TRIMIT BI – based on Power BI

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What is TRIMIT BI?

→ Business Intelligence (BI) solution, specifically designed for TRIMIT

→ Based on Microsoft Power BI

→ TRIMIT BI consists of:
- → The connector between TRIMIT and Power BI
- → A basic dataset with standard reports for TRIMIT
- → 3 additional, optional datasets with standard reports for TRIMIT

→ TRIMIT BI can be extended based on individual requirements

The 4 datasets

→ **TRIMIT BI Operations**
  → Sales performance, returns and complaints, purchase, inventory
  → Included in Essentials package

→ **TRIMIT BI Finance**
  → Chart of accounts, comparison to budgets, cashflow analysis, customer balance
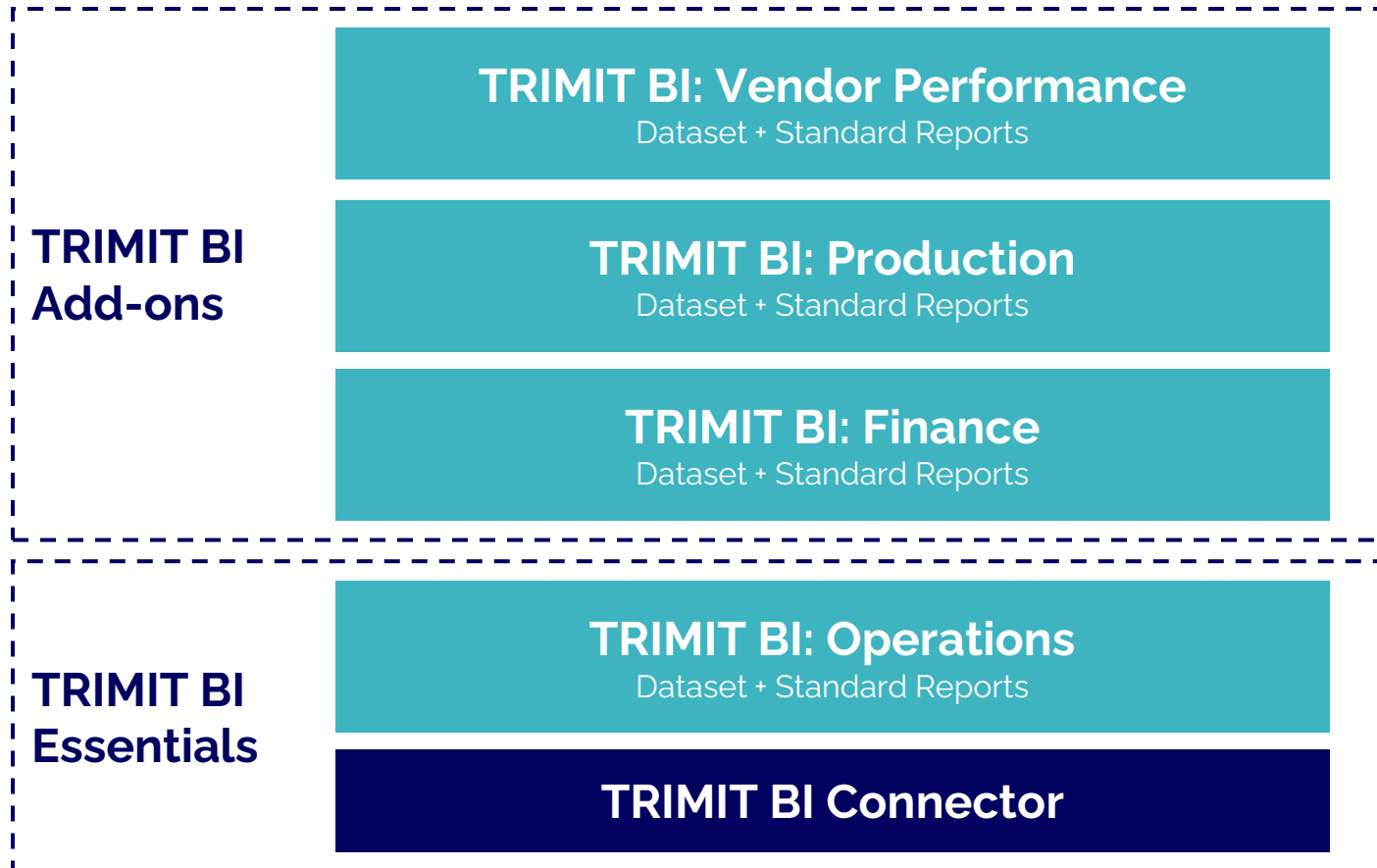
→ **TRIMIT BI Production**
  → Pre and post calculation on production

→ **TRIMIT BI Vendor Performance**
  → Supplier performance, supplier comparison

Licensing structure

TRIMIT BI Add-ons

TRIMIT BI: Vendor Performance
Dataset + Standard Reports

TRIMIT BI: Production
Dataset + Standard Reports

TRIMIT BI: Finance
Dataset + Standard Reports

- Add-on packages to Essentials
- Subscription licensing only
- Per company, per month pricing
- The right to get new updates included.
- Available for BC cloud and on-prem BC 14 or newer.

TRIMIT BI Essentials

TRIMIT BI: Operations
Dataset + Standard Reports

TRIMIT BI Connector

- Foundation package
- Per company, per month pricing
- Subscription licensing only
- The right to get new updates included.
- Mandatory for all customers using TRIMIT BI
- Available for BC cloud and on-prem BC 14 or newer.

Technical requirements and details
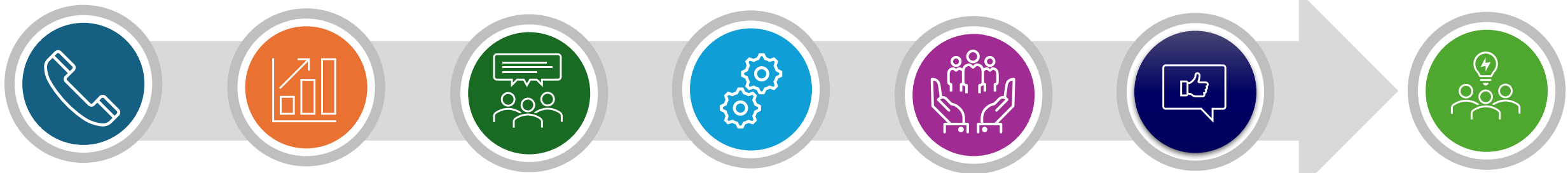
→ **General requirements**

- → **All users most have a Power BI Pro license (70 DKK/month).**
- → **TRIMIT require a dedicated user with Power BI Pro license and TRIMIT license.**
- → **TRIMIT BC Cloud or TRIMIT BC On-prem version BC14 or newer.**

→ **Technical details**

- → **Data can be refreshed from TRIMIT to Power BI up to 8 times per day.**

TRIMIT BI
Customer Onboarding

Onboarding process

Contact
Establish initial contact to understand your needs and introduce TRIMIT BI's potential.

Demo
Explore the features of TRIMIT BI and Power BI, with a discussion on how it fits your business needs.

Pre-onboarding
Align onboarding expectations and discuss the impact of data quality on reporting.

Installation
Set up Power BI, configure TRIMIT BI, and ensure user access is ready for seamless usage.

Onboarding
Train your team to navigate Power BI, interpret reports, and ensure data quality standards.

Follow-up
Confirm everything is running smoothly and provide support for any questions or issues.

BUSINESS INTELLIGENCE UNLOCKED

Onboarding Stages

1. Contact

Our onboarding journey begins with an initial contact with the sales department, during which we establish an understanding of your business needs and requirements. This first interaction includes a high-level overview of the TRIMIT BI features and how they align with your objectives. It sets the stage for a productive relationship and helps us identify areas where our solution can deliver the most value.

2. Demo

In this step, we arrange a detailed demonstration of the TRIMIT BI packages, introducing the capabilities and benefits of Power BI as a reporting and analytics tool. During the demo, we present each feature of the TRIMIT BI package, ensuring clarity on how it can support your business objectives. We also explore specific needs to ensure the package is a strong fit for your organization.
In-person or via Teams

3. Pre-onboarding

After accepting the offer, we hold an initial pre-onboarding meeting to review the onboarding plan in detail and align on expectations. This step allows us to collaboratively address any specific requirements or customizations, ensuring the solution is tailored to meet your needs. Additionally, we introduce the topic of data quality, discussing the role it plays in maximizing the accuracy and effectiveness of Power BI analytics.
In-person or via Teams
Estimated time: 0,5 hour (1 hour for TRIMIT BI Finance)

4. Installation

With clear expectations established, we proceed to the installation phase. In this phase both you and your IT partner will have some initial tasks, before we set up Power BI, configure the TRIMIT BI package, and assign users within your organization.

5. Onboarding

Once the system is fully installed, we conduct comprehensive training on using Power BI, with a focus on the TRIMIT BI package. This session includes a thorough walkthrough of the report pages, definitions of key performance indicators (KPIs), and a discussion about interpreting the various analytics visuals. We also revisit data quality, offering guidance on maintaining data standards for accurate reporting.
In-person or via Teams
Estimated time: 5 hours (2 hours for other packages than TRIMIT BI Operations)

6. Follow-up

Our onboarding process concludes with a follow-up meeting, aimed at answering any remaining questions and ensuring that everything is running smoothly. This session provides an opportunity for further clarification, troubleshooting, or additional support, helping to cement a smooth transition into full use of the Power BI solution. This meeting sets the stage for the potential future customizations.
In-person or via Teams
Estimated time: 1 hour