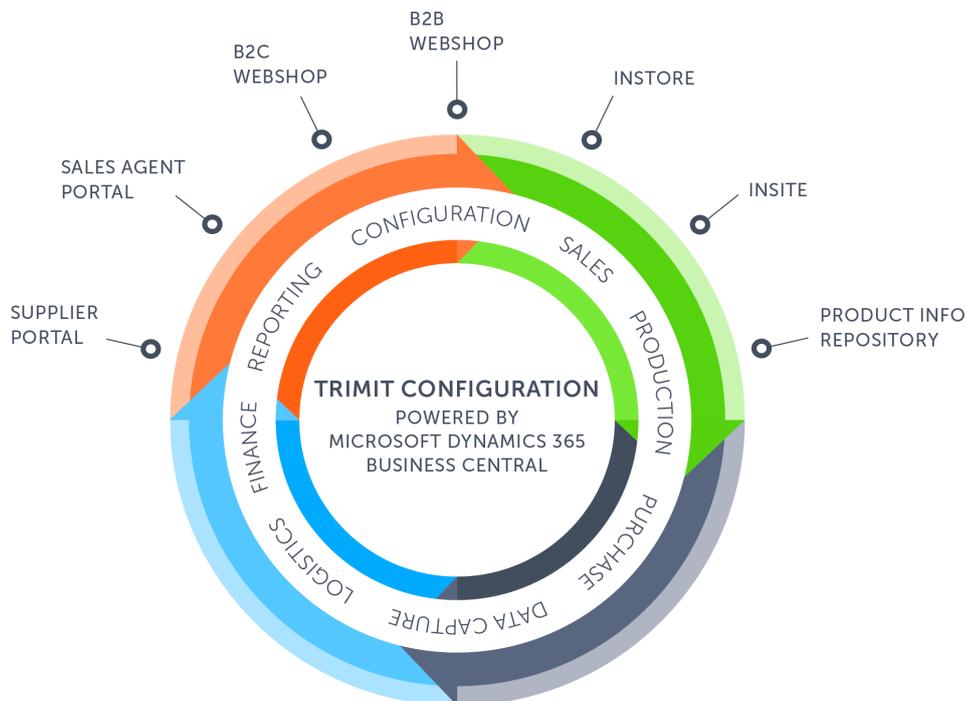# FEATURES IN TRIMIT CONFIGURATION BASED ON BUSINESS CENTRAL

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This document provides an overview of the most important features available in TRIMIT Configuration based on Microsoft Dynamics 365 Business Central.

The purpose of TRIMIT is to supply manufacturing companies with configuration needs with a single software solution that covers their needs. This is done by extending and enhancing Microsoft Dynamics 365 Business Central with configuration functionality.

Microsoft Dynamics 365 Business Central is an ERP system that covers the general needs of any company and is one of the most reliable ERP software products on the market. Microsoft has a long-term development strategy for Dynamics 365 Business Central that ensures a solution that will never get outdated. Using Microsoft Dynamics 365 Business Central as the foundation for TRIMIT Configuration ensures the platform and provides the basic functionality like General Ledger, Purchase, Sales, Inventory, etc.

TRIMIT Configuration is completely integrated with Microsoft Dynamics 365 Business Central. You will experience TRIMIT Configuration powered by Microsoft Dynamics 365 Business Central as one solution.

In this document, you will get an overview of the features that are most important for a Manufacturing company with configuration needs. TRIMIT Configuration includes numerous features beyond the ones described here.

CONTENTS

PRODUCT CONFIGURATION

Product Configuration is the key to correct orders in your system. The Product Configuration handles variants and rules of combining variants to ensure a production order that is possible to make. You also get the tools to pre-calculate the cost of your products. Below is an extract of the Product Configuration features in TRIMIT Configuration.

MASTER PRODUCT

The Master Product (hereafter referred to as Master) is your template for all the different versions of one product. In the Master, you handle the unlimited number of variants, you create the Bill of Materials (hereafter referred to as BOM) in endless levels, and you set up the Routing for making the product. The Master also controls all the basic settings for the configured product. This makes it possible configure the item and optionally create the item on the fly while entering a sales order or a purchase order.

VARIANTS

To each Master you can attach an unlimited number of variants (type, material, length, width, color etc.) defined by you. To each variant you can attach an unlimited number of options (red, green, blue, etc.) defined by you. This makes it possible to build both simple and advanced products with multiple variants.

VALID COMBINATION OF VARIANTS

To each Master you can define both the valid and the invalid combination of variant options. This will ensure that all your sales orders only have valid combinations.

VARIANT PRICING

To each Master you can define how each variant option will affect the sales price. This will show in the Product Configuration as a price adjustment. In the same way, you can also work with discounts.

BILL OF MATERIALS

To each Master, you can attach a generic BOM that includes both time, materials, routing and overhead. In the generic BOM, you define the rules (see Formulas) for how the combination of variant options affects the specific production order. With the generic BOM, you no longer need to create a specific BOM for each combination of variants. It is even possible to add materials just as information, which will have no effect on the demand planning.

TEMPORARY BOM

When you are working with the setup of rules (Formulas), you can use the temporary BOM to verify that the rules works as intended. The temporary BOM takes the configuration into the generic BOM and calculates all the rules for inheritance and calculation.
The use of a temporary item BOM has two advantages:

- All maintenance take place on the Master BOM and not on individual item BOM's

- Product configuration may lead to an enormous number of item possibilities. With the use of a temporary item BOM, it is possible to avoid creation of individual BOM's and in some situations it is possible avoid to create the configured item itself.

COPY MASTER BY WIZARD

It is possible to copy a Master from another Master including Price tables and Master BOM including Formulas and Search Table Lines. The wizard also allows you to create a new master from scratch with only a minimum of mandatory fields – without copying information from existing master.

CALCULATION OF COST

The BOM includes both time, materials, routing and overhead, and that will enable you to calculate the cost of a product at any time in the building process. TRIMIT Configuration makes it possible to calculate the production cost of an item and ingoing items in all levels of the bill of material including cost of materials, operations, machine setup costs, overheads etc. In a Cost Calculation, the cost of the items on raw material level can be based on last purchased cost, the price list, or the unit cost.

Overall, it enables the salesperson to get the precise cost of a configured product directly on the order.

The Unit Cost can also be calculated with the TRIMIT functionality of Item Charges. Cost Components as Transport, Duty Percentages, Overhead, etc. can be applied on the Unit Cost. This is supported by TRIMIT for standard costing method and FIFO.

FORMULAS

You use the Formulas to define the rules and calculations in your system. Within the Product Configuration, the Formulas can select the components in the BOM from the variants. You can create a specific (temporary) item BOM, calculate consumption quantities, and calculate volumes, measures or weights based on a specific combination of variants and dimensions. In certain cases, Formulas can replace the need for customized code.

ITEM CREATION

The Product Configuration can create new items directly on the order. In cases where you need to put specific configurations on stock, you can ask the system to create all the needed item numbers. The creation of items copies most information from the Master, ensuring that all settings are correct.

SALES

The sales area is where you enter orders and need all the features that go with order entry like, customers, pricing discounts, configuration, etc. The sales area is part of Microsoft Dynamics 365 Business Central. TRIMIT Configuration, extends the sales area to handle the features for configuration. Below is an extract of the sales features in TRIMIT Configuration.

CUSTOMER SPECIFIC ITEMS (CONFIGURATION)

With the TRIMIT Product Configuration, it is possible to create customer specific items on the fly while creating a sales order. The Product Configuration handles variants and rules of combining variants to

ensure a product that is possible to make. The result of the Product Configuration is a production order build to the specifications of the configuration. Product Configuration is the key to correct orders in your system.

STOCK ITEMS

In cases where the Product Configuration is the same as a stock item, the system will pick the stock item for the order. You will avoid more numbers on the same item.

AVAILABLE QUANTITY

When creating sales order for both configured items and items on stock, the sales order feature supplies you with vital information like 'available quantity', which ensures that you give your customer true information of what he can get. The system calculates the available quantity from inventory, sales orders, purchase orders and production orders, taking in consideration all possible transactions for the specific item or components. You can do this from the finished products, also on the sub-assemblies and/or raw materials. If there are not enough available items on current stock, the system informs the user of the next availability, (for instance goods coming in from a purchase order next week). In addition, you can manage bottlenecks to see, if there is available capacity.

PRICES AND DISCOUNTS

The pricing feature allows you to create anything from overall pricing to customer specific pricing per variant, from general price to price in a period or campaign. Prices can even be cross companies within the same group. You can copy one pricelist to another or set a pricelist to be depending on a base pricelist. You can handle discounts in similar ways and even combine discounts.

BLANKET ORDERS

The blanket order feature enables you to manage framework agreements with your customers. You simply create the framework agreement as a blanket order. Sales orders within the framework will then deduct from the blanket order giving you an overview of the framework agreement status.

WORKFLOW

The workflow management enables you to keep track of all activities around a sales order. With the workflow, you have the total overview of where you are in the process. You are also able to create workflow templates from which the workflow can be created for a specific sales order to keep track of all the activities related to your order.

COMMISSION

The commission feature in TRIMIT Configuration enables you to setup provisions for the salesperson commissions, where every salesperson can get different percentages per customer (group) and/or item (group). You are even able to setup commissions for up to three different salespersons per customer. Based on invoices or invoices paid, you can calculate the entitled commission per month, so you can take this into the salary or even create purchase invoices for the payments of the commission. With the same feature, you can also calculate royalties. Furthermore, you can use this feature for determining item charges, and compare to real costs, such as freight costs, duty costs, etc.

BONUS

The bonus feature in TRIMIT Fashion enables you to setup bonuses for the customers based on minimum quantities or amounts that a customer buys per order, season, collection, etc.
This bonus can determine special discounts for future orders.

SENDING DOCUMENT VIA E-MAIL

Documents like the order confirmation, shipment, invoice, reminder, finance charge memo, customer statement and sales statistics can be printed and send to the customer. In addition, it is also possible to create e-mail templates, so when printing the document an e-mail will be send to the recipients of the customer with a pre-defined content of the text in which you can use variables based on the information of the customer or sales order.

SALES STATISTICS

You are able to create sales statistics based on orders and/or invoices in many different ways.
For the frequently used statistics, you are able to create predefined setups, so it can be used more frequently with the same setups. These sales statistics setups can also be used to publish sales information on the different portals.

E-COMMERCE

The features described in the above section "sales" are all about what you can do, when you enter an order directly in Microsoft Dynamics 365 Business Central with TRIMIT Configuration. However, you can also get orders over the internet and by external people. Below is a short description of the web solutions that you can get with TRIMIT Configuration.

SALES AGENT PORTAL

The sales agent portal is for direct sales team and agents. It enables you to select your own customers / shops and place the order for that customer through a very simple and intuitive user interface. Your sales force gets access to the latest items, customer information, orders, sales history etc.
Within the sales agent portal, it is also possible to enter a complete configuration for the required product based on the information of your master.

B2B WEBSHOP

The B2B shop makes it possible to expand the sales network directly to your customers or even to your own shops. The customers and shops can retrieve relevant information (concerning availability, time of delivery etc.) to themselves or the consumer instantly. The B2B shop also makes it possible for the customers to retrieve or enter data outside opening hours. Your customers and your own shops can order directly through the system, whenever they want without calling or faxing.
Within the B2B shop, it is also possible to enter a complete configuration for the required product based on the information of your master.

B2C WEBSHOP

The B2C shop opens your collections for the consumers. The web shop is open 24/7 and has the traditional facilities such as; ordering, credit card payment, multiple language and currencies, web shop pricing, campaigns and discounts, gift card, customer club and much more.

B2C-INSTORE WEBSHOP

The B2C-Instore shop can be compared with the B2C shop, but the person ordering is actually the B2B customer that orders for a consumer in its shop.

INSITE

The TRIMIT InSite portal can provide you information regarding goods sold and goods to be delivered based on the open and/or posted sales orders. It can be run in an infinite number of ways and is an alternative to the TRIMIT Sales Statistics. Setting up the different docks that needs to be shown is very easy and takes place in TRIMIT Furniture itself.

PRODUCT INFORMATION MANAGEMENT (PIR)

For the users that also use the webshops and portals of TRIMIT, you are able to see and change in an easy way the pictures and descriptions of your garments that will be shown on the webshops/portals.
Especially when the master is configured by the customer, it is necessary to add extra pictures in the PIR for different layers of your finished product.
In addition, you are able to add docks with statistical information to your B2B shop, Sales Agent Portal and InSite Portal by using the sales statistics setups.

PRODUCTION

The production area is where you handle your production. With TRIMIT Configuration, the production area is created specifically to handle the configured items and their variants. The TRIMIT Production functionality is suitable for discrete manufacturing. This could be simple chairs or complete customized kitchens. TRIMIT Configuration supports both in-house and outsourced production. The manufacturing part of Microsoft Dynamics 365 Business Central does not handle the configured products. Below is an extract of the Production features in TRIMIT Configuration.

PRODUCTION ORDER

In the production order, you have all the data to give you a complete overview of the production process. The production order holds the complete (one level) BOM including the time consuming operations and the setup times. That also gives you the complete cost calculation of each production order. The Production order is prepared for automatic deduction of time and materials. The production order will even show you actual consumed time and material for your order post calculation.

WORK CENTERS

You can connect operations and machine setup times to a work center. On a work center, you can define the capacity and assign it to be a Bottleneck with possibility to raise warnings in connection with the full

use of all capacity in a period. Operations and machine setup times are a part of the BOM as well as items (sub-assemblies/raw materials), and the Consumption per produced unit is directly set on the BOM line for the specific operation or machine setup.

WORKFLOW

The workflow management enables you to keep track of all activities around a production order. With the workflow, you have the total overview of where you are in the process. You are also able to create workflow templates from which the workflow can be created for a specific production order to keep track of all the activities related to your order.

MULTILEVEL BOM

You can make BOM on Master level or on item Level. A BOM consist of items (sub-assemblies with their own BOM structure/raw materials), machine setups and operations. Master BOM's can be built from top level down, and this way it is possible to construct even complex BOM structures and maintain the overview in the construction phase.

MAKE TO STOCK

It is possible to purchase or manufacture for stock. It can take maximum stock, reorder point (minimum stock) and reorder (order multiple) quantities into consideration while planning if desired.

MAKE TO ORDER

It is also possible to purchase or manufacture based on the sales order. The system automatically creates a so-called 'Related Order' based on the sales line. If a sub-assembly or raw material is also order specific, the system also creates a related order on that level. If necessary, this takes place on all underlying levels.

PRE- AND POST CALCULATION

Every posting results in entries. Based on these entries it is possible to calculate the actual costs of a manufactured product. You can compare this to the unit cost of a product based on the original BOM.

TRANSFERS OF MATERIALS AND STYLES

Based on a production order it is possible to create transfer orders for the raw materials you want to send to an outsourced manufacturer and to create transfer orders for the finished products coming back from your outsourced manufacturer.

Transfer orders can also be generated automatically via Related Orders or via TRIMIT MRP. This functionality uses the standard NAV Stock keeping Unit Cards on which a replenishment system 'Transfer' can be setup. On Master level, these SKU cards can be created and maintained.

DEMAND PLANNING

The demand-planning feature in TRIMIT Configuration, gives you a flexible way of calculating the need for production and purchase. The demand planning will calculate the requirements from a selected range of sales orders or production orders. The demand planning will calculate both finished goods and look at BOM

structures to calculate the need of raw materials at all BOM levels. The demand planning uses an MRP (Material Requirement Planning) engine, where it is possible to optimize the purchase or production of all types of items. Below is an extract of the demand planning features in TRIMIT Configuration.

MRP SETTINGS

It is possible to set different parameters in order to calculate exactly what you need. You can even have different default setups, which you can reuse in different planning situations.
The basic setups will create the following entities from an MRP planning:

- Purchase Order (creation of Quotes/Orders is optionally)
- Production Orders (creation of Suggestions/Orders is optionally)

An MRP period (re-order cycle) and the MRP horizon can be setup per planning run, but also on product level. Dampeners can be setup, so that re-planning can be less hysterical.

MRP ACTIONS

The MRP actions improve the visibility of the result of the TRIMIT demand planning calculations. MRP actions is a tool from where you can run the different TRIMIT demand planning calculations methods. The created suggestions, quotes or orders are presented in a sheet for better overview. You can then select and execute the relevant ones. MRP actions furthermore give you the option to recalculate already existing production- and purchase orders.

BLANKET ORDERS

You can choose whether you want to include blanket orders in the planning or not. Furthermore, you can use the blanket orders for forecasting.

PURCHASE

The purchase area is where you can purchase anything to stock with a purchase order and you need features like suppliers, pricing, deliveries etc. The purchase area is part of Microsoft Dynamics 365 Business Central. TRIMIT Configuration, extends the purchase area to handle the needs of Configuration Companies. Below is an extract of the purchase features you get with TRIMIT Configuration.

PURCHASE DIRECTLY FROM A SALES ORDER

With TRIMIT Configuration, you can create a purchase order directly from a sales order. The system creates a link between the purchase and the sales order to give you the full identity of where it comes from. This feature comes in handy, when you get those special orders that, you need to follow. These orders will not interfere with the demand planning.

PURCHASE DIRECTLY FROM A PRODUCTION ORDER

With TRIMIT Configuration, you can create a purchase order directly from a production order for the raw materials. The system creates a link between the purchase and the production order to give you the full identity of where it comes from. This feature comes in handy, when you get those special production orders that you need to follow. These orders will not interfere with the demand planning.

PURCHASE CREATED BY DEMAND PLANNING

When using TRIMIT demand planning, the result is a number of purchase- or production orders. Parameters on each Master controls the selection of supplier or if you produce the Master yourself.

RECEIVING DIRECTLY TO PURCHASE ORDERS

You can assign received items directly to the purchase order. This will speed up the process in getting the goods on stock in the system, and to control that the supplier has delivered as ordered. Differences between the quantities in a purchase order and actual quantities can be handled (shortages and surpluses).

PURCHASE VIA WEB

SUPPLIER PORTAL

The TRIMIT supplier portal handles the communication regarding purchase orders and purchase quotes between a company and its supplier of finished products or materials in the product life cycle phases of pre-sales, sales, delivery and re-order. The portal gives your suppliers on-line access to the masters they have to produce for you, and online means that they have access to the latest specification changes of the masters immediately after you enter them.

LOGISTICS

Logistics is the process of shipping and receiving goods. Internal and external logistics is part of Microsoft Dynamics 365 Business Central. TRIMIT Configuration, extends the logistics to handle the needs of Configuration Companies. Below is an extract of the logistics features you get with TRIMIT Configuration.

PICKING WITH PRIORITIES

In TRIMIT Configuration, you can work with pick suggestions. You can allocate goods to orders considering the current stock. You can evaluate the pick suggestion with customer priorities and other parameters. It is possible to change this proposal. After the user is completely satisfied, the TRIMIT Pick Suggestion can evolve in real warehouse picks.

CONTAINER MANAGEMENT

For managing external logistics, TRIMIT Configuration has a feature called 'Container Management'. With container management you can follow shiploads whether they are inbound (from supplier), outbound (to customer) or internal (transfer between own warehouses). With container management, you can manage deadlines, shipping & receiving dates and quantities. The user is able to keep track of the container's whereabouts and content. The container management feature in TRIMIT Configuration enables you to track containers by connecting sales lines, purchase lines, transfer lines or pick documents to it. By changing the receipt-/shipment date of the container also, the dates of the connected lines are changeable. Posting the container will have the same effect as posting the shipment/receipt of an order. In a wider perspective, it can manage boxes packed for shipments as well.

CLAIMS

The claims area is where you handle a problem that a customer discovers with their purchase and want to file a complaint in order to get money back, a replacement, a discount or other solutions. Claims management keeps track of claims and product quality. Being a fully integrated part of TRIMIT Configuration, there is access to all information about the product, sales orders, purchase orders and production orders. That gives the claims management an important role in your quality assurance. The claims management has an appearance similar to the sales- and purchase order.

REGISTER THE CLAIM BY FIRST CONTACT

When customers file a claim, you can register it in claims management. This will enable you to look for the invoiced styles, quantities and prices and take those lines including their configuration into the claim. In the claim, it is possible to register reason, which can already determine the actions to follow-up.

TYPES OF CLAIMS

Claims management handles: rejections, credit memos, agreements on price reduction, replacement and repairs. Depending on the claim type, claims management will create the necessary documents and you are even able to post these documents directly via the claim.

RETURNS

A possible outcome is that the customer returns the product. Several actions can take place:
- The customer gets a refund (credit memo).
- The customer gets a substitute with or without a discount
- The returned product goes to a special stock for investigation
- The returned product will go back to the supplier.
- Etc.

Of course, it is also possible to manage claims without a return. You can give the customer a discount, refund or substitute even if he does not return the product.

CLAIM LOGISTICS

If a substitute needs to be send to the customer or the returned product needs to be send to the supplier, the system will automatically create the necessary pick documents, so that the warehouse employees can take the appropriate actions.

CLAIM FINANCIAL HANDLING

If the claim results in a refund or a discount, the system will automatically create a credit memo or return order, so that the financial department can take appropriate actions.

STATISTICS

As a part of claims management, it is possible to pull statistics of the occurrence of the different claims types.

DATACAPTURE

Datacapture is the area, where your shop floor employees can register working time and materials. Datacapture runs in a Shop Floor Role Center in, where the employees can:

- Enter when they arrive to work
- Enter when they leave
- Enter what production orders they work on
- Enter the quantities they have made.

The registrations of the employees from the Datacapture goes into a journal. Posting the journal will give time and material consumption on the production orders.

UPGRADES AND TAILORING

Microsoft has announced that Microsoft Dynamics 365 Business Central will have a new release every half year for the on-premises. TRIMIT Fashion will follow the releases from Microsoft with new releases of TRIMIT, and may even have small releases in between. Therefore, you will experience a number of possible upgrades.

TAILORING

Once you start using Microsoft Dynamics 365 Business Central, you may have a special need that is not included in the solution. This is where system tailoring comes in. Microsoft Dynamics 365 Business Central has tools for easy tailoring so you can have it your way. However – tailoring comes with an extra cost every time you upgrade your system.

ZERO COST UPGRADE

With Microsoft Dynamics 365 Business Central and TRIMIT Configuration, you get most of the functionality you need in a Configuration company. TRIMIT Configuration provides tools for adjusting the system without tailoring the code. TRIMIT Configuration includes tools and methods to make the tailoring of code easier to upgrade.