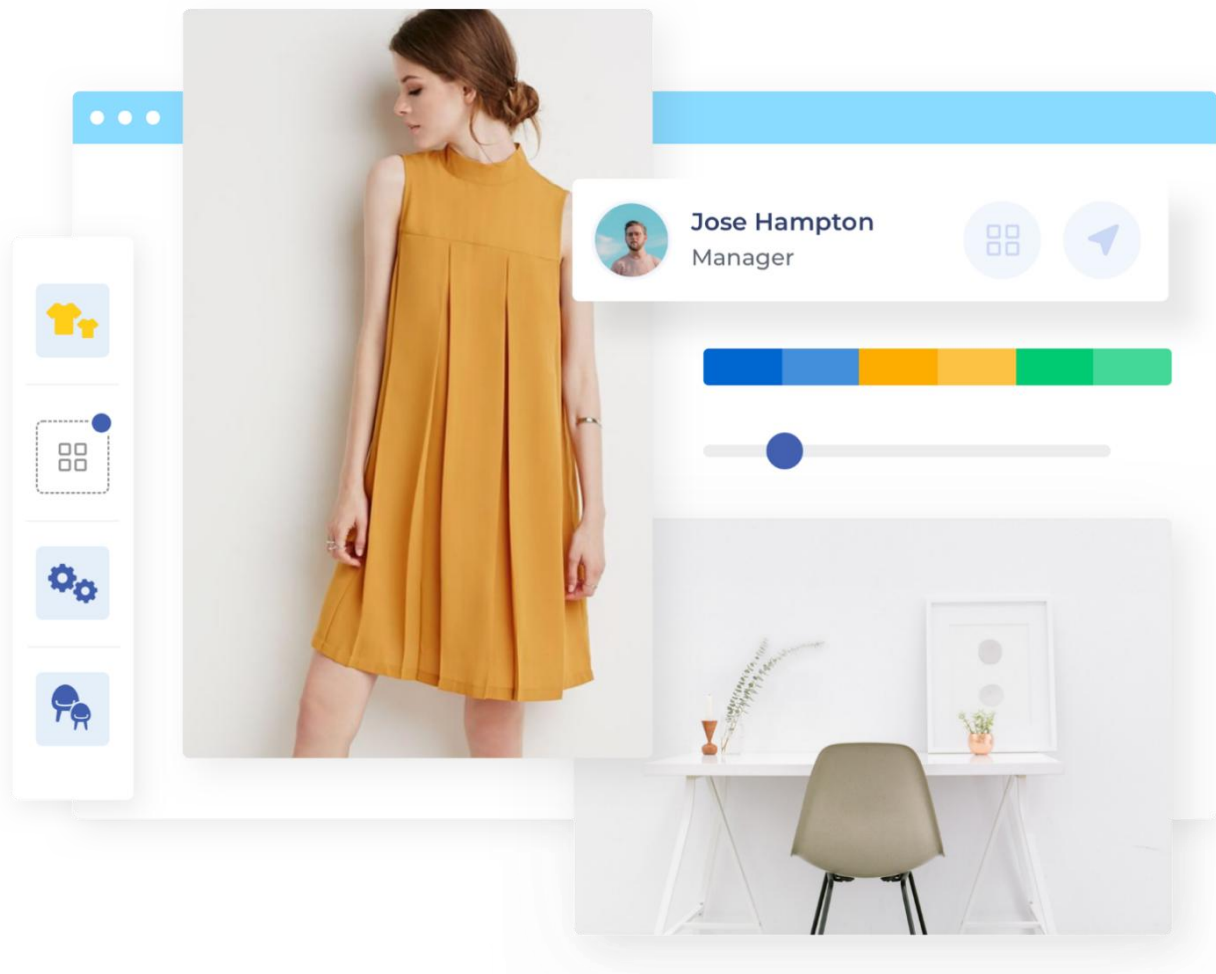


**WHITE PAPER**

TRIMIT SALES- AND PURCHASE COMMENTS BC16

This document contains information about the Sales-/Purchase Comments functionality in TRIMIT for Business Central W1 BC16.

Version: BC16.1.700.0 - 1

Date: 27-07-2020

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INTRODUCTION

On a Sales Document, Sales Document Line, Purchase Document and Purchase Document Line, you can enter **Comments**.

You can also mark these Comments as specific **Comment Handling 1 – 9**.

In combination with the **Report Layout Settings** it gives you the possibility to determine which Comments you want to print on the report of the Document (like Sales Order Confirmation or Purchase Order), based on the TRIMIT Reports for those Documents.

The functionality described is the functionality in **TRIMIT for Business Central W1 BC16**.

The pictures in this White Paper are based on the demo database for **TRIMIT Business Central W1 BC16**, which is based on Microsoft Dynamics 365 Business Central 2020 release wave 1, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT Sales- and Purchase Comments contains the following objects:

The tables	6036502	<i>trm Caption Class Setup</i>
	TableExtension 6036518	<i>trm Purch Comment Line Ext</i> extends 43 <i>Purch. Comment Line</i>
	TableExtension 6036519	<i>trm Sales Comment Line Ext</i> extends 44 <i>Sales Comment Line</i>
	6037350	<i>trm Report Layout Settings</i>
The pages	6036503	<i>trm Caption Class Setup</i>
	PageExtension 6036539	<i>trm Purch. Comment Sheet Ext</i> extends 66 <i>Purch. Comment Sheet</i>
	PageExtension 6036540	<i>trm Sales Comment Sheet Ext</i> extends 67 <i>Sales Comment Sheet</i>
	6037366	<i>trm Report Lay. Setting (List)</i>
	6037367	<i>trm Report Layout Setting (Card)</i>
The reports	6036700	<i>trm Sales Quote</i>
	6036701	<i>trm Sales Order</i>
	6036702	<i>trm Sales Invoice</i>
	6036703	<i>trm Sales Credit Memo</i>
	6036704	<i>trm Sales Shipment</i>
	6036730	<i>trm Purchase Order</i>

SETUPS

CAPTION CLASS SETUP

In the **Caption Class Setup**, we can determine the “Column Names” for the Comment Handling 1 – 9:

Caption Class Setup

Inventory >

Purchase >

Sales >

Comments

GENERAL		PURCHASE		SALES	
Comment Handling 1	0	Purch. Comment Handling 1	2	Sales Comment Handling 1	2
Comment Handling 2	0	Purch. Comment Handling 2	2	Sales Comment Handling 2	2
Comment Handling 3	0	Purch. Comment Handling 3	0	Sales Comment Handling 3	0
Comment Handling 4	0	Purch. Comment Handling 4	0	Sales Comment Handling 4	0
Comment Handling 5	0	Purch. Comment Handling 5	0	Sales Comment Handling 5	0
Comment Handling 6	0	Purch. Comment Handling 6	0	Sales Comment Handling 6	0
Comment Handling 7	0	Purch. Comment Handling 7	0	Sales Comment Handling 7	0
Comment Handling 8	0	Purch. Comment Handling 8	0	Sales Comment Handling 8	0
Comment Handling 9	0	Purch. Comment Handling 9	0	Sales Comment Handling 9	0

By clicking **Look up value** in a field, you can determine the **User Defined Caption per Language Code**. I.e.:

CAPTION CLASS CAPTIONS | WORK DATE: 6-9-2020

Search + New Edit List Delete Open in Excel

Language Code ↑	User Defined Caption
ENU	Packing Instructions
NLD	Verpakkings-instructies

REPORT LAYOUT SETTINGS

In the **Report Layout Settings**, you can determine if the Comments with checkmarks for **Comment Handling 1 – 9** should be printed on the report.

REPORT LAYOUT SETTING | WORK DATE: 6-9-2020

General · 0 · General

Header >

General >

Sales >

Sales Invoice >

Sales Comments

SALES HEADER	SALES LINE
Packing Instructions	Packing Instructions
Logo Instructions	Logo Instructions
Sales Comment Handling 3	Sales Comment Handling 3
Sales Comment Handling 4	Sales Comment Handling 4
Sales Comment Handling 5	Sales Comment Handling 5
Sales Comment Handling 6	Sales Comment Handling 6
Sales Comment Handling 7	Sales Comment Handling 7
Sales Comment Handling 8	Sales Comment Handling 8
Sales Comment Handling 9	Sales Comment Handling 9

REPORT LAYOUT SETTING | WORK DATE: 6-9-2020

Purchase Report · 6036730 · General

Header >

General >

Purchase >

Purchase Comments

PURCHASE HEADER	PURCHASE LINE
Packing Instructions	Packing Instructions
Logo Instructions	Logo Instructions
Purch. Comment Handling 3	Purch. Comment Handling 3
Purch. Comment Handling 4	Purch. Comment Handling 4
Purch. Comment Handling 5	Purch. Comment Handling 5
Purch. Comment Handling 6	Purch. Comment Handling 6
Purch. Comment Handling 7	Purch. Comment Handling 7
Purch. Comment Handling 8	Purch. Comment Handling 8
Purch. Comment Handling 9	Purch. Comment Handling 9

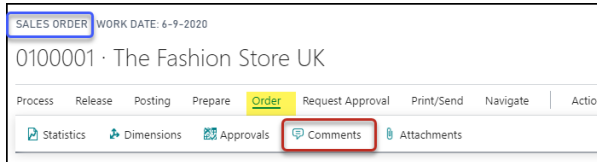
PROCESS

Comments in a Sales-/Purchase Headers or on Sales-/Purchase Lines can be 'assigned' to specific **Comment Handling 1 – 9** and can – based on the **Report Layout Settings** – also be printed on the reports.

SALES DOCUMENT HEADER

In a Sales Quote, Order, Blanket Order, Credit Memo and Invoice, you can enter Comments.

In Sales Orders, via **Order, Comments**



In Sales Quotes, via **Quote, Comments**

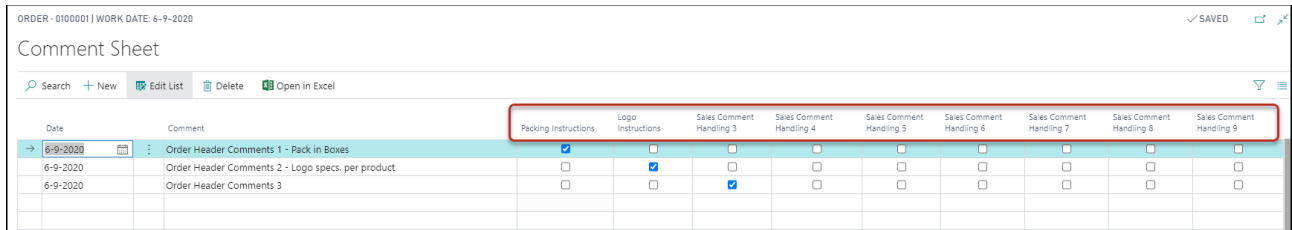
In Sales Blanket Orders, via **Order, Comments**

In Sales Credit Memos, via **Credit Memo, Comments**

In Sales Invoices, via **Invoice, Comments**

For these Comments, you can assign them to a specific **Sales Comment Handling 1 – 9**.

These fields are not visible by default; you need to add them via **Personalization**.



Date	Comment	Packing Instructions	Logo Instructions	Sales Comment Handling 3	Sales Comment Handling 4	Sales Comment Handling 5	Sales Comment Handling 6	Sales Comment Handling 7	Sales Comment Handling 8	Sales Comment Handling 9
6-9-2020	Order Header Comments 1 - Pack in Boxes	☒	☐	☐	☐	☐	☐	☐	☐	☐
6-9-2020	Order Header Comments 2 - Logo specs. per product	☐	☒	☐	☐	☐	☐	☐	☐	☐
6-9-2020	Order Header Comments 3	☐	☐	☒	☐	☐	☐	☐	☐	☐

The names of the columns have been determined by the [Caption Class Setup](#).

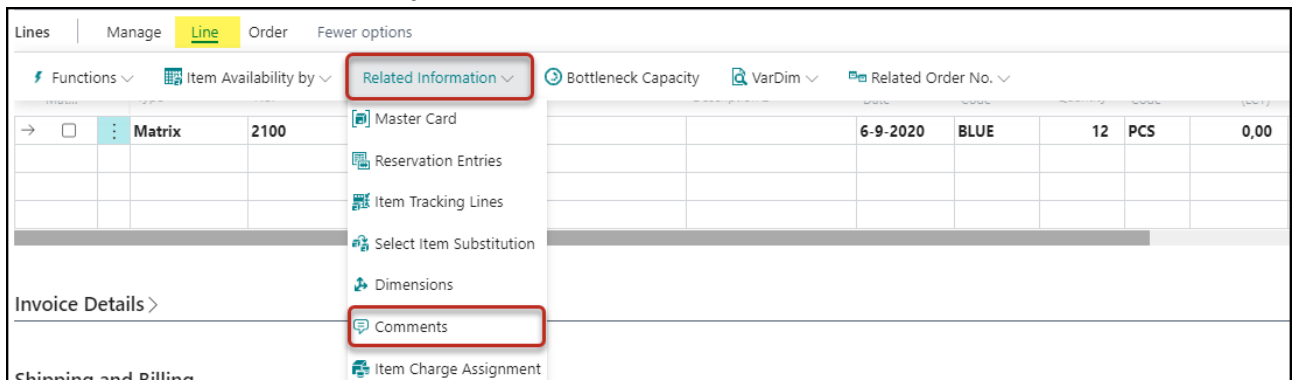
SALES DOCUMENT LINE COMMENTS

In a Sales Quote, Order, Blanket Order, Credit Memo and Invoice, you can enter Comments to the Lines.

NOTE

When a Matrix needs to be printed on the document, make sure that the Line Comments are connected to the Matrix Line; Line Comments connected to the Item Lines will be ignored!!

In Sales Order, via **Line, Related Information, Comments**



In Sales Quotes, via **Line, Comments**

In Sales Blanket Orders, via **Line, Comments**

In Sales Credit Memos, via **Line, Comments**

In Sales Invoices, via **Line, Related Information, Comments**

EDIT - COMMENT SHEET - ORDER - 0100001										
Date	Comment	Packing Instructions	Logo Instructions	Sales Comment Handling 3	Sales Comment Handling 4	Sales Comment Handling 5	Sales Comment Handling 6	Sales Comment Handling 7	Sales Comment Handling 8	Sales Comment Handling 9
6-9-2020	Sales Order Line Comment 1 - Pack per color	☒	☐	☐	☐	☐	☐	☐	☐	☐
6-9-2020	Sales Order Line Comment 2 - Logo Tag in Neck Middle	☐	☒	☐	☐	☐	☐	☐	☐	☐
6-9-2020	Sales Order Line Comment 3	☐	☐	☒	☐	☐	☐	☐	☐	☐

PRINTING SALES DOCUMENT

Based on the [Report Layout Settings](#) for a Report, the Comments of the Header and/or Lines can be printed on the reports; at least for the specific reports of TRIMIT:

6036700 *trm Sales Quote*

6036701 *trm Sales Order*

6036702 *trm Sales Invoice*

6036703 *trm Sales Credit Memo*

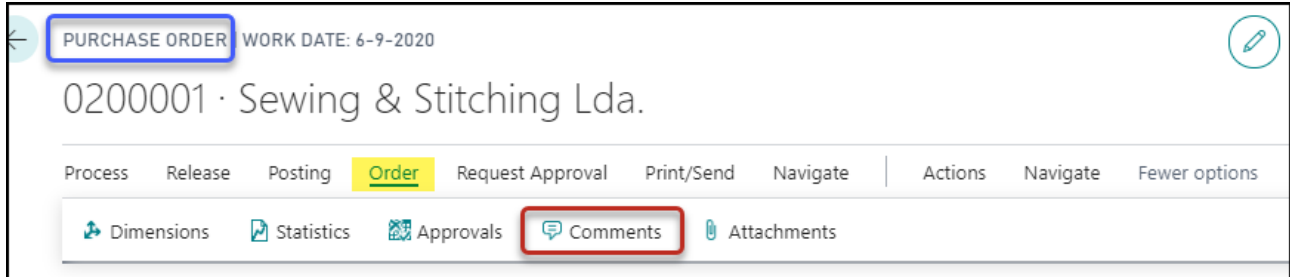
6036704 *trm Sales Shipment*

No.	Description	Quantity	List Price	Unit Price	Amount
Order Header Comments 1 - Pack in Boxes					
Order Header Comments 2 - Logo specs. per product					
Order Header Comments 3					
2100	Lily Blouse	12	69,00	35,99	431,88
Sales Order Line Comment 1 - Pack per color					
Sales Order Line Comment 2 - Logo Tag in Neck Middle					
Sales Order Line Comment 3					
					
20 Royal Blue	XS S M L XL XXL 3XL				
	2 4 4 2			69,00	
Total					431,88
25 % VAT					107,97
Total Incl. VAT					539,85

PURCHASE DOCUMENT HEADER

In a Purchase Quote, Order, Blanket Order, Credit Memo and Invoice, you can enter Comments.

In Purchase Orders, via **Order, Comments**



In Purchase Quotes, via **Quote, Comments**

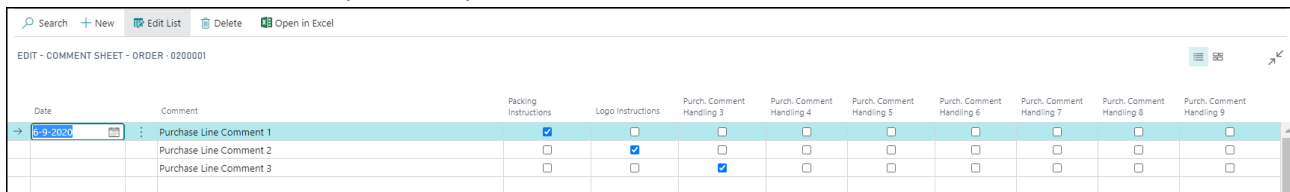
In Purchase Blanket Orders, via **Order, Comments**

In Purchase Credit Memos, via **Credit Memo, Comments**

In Purchase Invoices, via **Invoice, Comments**

For these Comments, you can assign them to a specific **Purchase Comment Handling 1 – 9**.

These fields are not visible by default; you need to add them via **Personalization**.



Date	Comment	Packing Instructions	Logo Instructions	Purch. Comment Handling 3	Purch. Comment Handling 4	Purch. Comment Handling 5	Purch. Comment Handling 6	Purch. Comment Handling 7	Purch. Comment Handling 8	Purch. Comment Handling 9
6-9-2020	Purchase Line Comment 1	☒	☒	☐	☐	☐	☐	☐	☐	☐
	Purchase Line Comment 2	☐	☐	☒	☐	☐	☐	☐	☐	☐
	Purchase Line Comment 3	☐	☐	☒	☐	☐	☐	☐	☐	☐

The names of the columns have been determined by the [Caption Class Setup](#).

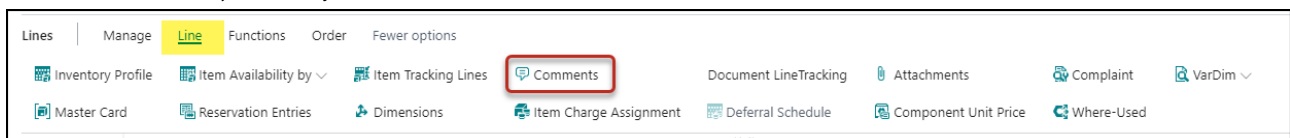
PURCHASE DOCUMENT LINE COMMENTS

In a Purchase Quote, Order, Blanket Order, Credit Memo and Invoice, you can enter Comments to the Lines.

NOTE

When a Matrix needs to be printed on the document, make sure that the Line Comments are connected to the Matrix Line; Line Comments connected to the Item Lines will be ignored!!

In Purchase Order, via **Line, Comments**



In Purchase Quotes, via **Line, Comments**

In Purchase Blanket Orders, via **Line, Comments**

In Purchase Credit Memos, via **Line, Comments**

In Purchase Invoices, via **Line, Related Information, Comments**

ORDER : 0200001 | WORK DATE: 6-9-2020 ✓ SAVED

Comment Sheet

Search + New Edit List Delete Open in Excel

Date	Comment	Packing Instructions	Logo Instructions	Purch. Comment Handling 3	Purch. Comment Handling 4	Purch. Comment Handling 5	Purch. Comment Handling 6	Purch. Comment Handling 7	Purch. Comment Handling 8	Purch. Comment Handling 9
6-9-2020	Purchase Order Comment 1	☒	☐	☐	☐	☐	☐	☐	☐	☐
6-9-2020	Purchase Order Comment 2	☐	☒	☐	☐	☐	☐	☐	☐	☐
6-9-2020	Purchase Order Comment 3	☐	☐	☒	☐	☐	☐	☐	☐	☐

PRINTING PURCHASE DOCUMENT

Based on the [Report Layout Settings](#) for a Report, the Comments of the Header and/or Lines can be printed on the reports; at least for the specific report of TRIMIT:

6036730 *trm Purchase Order*

No.	Description	Vend. Item No.	Shipmen + Data	Quantity	Unit Cost	Amount
Purchase Order Comment 1						
Purchase Order Comment 2						
2010	Amelia Trousers			21	33,153	696,22
Purchase Line Comment 1						
Purchase Line Comment 2						
						
01 White	36 38 40 42 44 46 48 2 4 6 6 3					
Total						696,22
Ship-to Address Blue Warehouse Jeff Smith South East Street, 3 Birmingham, B27 4KT Great Britain						