



FEATURES IN TRIMIT

SALES AGENT PORTAL

This document describes the features available in the TRIMIT Sales Agent Portal, released with TRIMIT 2016.

The sales agent is a person working for the company with the sales responsibility for a range of customers. The sales agent will travel to the customers and make orders with the customer on-site. Orders may also be made during a Fair.

The TRIMIT Sales Agent Portal is built to enable sales agents to create sales orders for their customers into the company's NAV/TRIMIT database via the web.

The TRIMIT Sales Agent Portal is based on the TRIMIT B2B Portal and has most of the same functionality.

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ABBREVIATIONS

NAV/TRIMIT; is referring to Microsoft Dynamics NAV 2016, with TRIMIT 2016.

CPO; is referring to the TRIMIT Connect Portal.

Company; is the owner of TRIMIT Supplier Portal.

Customer; is referring to another company registered as a Customer of the Company.

User; is referring to a Portal user.

Registered User; is the employee of the supplier.

Basket; is referring to the sales order in the shop, also called "Shopping Cart".

Product; is in TRIMIT defined as the Master. The Fashion Industry often uses the word "Style".

PDM; is a general term for Product Data Management.

TRIMIT PDM; is the TRIMIT functionality for Product Data Management.

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THE PORTAL FEATURES

SALES AGENT HOME PAGE

The home page in the TRIMIT Sales Agent Portal shows the list of customers for which the sales agent is responsible. Once a customer has been selected, the sales agent can make orders and see the order history for that customer – as if he was logged in to the TRIMIT B2B Portal for that customer.

MULTIPLE SALESPERSON RELATIONSHIPS

In the Fashion Industry there can be several salespersons working with the same customer. At a fashion fair there is typically a number of salespersons that needs to create orders in the TRIMIT Sales Agent Portal to random and new customers regardless of a salesperson relationship.

The new functionality called Multiple Salesperson Relationships enables you to setup specific rules for which customers a salesperson can see the information or/and can enter sales orders on the TRIMIT Sales Agent Portal.

ORDER FLOW

The purpose of the order flow is for the customer to be able to place an order.

The order flow in TRIMIT Sales Agent Portal for the user is:

- Exploring the portal, finding desired products and adding to the basket.
- Opening the basket and get an overview of selected products and their prices.
- Enter invoice and delivery address.
- Accept terms and conditions.

The order flow is only available for registered users that are related to a customer in NAV/TRIMIT.

Orders from the TRIMIT Sales Agent Portal are automatically created in NAV/TRIMIT and the in-house procedures for accepting the order and making delivery is handled in NAV/TRIMIT as any other sales order.

DYNAMIC HANDLING OF PRODUCTS

The purpose of the Dynamic handling of products is to select the products to be shown in the TRIMIT Sales Agent Portal. The job of maintaining what can be sold in the TRIMIT Sales Agent Portal is typically in-house and by a person, that is using NAV/TRIMIT on a daily basis.

With TRIMIT Sales Agent Portal, the selection of products to the Portal is done in NAV/TRIMIT. The setup offers great flexibility on how and what products is to be shown.

MULTIPLE AVAILABILITY CHECK METHODS

The purpose of the availability check is to only show the user products that are available at the time of ordering to avoid orders on products that are not available.

TRIMIT Sales Agent Portal offers the following methods:

- Inventory
- Inventory minus sold (from sales orders in NAV/TRIMIT)

ADVANCED SALES INTEGRATION

The Advanced Sales Integration has two general purposes; one is to increase performance in the Portal, and the second is for the customer to validate the orders from the TRIMIT Sales Agent Portal before they become sales orders in NAV/TRIMIT. With the Advanced Sales Integration, the sales documents are stored temporarily, and they can be validated in the Portals Role Center.

NO LOST ORDERS (NLO)

The purpose of “NLO” is to keep the order even when the internet connection breaks. TRIMIT Sales Agent Portal is built to keep orders alive, when users drop out. The open orders are shown with a green frame, next time the user logs in.

MULTIPLE LANGUAGES

The purpose of multiple languages is for the Portal to be shown in the user’s language.

The Company may decide which languages are needed for their own sales agents and by that make sure that their TRIMIT Sales Agent Portal is translated and shown in these languages.

TRIMIT Sales Agent Portal registers the language of the user’s browser settings and displays the Portal in the same language or falls back to English if the local language is not provided. The basic product related language texts are created and edited in NAV/TRIMIT.

All the Portal related language texts can be edited in the TRIMIT Sales Agent Portal administration module. This release includes the languages of English and Danish.

PRICING

Prices are maintained in NAV/TRIMIT and can be setup for specific customers, pricelists or general prices for all customers. Based on setup the right prices are shown related to the customer for which the sales agent creates a sales order.

It is possible to define two types of pricelists specifically for the TRIMIT Sales Agent Portal. The types are “suggested retail price” and “unit price”.

MULTIPLE CURRENCIES

The purpose of multiple currencies is that the sales agent can see the prices in the currency of the customer for which he is creating a sales order.

PORTALS ROLE CENTER

The TRIMIT Portals Role Center includes the access to the Advanced Sales Integration, the Portals Messages and the Activity Log.

BEST PRACTICE LAY-OUT

The purpose of the TRIMIT Sales Agent Portal layout is for the user to feel at home and to be able to create orders. In market investigations of B2B Portals the trend is that the Portals are to be simple to look at and easy to use and then that B2B Portals do not have high demands for the graphical appearance. An obvious reason is the habits of user – the user simply prefer when they can recognize their way around the Portal.

TRIMIT Sales Agent Portal comes with a layout that matches the best practice of SA Portals and kept as simple as possible.

ORDER TYPE SELECTION

It is possible for a sales agent to select order types on SA portal. In addition, when sales agent is creating a new order and has to choose order types – it is not a list of radio buttons, instead it is clickable images.

COMPOSITION AND CARE LABEL INFORMATION

Composition and Care Label functionality extends the item information on SA portal.

In order to show the composition of the item, i.e. what fabric an item is made of, SA portal has an option to show the item composition information. This information is displayed on the product details page. The Care Label functionality shows the way to handle item in regards to wash and care. This information can be displayed as pictograms or as a text.

EXTENDED TEXTS FOR PRODUCTS

SA portal has a possibility to show extended product description on a product (masters and flat items) and category overview pages. It is possible to set a specific text for a product and then only choose which portals should show this text.

Furthermore, the extended text is HTML aware, so that it is possible to use basic HTML tags (e.g. type in NAV “... *Text in bold...*” and the text within the tags appears in bold font on portal) inside NAV and have it rendered accordingly on the portal.

SAVE ORDER AS ORDER OR QUOTE

The SA portal has an option to choose which document is created, sales order or sales quote, when the order is submitted. After submitting on the portal, the sales document is landing in the Advanced Sales Integration table, after posting from which the document appears whether as a sales order or a sales quote. This depends on the portal profile setup in NAV.

DASHBOARD

The dashboard on SA portal assembles all the needed information in one place. It is a launch page for different activities. SA portal has two dashboards – one is for the sales agent and another one has all information about a specific customer. Dashboard for the sales agent portal has the following areas: Favorite customers, Open orders, Overdue entries, Messages, News and My account. Dashboard for the customer has the following areas: Customer actions, Open orders, Overdue entries, History and Statistics.

IMAGE REPOSITORY

Having multiple portals on the same instance allows sharing images across portals. There is no need to upload image to all portals. The B2B shop and SA portal are sharing images uploaded on the B2C shop. If you create a look book, it should be possible to reuse the same look book with same images on other portals also.

The concept involves the definition and creation of a common repository, in which you can upload and align content for items and reuse it on several portals.

LOOK BOOK

The Look Book functionality in TRIMIT Portals is a way to combine different garment items in a single look and show this look to the customer in order to stimulate customer to consider buying multiple items. The Looks are grouped into Look Books. TRIMIT Portals can have multiple Look Books.

EDIT CONFIRMATION EMAIL

It is possible to select different email address to send the order confirmation email to on the submit order page on the portals. The system identifies the email addresses from customer, delivery and user information and suggests email addresses, if they are available. Sales agent can specify any other email address to send the order confirmation to.

OVERDUE DOCUMENTS

After the sales order is created and not paid for – the information is displayed for the customer showing the order number. This allows keeping track of unpaid orders and bringing this to customer's attention.

SHOPPING LIST

Shopping list on SA portal allows making quick overview of favorite products. Shopping list is always saved disregarding if customer logs out and logs in again – the list is still available. Shopping list does not reserve products on stock, so adding item to the shopping list does not affect item availability.

PRICE DIFFERENTIATION ON MATRIX CELLS

If a product has different prices for different variant combinations, i.e. larger size costs more than smaller size, then this can be reflected in product matrix on SA portal.

MESSAGING

Portals messages have a basic functionality, which allows sending text messages, which can also include files. Messages can be sent only one way, i.e. from TRIMIT to Portals. SA portal displays a list of received messages on a dashboard.

SHOW AND MANAGE AVAILABILITY THRESHOLD

SA portal allows hiding the actual item availability on the product page. Instead, the portals administrator can set a value to be shown with trailing "+" sign, meaning "more than certain amount". In this way, the availability is shown in a more discreet way.

EXPAND CATEGORIES

SA portal has a feature of expanding and collapsing the categories and thus showing and hiding all the items. In addition, using the quick add function it is possible to quickly navigate to a needed product page knowing item number or name.

PORTALS ACTIVITY LOG

Portals Activity Log collects all the sales agent actions regarding order CRUD and customer CRUD. In addition, other actions can be added after customization.

PORTALS DROP SHIPMENT

This feature gives a possibility to display available item variants depending on the item shipment date.

COPY ORDER TO SEVERAL CUSTOMERS

SA portal has a feature to copy selected order to several customers. This can increase the effective productivity of sales agents and keep them away the unneeded work of creating identical orders.

ORDER TEMPLATES

This feature can convert a complex sales order into order template and reuse it as many times as needed and for many different customers. Order template can be managed as a normal order which makes it easy to maintain.

CREATE QUOTE FOR BLOCKED CUSTOMERS

Even if customer is blocked for creating sales orders, it is possible to create a sales quote instead. It is not needed to do anything special about this – the system reacts on blocked customer and suggests creating a quote. The workflow in this case is normal.

PORTALS DROP SHIPMENT

This feature gives a possibility to display available item variants depending on the item shipment date.

REGISTERED USER FEATURES

The following features only concerns registered users.

CREATE USER PAGE

TRIMIT Sales Agent Portal has a standard create user page that includes the normal user data (name, address, e-mail).

USER VALIDATION

Before the user can gain access to the TRIMIT Sales Agent Portal, the user needs to be related to a customer in NAV/TRIMIT. This can only be done by the company in NAV/TRIMIT in the Portals Role Center via the user relationships.

USER DATA TO ORDER

When a user is logged in, the name and address will automatically be copied to the order.

MY PAGE

When the registered user logs in to the TRIMIT Sales Agent Portal a “My account” area is available on dashboard.

In the “My account” area the user can see own data, previous invoices (Shopping history) and open orders.

PLATFORM FEATURES

The following features concern the web platform and the integration to NAV/TRIMIT.

CMS PLATFORM

The CMS platform for TRIMIT Sales Agent Portal is the TRIMIT ConnectPortal (CPO). CPO is a highly advanced CMS product, built on the latest .net coding and built for making integration between portals and NAV/TRIMIT. The CPO comes with a user friendly Admin interface.

The CPO includes the CMS features like:

- Multiple sites
- User handling with user groups.
- Menus pages and menu structure.
- Content pages with lay out editor and HTML editor and a long range of available controls.
- Different types of content pages like document pages, list pages, content pages etc.
- Site appearance managed in style sheets.

ONLINE DATA FROM NAV VIA CONNECTPORTAL INTEGRATOR

The ConnectPortal integrator is managing the on-line data transfers between the CPO and the NAV/TRIMIT database. Data is exchanged via NAV/TRIMIT web services.

In the CPO, the ConnectPortal integrator is a number of NAV/TRIMIT controls that can be used in the CPO pages. In NAV/TRIMIT the ConnectPortal, integrator is the XML ports where the definition of what NAV/TRIMIT data to move is set. It is also the entire setup of the TRIMIT Sales Agent Portal.

LOAD ON DEMAND

There has been a considerable improvement after applying load on demand methodology comparing to previous versions of Sales agent portal. Load on demand methodology affects such areas as opening a sales basket, opening product details page, save and exit the order, open (edit) sales order etc. The difference in performance is especially noticeable on large orders with more than 500 lines. Performance increase up to 77 percent on some of the specified areas.

FAST SAVE

The fast save is the methodology developed to use in connection to SA and B2B Portals. The main purpose for the fast save is to facilitate the saving of large orders from SA portal and B2B shop to the back end system. This methodology is enabled by default and cannot be switched off. This allows instantly submitting orders with vast amount of sales lines.

DATA SYNCHRONIZATION VIA SCHEDULES

The web site performance is always important and allows retain existing and attract new customers and users to the website. Data synchronization via portals schedules allows increase portals performance and data accessibility. This is done by collecting and storing all the needed NAV data in the portals' database.

KEEP FOCUS ON MAIN AREAS

SA portal allows hiding some of the areas on the product details page. This puts more emphasis on product information and helps gaining more useful space in regards of using on mobile devices.

INDEX REBUILD SCHEDULE

Having and using this schedule allows keeping performance within the CPO database on the persisting high level. This schedule can be set to run automatically and does not require the administrator intervention after the first time setup.

CONNECTPORTAL INSTANCES

SA portal can have several instances, which are connected to a single NAV company. This allows sharing the data and synchronizing users for all instances without any problems.

CAMPAIGN CUSTOMIZATION

With this feature we introduce an easy way to build your own campaign visualization with a basic setup. This means it is practically a no cost customization in regards to updating portals and TRIMIT NAV versions.

The overview of items is the place to draw attention. It could be to a range of items or individual items that you want to boost the sale for. Campaigns can be the Christmas sale or items that are "hot" in the collection or something very different. The plug-in system developed for the SA solution allows exactly that.

HIDE BASKET SUBLINE IMAGES

This feature allows hiding basket subline images when needed. This can be useful when using on mobile devices and under low speed internet conditions.