

WHITE PAPER

# Wizard and Copy Info

TRIMIT version: **25.2**

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# Table of Contents

<b>Wizard and Copy Info</b> .....	<b>1</b>
<b>Introduction</b> .....	<b>4</b>
<b>Components</b> .....	<b>4</b>
<b>Setups</b> .....	<b>5</b>
Master Wizard Setup .....	5
FastTab General .....	6
FastTab Master .....	7
FastTab Sales & Purchase .....	7
FastTab Bill of Materials .....	9
FastTab Inventory .....	10
FastTab Measurement Chart .....	10
FastTab Additional Info .....	11
FastTab Additional Comments .....	11
FastTab Workflow .....	12
FastTab Matrix .....	13
FastTab Assortment .....	13
FastTab Wizard .....	14
FastTab Numbering .....	17
Inventory Setup .....	18
<b>New Master by Wizard</b> .....	<b>19</b>
New Master from Blank .....	20
Variant 1 – 9 Page .....	22
Optional Parameters Page .....	23
Matrix Page .....	25
Assortment Matrix Page .....	27
Last Page of the Wizard .....	28
New Master from Template .....	30
Parameter Page 1 .....	32
Parameter Page 2 .....	32
Matrix Page .....	33
Assortment Matrix Page .....	35
Last Page .....	36
Maintain Master by Wizard .....	37
Matrix Page .....	38
Assortment Matrix Page .....	39
Last Page .....	39

**Copy Values.....40**  
First Page.....40  
Next Pages.....41

# Introduction

In TRIMIT, you can copy one Master to another new Master by using the **Wizard**.

You can use the same **Wizard** also for creating new Masters from blank.

You can use the same **Wizard** also for maintaining Variants of a Master.

When copying a Master, you are also able to determine which information should – by default – already simply be copied, and for which information of the Master you want to interfere to determine what exactly should be copied.

**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 25.2 for Business Central W1 BC27.X**.

The pictures in this White Paper are based on the demo data for **TRIMIT 25.2**, which is based on Microsoft Dynamics 365 Business Central 2025 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

## Components

**TRIMIT Wizard and Copy Info** contains the following objects:

<b>The tables</b>	<b>6037134</b>	<b><i>trm Master Wizard Setup</i></b>
<b>The pages</b>	<b>6037129</b>	<b><i>trm Master Wizard</i></b>
	<b>6037137</b>	<b><i>trm Master Wizard Setup List</i></b>
	<b>6037138</b>	<b><i>trm Master Wizard Setup</i></b>
	<b>6037199</b>	<b><i>trm Copy Values by Wizard</i></b>
<b>The codeunits</b>	<b>6037100</b>	<b><i>trm Call Create Master Wizard</i></b>

# Setups

## Master Wizard Setup

With the **Master Wizard Setup**, you can determine which information should be copied – by default – from one Master to a new Master when you use the **Copy Master by Wizard** functionality in TRIMIT. You can also determine which information you want to be able to change or select during the Wizard.

To create the **Master Wizard Setups**, you can click **+ New Master by Wizard** in the *Actions* of the **Profile TRIMIT Small Business** to open the Wizard first and then choose **Create Master from Template**.

The screenshot shows the Dynamics 365 Business Central interface. At the top, the 'Actions' menu is open, and '+ New Master by Wizard' is highlighted with a red box. Below this, the 'Master Wizard' dialog is displayed. It has three options: 'Create Master from Blank' (disabled), 'Create Master from Template' (selected and highlighted with a red box), and 'Maintain Master' (disabled). Under 'Set Copy Setup Code for default parameters:', there is a table with two rows: 'ALL' (All Will Be Copied) and 'BASIC' (Basic Setup). The '+ New' button at the bottom left of the table and the 'Select from full list' button at the bottom right are also highlighted with red boxes. A 'Next' button is at the bottom right of the dialog.

In field **Copy Setup** you can press **Look up value** (Alt+Down arrow) and click **+ New** or **Select from full list** to open the **Master Wizard Setup List**.

Once you have entered a **Copy Setup**, you can click **AssistEdit** (Alt+Right arrow) to open the Card of the **Master Wizard Setup**.

The screenshot shows the 'Select - Master Wizard Setup List' card. The table has two rows: 'ALL' (All Will Be Copied) and 'BASIC' (Basic Setup). The 'Edit' button in the context menu is highlighted with a red box. The '+ New' button in the top right of the card is also highlighted with a red box.

Now you can open the Card of the **Master Wizard Setup** by clicking **+New** or **Show the rest, Edit** or **View**.

Master Wizard Setup

ALL

**General**

Code ..... ALL      Default Collection No. ....

Description ..... All Will Be Copied

**Master** >

**Sales & Purchase** >

**Bill of Materials** > Yes

**Inventory** >

**Measurement Chart** > Yes

**Additional Info** >

**Additional Comments** > Yes

**Workflow** > Yes

**Matrix** >

**Assortment** >

**Wizard** >

**Numbering** >

## FastTab General

### Code

Unique Code for this **Master Wizard Setup**

### Description

Description for this **Master Wizard Setup**

## Default Collection No.

You can enter a **Collection No.**, which will be filled in the **Master Wizard** when you choose this **Code** in your Wizard.

## FastTab Master

Master			
Copy Master Pictures .....	<input type="checkbox"/>	Copy Item Translations .....	<input checked="" type="checkbox"/>
Copy Dimensions .....	<input checked="" type="checkbox"/>	Copy Item Attributes .....	<input checked="" type="checkbox"/>
Copy Extended Text .....	<input checked="" type="checkbox"/>	Copy General Comments .....	<input checked="" type="checkbox"/>

### Copy Master Pictures

A checkmark in this Field will copy the Pictures from the **Template Number** to the **Number**. No checkmark means, that the Pictures will not be copied.

### Copy Dimensions

A checkmark in this Field will copy the Dimensions from the **Template Number** to the **Number**. No checkmark means that the Dimensions of the **Template Master** will not be copied to the **Number**. However, the **Number** can get Dimensions based on the **Collection No.** if that was filled when copying.

### Copy Extended Text

A checkmark in this Field will copy the Extended Text from the **Template Number** to the **Number**. No checkmark means that the Extended Text will not be copied.

### Copy Item Translations

A checkmark in this Field will copy the Item Translations from the **Template Number** to the **Number**. No checkmark means that the Item Translations will not be copied.

### Copy Item Attributes

A checkmark in this Field will copy the Item Attributes from the **Template Number** to the **Number**. No checkmark means that the Item Attributes will not be copied.

### Copy General Comments

A checkmark in this Field will copy the General Comments that are related to the **Template Number** to the **Number**.

No checkmark means that the General Comments will not be copied.

## FastTab Sales & Purchase

Sales & Purchase			
Copy Sales Prices .....	<input checked="" type="checkbox"/>	Set Purchase Prices = 0 .....	<input type="checkbox"/>
Set Sales Prices = 0 .....	<input type="checkbox"/>	Copy Item Vendor .....	<input checked="" type="checkbox"/>
Copy Sales Discounts .....	<input checked="" type="checkbox"/>	Copy Item Charge .....	<input checked="" type="checkbox"/>
Copy Purchase Prices .....	<input checked="" type="checkbox"/>	Set Item Charge = 0 .....	<input type="checkbox"/>

### Copy Sales Prices

A checkmark in this Field will copy the Sales Prices and the VarDim Sales Prices from the **Template Number** to the **Number**.

If Sales Prices or the VarDim Sales Prices of the **Template Number** have **Search Expressions** and related Search Table Lines, new Search Tables and Search Table Lines will be created for the **Number** based on the **Template Number** Search Tables.

In the newly created Search Tables only the Variants (colors, sizes, wood types, etc.) of the **Number** will be included.

If the **Number** contains more Variants (colors, sizes, wood types, etc.) as the **Template Number**, the Prices in the Search Table Lines will be filled in based on the **Unit Price** in the Sales Prices or the **Adjustment Amount Sales** in the VarDim Sales Prices.

If Sales Prices or the VarDim Sales Prices of the **Template Number** have **Formulas**, the same Formulas will also be connected in the Sales Prices of the **Number**.

If the Sales Prices of the **Template Number** also have Sales Prices per Dimension, they will also be copied for the corresponding Sales Prices of the **Number**.

No checkmark means that the Sales Prices will not be copied.

#### Note 1

Keep in mind that if you have a **Formula** to determine Sales Prices or VarDim Sales Prices, and change the **Formula**, this can influence the prices of several different Masters.

#### Note 2

Sales Prices of **Sales Type Campaign** will NOT be copied, regardless of whether it is in the Sales Prices or VarDim Sales Prices.

### Set Sales Prices = 0

If **Copy Sales Prices** has a checkmark, and the **Set Sales Prices = 0** has a checkmark, the records of the Sales Prices including **Search Expressions**, **Search Table Lines** and **Formulas** will be copied as described above.

However, the actual field for the **Unit Price** will be set to 0.00 as well as the **Unit Price** in the Search Table Lines.

This is also applicable in the **VarDim Sales Prices**, where the **Adjustment Amount Sales**, **Adjustment Sales in %**, **Unit Cost Adjustment in Amount** and **Unit Cost Adjustment in %** will be set to 0.00.

### Copy Sales Discount

A checkmark in this Field will copy the Sales Line Discounts (BC Line Discounts) and the Sales Line Combination Discounts (TRIMIT Line Discounts) from the **Template Number** to the **Number**.

### Copy Purchase Prices

A checkmark in this Field will copy the Purchase Prices from the **Template Number** to the **Number**.

If Purchase Prices of the **Template Number** have **Search Expressions** and related Search Table Lines, new Search Tables and Search Table Lines will be created for the **Number** based on the **Template Number** Search Tables.

In the newly created Search Tables only the Variants (colors, sizes, etc.) of the **Number** will be included.

If the **Number** contains more Variants (colors, sizes, etc.) than the **Template Number**, the Prices in the Search Table Lines will be filled based on the **Unit Price** in the Purchase Prices.

If Purchase Prices of the **Template Number** have **Formulas**, the same Formulas will also be connected in the Purchase Prices of the **Number**.

If the Purchase Prices of the **Template Number** also have Purchase Prices per Dimension, they will also be copied for the corresponding Purchase Prices of the **Number**.

No checkmark means, that the Purchase Prices will not be copied.

#### Note

Keep in mind that if you have a **Formula** to determine Purchase Prices, and would change the **Formula**, this can influence the prices of several different Masters.

## Set Purchase Prices = 0

If **Copy Purchase Prices** have a checkmark, and the **Set Purchase Prices = 0** have a checkmark, the records of the Purchase Prices including **Search Expressions**, **Search Table Lines** and **Formulas** will be copied as described above.

However, the actual field for the **Direct Unit Price** will be set to 0.00 as well as the **Direct Unit Price** in the Search Table Lines.

## Copy Item Vendor

A checkmark in this Field will copy the Item Vendor Catalog (table **gg Item Vendor**) from the **Template Number** to the **Number**.

## Copy Item Charge

A checkmark in this Field will copy the Item Charge Calculation Lines that are related to the Master or Items from the **Template Number** to the **Number**.

## Set Item Charge = 0

If you have a checkmark in **Copy Item Charge** and a checkmark in **Set Item Charge = 0**, the Item Charge Calculation Lines will be copied, but the Field **Item Charge Unit Amount (LCY) or %** will be set to 0000.

## FastTab Bill of Materials

Bill of Materials			
Copy Bill of Materials .....	<input checked="" type="checkbox"/>	Incl. BOM Comments .....	<input checked="" type="checkbox"/>
Incl. BOM Auto Formula .....	<input checked="" type="checkbox"/>		

## Copy Bill of Materials

A checkmark in this Field will copy the Bill of Materials (BOM Component Lines) that is related to the **Template Number** to the **Number** from the Master Wizard.

If BOM Component Lines of the **Template Number** have **Search Expressions** and related Search Table Lines, new Search Tables and Search Table Lines will be created based on the **Template Number** Search Tables.

In the newly created Search Tables only the Variants (colors, sizes, etc.) of the **Number** will be included. If the **Number** contains more Variants (colors, sizes, etc.) as the **Template Number**, the **Quantity per** in the Search Table Lines for the **Number** will be filled based on the **Quantity per** in the BOM Component Line.

These Search Tables will only be filled, and the automatic generated Formula will only be copied to a new Formula, if the **Incl. BOM Auto Formula** does have a checkmark.

If the BOM Component Line of the **Template Number** contains a **Formula** – not based on a Search Expression – a new identical Formula will be created. If the Formula Lines also contains a Search Table, a new Search Table will be created.

No checkmark means that the Item Bill of Materials and its Search Tables and Formulas will not be copied.

## Incl. BOM Auto Formula

A checkmark in this Field will copy the Formulas that have been generated automatically that are related to the **Template Number** to the **Number** from the Master Wizard.

Usually, these Formulas have been created based on the **Search Expression**.

No checkmark means that the automatically generated Formulas will not be copied.

## Incl. BOM Comments

A checkmark in this Field will copy the Bill of Materials Comments that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Item Bill of Materials Comments will not be copied.

## FastTab Inventory

Inventory	
Copy Stockkeeping Unit .....	<input checked="" type="checkbox"/>

## Copy Stockkeeping Unit

A checkmark in this Field will copy the Stockkeeping Units from the **Template Number** to the **Number** from the Master Wizard.

For the Items (Master/Color/Size/...) that were already related to the **Template Master**, the Stockkeeping Units from those Items will be copied to the new **Number** related Items including the data in those SKUs.

For new **Number** related Items (Master/Color/Size/...) that were not already created for the **Template Master**, Stockkeeping Units will be created for the same Locations as for the **Template Master**, but the data in those Stockkeeping Units will be based on the data in the Master SKU itself, so you might have to change them afterwards!

## FastTab Measurement Chart

Measurement Chart			
Copy Measurement Chart .....	<input checked="" type="checkbox"/>	Include Measurement Pictures .....	<input checked="" type="checkbox"/>
Include Measurement Special Columns ..	<input type="checkbox"/>	Include Measurement Comments .....	<input checked="" type="checkbox"/>
Include Measurement Special Values .....	<input type="checkbox"/>		

## Copy Measurement Chart

A checkmark in this Field will copy the last Version of the Measurement Chart that is related to the **Template Number** to the **Number** from the Master Wizard with **Version 0**.

I.e., if the **Template Number** has **Version 0, 1** and **2**, the values of **Version 2** will be copied as the **Version 0** for the **Number**. The Description of this **Version 0** will be "Copy of" + Description of **Version 2** of the **Number**.

No checkmark means, that the Measurement Chart will not be copied and the **Include** Fields of this FastTab will be disabled.

## Include Measurement Special Columns

A checkmark in this Field will copy the Special Columns of the last Version of the Measurement Chart that is related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Special Columns will not be copied.

## Include Measurement Special Values

A checkmark in this Field will copy the Special Values and its Comments of the Special Columns of the last Version of the Measurement Chart that is related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Special Values and its Comments will not be copied.

## Include Measurement Pictures

A checkmark in this Field will copy the Pictures of the last Version of the Measurement Chart that is related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Pictures will not be copied.

## Include Measurement Comments

A checkmark in this Field will copy the Comments of the last Version of the Measurement Chart that is related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Comments will not be copied.

## FastTab Additional Info

Additional Info			
Copy Composition .....	<input checked="" type="checkbox"/>	Copy Additional Info .....	<input checked="" type="checkbox"/>
Copy Care Label .....	<input checked="" type="checkbox"/>	Copy Additional Tags .....	<input checked="" type="checkbox"/>
Copy Sustainability Info .....	<input checked="" type="checkbox"/>		

## Copy Composition

A checkmark in this Field will copy the Composition Lines that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Composition Lines will not be copied.

## Copy Care Label

A checkmark in this Field will copy the Care Label Lines that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Care Label Lines will not be copied.

## Copy Sustainability Info

A checkmark in this Field will copy the Sustainability Lines that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Sustainability Lines will not be copied.

## Copy Additional Info

A checkmark in this Field will copy the Additional Info Lines that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Additional Info Lines will not be copied.

## Copy Additional Tags

A checkmark in this Field will copy the Additional Tags Lines that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Additional Tags Lines will not be copied.

## FastTab Additional Comments

Additional Comments			
Copy Additional Comments .....	<input checked="" type="checkbox"/>	Filter Additional Comments Code .....	<input type="text"/>
Include Additional Pictures .....	<input checked="" type="checkbox"/>		

## Copy Additional Comments

A checkmark in this Field will copy the Additional Comments that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Additional Comments will not be copied and the other Fields on this FastTab will be disabled.

## Include Additional Pictures

A checkmark in this Field will copy the Pictures related to the Additional Comments that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Pictures will not be copied.

## Filter Additional Comments Code

In this Field, you can set a **Filter** for the Additional Comments Codes you want to copy from the **Template Number** to the **Number** from the Master Wizard.

## FastTab Workflow

**Workflow**

Copy Workflow  Set Workflow Collection No.

Include Workflow Values

## Copy Workflow

A checkmark in this Field will copy the Workflow Steps that are related to the **Template Number** to the **Number** from the Master Wizard.

No checkmark means that the Workflow Steps will not be copied and the other Fields on this FastTab will be disabled.

Some fields in the Workflow Steps will however not be copied unless you have a checkmark in **Include Workflow Values**.

## Include Workflow Values

A checkmark in this Field will copy all the fields of the Workflow Steps that are related to the **Template Number** to the **Number** from the Master Wizard.

This also includes the following fields, which will not be copied if no checkmark has been entered in this Field: Closed, Closing Date, Closed by Type, Closed By, Approved, Rejected

Workflow for Master: 2000													
Step No.	Depending on Steps	Description	Deadline	Responsible ID Type	Responsible ID	Closed	Approved	Rejected	Closing Date	Closed by Type	Closed By	Assign Status Code	
10	0	Idea (Story Board)	6/25/2023	User Group	DESIGN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6/20/2023	User	ADMIN	IDEA	
20	0	Design	7/9/2023	User Group	DESIGN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7/1/2023	User	ADMIN		
30	0	Proto Sample	8/6/2023	User Group	PRODUCTION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8/1/2023	User	ADMIN		
40	30	Quality Check Proto Sample	8/13/2023	User Group	DESIGN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8/20/2023	User	ADMIN	APPROVED	
50	0	Fit Sample	9/17/2023	User Group	PRODUCTION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9/20/2023	User	ADMIN		
→ 60	50	Quality Check Fit Sample	9/24/2023	User Group	DESIGN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9/20/2023	User	ADMIN		
70	0	Production Salesmen Sa...	10/1/2023	User Group	PRODUCTION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		User			
80	70	Salesmen Samples Recei...	12/3/2023	User Group	LOGISTICS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		User			
90	0	Start Pre-Sales	12/10/2023	User Group	SALES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		User		READY	

## Set Workflow Collection No.

A checkmark in this Field will fill the **Collection No.** in the Workflow Steps of the **Number 2** based on the field **Collection No.** of the Master Wizard – which can be based on the [Default Collection No.](#) in the Master Wizard Setup.

No checkmark will not fill the **Collection No.** in the Workflow Steps.

## FastTab Matrix

Matrix			
Skip Create Matrix .....	<input type="checkbox"/>	Copy Matrix Variant 2 .....	<input checked="" type="checkbox"/>
Copy Matrix Variant 1 .....	<input checked="" type="checkbox"/>	Copy Matrix Variant 3 .....	<input checked="" type="checkbox"/>

### Skip Create Matrix

A checkmark in this Fields will **not** copy the Matrix of the **Template Number** to the **Number** from the Master Wizard.

This means that you can create the Matrix manually after the copy has been executed.

No checkmark means that the Matrix will be copied, and you are able to enter checkmarks in the other Fields on this FastTab.

### Copy Matrix Variant 1 / 2 / 3

A checkmark in this Field will automatically copy the same VarDim Variant Options of Variant 1, 2, 3 of the **Template Number** to the **Number** from the Master Wizard.

#### Note

You can also add the **Copy Matrix Variant 4 / 5 / 6 / 7 / 8 / 9** if applicable by using **Personalization**.

## FastTab Assortment

Assortment			
Skip Create Assortment .....	<input type="checkbox"/>	Copy Assortment Variant 2 .....	<input checked="" type="checkbox"/>
Copy Assortment Variant 1 .....	<input checked="" type="checkbox"/>	Copy Assortment Variant 3 .....	<input checked="" type="checkbox"/>

### Skip Create Assortment

A checkmark in this Fields will **not** copy the Assortment Matrix of the **Template Number** to the **Number** from the Master Wizard.

This means that you can create the Assortment Matrix manually after the copy has been executed.

No checkmark means that the Assortment Matrix will be copied, and you are able to enter checkmarks in the other Fields on this FastTab.

### Copy Assortment Variant 1 / 2 / 3

A checkmark in this Field will automatically copy the same VarDim Variant Options of Assortment Variant 1, 2, 3 of the **Template Number** to the **Number** from the Master Wizard.

#### Note

You can also add the **Copy Assortment Variant 4 / 5 / 6 / 7 / 8 / 9** if applicable by using **Personalization**.

# FastTab Wizard

Wizard			
Skip Parameter Page 1 .....	<input checked="" type="checkbox"/>	Skip Assortment Variant Page .....	<input checked="" type="checkbox"/>
Skip Parameter Page 2 .....	<input checked="" type="checkbox"/>	Close Wizard when Finished .....	<input checked="" type="checkbox"/>
Skip Matrix Variant Page .....	<input checked="" type="checkbox"/>		

The Wizard for copying a **Template Number** to a new **Number** can show you several pages with options that you can set/change before it is actually copied.

## Skip Parameter Page 1

A checkmark in this Field will **not** open the first Page with Parameters. The chosen **Master Wizard Setup** will then simply set these options. If no **Master Wizard Setup** is chosen in the Wizard, this Page with Parameters will not be opened, and the information will simply be copied.

The first Page with Parameters contains the following options:

### Master Wizard

Copy the following informations.

- Mark All .....
- Copy Dimensions .....
- Copy Extended Text .....
- Copy Item Translations .....
- Copy Sales Prices .....
- Copy Sales Discounts .....
- Copy Purchase Prices .....
- Copy Item Vendor .....
- Copy Item Charge .....

## Skip Parameter Page 2

A checkmark in this Field will **not** open the second Page with Parameters. The chosen Master Wizard Setup will then simply set these options. If no **Master Wizard Setup** is chosen in the Wizard, this Page with Parameters will be opened, and the user can select which information he wants to copy.

The second Page with Parameters contains the following options:

**Master Wizard** [Close] [Back] [Next]

Copy the following informations.

- Mark All
- Copy Bill of Materials
- Copy Additional Info
- Copy Measurement Chart
- Copy Workflow
- Copy Master Pictures
- Copy Additional Comments
- Copy Sustainability Info
- Copy Composition
- Copy Care Label
- Copy Item Attributes
- Copy Additional Tags
- Copy Stockkeeping Unit

## Skip Matrix Variant Page

A checkmark in this Field will not open the Matrix Variant Page in which a user is able to choose the Variants from the **Template Number** that needs to be copied to the **Number** from the Master Wizard.

This only makes sense, if the user wants to copy the Master first and afterwards wants to choose the Variants, or if the Fields **Copy Matrix Variant 1/2/3** (and perhaps **4/5/6/7/8/9**) on the FastTab **Matrix** have checkmarks – so the Variants will be copied automatically.

No checkmark means that the **Matrix Variant Page** will open during the process of the Master Wizard. I.e.:

The lines are related to the **Variant 1 – 9** in the VarDim Master of the **Template Number**.

### Skip Assortment Variant Page

A checkmark in this Field will **not** open the Assortment Variant Page in which a user is able to choose the Assortment Variants from the **Template Number** that needs to be copied to the **Number** from the Master Wizard.

This only makes sense, if the user wants to copy the Master first and afterwards wants to choose the Assortment Variants, or if the Fields **Copy Assortment Variant 1/2/3** (and perhaps **4/5/6/7/8/9**) on the FastTab **Assortment** have checkmarks – so the Assortment Variants will be copied automatically.

No checkmark means that the **Assortment Variant Page** will open – if the **Template Number** has Assortments - during the process of the Master Wizard. I.e.:

The lines are related to the **Variant 1 – 9** in the Assortments of the **Template Number**.

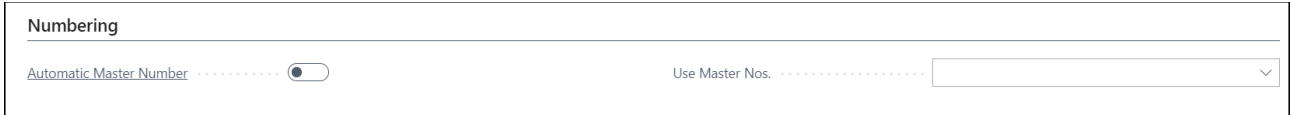
## Close Wizard when Finished

This Field determines what will happen after you have copied the **Template Number**:

A checkmark in this Field means that the Wizard will be closed

No checkmark in this Field means that you go back to the first page of the Wizard to enter a new **Template Number/Number** to copy.

## FastTab Numbering



The screenshot shows a section titled "Numbering". It contains two fields: "Automatic Master Number" with a toggle switch that is currently turned off, and "Use Master Nos." with a dropdown menu.

## Automatic Master Number

A checkmark in this Field will determine a new Master Number for your copy based on the **Use Master Nos.** No. Series. This will only happen if the **Number** in the Wizard was empty.

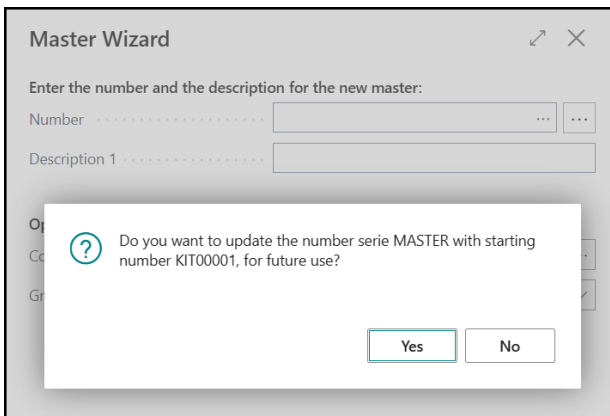
No checkmark means that the new Master will simply get the **Number** that you entered in the Wizard.

## Use Master Nos.

In this Field, you need to enter a **No. Series** for the new Masters if you have entered a checkmark in **Automatic Master Number**.

## Determine Start No. in No. Series Line

If you have chosen a **Use Master Nos.** but this No. Series does not have any Lines yet (so no **Start No.**), and you would use this **Copy Setup** for a new Master, the system will ask you if the **Number** you entered for the new Master should also become **Start No.** in the No. Series:



The screenshot shows the "Master Wizard" dialog box. It has a title bar with a close button. The main text says "Enter the number and the description for the new master:". Below this are two input fields: "Number" and "Description 1". A modal dialog box is overlaid on top, containing a question mark icon and the text: "Do you want to update the number serie MASTER with starting number KIT00001, for future use?". At the bottom of the modal are two buttons: "Yes" and "No".

# Inventory Setup

## Default MasterWizard Setup

After you have created the **Master Wizard Setups**, you are able to choose one as a **Default MasterWizard Setup** in the Inventory Setup.

The content of this Parameter will then by default be shown in the first page of the Wizard, after selecting **Create Master from Blank** or **Create Master from Template**.

## Create All Matrix Related Items

If you set this Parameter to Yes and a Matrix or an Assortment Matrix is related to a Master, the system will automatically create all Items based on the possible combinations of the Matrix and/or the Assortment Matrix when these are created or maintained. If an Assortment Matrix is related to the Master, an Item BOM will be created and maintained as well. Otherwise, the Items and the Item BOM will be created first time you fill in the matrix for instance in a Sales Order.

This Parameter can be overruled when copying a Master via Wizard or creating a Master from Blank. For this we added an extra Global Variable in the Master Wizard: **SkipCreateItems**, when copying a Master by Wizard or creating a Master from Blank.

This will overrule the parameter **Create All Matrix Related Items** in the Inventory Setup.

This extra Global Variable can be used when automating it from the outside.

```
{ } app.json AL VarDimHandling.Codeunit.al 9+ X
src > src > AL VarDimHandling.Codeunit.al > Codeunit 6037132 "trm VarDim Handling" > S
1 codeunit 6037132 "trm VarDim Handling"
5092 end;
5093
5094 3 references
5094 procedure Set_SkipCreateItems(value_par: Boolean)
5095 begin
5096     SkipCreateItems := value_par;
5097 end;
5098
```

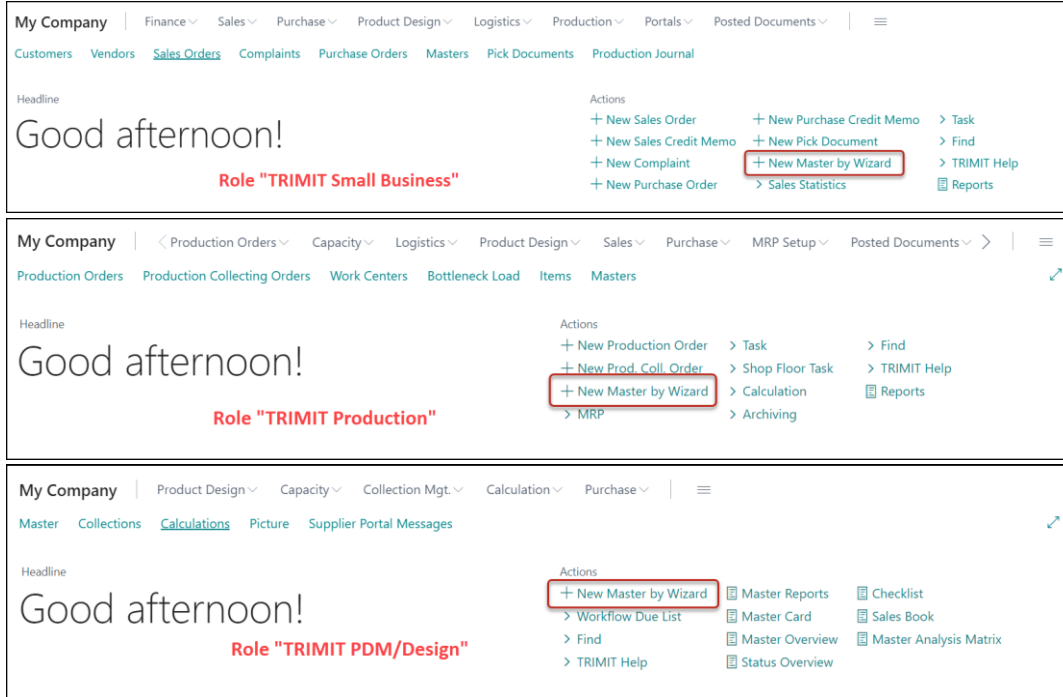
# New Master by Wizard

With **New Master by Wizard**, you can copy any existing Master to a new Master, regardless, if the Master has a Matrix or not. You are also able to create a new Master from blank, as well as adding/changing the Variants of an existing Master.

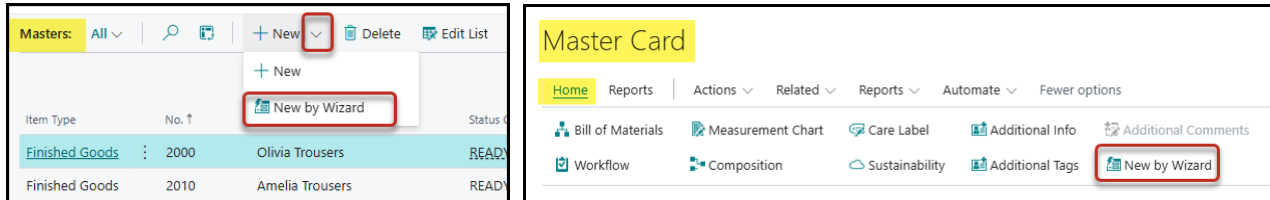
By using the [Master Wizard Setup](#), you are able to determine which information should simply be copied and which information you would like to select during the process of copying.

You can start the function:

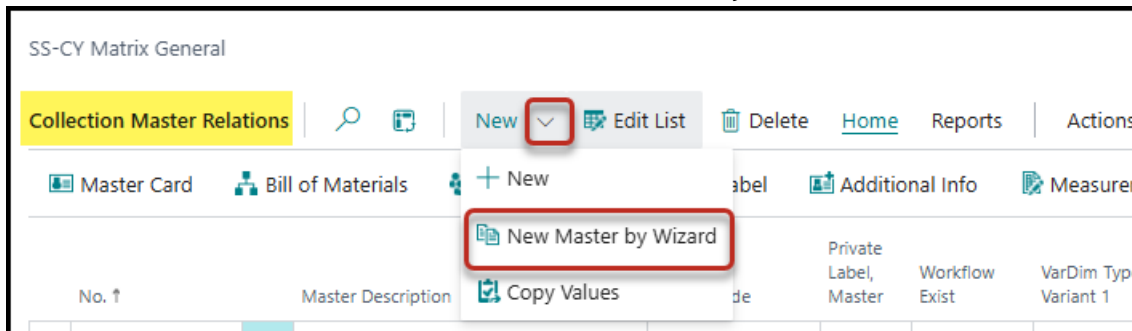
In several specific TRIMIT Role Centers under the *Actions*, click **+ New Master by Wizard**.



In the Master List, click **New, New by Wizard** and in the Master Card, click **Home, New by Wizard**.



In the Collection Master Relations, click **New, New Master by Wizard**.



# New Master from Blank

With the option **Create Master from Blank**, you can create new Masters with:

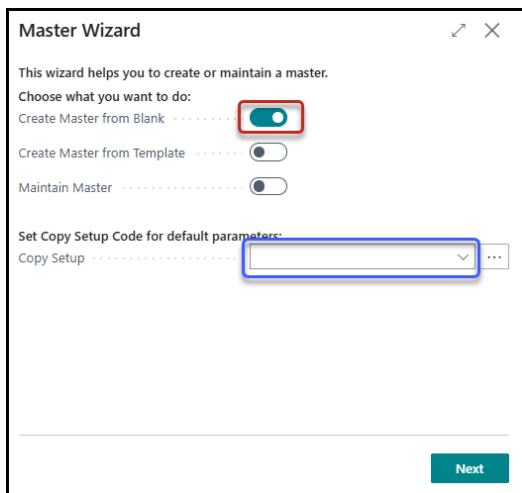
- ➔ Only *Variant* VarDim Types as part of the Item Nos.
- ➔ *Variant* VarDim Types and/or *Dimension* VarDim Types as part of the Item Nos.
- ➔ *Variant* VarDim Types and/or *Dimension* VarDim Types that will not be part of the Item Nos.

You cannot use the option **Create Master from Blank** if you want to create new Masters with:

- ➔ Sequential Item Nos. completely; in that case you need to:
  - Have *Variant* VarDim Types and/or *Dimension* VarDim Types as part of the Item Nos.
  - Set **Matrix Relation**, **Assortment Matrix Relation**, and **Configuration** on the third page of the Wizard to *FALSE*.

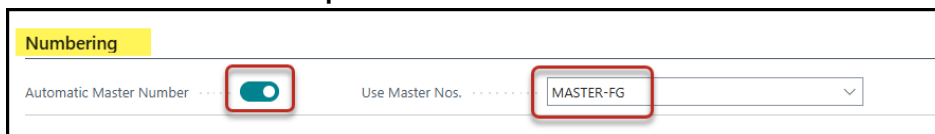


- Add the "L"s to the **No. System** of the Master that represents the **Sequence No. Counter**.
- Set the **Positive List** and/or **Negative List** and perhaps **Overall/Subordinate** to limit the Variants.
- ➔ Combination of *Variant* VarDim Types and/or *Dimension* VarDim Types that are part of the Item Nos. and VarDim Types that are **not** part of the Item Nos. completely; in that case you need to:
  - Create the Master for the VarDim Types that are part of the Item Nos. and make sure that **Order Configuration** on the third page of the Wizard is set to *FALSE*.
  - After creating the Master, you can add the VarDim Types to the **VarDim Master** of the created Master that are **not** part of the Item Nos.



With a checkmark in **Create Master from Blank** you can create a new Master from blank. Click **Next**

You can also fill in a **Copy Setup**; especially to determine the new Master Number based on the settings in the **MasterWizard Setup**:



## Description of the Fields:

### Number

You need to enter the **Number** (Code) for the new Master.

Based on the **Copy Setup** you could be able to give an <enter> to determine the next Master Number based on the settings in the chosen **Copy Setup**.

### Description 1

You need to enter the **Description** for the new Master.

### Collection No.

You can connect this Master already to a Collection No.

If entered, the system will automatically create a Collection Master Relation based on the Parameter in the Inventory Setup **Create Collection Relation Automatically**.

The Collection No. will also be set in the new Master itself.

### Group master

You can select another Master from which you want to choose the actual Variants (colors and sizes).

The Variants for the new Master will then also depend on the Variants of this Group Master.

For more information see the **White Paper – TRIMIT Group Master**.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page (X)** in the top right corner of the page, to close the Wizard without creating the new Master.

## Variant 1 – 9 Page

The screenshot shows a window titled "Master Wizard" with a close button in the top right. Below the title is the instruction "Choose Variants for the master:". There are nine rows, each labeled "Variant 1" through "Variant 9" on the left and a text input field on the right. The first two input fields contain "COLOR\_1" and "SIZE\_C" respectively. At the bottom of the window are two buttons: "Back" and "Next".

### Description of the Fields:

#### Variant 1 – 9

You can choose up to 9 different VarDim Types for the new Master.

You can choose any VarDim Type with **Limited Usage** VarDim Master or "" (empty).

If you enter a **Variant 1 – 9** that does not exist yet as a **VarDim Type**, the Wizard for creating **VarDim Types** will open, and you can create the new **VarDim Type**.

The left screenshot shows the "Create VarDim Type" wizard with "Limited Usage" set to "VarDim Master", "Type" set to "Variant", "Code" as "COLOR", and "Name" as "Colors". The "Fixed Value Length" is set to 3. The right screenshot shows the same wizard with "Type" set to "Dimension", "Code" as "LEN", and "Name" as "Lenght (cm)". The "Fixed Value Length" is also set to 3. Both screenshots have "Add to My VarDim Type" checked and buttons for "VarDim Type", "Back", "Next", and "Finish" at the bottom.

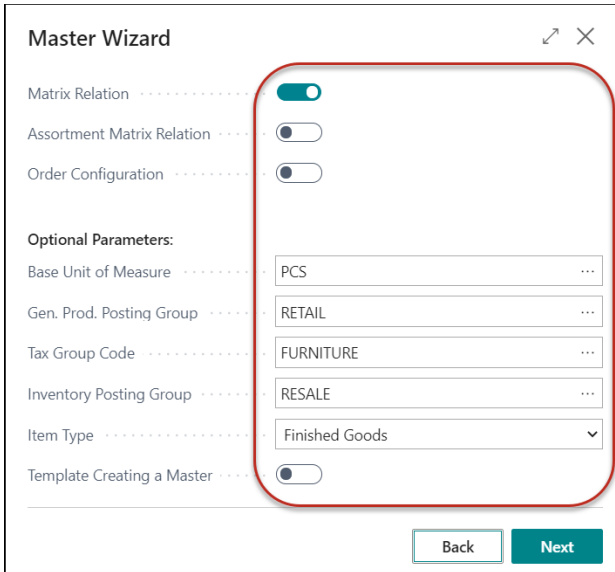
For a **VarDim Type** of **Type Variant**, you will also be able to create the Variant Values after clicking **Next**. For **VarDim Types** of **Type Variant** or **Dimension**, it important to have the **Fixed Value Length** filled, especially if the Values become part of the Item Nos.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page (X)** in the top right corner, to close the Wizard without creating the new Master.

## Optional Parameters Page



Master Wizard

Matrix Relation

Assortment Matrix Relation

Order Configuration

Optional Parameters:

Base Unit of Measure PCS

Gen. Prod. Posting Group RETAIL

Tax Group Code FURNITURE

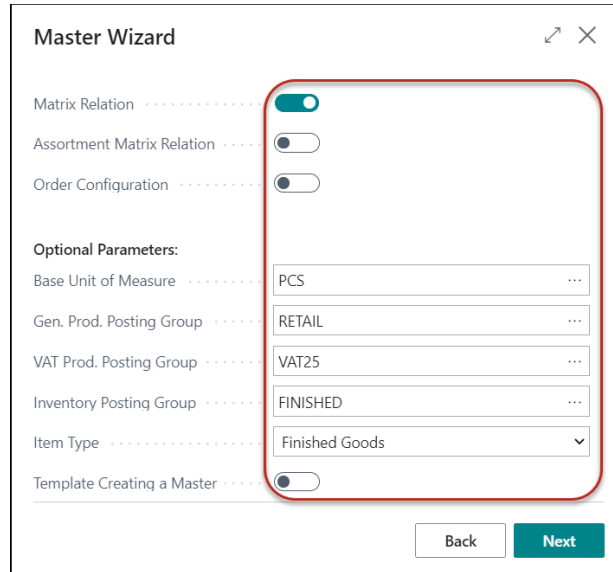
Inventory Posting Group RESALE

Item Type Finished Goods

Template Creating a Master

Back Next

For US and CA



Master Wizard

Matrix Relation

Assortment Matrix Relation

Order Configuration

Optional Parameters:

Base Unit of Measure PCS

Gen. Prod. Posting Group RETAIL

VAT Prod. Posting Group VAT25

Inventory Posting Group FINISHED

Item Type Finished Goods

Template Creating a Master

Back Next

For all other localizations.

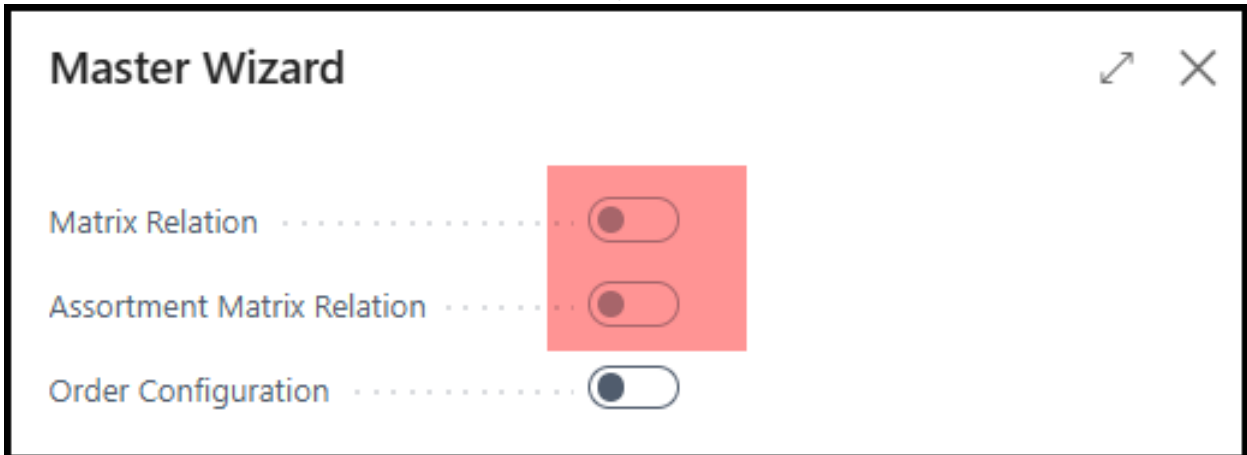
## Description of the Fields:

### Matrix Relation

Enter a checkmark if you want to use a Matrix for the new Master.

This is only possible if all chosen VarDim Types are of **Type Variant**.

In case one of the chosen VarDim Type is not of **Type Variant**, the **Matrix Relation** cannot be chosen.



Master Wizard

Matrix Relation

Assortment Matrix Relation

Order Configuration

### Assortment Matrix Relation

Enter a checkmark if you also want to use an Assortment Matrix for the new Master.

This is only possible if all chosen VarDim Types are of **Type Variant**.

In case one of the chosen VarDim Type is not of **Type Variant**, the **Assortment Matrix Relation** cannot be chosen.

## Order Configuration

Enter a checkmark if you want the Master to be a configurable Master for which you will not use Matrices.

If you have selected VarDim Types that are not of **Type Variant** or *Dimension*, this option will by default be set to **TRUE**.

- If the **Order Configuration** is set to **TRUE**, the Item No. = Master No. (**No. System** is only MMMMM).

In that case, the **VarDim Master** of the new Master could look as follows:

- If the **Order Configuration** is set to **FALSE**, the Item Nos. = Master + Variants + Dimension (**No. System** can be i.e., MMMMMAABB1112222)

In that case for all the VarDim Types (regardless if they are of **Type Variant** or *Dimension*) should have a **Fixed Value Length** filled, otherwise, the system will ask for it. I.e.:

In that case, the **VarDim Master** of the new Master could look as follows:

## Base Unit of Measure

You need to enter the **Base Unit of Measure**. This will also be applicable for the **Sales Unit of Measure** and the **Purchase Unit of Measure**.

## Gen. Prod. Posting Group

You need to enter the **General Product Posting Group**.

## Tax Group Code – only applicable for US and CA

You need to enter the **Tax Group Code** for the US/CA Taxes.

This is only applicable in the US and CA Localization.

## VAT Prod. Posting Group – not applicable for US and CA

You need to enter the **VAT Product Posting Group**. This field can by default be filled with the **VAT Product Posting Group** from the chosen **General Product Posting Group**.

This is not applicable for the US and CA Localization.

## Inventory Posting Group

You need to enter the **Inventory Posting Group**.

## Item Type

You can choose between *Finished Goods*, *Semi-Finished Goods* and *Raw Materials*.

## Template Creating a Master

A checkmark in this Field means that the new Master can be used for creating new Masters as a Template Number.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page (X)** in the top right corner, to close the Wizard without creating the new Master.

## Matrix Page

Master Wizard

Type the Variants for the VarDim types shown below.  
You can use look up button and mark the variants you want to choose. By clicking the assistedit button, values are copied from the template.

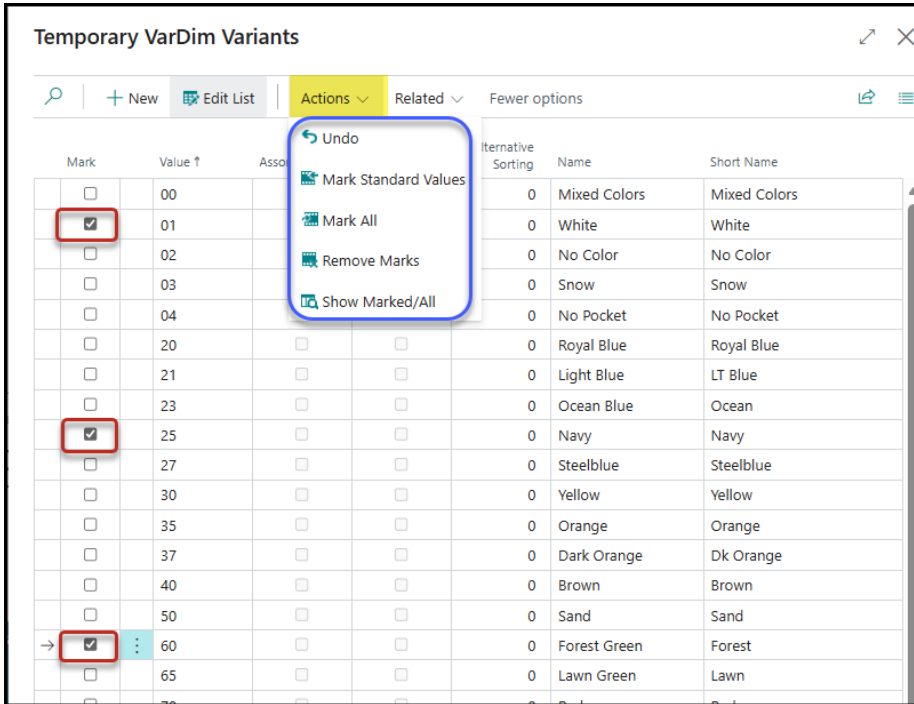
Garment/Fabric Colors	0	...	...
Casual Sizes XS - 5XL	0	...	...
.....		...	...
.....		...	...
.....		...	...
.....		...	...
.....		...	...
.....		...	...
.....		...	...

Back Next

This page will only open if you did have a checkmark in [Matrix Relation](#).

It will show the Description of the VarDim Types that you have chosen before for **Variant 1 - 9**.

By clicking **Look up value** (Alt+Down arrow), the list of VarDim Variants will be shown from which you can choose the applicable Values for the new Master.



You can overrule the default **Name/Short Name** of the **Values** in the VarDim Type for this new Master that you want to create, and therefore, also change the content for **Description 2** for your Item Nos. I.e., **Value 60** is *Forrest Green* but for a new Master it could be called *Dark Green*.

With the action **Mark Standard Values**, you can enter a checkmark in all the Values at once, for which the field **Standard Value** in the VarDim Variant Options (this field is not by default visible you need to add it via Personalize) of the VarDim Type has a checkmark.

With the action **Mark All**, you can enter a checkmark in all the Values at once.

With the action **Remove Marks**, you can delete all the checkmarks.

With the action **Show Marked/All**, you can filter on the marked Values.

If you have chosen a **Group Master**, and the VarDim Type is also connected to the **Group Master**, only the chosen Values of the **Group Master** will be shown in the list of Values.

Mark	Value ↑	Assortment	Blocked	Name
<input checked="" type="checkbox"/>	01	<input type="checkbox"/>	<input type="checkbox"/>	XS
<input checked="" type="checkbox"/>	02	<input type="checkbox"/>	<input type="checkbox"/>	S
<input checked="" type="checkbox"/>	03	<input type="checkbox"/>	<input type="checkbox"/>	M
<input checked="" type="checkbox"/>	04	<input type="checkbox"/>	<input type="checkbox"/>	L
<input checked="" type="checkbox"/>	05	<input type="checkbox"/>	<input type="checkbox"/>	XL
<input checked="" type="checkbox"/>	06	<input type="checkbox"/>	<input type="checkbox"/>	XXL
<input type="checkbox"/>	07	<input type="checkbox"/>	<input type="checkbox"/>	3XL
<input type="checkbox"/>	08	<input type="checkbox"/>	<input type="checkbox"/>	4XL
<input type="checkbox"/>	09	<input type="checkbox"/>	<input type="checkbox"/>	5XL
<input checked="" type="checkbox"/>	AA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	XS-L / 1221
<input checked="" type="checkbox"/>	BB	<input checked="" type="checkbox"/>	<input type="checkbox"/>	S-XL / 1221
<input type="checkbox"/>	CC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	M-XXL / 1221
<input type="checkbox"/>	DD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	XS-L / 1222
<input type="checkbox"/>	EE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	S-XL / 1222
<input type="checkbox"/>	FF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	M-XXL / 1222
<input type="checkbox"/>	GG	<input checked="" type="checkbox"/>	<input type="checkbox"/>	XS-XL / 12211

**Note**

If you choose Assortment Colors or Assortment Sizes in the regular Matrix, and you do have special VarDim Types of **Type Code** for these Assortments, the system will also automatically create the Bill of Materials for the created Assortment items.

After you have chosen the VarDim Variants for the new Master, you see the quantity of chosen VarDim Variants.

**Master Wizard**

Type the Variants for the VarDim types shown below.  
 You can use look up button and mark the variants you want to choose. By clicking the assisted edit button, values are copied from the template.

Garment/Fabric Colors .....  ...

Casual Sizes XS - 5XL .....  ...

.....  ...

.....  ...

.....  ...

.....  ...

.....  ...

.....  ...

.....  ...

.....  ...

Click **Next**, to open the next page of the Wizard. Click **Next**, to open the next page of the Wizard. If no **Assortment Matrix Page** opens, the new Master will now be created.

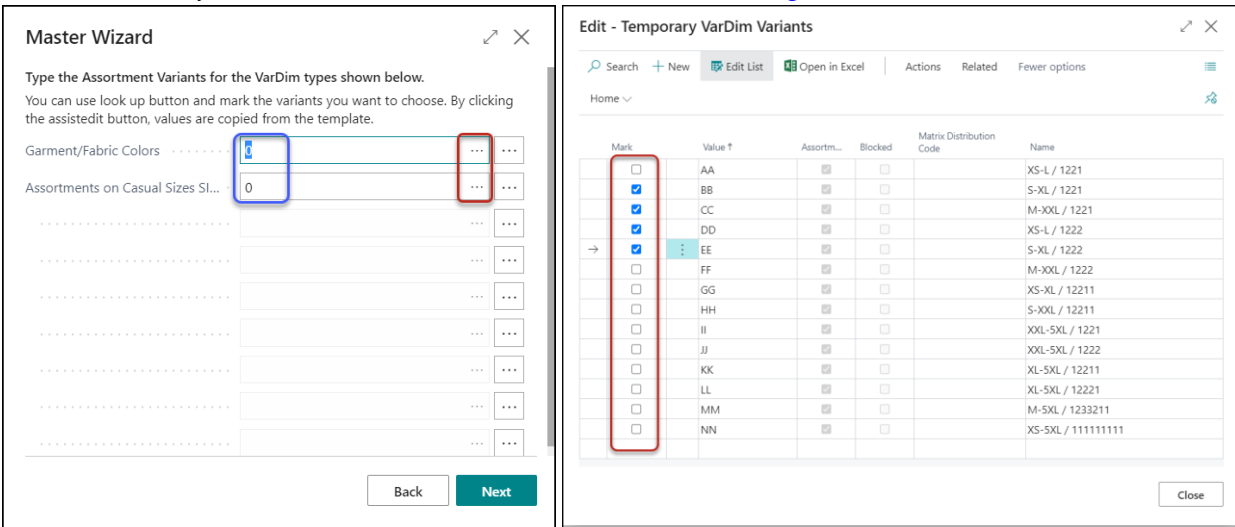
Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page (X)** in the top right corner, to close the Wizard without creating the new Master.

## Assortment Matrix Page

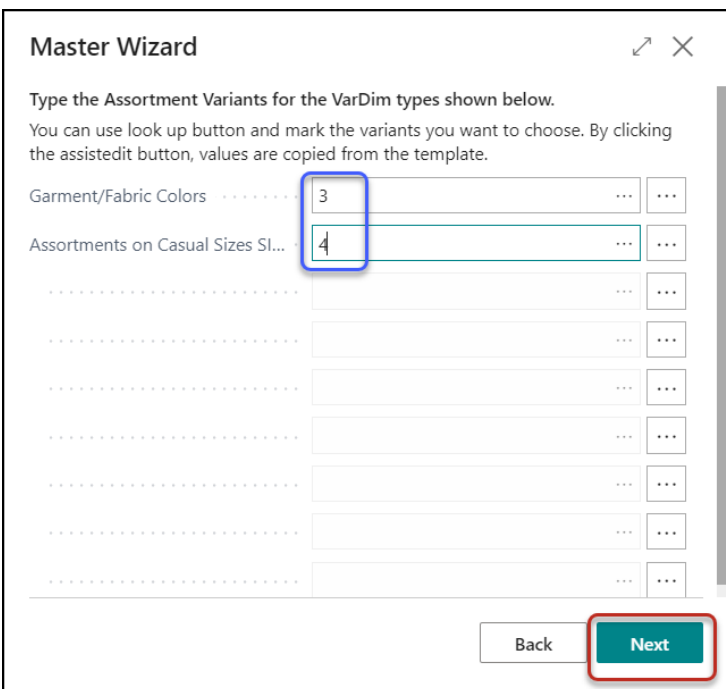
This page will only open if you have a checkmark in [Assortment Matrix Relation](#). Otherwise, you will go to the [Last page of the Wizard](#).

Now you can choose the Values for the first Variants of the Master.  
 In that case, only the Values that have been chosen in [Matrix Page](#) will be shown and can be chosen.



The last Variant (in this case *Assortments on Casual Sizes*) represents the Assortments that you can choose.

After you have chosen the VarDim Assortment Variants for the new Master, you see the quantity of chosen VarDim Variants.



Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page (X)** in the top right corner, to close the Wizard without creating the new Master.

## Last Page of the Wizard

The new Master has now been created.

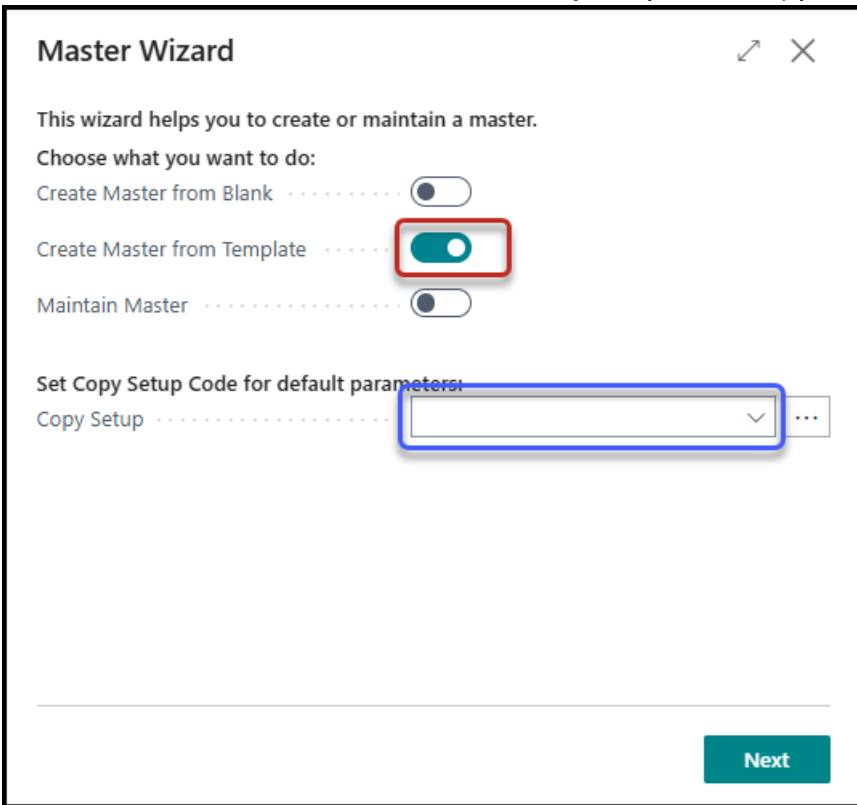
When clicking **Save and close the page (X)** in the top right corner, the Wizard will close.

When clicking **Continue** you will go back to the first page to create a new Master from Blank.



# New Master from Template

With a checkmark in **Create Master from Template** you can copy one Master to a new Master.



**Master Wizard**

This wizard helps you to create or maintain a master.

Choose what you want to do:

Create Master from Blank

Create Master from Template

Maintain Master

Set Copy Setup Code for default parameters:

Copy Setup

**Next**

## Copy Setup

Here you can enter a **Master Wizard Setup**, which determines which pages of the Wizard you will see, and which options will – by default – already be set or can be influenced during the Wizard process. This Field can be filled automatically based on the parameter **Default MasterWizard Setup** in the Inventory Setup.

### Note

If you do not enter a **Copy Setup**, the system will copy the following information automatically: Dimensions, Item Translations, Extended Text, Sales Prices, Sales Discounts, Purchase Prices, Item Vendor, and Item Charge, and it will Skip [Parameter Page 1](#).

Click **Next**

**Master Wizard**

Enter the number of the master you want to use as a template:

Template Number ..... 2100 ...

Description 1 ..... Lily Blouse

Enter the number and the description for the new master:

Number ..... 2105 ...

Description 1 ..... Blouse by Wizard

Optional fields for the new master:

Collection No. ....

Group Master ..... ▾

Back Next

## Description of the Fields:

### Template Number

The Master that you want to copy from.

Clicking **Look up value** (Alt+Down arrow) will show a list of Masters in which the field **Template Master** has a checkmark.

### Description 1

Description 1 of **Template Number** that will be shown

### Number

The Master you want to copy to.

If you leave this Field blank, the system can generate a new Number automatically when you use a **Copy Setup**. See [Automatic Master Number](#)

Pressing **AssistEdit** (Alt+Right arrow) will create a new Master Number for you based on the **No. Series** that has been entered in the Inventory Setup in the parameter **Master Nos. Finished Goods**.

### Description 1

Description 1 for the **Number** (the new Master) that you need to enter.

### Collection No.

You can connect the new Master to a **Collection No.** already by entering it in this Field.

It can automatically be filled based on the **Default Collection No.** of the **Copy Setup** but can still be changed.

This **Collection No.** will then be filled in the Master and based on the Parameter **Create Collection Relation Automatically** in the **Inventory Setup** it can also make a **Collection/Master Relation**.

For more details, see *White Paper – TRIMIT Collection Management*.

## Group Master

You can enter another Master as the **Group Master**.

This will determine the Variants (colors, sizes, etc.) that you are able to choose for the new Master.

For more details, see **White Paper – TRIMIT Group Master**.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

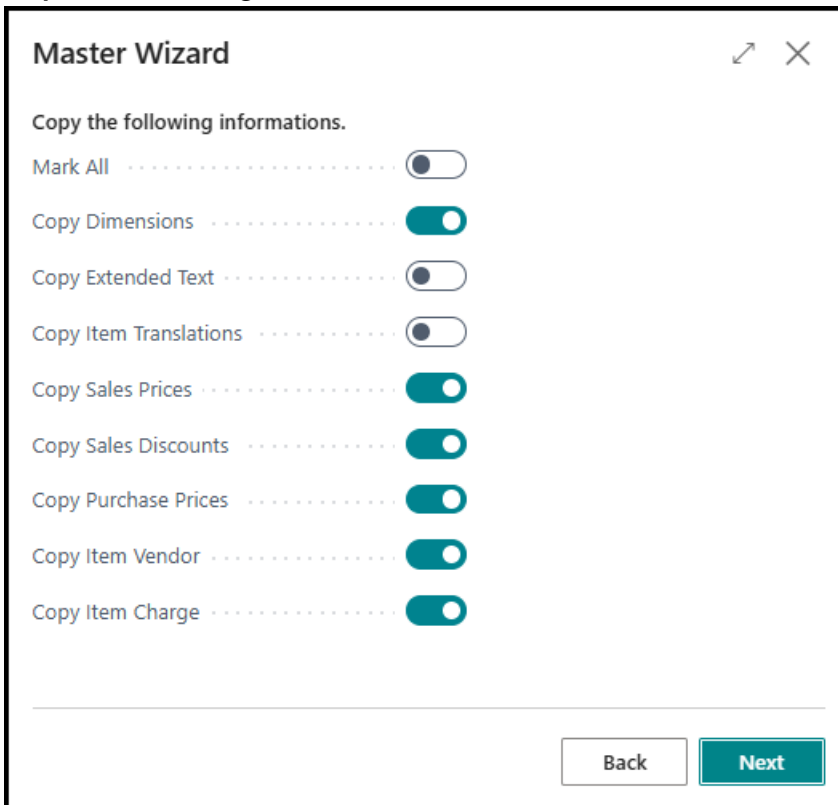
Click **Save and close the page (X)** in the top right corner, to close the Wizard without creating the new Master.

## Parameter Page 1

This page of options will NOT be shown if you did not choose a **Copy Setup**.

This page of options will NOT be shown if you did choose a **Copy Setup** with a checkmark in the field

**Skip Parameter Page 1**.



The screenshot shows a dialog box titled "Master Wizard" with a close button (X) and a refresh button (circular arrow) in the top right corner. Below the title, the text "Copy the following informations." is followed by a list of nine parameters, each with a toggle switch:

- Mark All:
- Copy Dimensions:
- Copy Extended Text:
- Copy Item Translations:
- Copy Sales Prices:
- Copy Sales Discounts:
- Copy Purchase Prices:
- Copy Item Vendor:
- Copy Item Charge:

At the bottom of the dialog box, there are two buttons: "Back" and "Next".

The checkmarks will automatically be filled in based on the content of the chosen **Copy Setup**.

A checkmark in **Mark All**: will automatically set a checkmark in all the parameters.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

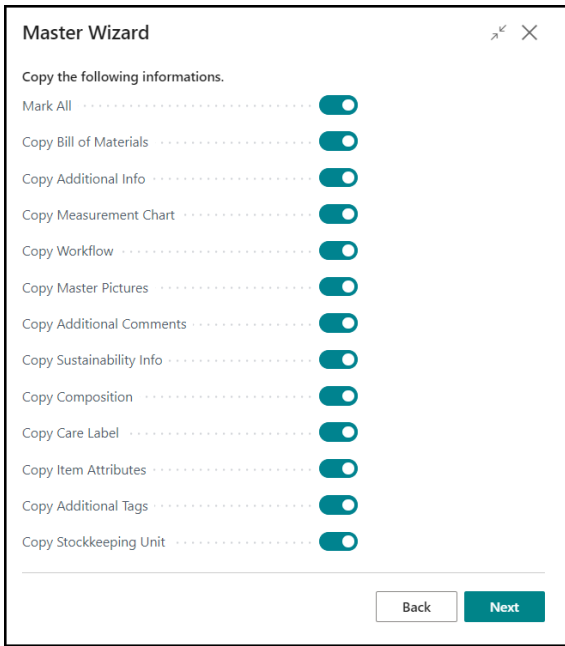
Click **Save and close the page (X)** in the top right corner, to close the Wizard without creating the new Master.

## Parameter Page 2

This page of options will always be shown if you did not choose a **Copy Setup**.

This page of options will NOT be shown if you did choose a **Copy Setup** with a checkmark in the field

**Skip Parameter Page 2**.



The checkmarks will automatically be filled in based on the content of a chosen **Copy Setup**.

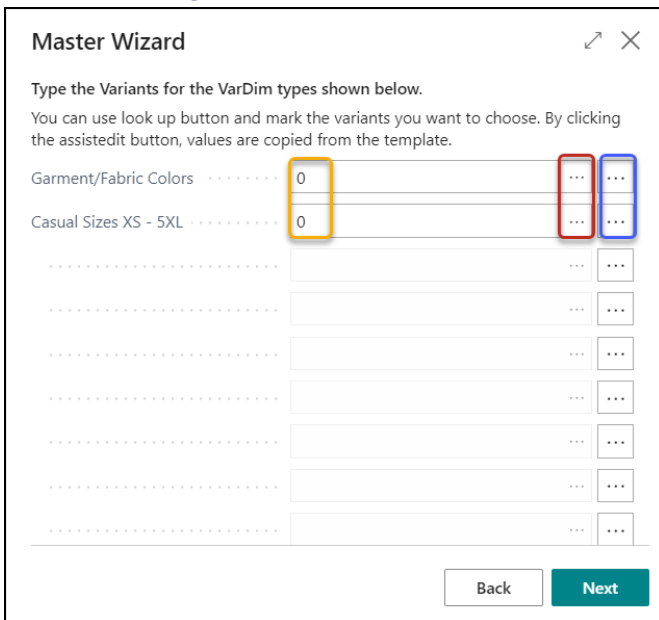
A checkmark in **Mark All**: will automatically set a checkmark in all the parameters.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page (X)** in the top right corner, to close the Wizard without creating the new Master.

## Matrix Page



This page will open if you did not choose a **Copy Setup** and the **Template Number** has a Matrix.

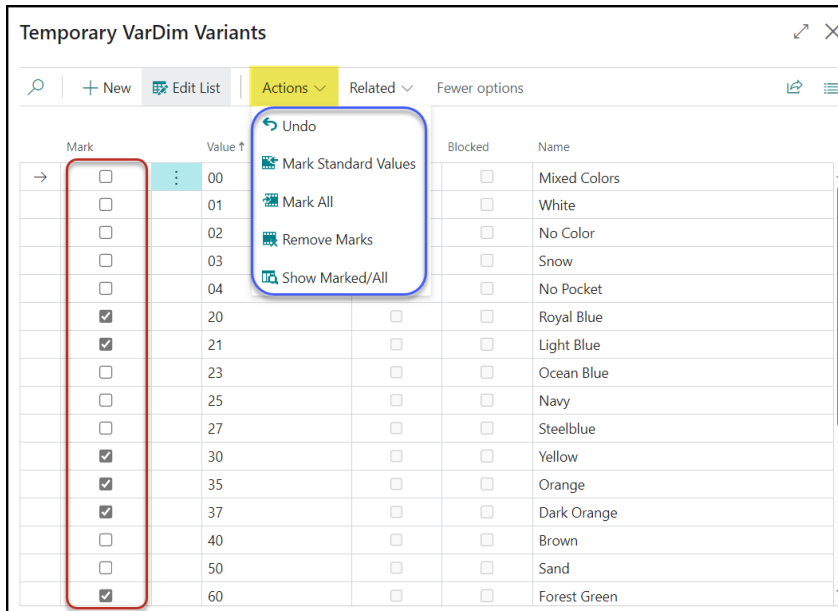
This page will NOT open if the **Template Number** does not have a Matrix, like for configurable Masters.

This page will NOT open if you did choose a **Copy Setup** with a checkmark in the field **Skip Create Matrix**.

This page will show the VarDim Types that are connected to the **Template Number**. The quantity of chosen Values can already be filled based on a chosen **Copy Setup** and the [Copy Matrix Variant 1 / 2 / 3](#) (and the 4/5/6/7/8/9)

By clicking **Look up value** (Alt+Down arrow), the list of all VarDim Variants will be shown from which you can choose the applicable Values for the new Master **Number**.

By clicking **AssistEdit** (Alt+Right arrow), the chosen Values of the **Template Number** will already be chosen.



You can overrule the default **Name/Short Name** of the **Values** in the VarDim Type for this new Master that you want to create, and therefore, also change the content for **Description 2** of your Item Nos. I.e., **Value 20** is *Royal Blue* but for a new Master it should simply be called *Blue*.

With the action **Mark Standard Values**, you can enter a checkmark in all the Values at once, for which the field **Standard Value** in the VarDim Variant Options (this field is not by default visible, you need to add it via Personalize) of the VarDim Type has a checkmark.

With the action **Mark All**, you can enter a checkmark in all the Values at once.

With the action **Remove Marks**, you can delete all the checkmarks.

With the action **Show Marked/All**, you can filter on the marked Values.

If you have chosen a **Group Master**, and the VarDim Type is also connected to the **Group Master**, only the chosen Values of the **Group Master** will be shown in the list of Values.

Click **Close** after you have chosen the applicable Values.

Click **Next**, to open the next page of the Wizard. If no **Assortment Matrix Page** opens, the new Master will now be created.

Click **Back**, to open the previous page of the Wizard.

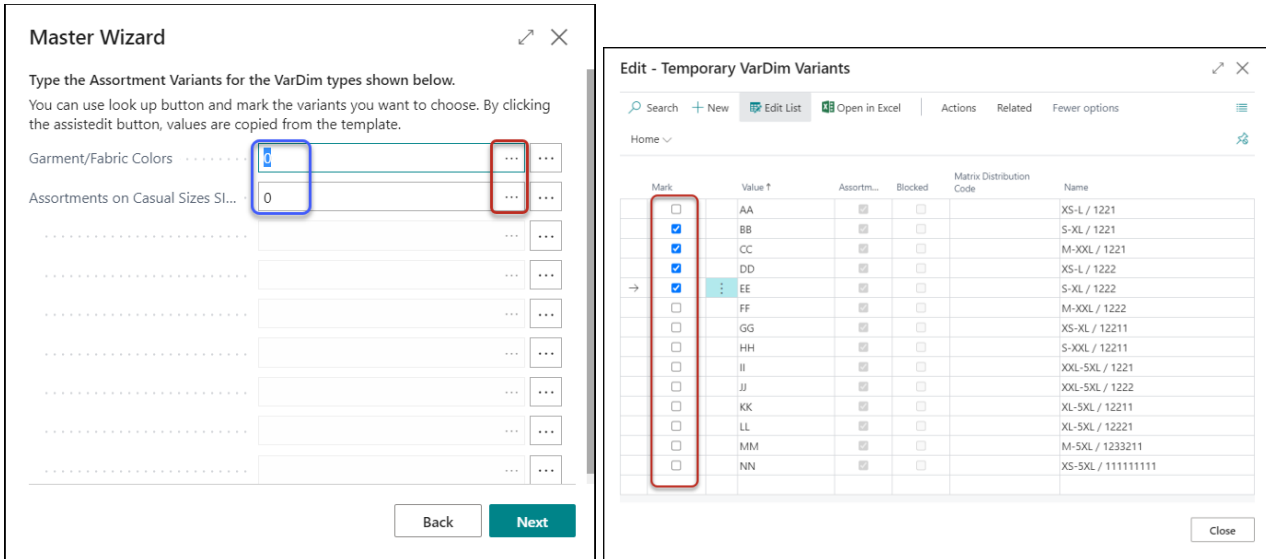
Click **Save and close the page (X)** in the top right corner, to close the Wizard without creating the new Master.

#### Note

If you choose other Values as from the **Template Number**, you need to check the Sales/Purchase Prices to see if you have different Prices for the Values.

If you choose other Values as from the **Template Number**, you need to check the Search Table Lines and Formulas that you might have in the **Bill of Materials**. They might miss the connections with the new Values.

# Assortment Matrix Page



This page will open if you did not choose a **Copy Setup** and the **Template Number** has an Assortment Matrix.

This page will NOT open if the **Template Number** does not have an Assortment Matrix.

This page will NOT open if you did choose a **Copy Setup** with a checkmark in the field **Skip Create Assortment**.

This page will show the VarDim Types that are connected to the **Template Number** for the **Assortment Matrix**.

The quantity of chosen Values can already be filled based on a chosen **Copy Setup** and the [Copy Assortment Variant 1 / 2 / 3](#). (and the 4/5/6/7/8/9).

By clicking **Look up value** (Alt+Down arrow), the list of all VarDim Variants will be shown from which you can choose the applicable Values for the new Master **Number**.

By clicking **AssistEdit** (Alt+Right arrow), the chosen Values of the **Template Number** will already be chosen.

After you have chosen the Values in the **Matrix Page**, the Values you can choose in the **Assortment Page** will be limited as well.

I.e., if you chose only the colors *Red*, *White* and *Blue* in the **Matrix Page**, you can also only choose these colors and the colors with a checkmark in **Assortment** in the **Assortment Page** – for the same VarDim Type.

After you have chosen the Values for the new Master, you see the quantity of Values you have chosen.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page (X)** in the top right corner, to close the Wizard without creating the new Master.

## Last Page

The new Master has now been created.

This page will open if you have not chosen a **Copy Setup**.

This page will NOT open if you did choose a **Copy Setup** with a checkmark in the field **Close Wizard when Finished**. In that case, the Wizard will close, and you return to the menu or Master List from where you started the Wizard.

When clicking **Continue** you will go back to the first page to enter a **Template Number** and a **Number** for the new Master that you want to create from Template.

The **Continue** button will NOT be visible if you started the Wizard via the Master List or Master Card.

When clicking **Save and close the page (X)** in the top right corner, the Wizard will close.

# Maintain Master by Wizard

The screenshot shows the 'Master Wizard' interface. At the top, it says 'Master Wizard' with a close button (X) and a refresh button (↶). Below that, it says 'This wizard helps you to create or maintain a master. Choose what you want to do:'. There are three options with toggle switches: 'Create Master from Blank' (off), 'Create Master from Template' (off), and 'Maintain Master' (on). The 'Maintain Master' toggle is highlighted with a red box. At the bottom right, there is a green 'Next' button, also highlighted with a red box.

With **Maintain Master**, you can change the Descriptions and chosen Variants of existing Masters.

The screenshot shows the 'Master Wizard' interface for the 'Maintain Master' step. It says 'Enter the number of the master to be maintained:'. There are three input fields: 'Number' (with '2110' entered), 'Description 1' (with 'Mia Blouse' entered), and 'Description 2' (empty). The 'Number' and 'Description 1' fields are highlighted with a red box. At the bottom right, there is a green 'Next' button, also highlighted with a red box.

You need to enter the **Number**, and the **Description 1 / 2** will be shown which can be changed.

Click **Next**, to open the next page of the Wizard.

Click **Back**, to open the previous page of the Wizard.

Click **Save and close the page (X)** in the top right corner, to close the Wizard without changing the Master.



## Assortment Matrix Page

The screenshot shows a 'Master Wizard' window with a title bar containing a refresh icon and a close icon (X). Below the title bar, there is a header 'Master Wizard' and a close button (X). The main content area contains the following text: 'Type the Assortment Variants for the VarDim types shown below. You can use look up button and mark the variants you want to choose. By clicking the assistededit button, values are copied from the template.' Below this text, there are two rows of input fields. The first row is labeled 'Garment/Fabric Colors' and contains the number '4'. The second row is labeled 'Assortments on Casual Sizes SL...' and contains the number '5'. Each row has a 'look up' button (magnifying glass icon) and an 'assistededit' button (document icon). The 'assistededit' button for the first row is highlighted with a red box. At the bottom of the window, there are two buttons: 'Back' and 'Next'. The 'Next' button is highlighted with a red box.

Now you can select more Assortment Variants for the Master.

If you have added new Variants for i.e., **Garment/Fabric Colors** on the **Matrix Page**, you are now also able to select them for the Assortment Matrix.

If no Documents (Sales, Purchase, Production) have been created you could also de-select Assortment Variants.

Otherwise, you need to make them *not available* by using **Status Codes** that can be set on several levels (Master, VarDim Type, Variant, and Collection). See for details: **White Paper – TRIMIT Collection Management**.

Click **Back**, to go back to the previous page of the Wizard

Click **Next**, to go to the next page.

Click **Save and close the page (X)** in the top right corner, the new Assortment Variants will be added to the Master and new related Items can be created based on the Parameter **Create All Matrix Related Items** in the Inventory Setup.

## Last Page

The screenshot shows the 'Master Wizard' window on the last page. The title bar contains a refresh icon and a close icon (X). The main content area is mostly empty, with a horizontal line near the bottom. At the bottom right of the window, there is a 'Continue' button, which is highlighted with a red box. The close icon (X) in the top right corner is also highlighted with a red box.

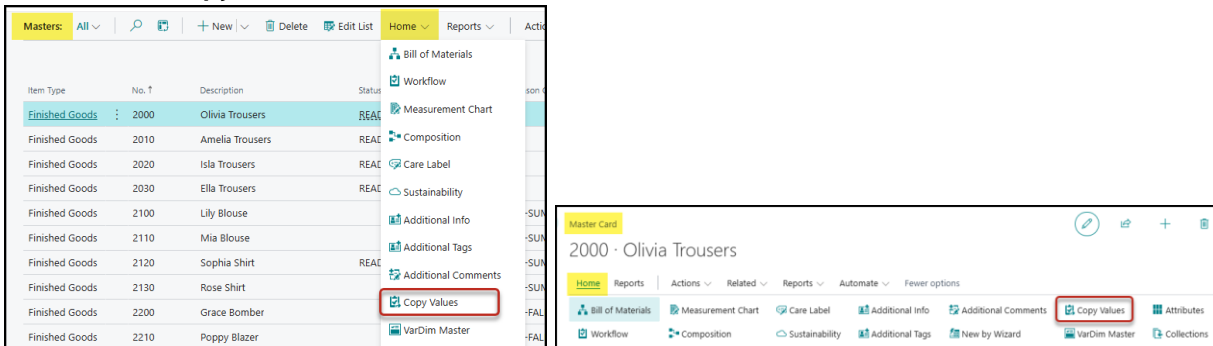
When clicking **Continue** you will go back to the first page to enter a **Number** for which you want to maintain the Variants.

The **Continue** button will NOT be visible if you started the Wizard via the Master List or Master Card.

When clicking **Save and close the page (X)** in the top right corner, the Wizard will close.

# Copy Values

In the Master List/Card, you can copy information from one Master to another Master by using the action **Home, Copy Values**.



## First Page

The 'Copy Master by Wizard' dialog box contains the following elements:

- Header: Copy Master by Wizard
- Instruction: Enter the number of the master to copy to.
- Field: Copy to Master: 2000
- Instruction: Enter the master you want to copy from.
- Field: Copy from Master: 2100
- Section: Which of the following information is to be copied
- Options (all are checked):
  - Mark All
  - Copy Bill of Materials
  - Copy Additional Info
  - Copy Measurement Chart
  - Copy Workflow
  - Copy Pictures
  - Copy Additional Comments
  - Copy Sustainability
  - Copy Comments
  - Copy Composition
  - Copy Care Label
  - Copy Item Attributes
  - Copy Additional Tags
  - Copy Stockkeeping Unit
- Next button

After you have entered the **Copy to Master** and the **Copy from Master**, you can select the information that you want to copy.

You can compare this with [Parameter Page 2](#) from the Wizard.

# Next Pages

Based on the checkmarks you entered on the First Page, you will get extra questions. You can compare this with the fields of the [Master Wizard Setup](#).

With a checkmark for **Bill of Materials**:

### Copy Master by Wizard

**Bill of Materials**

Enter the master you want to copy bill of materials from.

Copy from Master: ..... 2100 ...

Include Auto Formula .....

Back Next

With a checkmark for **Measurement Chart**:

### Copy Master by Wizard

**Measurement Chart**

Enter the master you want to copy measurements from.

Copy from Master: ..... 2100 ...

Include Special Columns .....

Include Special Columns Values ...

Include Measurement Pictures ....

Include Measurement Comments .

Copy from Chart Version ..... 0 ...

Back Next

With a checkmark for **Workflow**:

## Copy Master by Wizard

**Workflow**

Enter the master you want to copy workflow from.

Copy from Master: ..... 2100 ...

Include Values .....

Set Workflow Collection No. ....

[Back](#) [Next](#)

With a checkmark for **Pictures**:

## Copy Master by Wizard

**Pictures**

Enter the master you want to copy pictures from.

Copy from Master: ..... 2100 ...

General Picture .....

Additional Pictures .....

[Back](#) [Next](#)

With a checkmark for **Additional Comments** or **Comments**:

**Copy Master by Wizard**

**Comments**

Enter the master you want to copy additional comments from.

Copy from Master: ..... 2100 ...

Additional Comments .....

Group Code ..... ...

General Comments .....

BOM Comments .....

Back Next

**Copy Master by Wizard**

Copy

Click **Copy**, so the information will be copied.

Click **Save and close the page (X)** in the top right corner, to close the process without copying data.

**Note**

The above shown Pages are also used if you click the action **Copy** in the individual Pages of the Master itself.

I.e., if you are in a Master Card and click on the *Additional Comments*, you are also able to copy Comments by using the action **Copy**.

2000 - Olivia Trousers

Additional Comments | Search | + New | Edit List | Delete | Copy | Comments | Reports | Auto

Date	Code	Description
→ 12/1/2025	PACKING	Packing Comments
12/1/2025	PRODUCTION	Production Comments