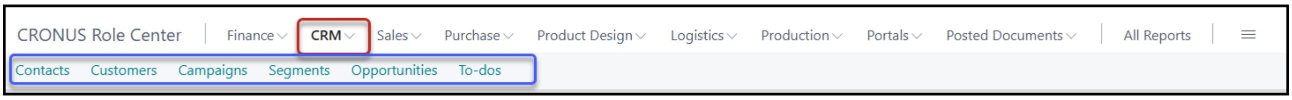
Home



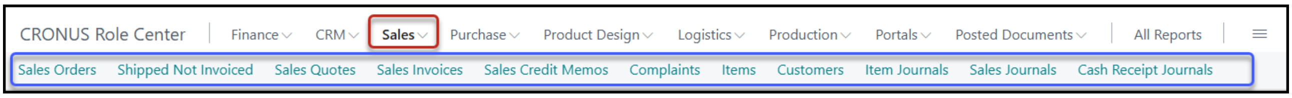
Finance



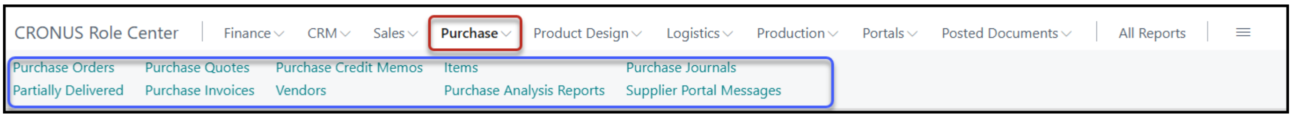
CRM



Sales

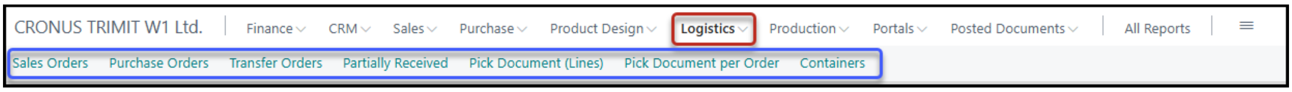


Purchase



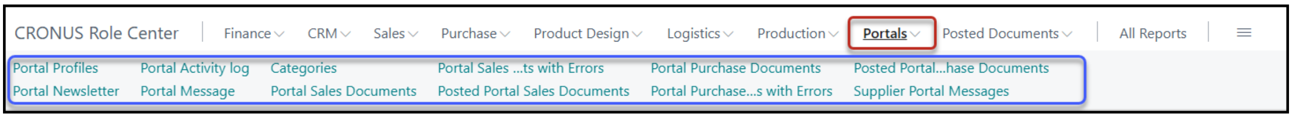
Product Design

Logistics

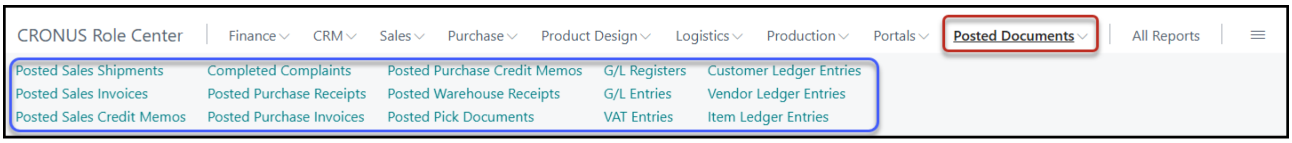


Production

Portals



Posted Documents

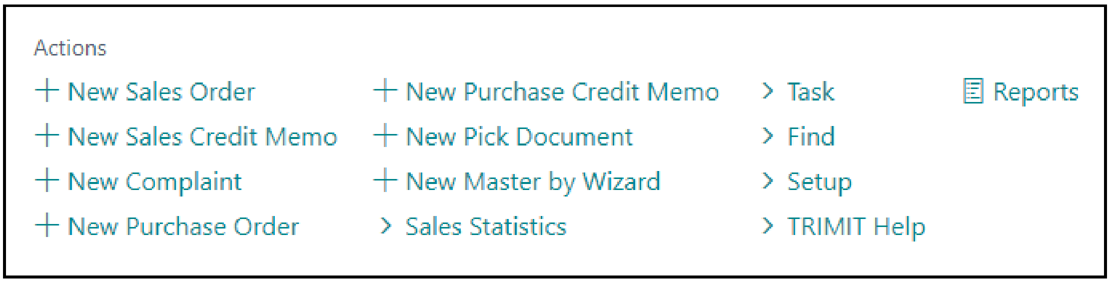


All Reports

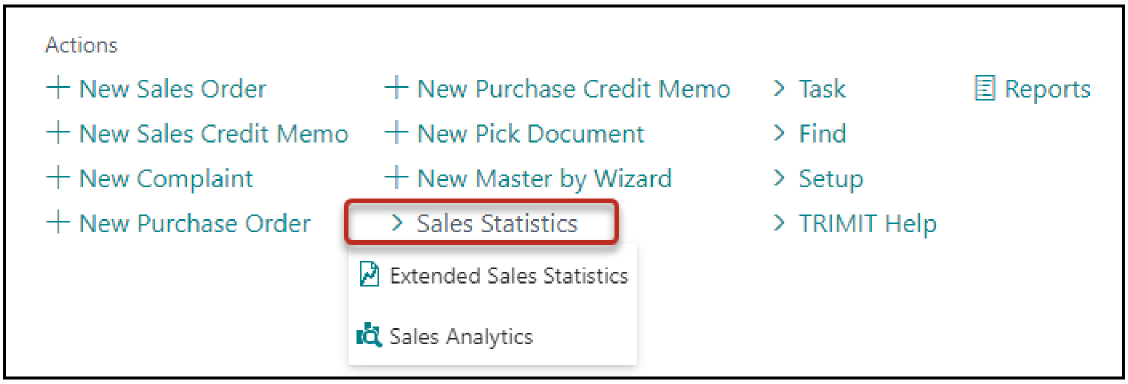
This will show an overview of all objects of **Reports & Analysis** in all Profiles (Roles) that have a checkmark in **Show in Role Explorer**. See [All Reports](#).

Actions

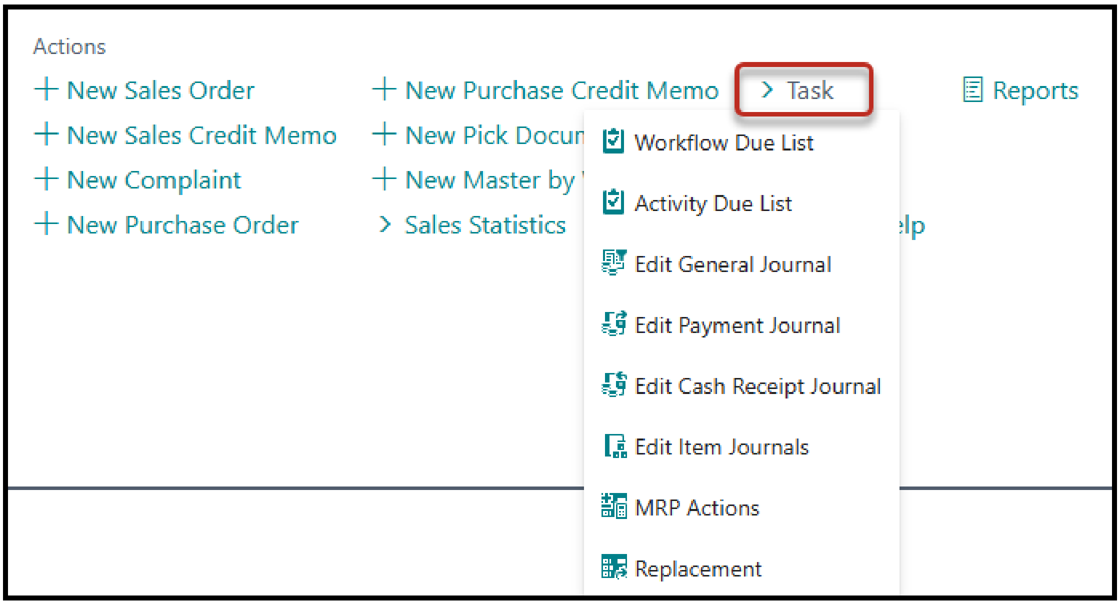
There are also special *Actions.*



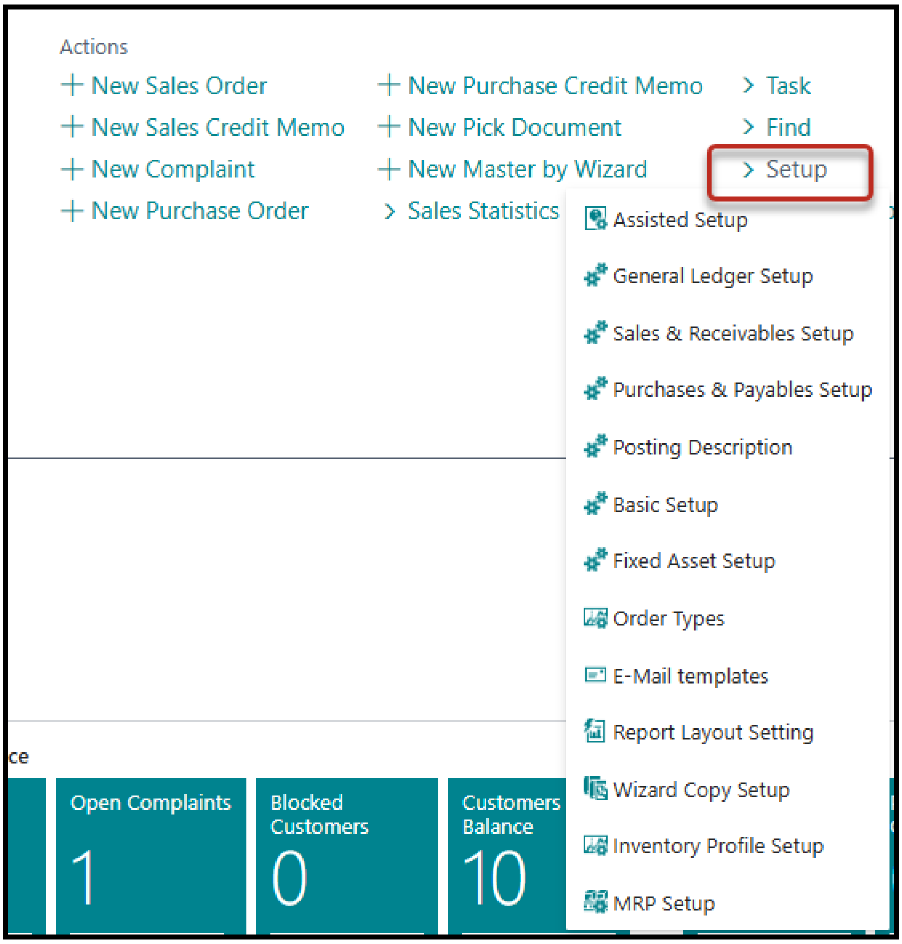
Actions, sales statistics



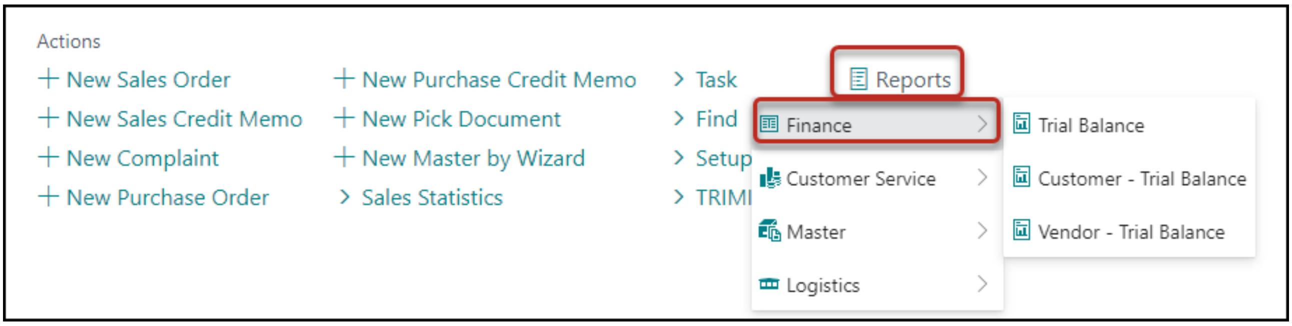
Actions, Task



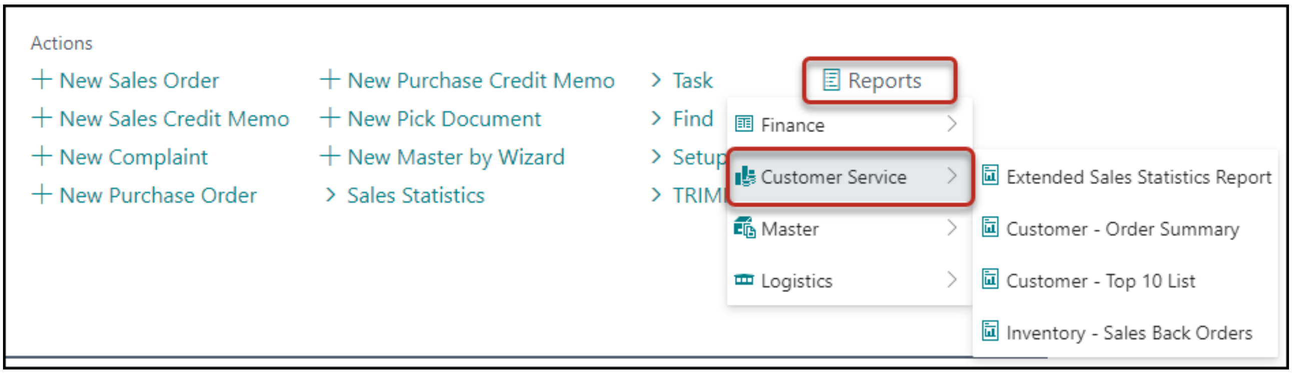
Actions, Setup



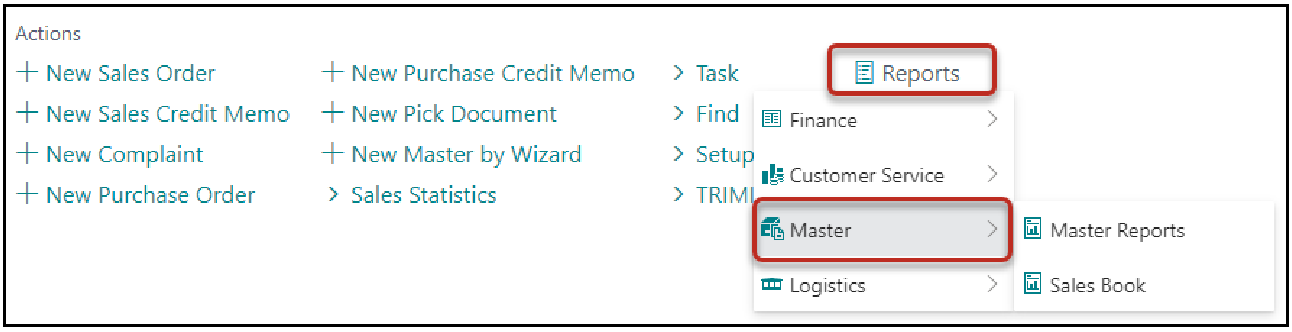
Reports, Finance



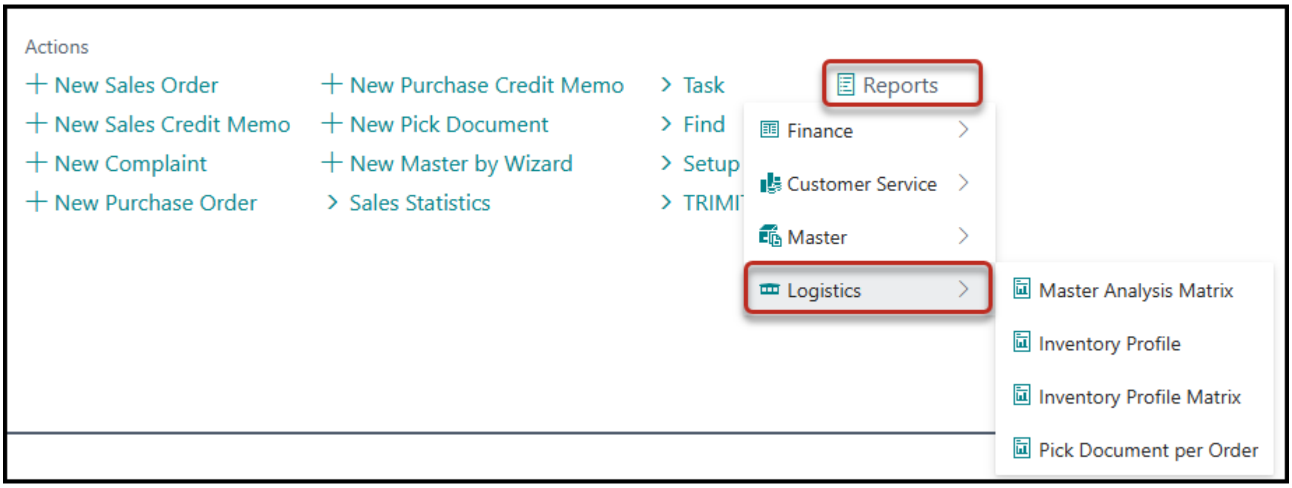
Reports, Customer Service



Reports, Master

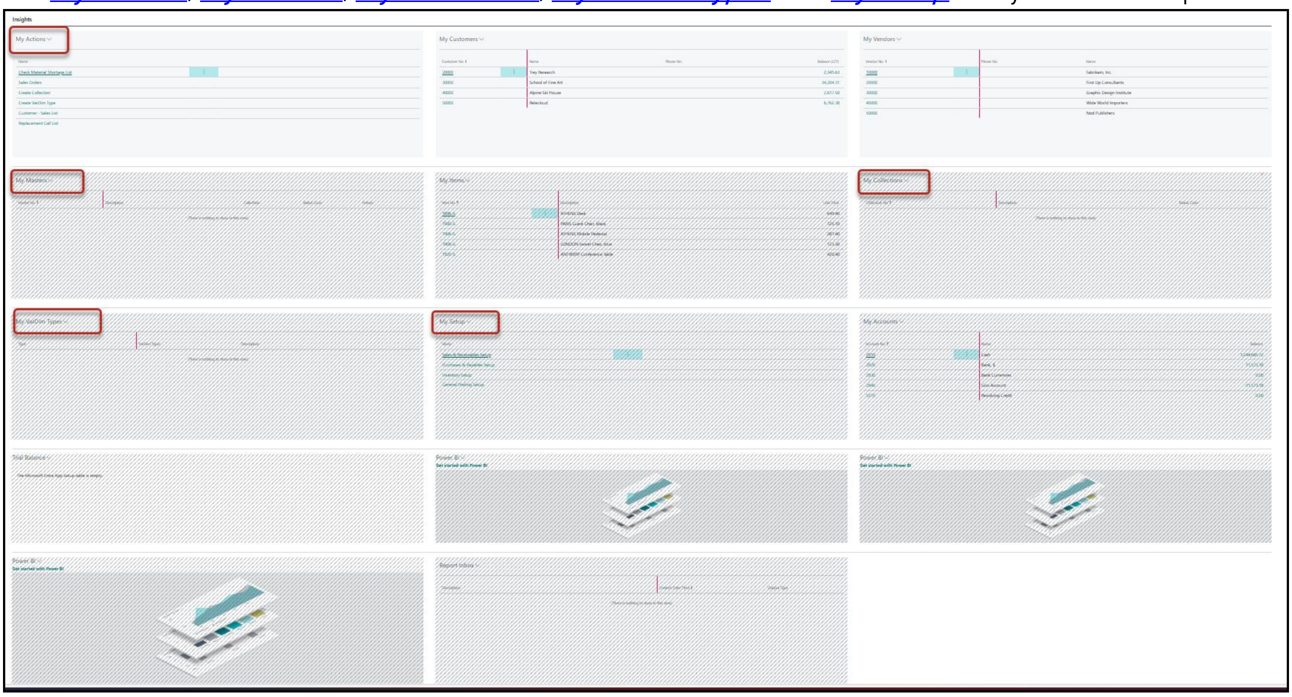


Reports, Logistics



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.

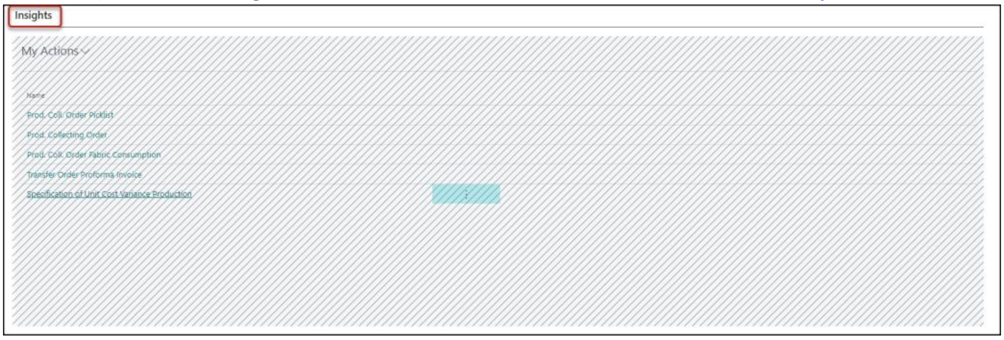


Profile (Role) TRIMIT Shop Floor Terminal

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***

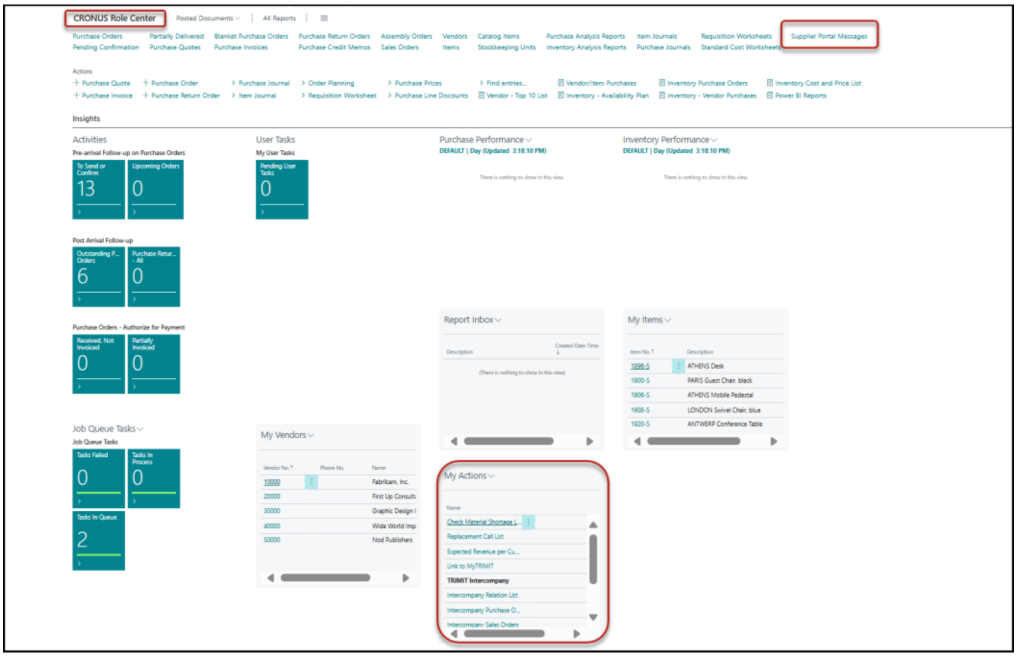
Possible Insights (ListPart Pages)

The only **ListPart Page** that can be chosen is the specific TRIMIT ***My Actions***.



Profile (Role) Purchasing Agent

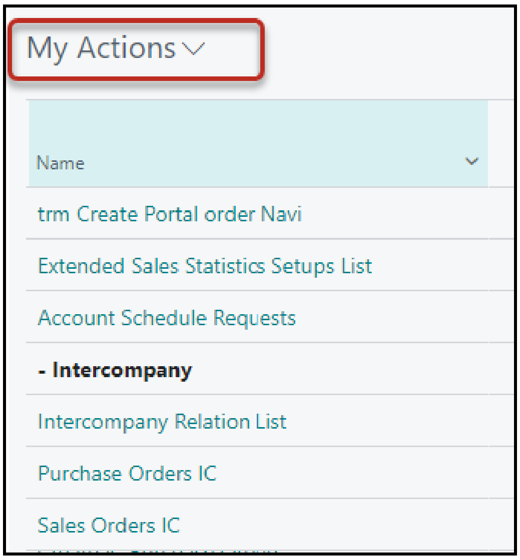
Although this is a standard BC **Profile (Role)**, TRIMIT has added some extras:
Supplier Portal Messages in the *Home Menu* of the Role Center.
The TRIMIT **ListPart Page** ***My Actions***.

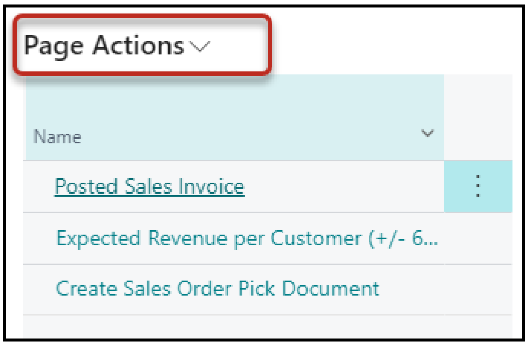


TRIMIT ListPart Pages

My Actions / Page Actions

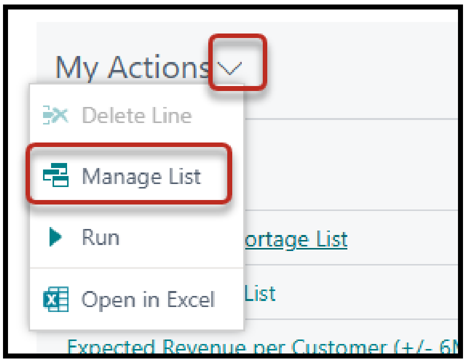
TRIMIT has introduced a ListPart Page in which you can define specific **Actions**.
On the TRIMIT Role Centers, this ListPart Page is called ***My Actions***.
On other pages, a FactBox is called ***Page Actions***.
In these Lists, a user has the possibility to create a list of Actions of different types.





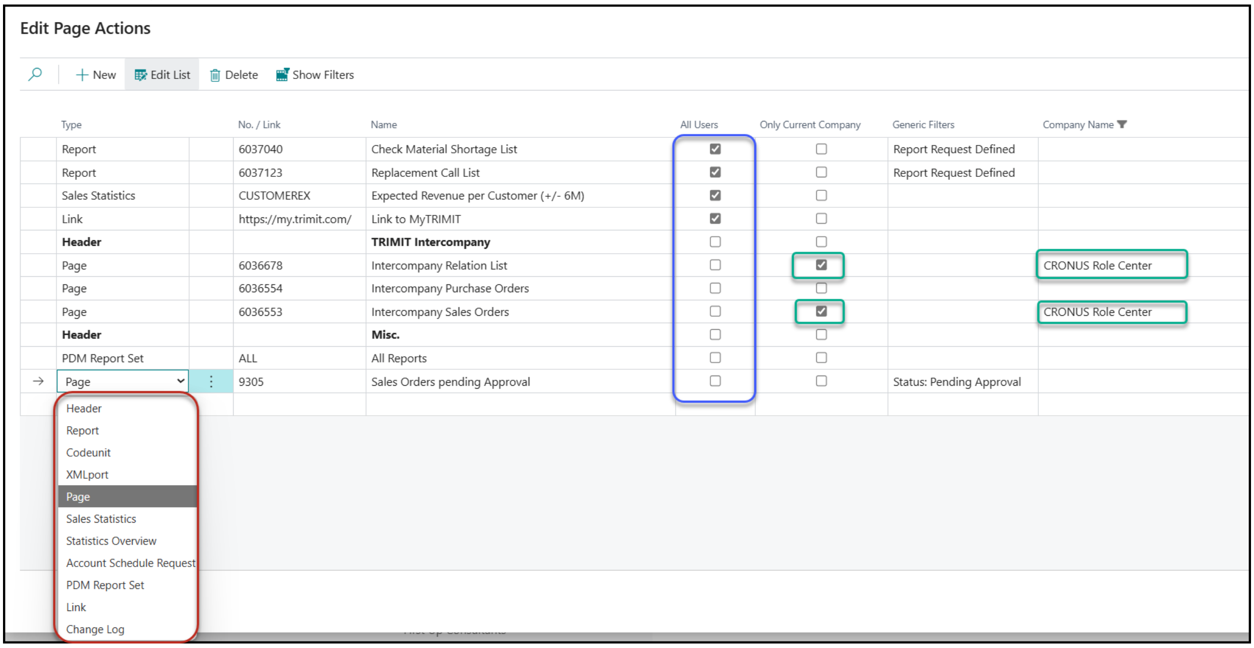
The purpose of these Lists is to avoid customizing the pages.
The Actions can be run by clicking on the chosen Action.
For instance: when you click on *Intercompany Relation List* the Page opens with the **Intercompany Relations** of TRIMIT.
By creating an Action List, a user can choose the Actions that 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.



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

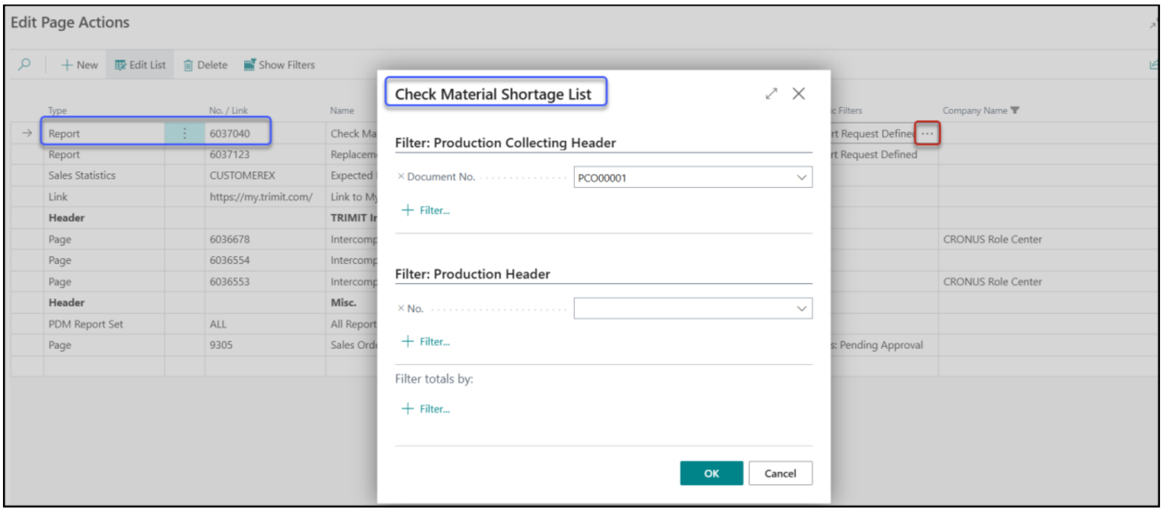
With a checkmark in this field, you can determine that this Action is applicable for all Users, and not only for the user that created this Action (see blue frame in the previous picture).
Without a checkmark in this field, it means that only the user that created this Action will see it in his My/Page Actions.

Only Current Company

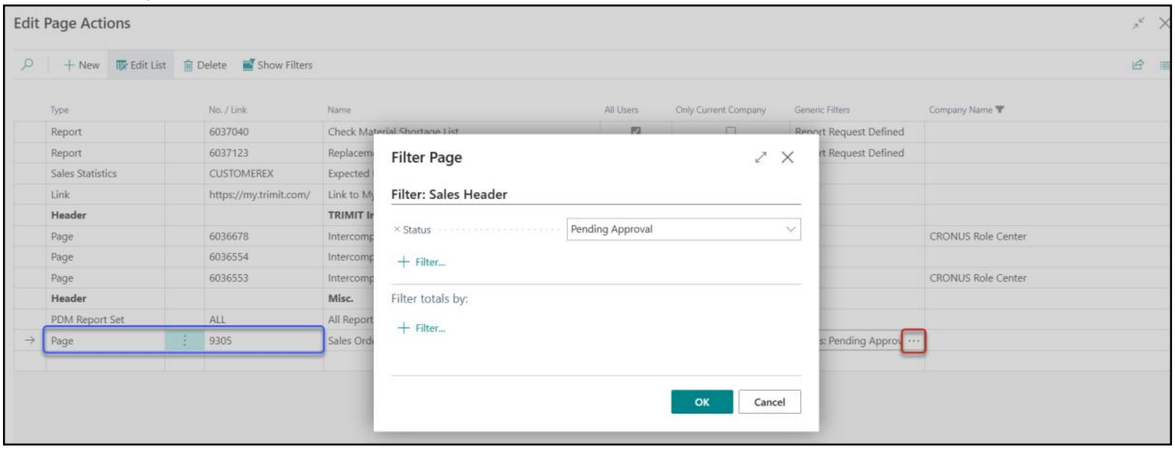
With a checkmark in this field, you can determine that this Action will only be in the My/Page Actions for the current company; in that case the field **Company Name** will be filled automatically with the **Name** of the current company (see green in the previous picture).
Without a checkmark in this field, it means that this Action will be in the My/Page Actions in any Company of the database.

Generic Filters

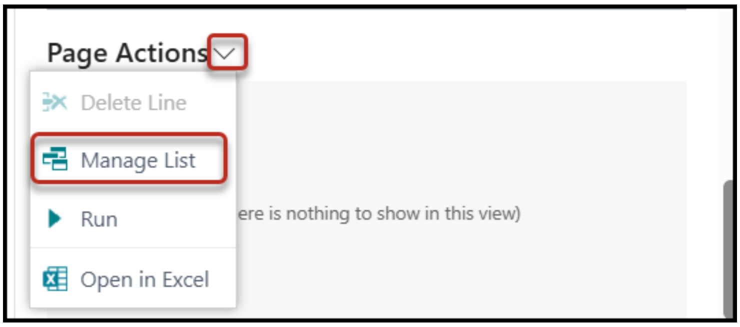
Generic Filters can only be used for **Type** *Report* and *Page.*
In case of **Type** = *Report,* when clicking on the … it will open the Options page for the Report, and you can enter the Options and Filters for this Report.



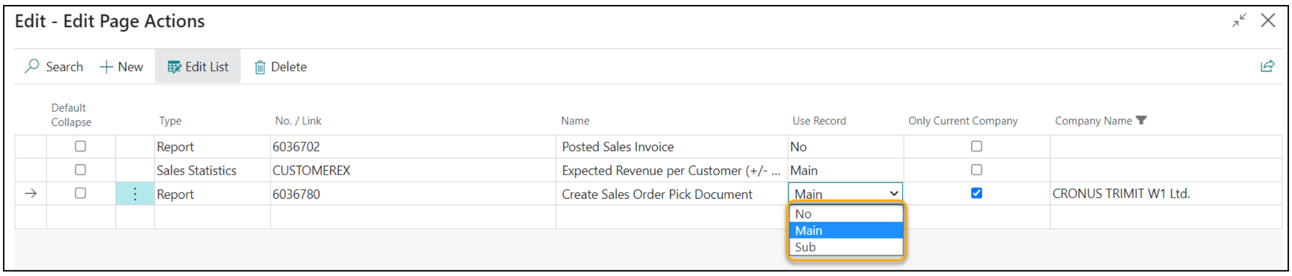
In case of **Type** = *Page*, when clicking on the … you can enter any Filter on the Main Table of the page.



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.

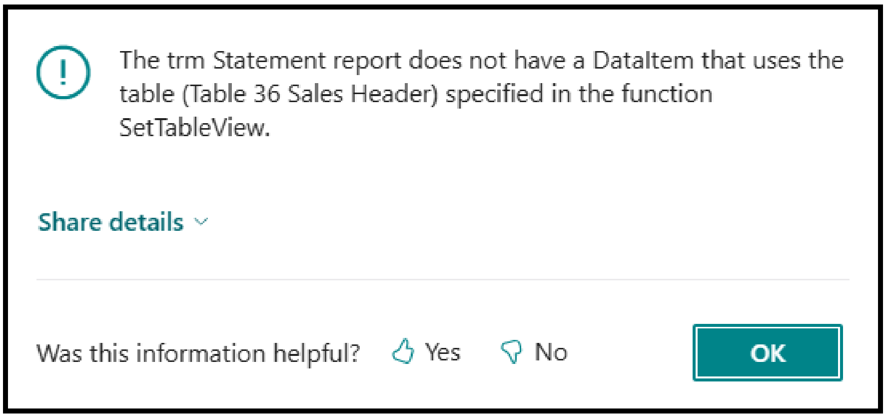
See My Actions – via a Role Center for most of the fields.

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:

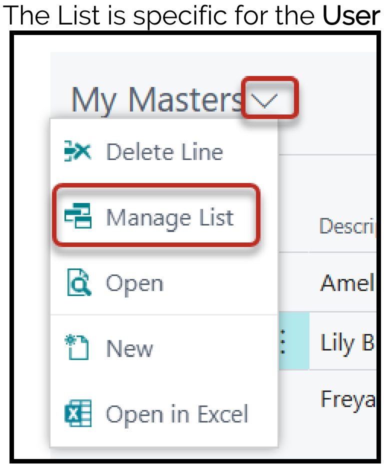
1. The Action is a generic.
2. The Action is specific depending on the main record.
3. The Action is specific depending on the sub record.

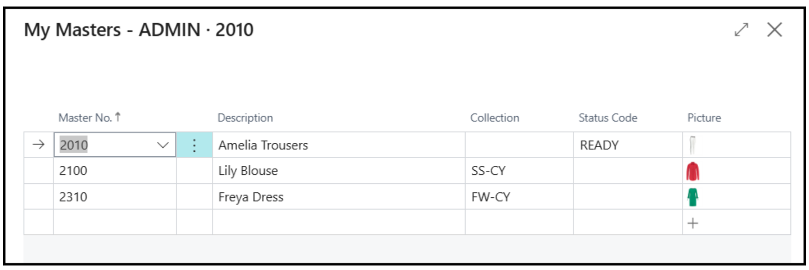
To establish this TRIMIT has introduced the field **Use Record** (see orange in previous picture.)
The **Use Record** field has four options:

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.: 
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

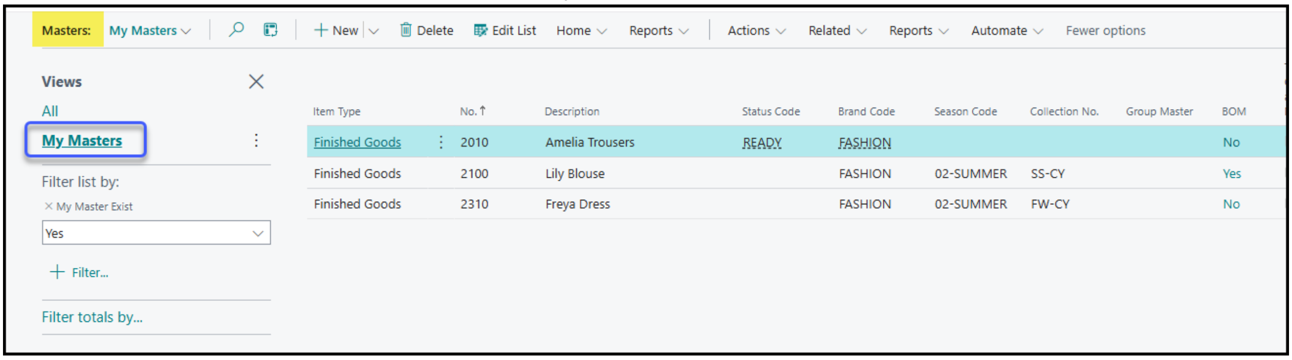
You can create your own List of Masters in the ListPart Page ***My Masters*** in a TRIMIT Role Center by clicking on **Manage List**. These are the Masters that you are working on, or that are important to you. The List is specific for the **User ID** that created the records in this list.





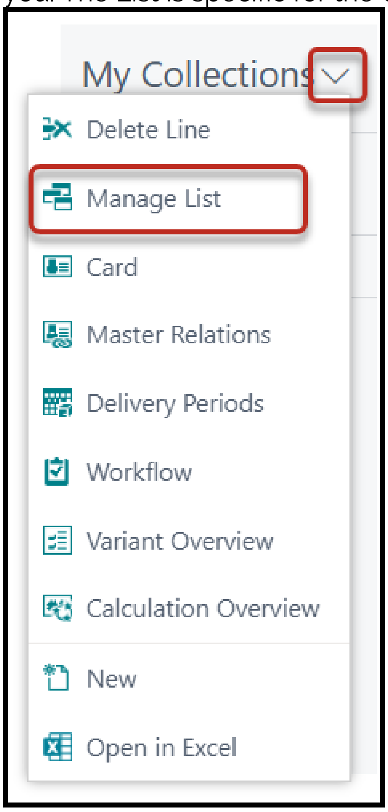
In the ListPart Page clicking on the **Master No.** will open the Master Card.

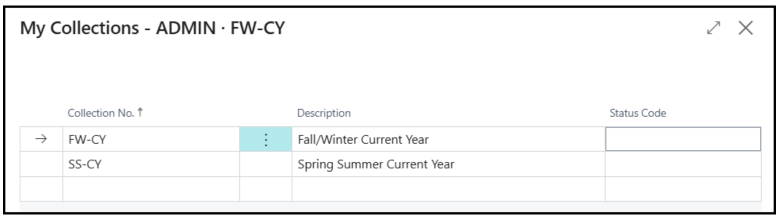
And now you are also able to see the list of ***My Masters*** as a separate View in the regular Masters List.



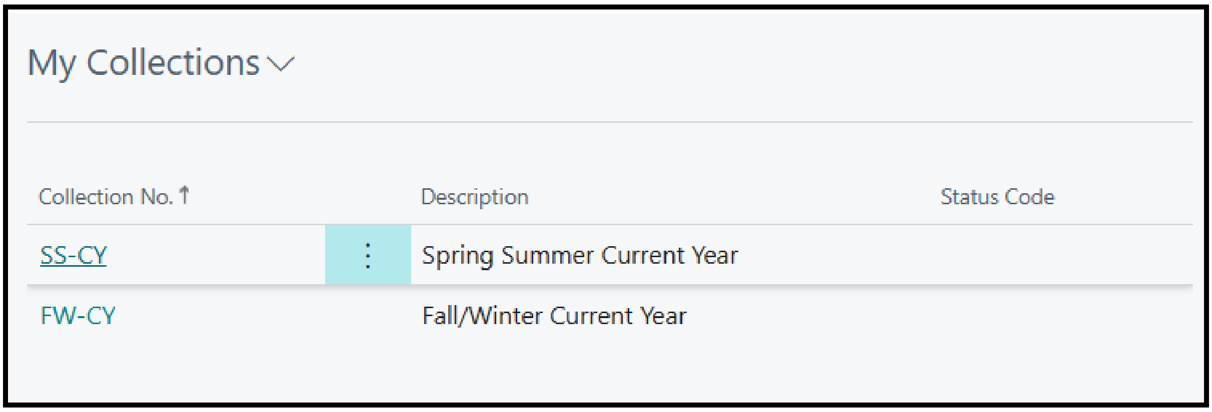
My Collections

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.





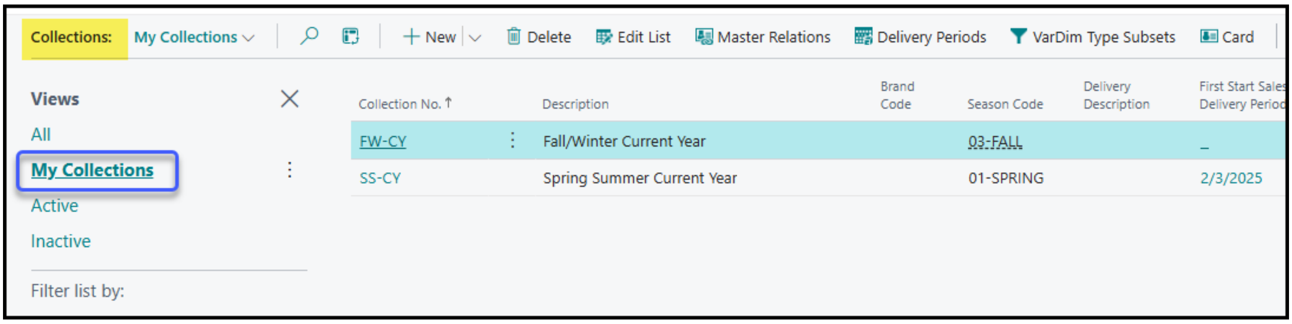
In the ListPart Page clicking on the **Collection No.** will open the **Collection Master Relations** page, in which you can add Masters to the Collection.



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.

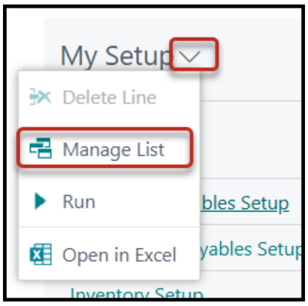
And now you are also able to see the list of *My Collection* as a separate View in the regular Collections List.

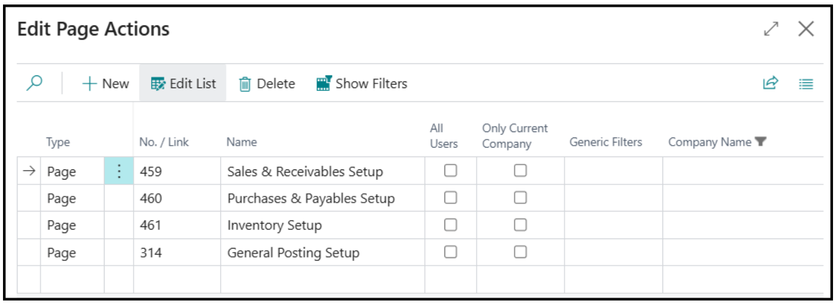


For more information regarding Collections, see *White Paper – TRIMIT Collection Management.*

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*.

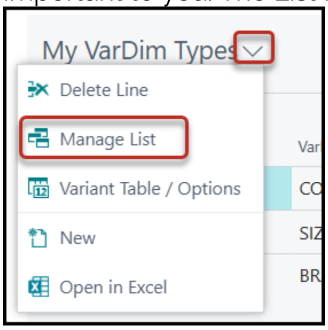


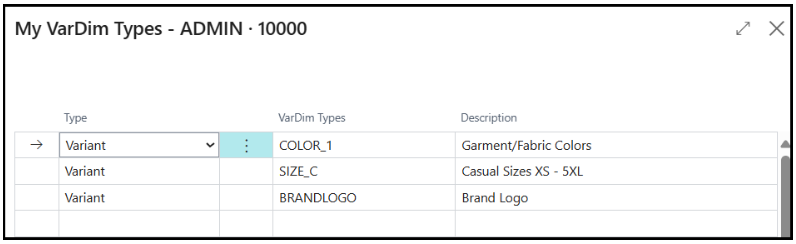


In the ListPart Page clicking on the **Name** will open the Card, Report, etc., depending on the **Type**.

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.

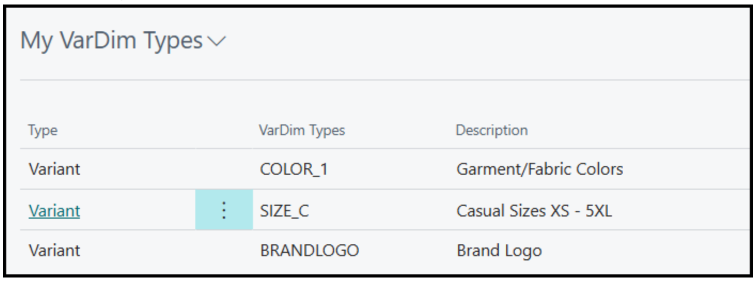




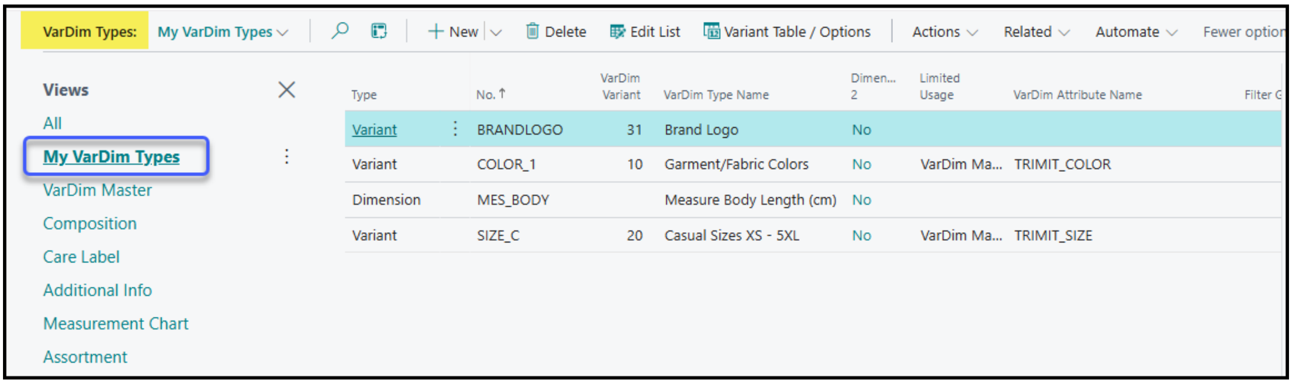
After the **My VarDim Types** list is filled, you are able to click on:

- **Variant Table/Options** which will opent 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.

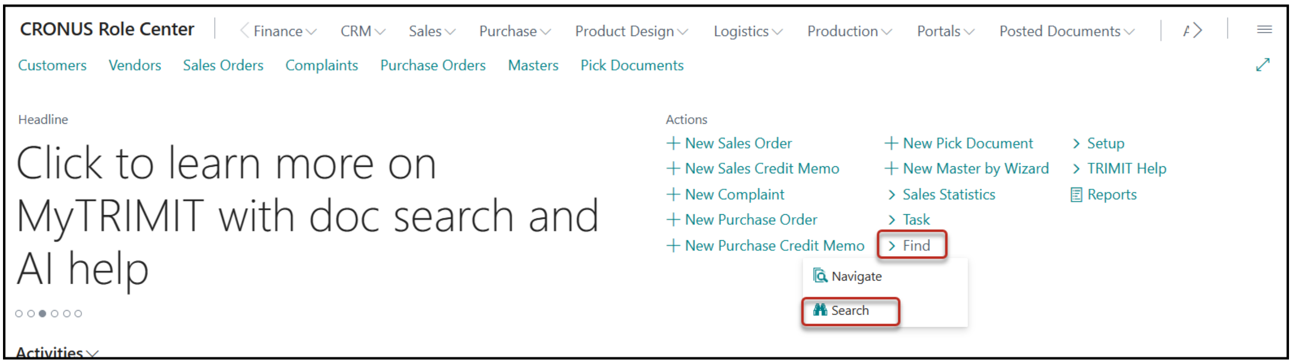


And now you are also able to see the list of ***My VarDim Types*** as a separate View in the regular VarDim Types List.

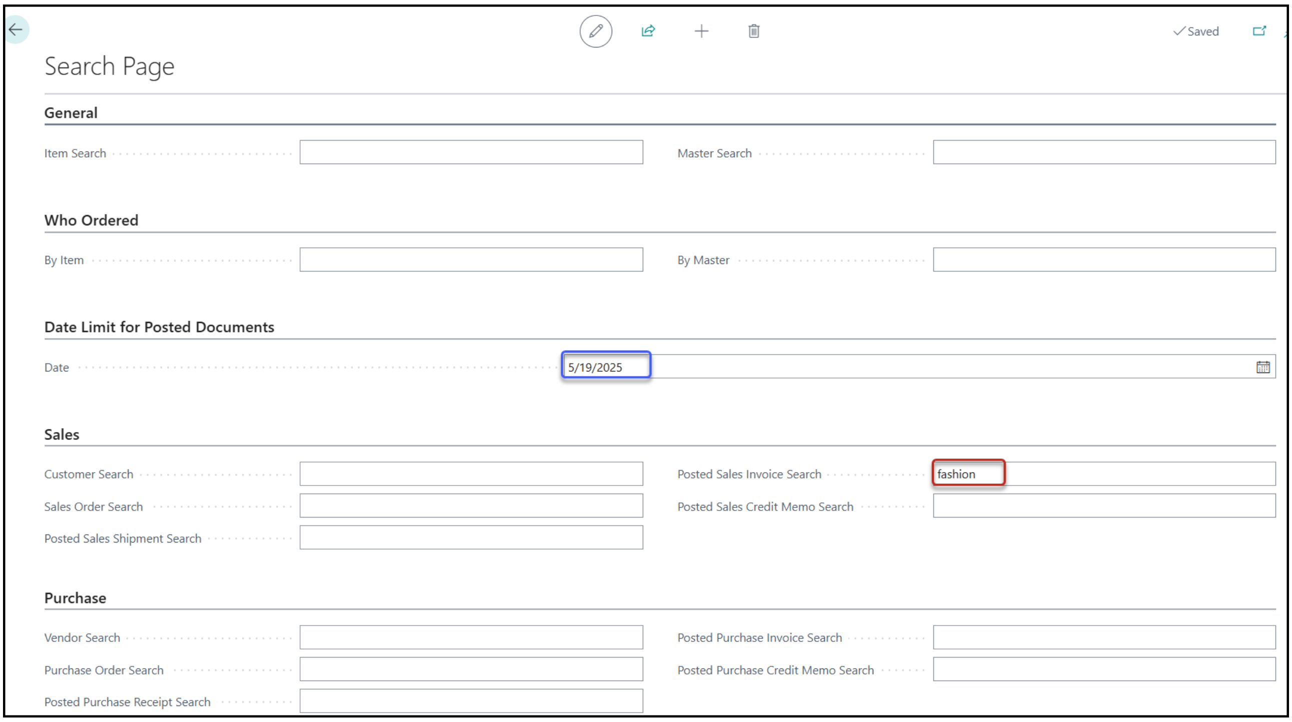


TRIMIT Search Function

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).



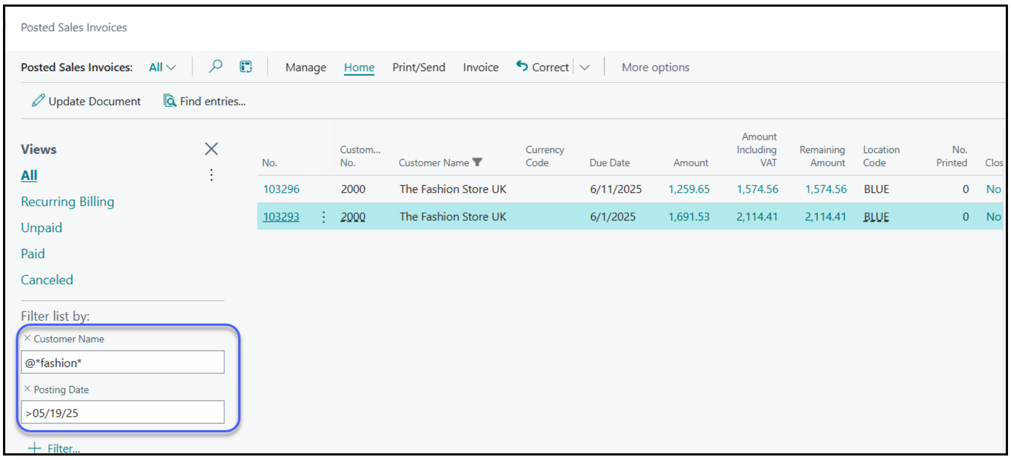
If you click on the ***Find, Search,*** the following Page opens. In this Page, you can search very easily for all the entities shown. There is no need for using '@', '*' or any other symbol. This is illustrated below.



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:



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.

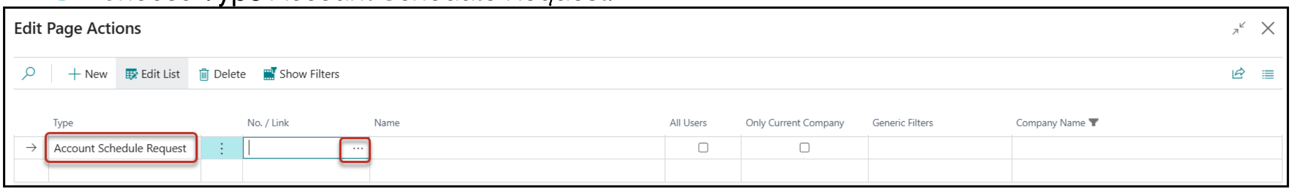
This way, searching for the required document goes amazingly fast. The next step is to select the right Invoice **No.** and click on it to open the Document.

Account Schedule Request

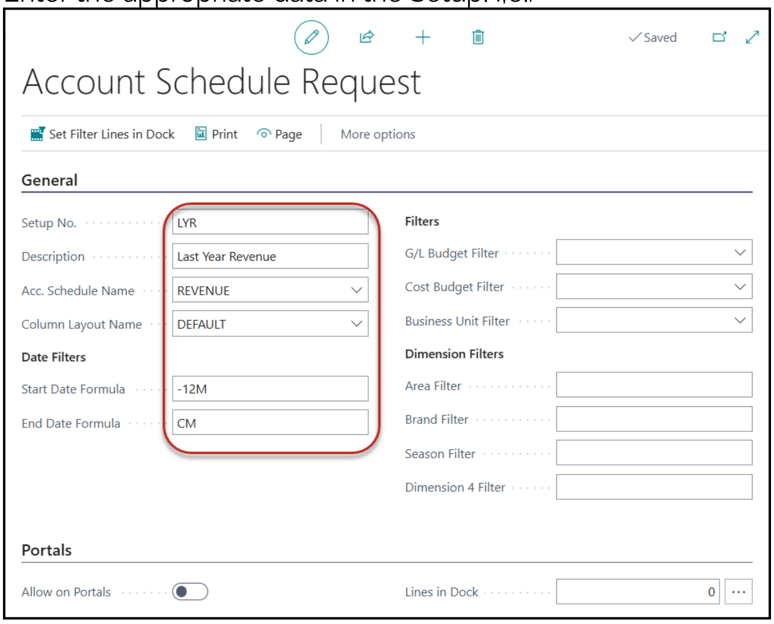
This Chapter describes how to create an Action of the **Type** *Account Schedule Request*.
The purpose of this Action is to create an Account Schedule Report.

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*.



- 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.:



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*.

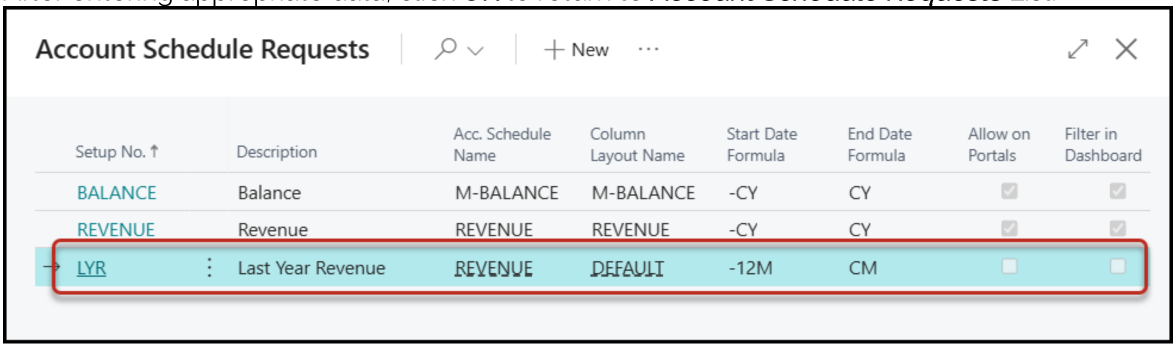
Allow in Portals

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

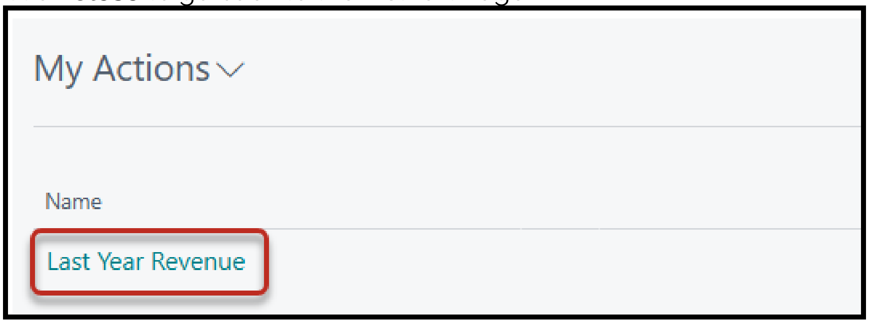
Lines in Dock

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.*

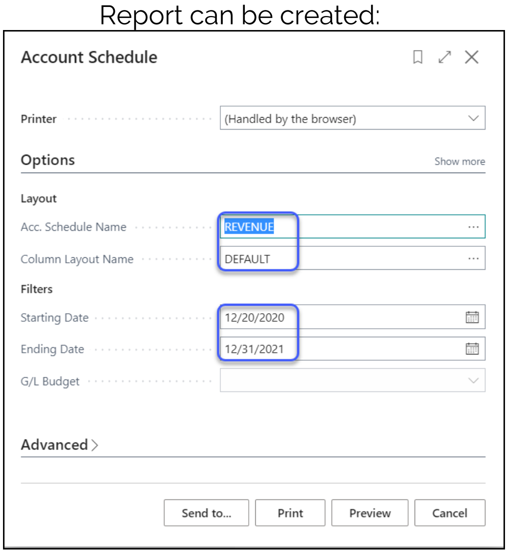
- After entering appropriate data, click **OK** to return to ***Account Schedule Requests*** List:



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



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



Revenues

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

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

12/20/2021
Page 1 / 1
ADMIN

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:

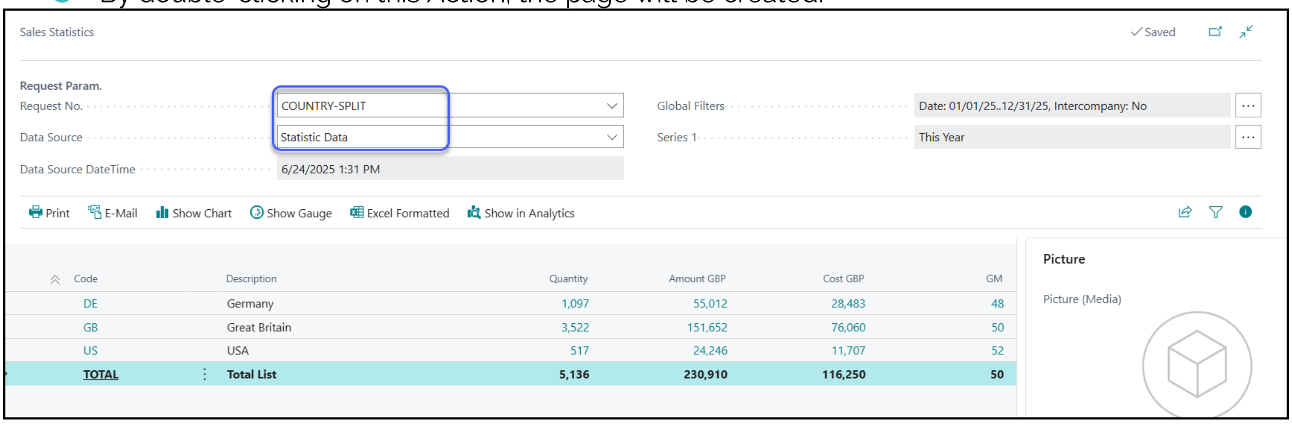
- Go to a **Page Actions** FactBox or to the **My Actions** ListPart Page.
- Click ***Manage List***. The **My Actions** List opens
- Choose **Type** *Sales Statistics*.

- 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*.

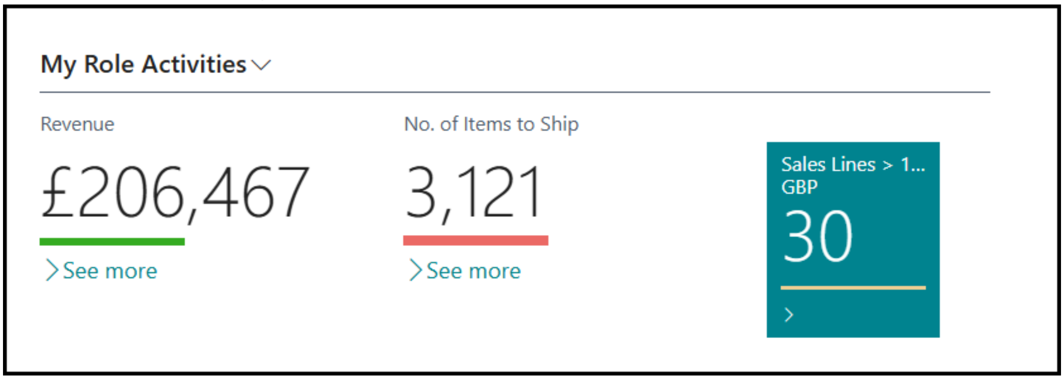
- This Sales Statistic Setup No. is now visible in the Page Actions.

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



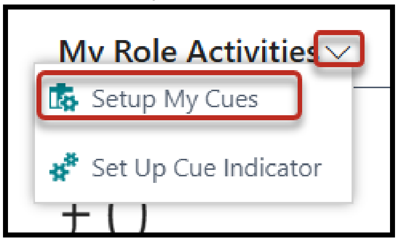
My Role Activities

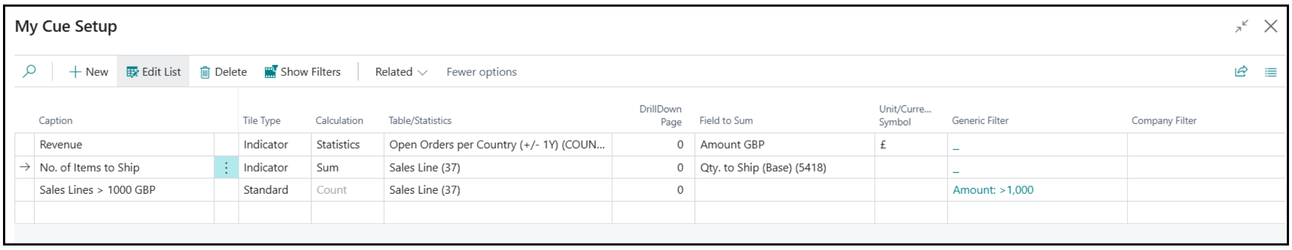
As described in the Role Center Setup you can already influence the TRIMIT Role Centers for **Small Business, PDM/Design** and **Customer Service**.



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:



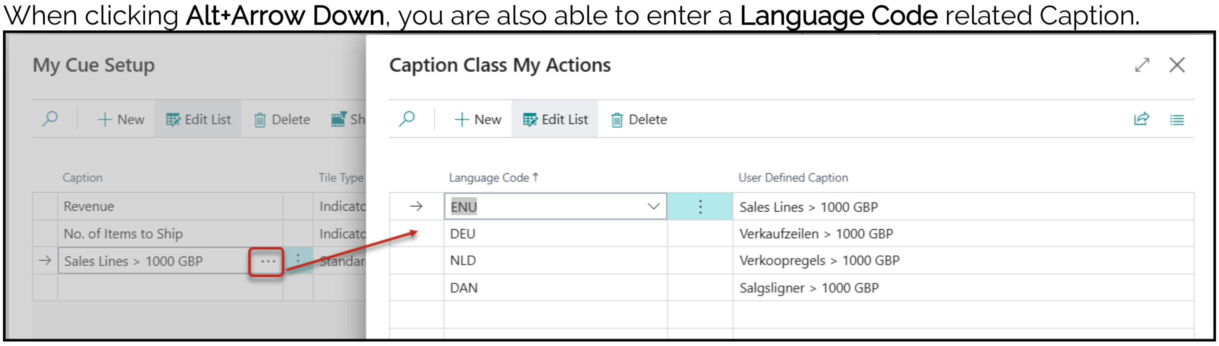


You can create a maximum of 10 own Cues (**Tile Type** = *Standard*) and 5 own Indicators (**Tile Type** = *Indicator*) , and they will only be shown in the list to you based on your User ID and because you created them.

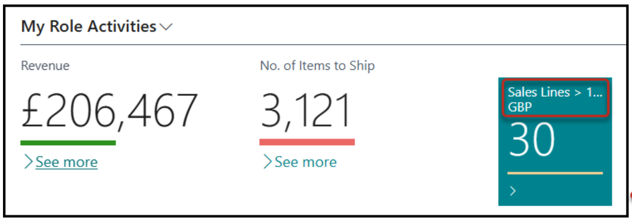
Description of the Fields

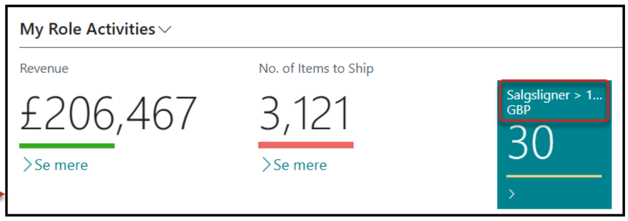
Caption

The name of the Cue/Indicator.
When clicking **Alt+Arrow Down**, you are also able to enter a **Language Code** related Caption.

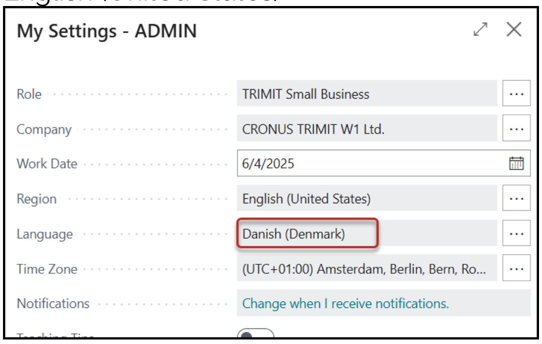


This will determine the Caption of the Cue based on the **Language** in the general **My Settings**.



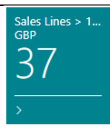
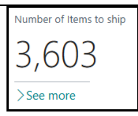


English (United States) Danish (Denmark)



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

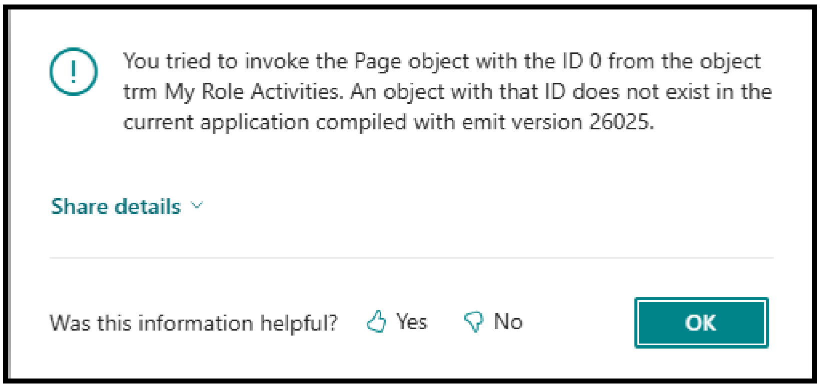
The **Calculation** you can choose depends on the **Tile Type**:
For **Tile Type** *Standard*, the **Calculation** is set to *Count*, and you cannot change it: it will always show the number of records based on the **Table/Statistics**, **Generic Filters**, and **Company Filter** of the ***My Cue Setup***.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

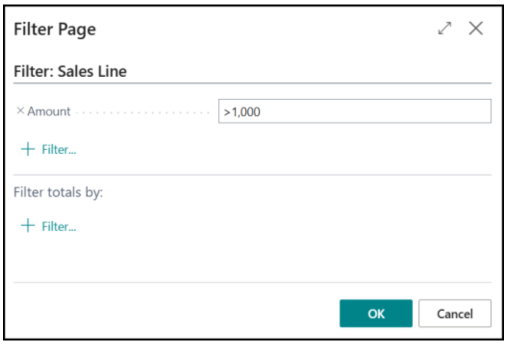
If **Calculation** is *Statistics*, you can choose one of the options that can be chosen for the Columns of the **Table/Statistics**.
If **Calculation** is *Sum,* you can choose a Field in the **Table/Statistics** from which you want to see the sum.

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.:

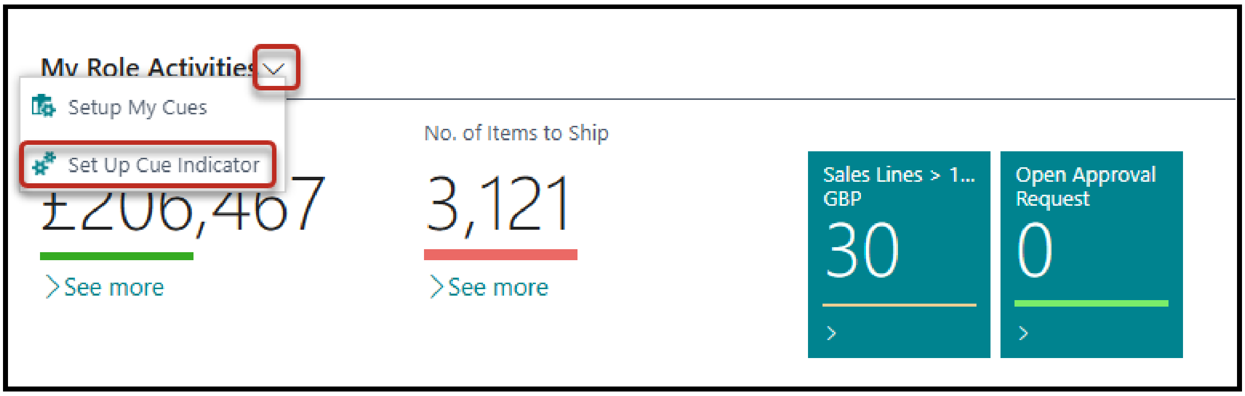


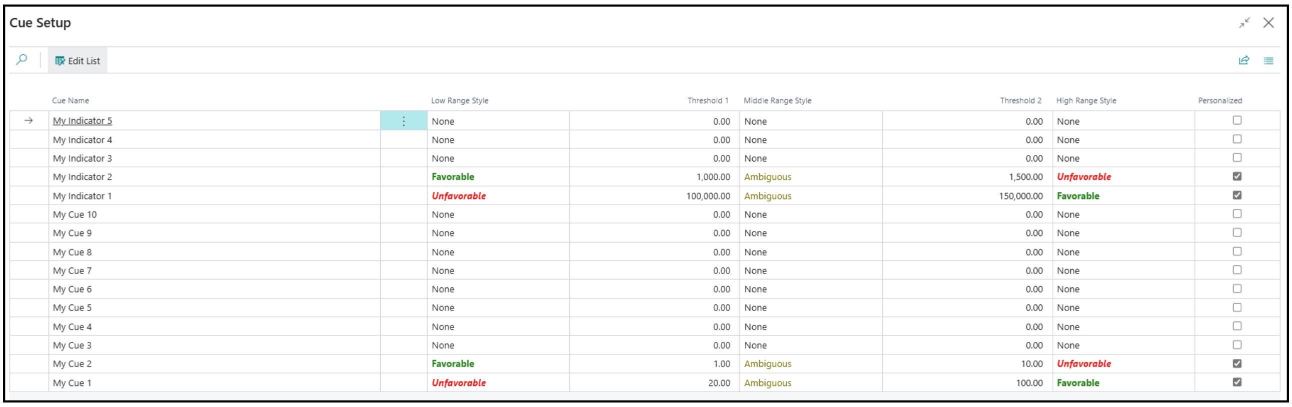
Company Filter

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

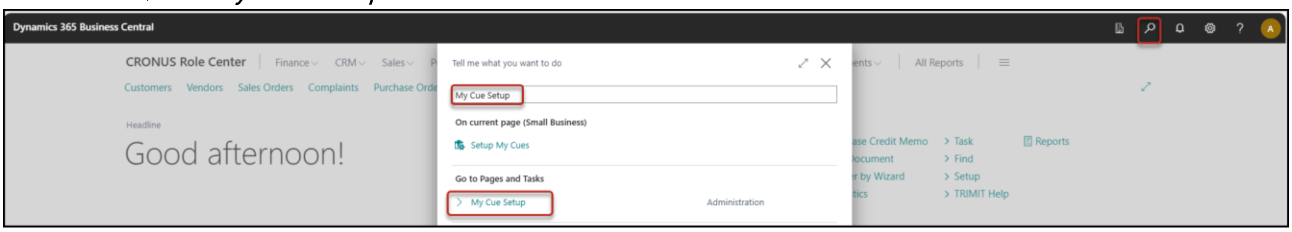
Cue Name	Low Range Style	Threshold 1	Middle Range Style	Threshold 2	High Range Style	Personalized
My Indicator 5	None	0.00	None	0.00	None	☐
My Indicator 4	None	0.00	None	0.00	None	☐
My Indicator 3	None	0.00	None	0.00	None	☐
My Indicator 2	Favorable	1,000.00	Ambiguous	1,500.00	Unfavorable	☑
My Indicator 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.

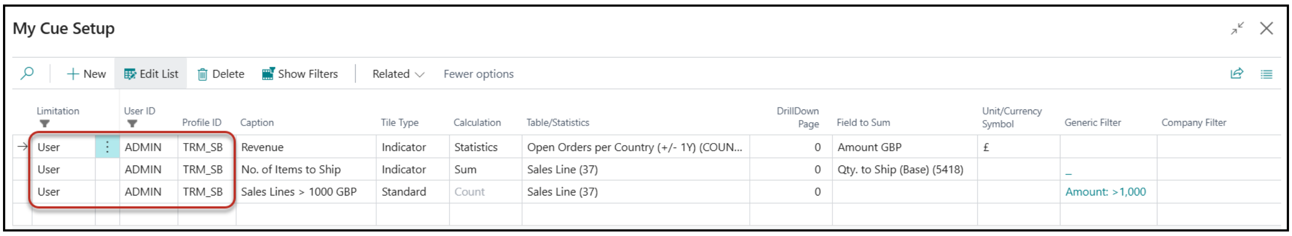
Extra Options for My Role Activities

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.

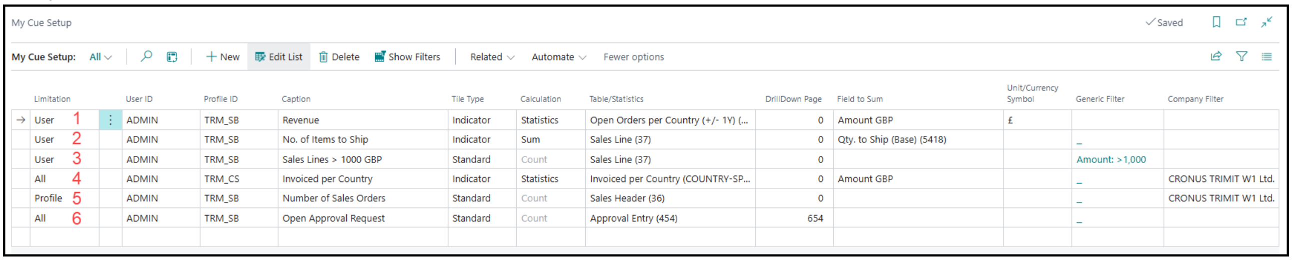
Limitation

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:



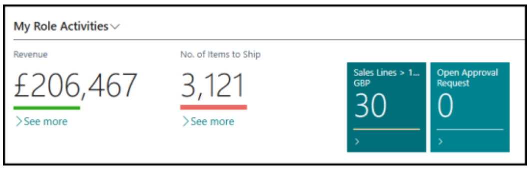
My Cue Setup ✓Saved

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) (...	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		_	CRONUS TRIMIT W1 Ltd.
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			_	

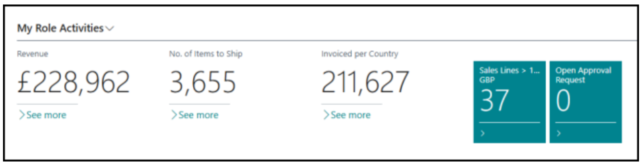
Example 1:

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

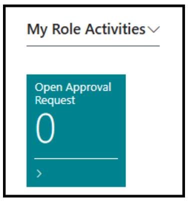


Example 3:

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

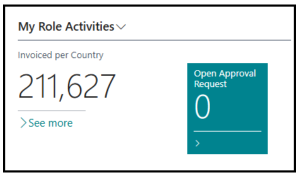
Example 4:

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



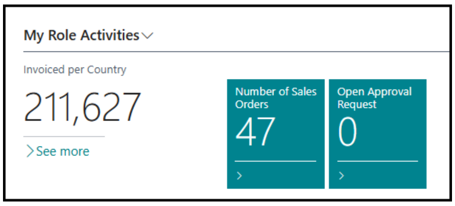
Example 5:

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.