



WHITE PAPER

TRIMIT TAG FILTERS 23.2

This document contains information about the TRIMIT Tags filter functionality in TRIMIT 23.2 for Microsoft Dynamics 365 Business Central 2023, Wave 2 (W1).

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INTRODUCTION

TRIMIT tag filter functionality gives possibility to use different types of filters on product category overview pages on TRIMIT portals like B2B and B2C webshops and SalesAgent portal.

TRIMIT tag filters extend the filter possibilities covering more than just attributes or VarDim types. In TRIMIT from a master or item itself and then on top of that you can provide a number of other tags either through attributes or via additional tags being VarDim types. Therefore, TRIMIT tag filters provides a generic setup where it is possible to have a wide variety of meaningful tags in a portal.

The functionality described is the functionality as of **TRIMIT 23.2 for Business Central W1 BC23.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 23.2**, which is based on Microsoft Dynamics 365 Business Central 2023 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

TAG FILTER SETUP

This chapter contains information about the Setups that you need to do to use filtering functionality on TRIMIT portals. Filtering functionality by using tag filters is available on TRIMIT B2C and B2B web shops and on SA portal.

The tag filter setup in TRIMIT can be done from the Category list page.

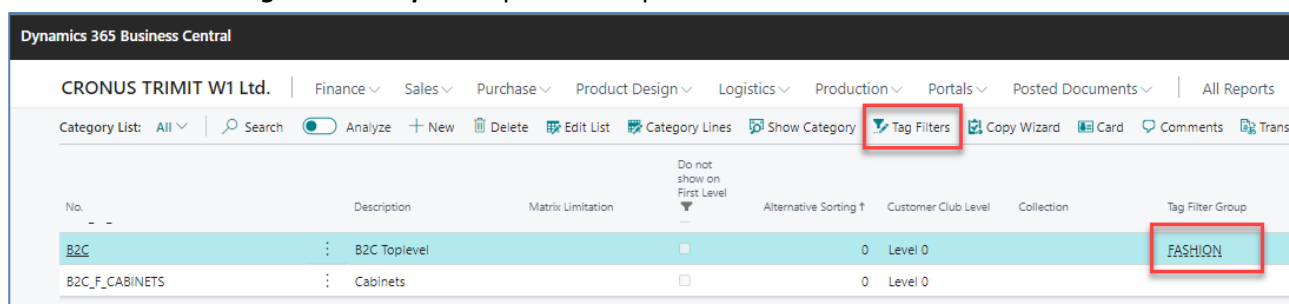
TAG FILTER SETUP ON CATEGORY LIST

TRIMIT supports tag filters on all product category levels. The tag filter can be set on a highest root category (aka root catalog). This means that the tag filters will be applied to products on all the sub categories.

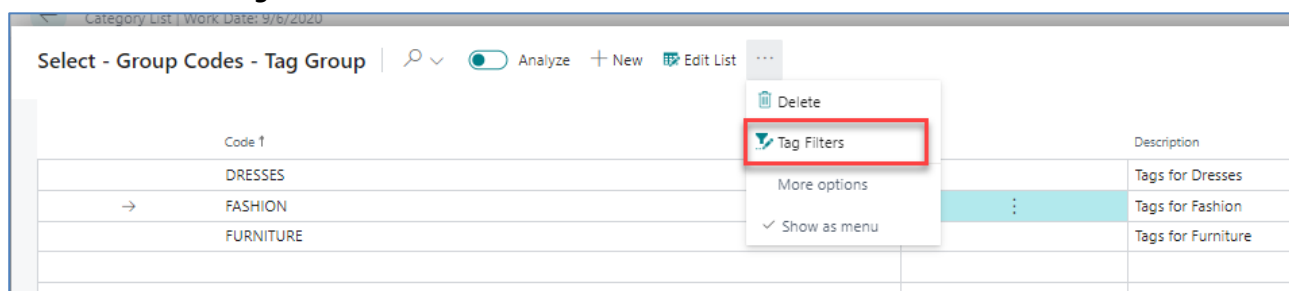
Alternatively, tag filter can be set on a lower category level, e.g. on Dresses, Shoes, etc. The respective filter drop down fields on portal category pages will only be shown if category contains products. Moreover, the filter options in the filter dropdowns will show only those values which are related to the products in the viewed category. And it is possible to do a multi selection in filter dropdown values on all portals.

In TRIMIT we use expression **Tag Filter Group** – this is a set of Tag types relevant for a category or a sub category. For example, portal can only filter on two things: color and size. Hence, it is needed to create a **Tag Filter Group** which consist of color and size from attribute or VarDim types.

To set the tag filter group in TRIMIT go to **Category list** page and enable editing. On a respective category line locate column **Tag Filter Group** and open the drop down.



On page that opens, **Select – Group Codes – Tag Group**, add new line and fill in values in **Code** and **Description** columns. Now, being on the same page, it is possible to click **Show the rest** (three dots) in the header and select **Tag Filters**.



This opens **Tag Management** page. Here select the filters needed.

Tag Management				
Search + New Edit List Delete Translations				
Type ↑	Code ↑	Description	Sorting	
→ Item Attribute	20	TRIMIT_COLOR	1	
Item Attribute	24	TRIMIT_SIZE	2	
VarDim Variant	POCKET_COL	Pocket Color	0	
Item Statistic Group		Design	3	

DESCRIPTION OF THE FIELDS ON TAG MANAGEMENT PAGE

TYPE

Type of the tag filter. Available values: *Item Attribute*, *VarDim Variant*, *Global Dimension 1*, *Global Dimension 2*, *Collection*, *Period Code*, *Group Master*, *Item Statistic Group 1-5*, *Item Category Code*, *Product Family*. Select the one which corresponds to your needs.

CODE

This drop down will have different values depending on the selection in the Type column

DESCRIPTION

Value in this field will be set automatically after selection in the Code column.

SORTING

Select a digit if you want to place some filters before others.

Add translations for the tags and filters and portals will display them after the synchronization.

To get the overview of the related tag filters of the specific **Tag Filter group** click **Tag Filters** in the header of the **Category list**.

ADDITIONAL TAGS

By using *Additional tags* on the master or item, it is possible to broaden the usage of the filtering possibilities on the portals.

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FinanceSalesPurchaseProduct DesignLogistics

Master List: AllSearchAnalyzeNewDeleteEdit ListProcessReports

Item Type	No. ↑	Description	Status Code
Finished Goo...	2000	Olivia Trousers	READY
Finished Goo...	2010	Amelia Trousers	READY
Finished Goo...	2020	Isla Trousers	READY
Finished Goo...	2030	Ella Trousers	READY
Finished Goo...	2100	Lily Blouse	
Finished Goo...	2110	Mia Blouse	
Finished Goo...	2120	Sophia Shirt	READY

Bill of Materials

Workflow

Measurement Chart

Composition

Care Label

Sustainability

Additional Info

Additional Tags

Additional tag types are as follows: *Item Statistic groups 1-5, Item Category Group and Product Family.*

Additional Tag Lines Work Date: 9/6/2020			
Search Analyze + New Edit List Delete Copy			
Type	Value	Description	
→			
Item Statistic Group Item Statistic Group 2 Item Statistic Group 3 Item Statistic Group 4 Item Statistic Group 5 Item Category Code Product Family			

It is possible to add several identical types with different values to the same product under the Additional tags.

ADDITIONAL INFO

Here is a scenario with using Additional Info values assigned to a master as a filter on portals.

On **VarDim Type** list, locate a type which you are going to use for filtering. In this case POCKET_COL. Set column **Limited usage** to **Additional Info**.

VarDim Type List | Work Date: 9/6/2020

Search Analyze + New Edit List Delete Edit View Variant Table / Options More options

Type	No. 1	VarDim Variant	VarDim Type Name	Dimension 2	Limited usage	VarDim Attribute Name
Dimension	MES_NECK		Measure Neck (cm)	No		
Dimension	MES_SLEEVE		Measure Sleeve Length (cm)	No		
Variant	PANEL_POS	110	Position of the Cabinet Panels	No	VarDim Master	
Headline	POCKET		Pocket Specifications	No		
→ Variant	POCKET_COL	10	Pocket Color	No	Additional Info	
Variant	POCKETS	44	No. of Pockets and Position	No		
Variant	S_COL_FEET	91	Sofa Feet Colors	No	VarDim Master	TRIMIT_COLOR

Now in **Master List** locate a product. Click **Additional Info** under **Process** in the header.

Master List | Work Date: 9/6/2020

Search Analyze New Edit List Delete Edit View Process Reports More options

Bill of Materials Measurement Chart Care Label Additional Info Additional Comments Workflow Composition Sustainability Additional Tags Copy Values

Insert line(s) with type **Variant** and use the VarDim type value from the VarDim Type list (in the step above).

Additional Info Lines | Work Date: 9/6/2020

Search Analyze + New Edit List Delete Copy Copy Standard Lines Comments More options

Type	Symbol	VarDim Type	Value	Description	Picture
→ Variant		POCKET_COL	20	Royal Blue	
Variant		POCKET_COL	35	Orange	
Variant		POCKET_COL	90	Grey	
					+

Now go to category list page and add VarDim variant POCKET_COL to Tag Filters for the category with tag filter group set.

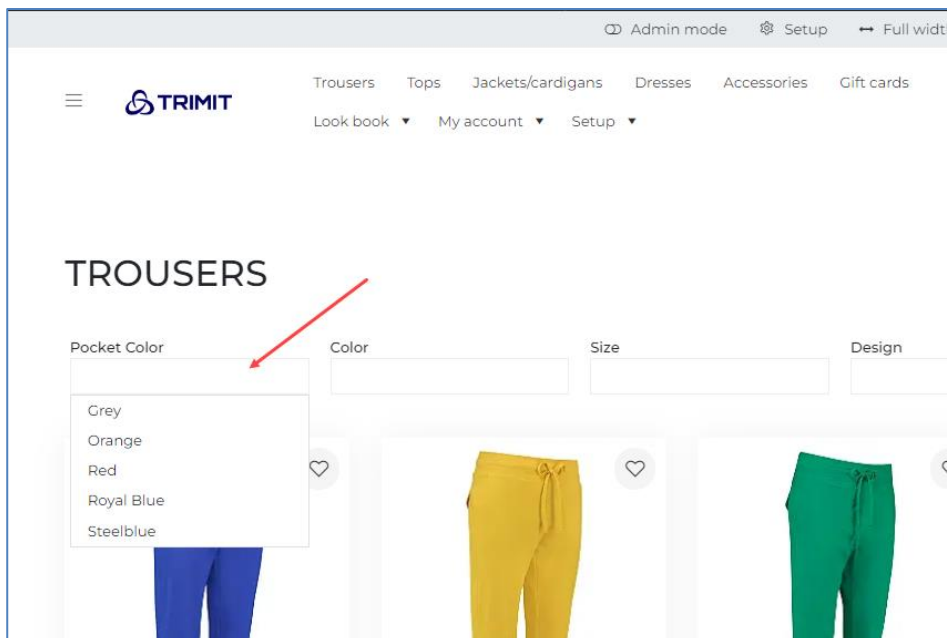
Category List | Work Date: 9/6/2020

Search Analyze + New Edit List Delete Category Lines Show Category Tag Filters Copy Wizard Card Comments Translation Text Picture Workflow More options

No.	Description	Matrix Limitation	Do not show on First Level	Alternative Sorting	Customer Club Level	Collection	Tag Filter Group	Expand On Overview
AGENT_W_ACCESS	Accessories		☐	0	Level 0			Inherited
AGENT_W_DRESSES	Dresses/Skirts		☐	0	Level 0		DRESSES	Yes
AGENT_W_JACKETS	Blazers		☐	0	Level 0			Inherited
AGENT_W_TOPS	Tops		☐	0	Level 0			Inherited
AGENT_W_TROUSERS	Trousers		☐	0	Level 0			Inherited
B2B	B2B Toplevel		☐	0	Level 0			Inherited
B2B_F_CABINETS	Cabinets		☐	0	Level 0			Inherited
B2B_F_CHAIRS	Chairs		☐	0	Level 0			Inherited
B2B_F_SOFAS	Sofas		☐	0	Level 0			Inherited
B2B_F_TABLES	Tables		☐	0	Level 0			Inherited
→ B2B_FASHION	Fashion		☐	0	Level 0		FASHION	Inherited
B2B_FURNITURE	Furniture		☐	0	Level 0		FURNITURE	Inherited
B2B_GIFTCARDS	Gift Cards		☐	0	Level 0			Inherited

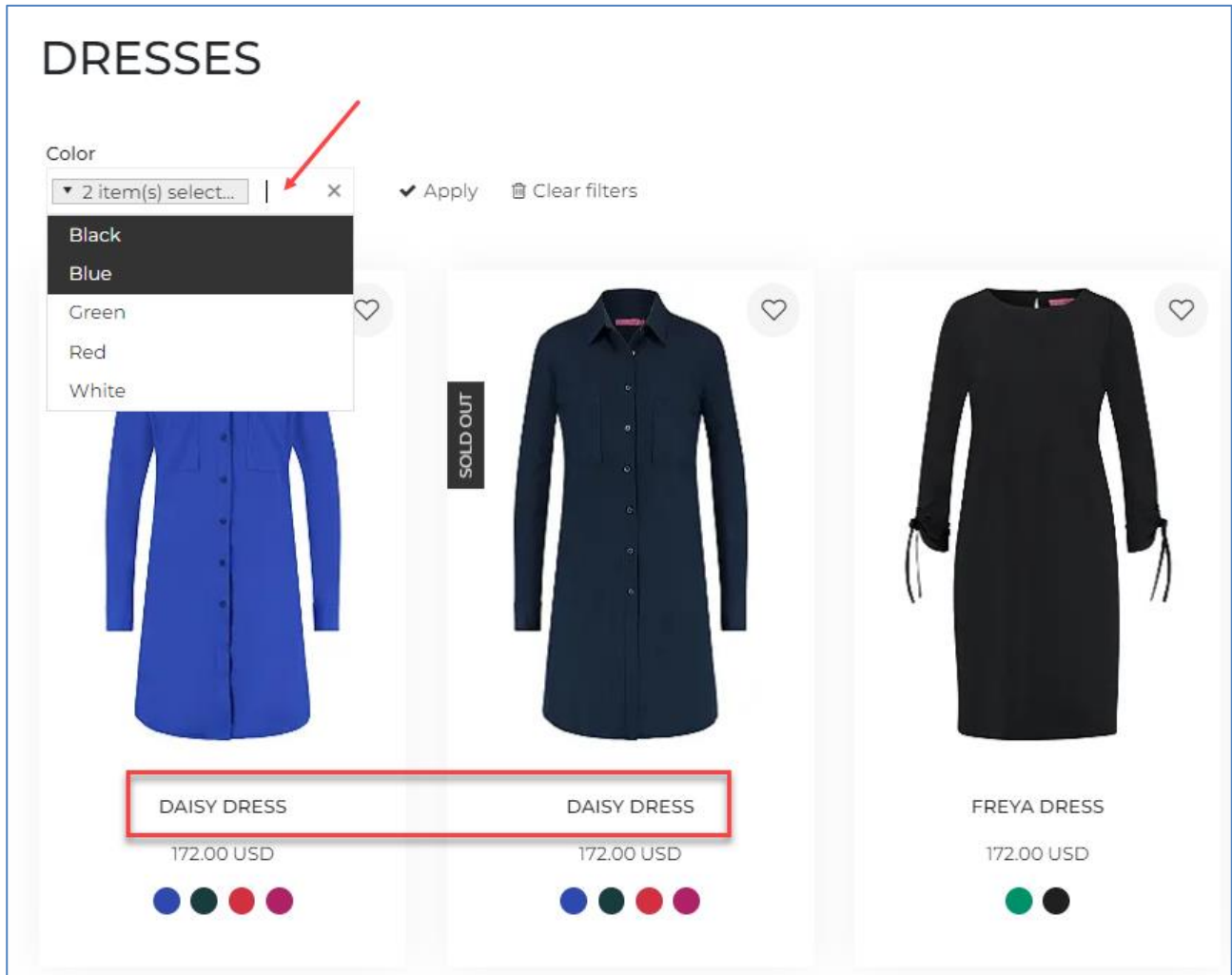
Tag Management				
Search + New Edit List Delete Translations				
Type ↑	Code ↑	Description	Sorting	
Item Attribute	20	TRIMIT_COLOR	1	
Item Attribute	24	TRIMIT_SIZE	2	
→ VarDim Variant	POCKET_COL	Pocket Color	0	
Item Statistic Group		Design	3	

Now run the synchronization on portals. The new filter based on master additional info will be shown in the related category.



EXPAND ON VARIANT

Masters can be set to be shown as expended on first variant (which is a color by design) on all TRIMIT Portals. This can be done from a category list in TRIMIT. If tag filtering is set on the related category, then related items will react on application of the filters on portals accordingly.



The image above shows that after applying multiple filter values for “black” and “blue” – two items, which belong to one master, are found.

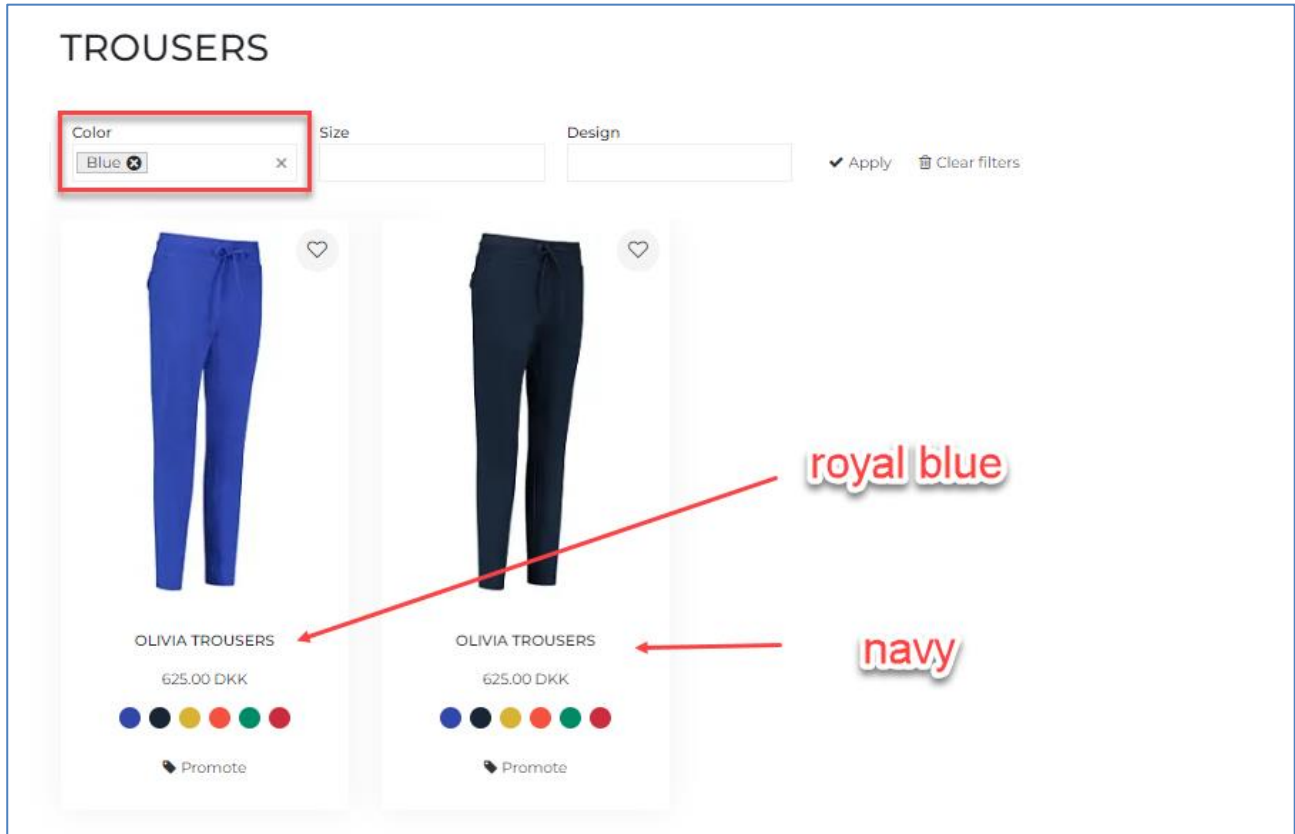
FILTER GROUPING

If a VarDim variant (e.g. color) has options which it gives a meaning to group together (e.g. color shades like royal blue, light blue, ocean blue) then corresponding item attribute value should be selected for the color shades in question. For instance:

VarDim Variant Option No. COLOR_1 - 10								
Value ↑	Description	Short Description	Color Reference	RGB Code	No Image	Picture	Attribute Value	
00	Mixed Colors	Mixed			☒	+	Mixed	
01	White	White			☐		White	
02	No Color	No Color			☒	+		
03	Snow	Snow			☐		White	
04	No Pocket	No Pocket			☒	+		
→ 20	Royal Blue	Blue			☐		Blue	
21	Light Blue	Lt Blue			☐		Blue	
23	Ocean Blue	Ocean			☐		Blue	
25	Navy	Navy			☐		Blue	
27	Steelblue	Steelblue			☐		Blue	
30	Yellow	Yellow			☐		Yellow	

Then, after synchronization on portals, selecting a filter value “blue” will display all the related shades. This is possible to see on portal overview page if a category is set to expand on overview (expand on color).

Applying a filter can show a grouped color shades:



TAG FILTER SYNCHRONIZATION

Note: to update B2B, B2C or SA – you should run the same set of schedules:

- catalog-sync,
- filter-tags-set,
- filter-tags-translate-value,
- filter-tags-translate-type;
- also b2c-products for B2C.

SCHEDULES

B2C

Individual schedules will open in a new page and will run immediately. Useful when in development mode or if you have your schedules turned off and wish to run a schedule manually

- Products - Catalog
- Products - Pregenerate Data (B2C Items)
- Products - B2C Items
- Products - Prices
- Products - Virtual URLs
- Products - Item Availability
- Products - Item Availability Express (Targets only items which have been bought before)
- Products - Extended texts
- Products - Additional Information (Wash & Care, Composition, Extra Info)
- Products - Search Data
- Products - Sorting on Product Overview Pages
- Tag Filters - Update Tags / Filters
- Tag Filters - Filter Translation
- Tag Filters - Tags Translation
- Configuration - VarDim Order
- Configuration - VarDim Variant Options
- Configuration - VarDim Translations
- Configuration - VarDim Positiv/Negativ List
- Configuration - Visual Config Setup

Run schedules manually

B2B

Individual schedules will open in a new page and will run immediately. Useful when in development mode or if you have your schedules turned off and wish to run a schedule manually

- Products - Catalog
- Products - Catalog translations
- Products - Master choices translation
- Products - Extended texts
- Products - Additional Information (Wash & Care, Composition, Extra Info)
- Products - Search Data
- Tag Filters - Update Tags / Filters
- Tag Filters - Filter Translation
- Tag Filters - Tags Translation

Filter sync runs for all masters and masters + matrix limitation in catalog (what is in category structure). And then calls TRIMIT and gets tag info for the master or master + matrix limitation.

In other words running synchronization for tag filters updates all the portals at the same time as there is no differentiation on the what portal or category root the synchronization has been called from.

The product filter data is saved in those custom data groups:

TRM-CATALOG – column name (add if hidden) represents a filter name and each master can hold up to several filter values:

Filter						
Group Name						
TRM-CATALOG						
Custom Data						
Edit Parent	Changed	Tags (TRM_FILTER_COLLECTION)	Tags (TRM_FILTER_COLOR_1) ▲ 5	Key1	Key2	Key4
	  				2000 	
	7/4/2022 9:52:07 AM	PERF:TEST SS-CY COLL:KBI	20		2000	2000
	7/4/2022 9:52:07 AM	PERF:TEST SS-CY COLL:KBI	20		2000	2000

In a future product filter data can be moved to a separate custom table withing Modelyn.

SEARCH ON PORTALS

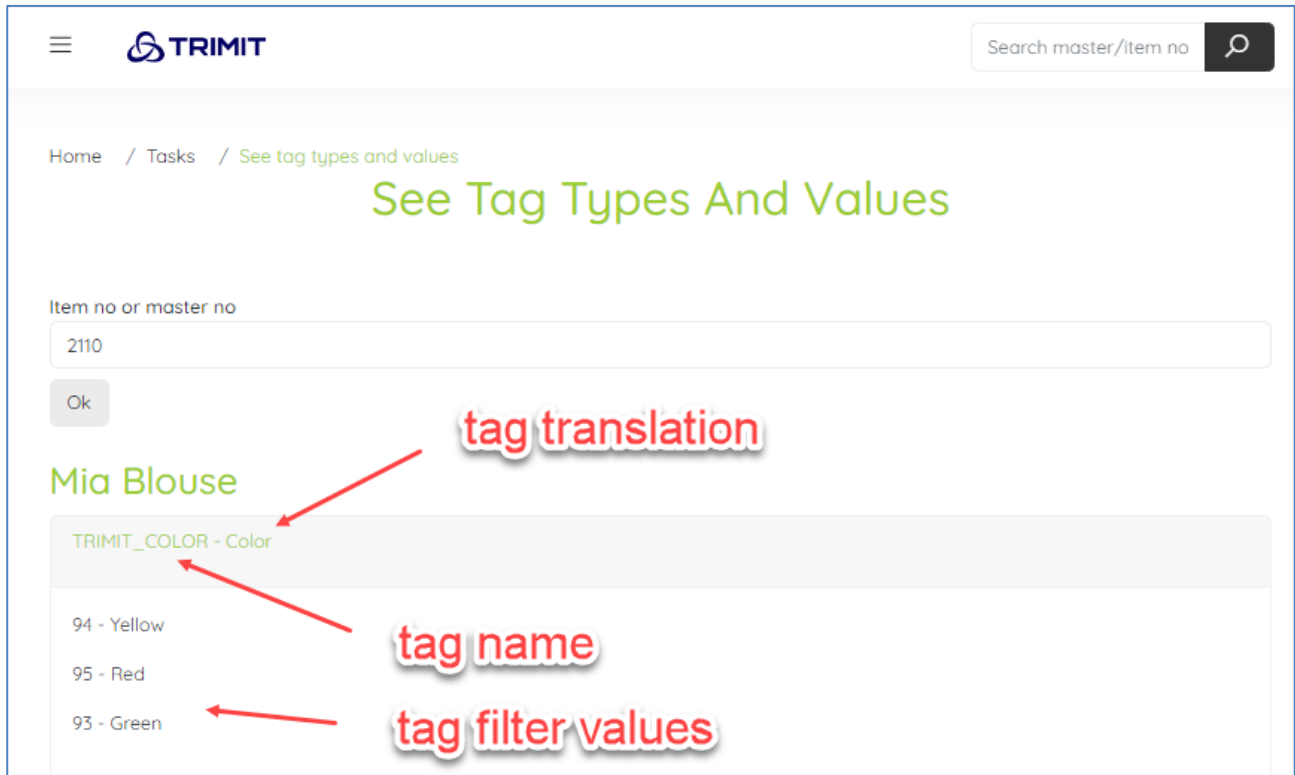
It is possible to search for products on portals by using item number, master number, default description, translated description and also filter tags.

LIMITATION:

Product filtering is not available on the search result pages and on category search pages on all TRIMIT portals. As we cannot accommodate filtering on the limited search results pages. E.g. when searching for “red” and clicking **Enter** portal show the search results, but filters on this search page have all the values which are related to all the colors. This is why filters are not available for the search result page.

SETUP IN PIR

It is possible to see the relevant tag filters and values for a specific product in PIR in dock **Products**, link is called **See Filter Tag Types and Values**. On this page opened - type the number of the product and click **OK** to see the relevant filter info.



Home / Tasks / See tag types and values

See Tag Types And Values

Item no or master no

Ok

Mia Blouse

TRIMIT_COLOR - Color

- 94 - Yellow
- 95 - Red
- 93 - Green

tag translation

tag name

tag filter values