INSTALLATION GUIDE CLOUD TRIMIT 26.1

This Document contains information regarding the installation of **TRIMIT 26.1** for **Microsoft Dynamics 365 Business Central on-premises 2026 release wave 1 (BC28).**
This document is for Developers and experienced Consultants, hence the instructions do not include detailed menu paths, as it is expected that handling Business Central is common knowledge.
The package for **TRIMIT 26.1.XXXXX** can be downloaded here or via AppSource.
The package for **TRIMIT Data and Test 26.1.XXXXX** can be downloaded here.
The TRIMIT AddOn packages for **Tasklet Factory**, **Continia Document Capture, ForNav**, **ClickLearn, Delogue PLM**, **Front Systems** and **TRIMIT Sustainability** can be downloaded here.

The installation of TRIMIT requires the following actions:

- Creating a Tenant for the Production Environment and a Sandbox Environment for the Customer.
- Installation of the TRIMIT App.
- Installation of the TRIMIT AddOns (Optional)
- Online Help
- Installation of the TRIMIT License file
- Creation of TRIMIT Demo Data

This document will guide you through these processes. All files (besides the Business Central installation itself) can be found on MyTRIMIT.

NOTE

This document describes a new installation. For the upgrade of an existing TRIMIT installation, please look in the Upgrade Instructions document.

CONTACT

If you discover an issue while performing this Guide, please register an Service Request or send an E-Mail to partnersupport@trimit.com.

DISCLAIMER

Read these guidelines before you perform an Installation on your live database.
TRIMIT Solutions A/S, Partners of TRIMIT Solutions A/S or others cannot be held responsible for any damage caused by the installation of TRIMIT.

Version: 26.1
Date: 29-04-2026

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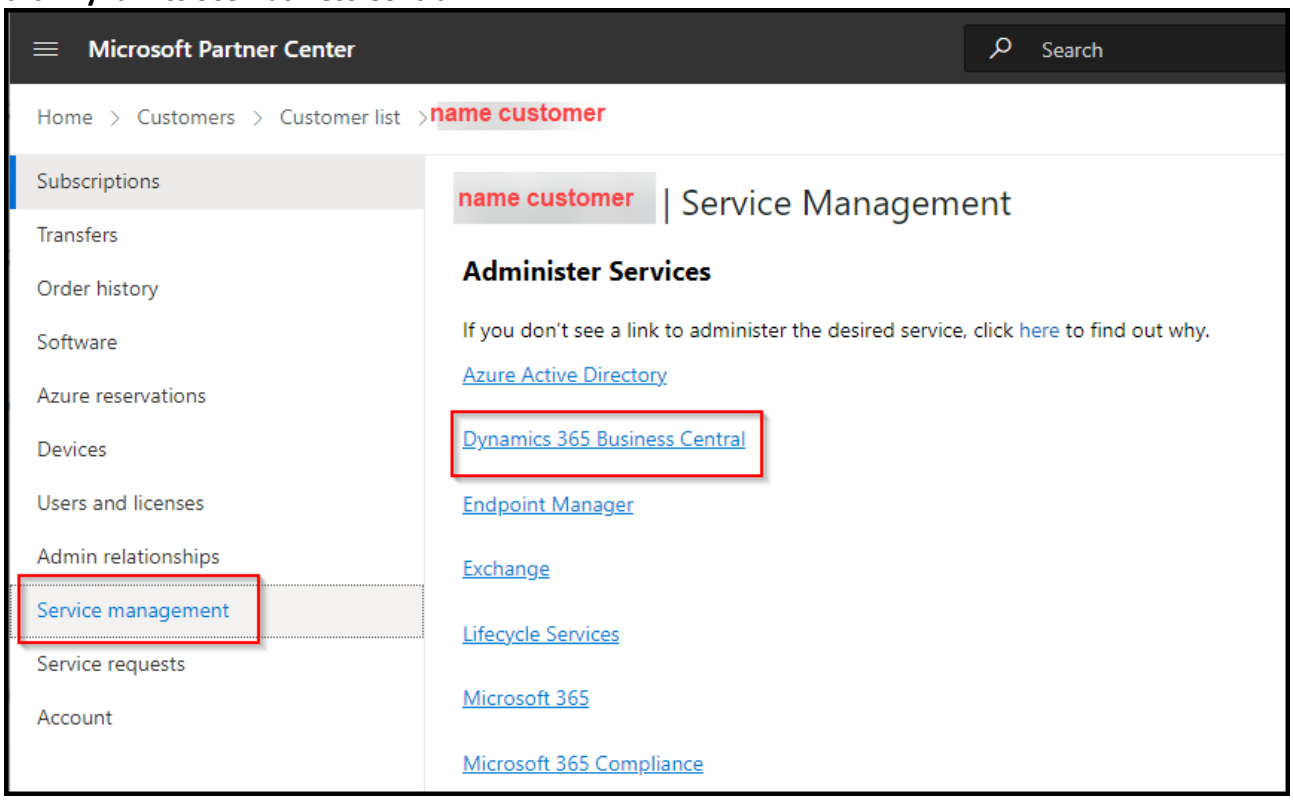
CREATING A TENANT FOR A NEW CUSTOMER

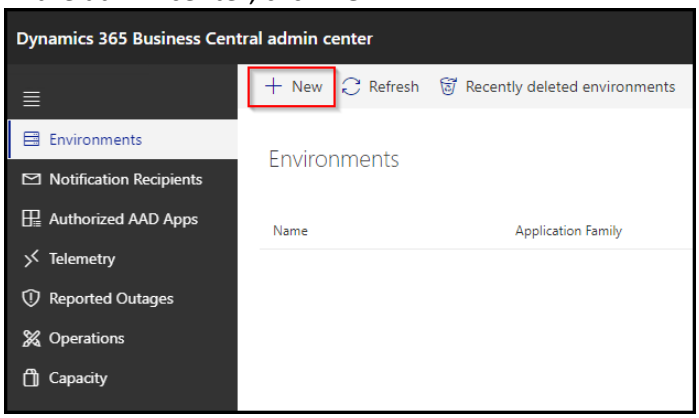
Prerequisites:

- Customer has approved the granular admin relationship.
- Customer has been assigned a Business Central license.

Go to https://partner.microsoft.com/en-us/dashboard/commerce2/customers/list,
log in with your *@trimit-cloud.com* account.
Click the customer's name on the list, go to **Service Management** if not already selected,
click **Dynamics 365 Business Central**.



In the admin center, click **New**.



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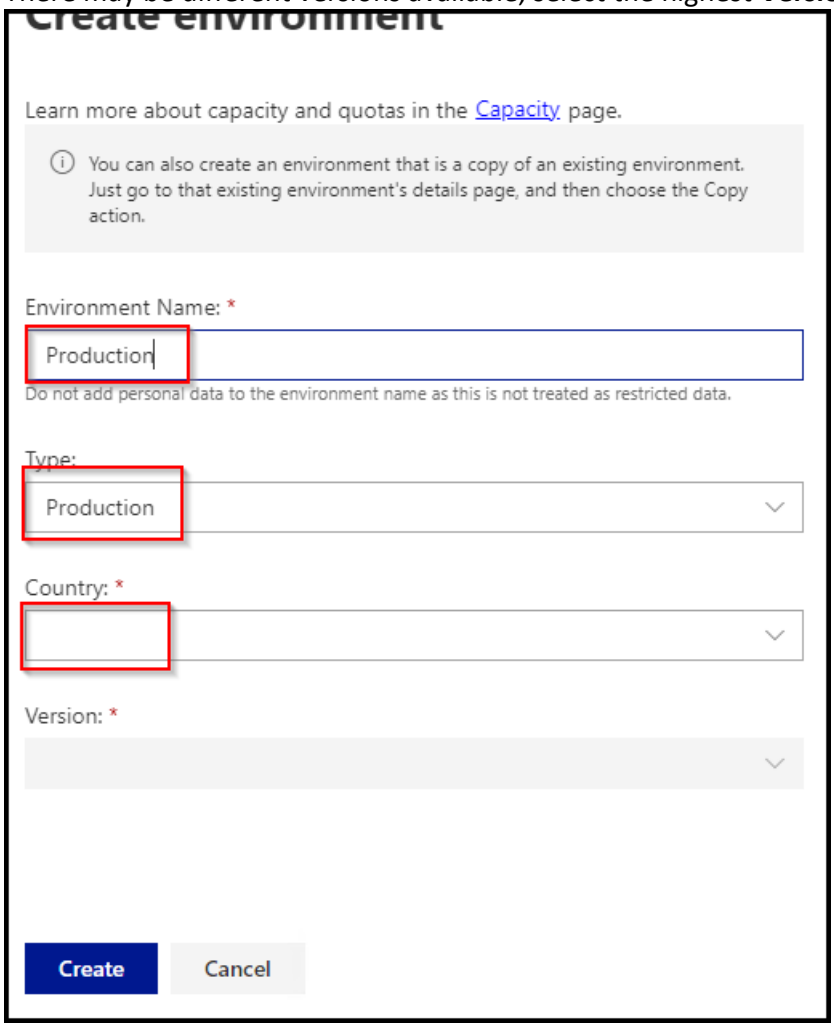
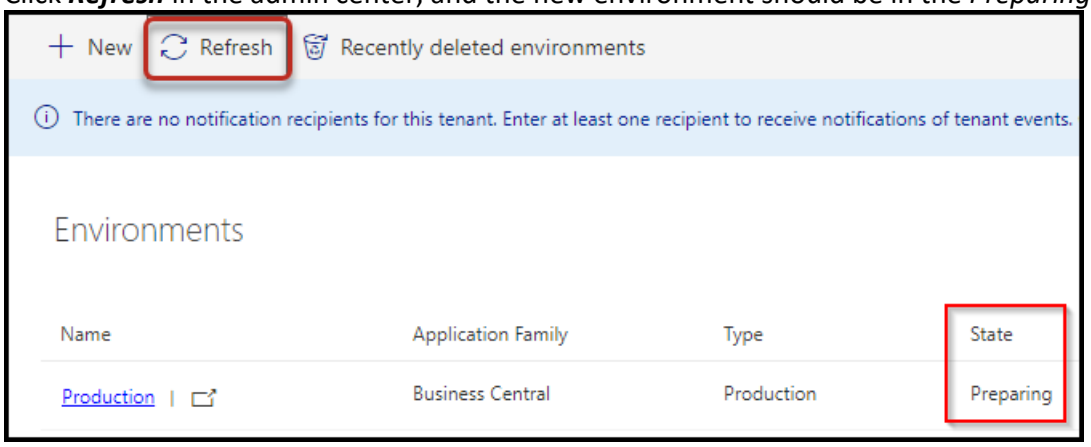
For the first **Environment Name** put in *Production* as name and select the **Type** *Production*. Country should be whatever the Customer needs, Danish would be *DK*, German *DE* and so on. There may be different versions available, select the highest **Version** and click ***Create***.



Click ***Refresh*** in the admin center, and the new environment should be in the *Preparing* **State**.



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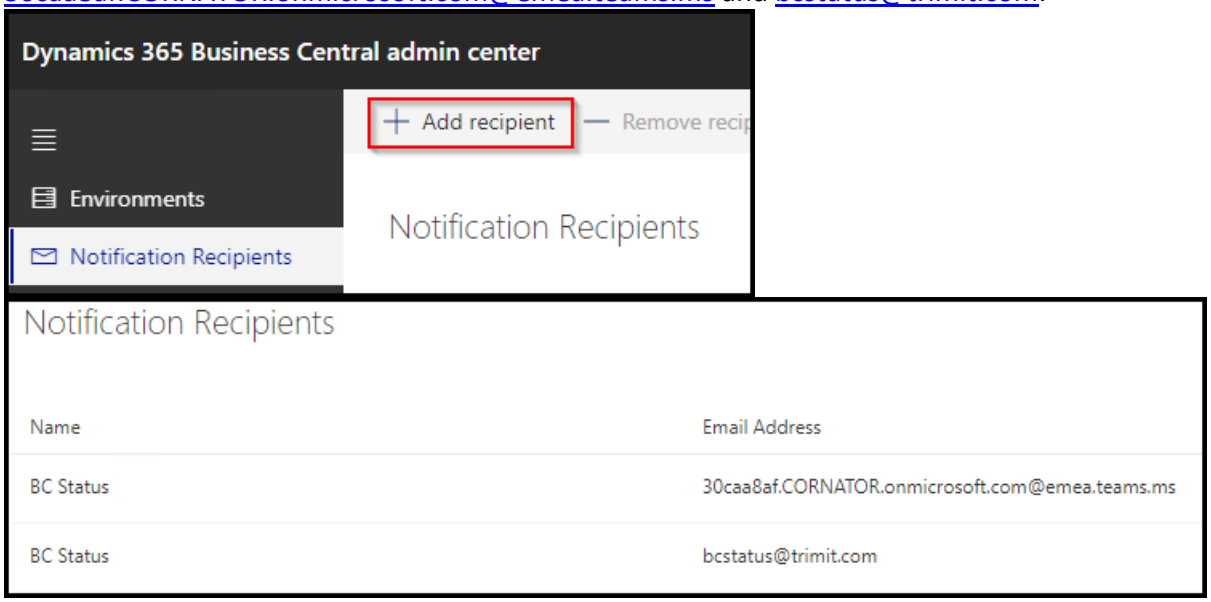
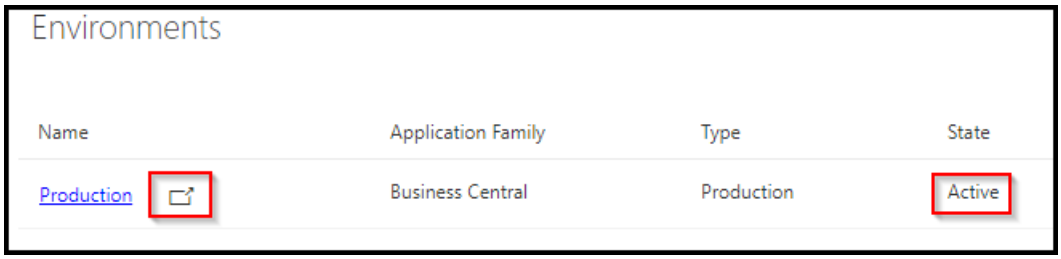
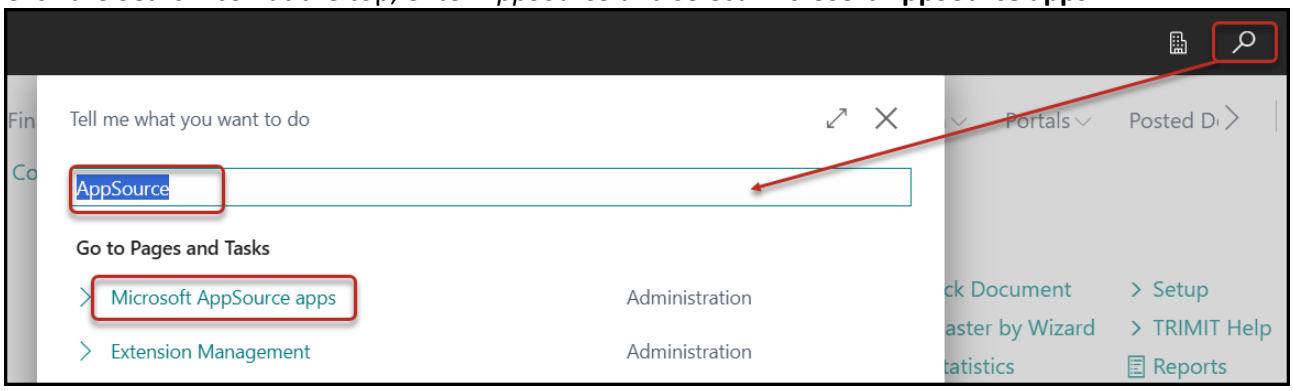
While this gets ready, go to **Notification Recipients** and add two **Email Addresses**. 30caa8af.CORNATOR.onmicrosoft.com@emea.teams.ms and bcstatus@trimit.com.



When the Environment has the **State** *Active*, click the small icon with the arrow, this will open the Environment in a new tab.



Click the Search icon at the top, enter *AppSource* and select **Microsoft AppSource apps**.



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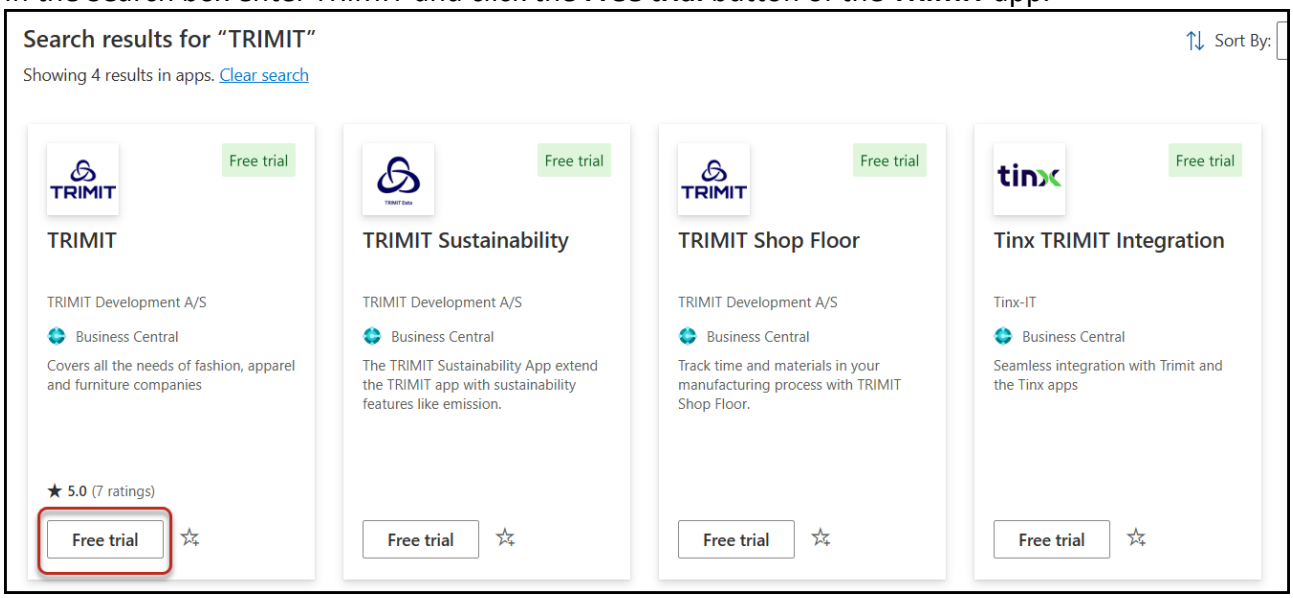
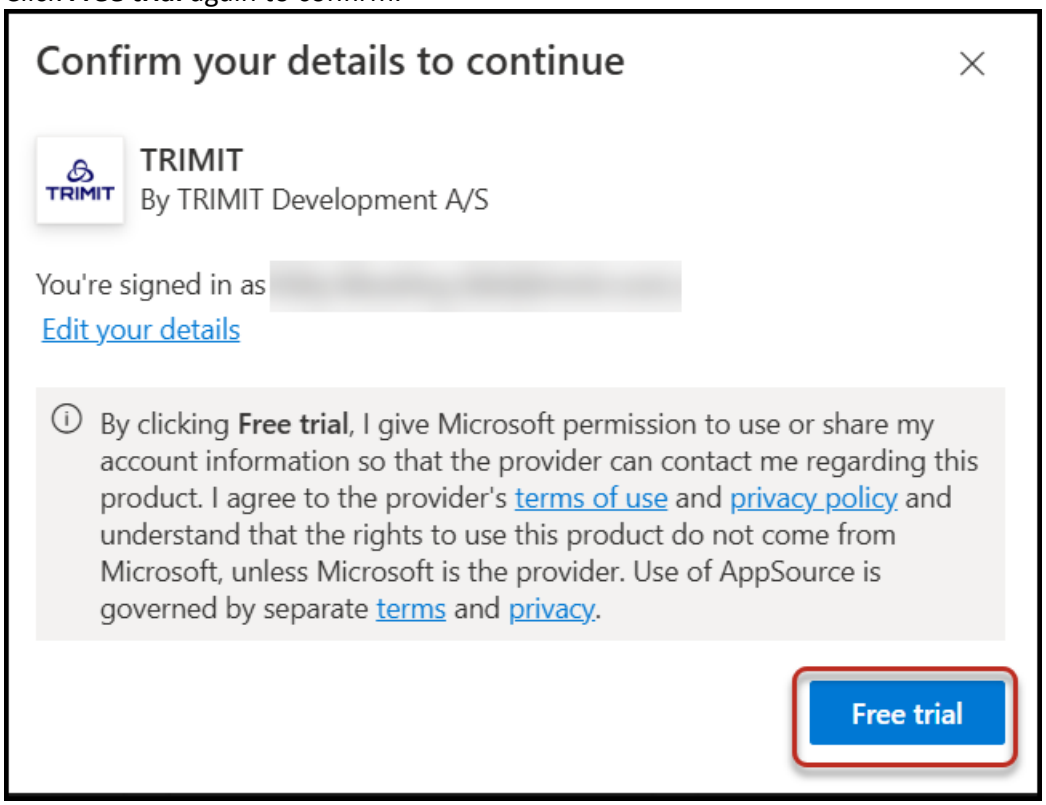
In the Search box enter *TRIMIT* and click the **Free trial** button of the **TRIMIT** app.



Click **Free trial** again to confirm.



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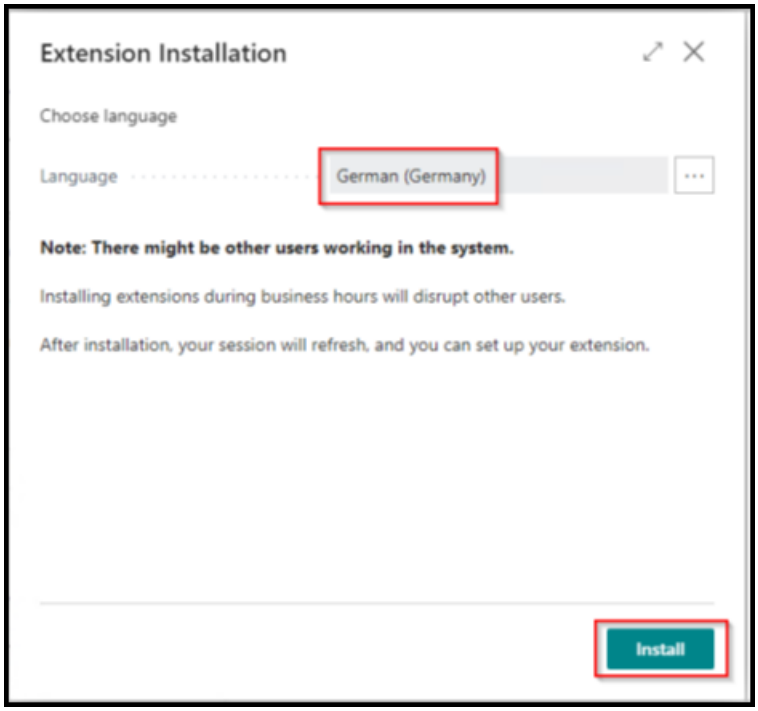
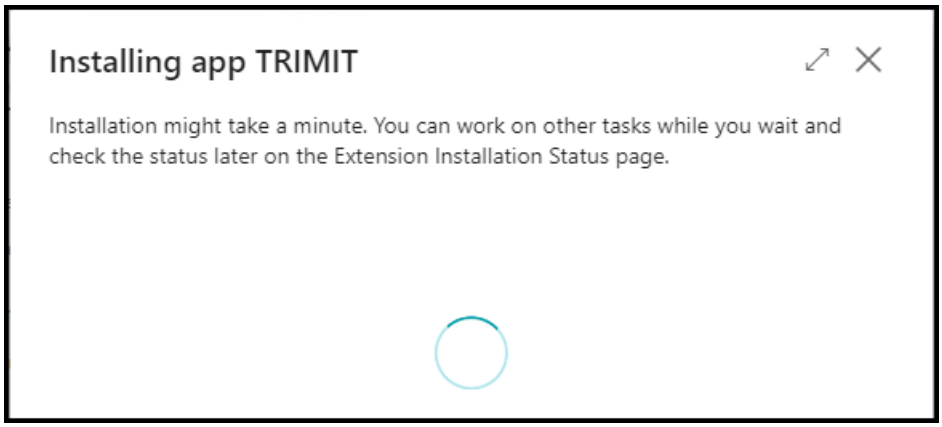
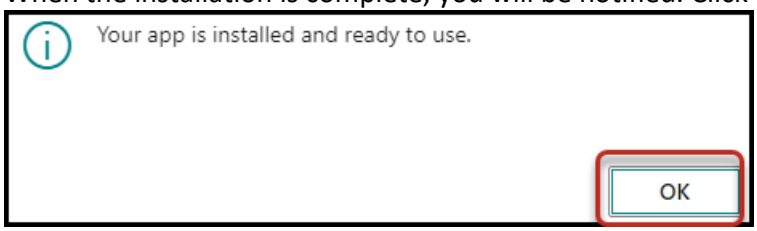
Select the **Language** and click **Install**.



Installation will take a while.



When the installation is complete, you will be notified. Click **OK**.



When the **TRIMIT** App is installed, it is time to install whatever other Apps are needed (like **TRIMIT Shop Floor** App), if any.

See also the Extra TRIMIT PTE Apps

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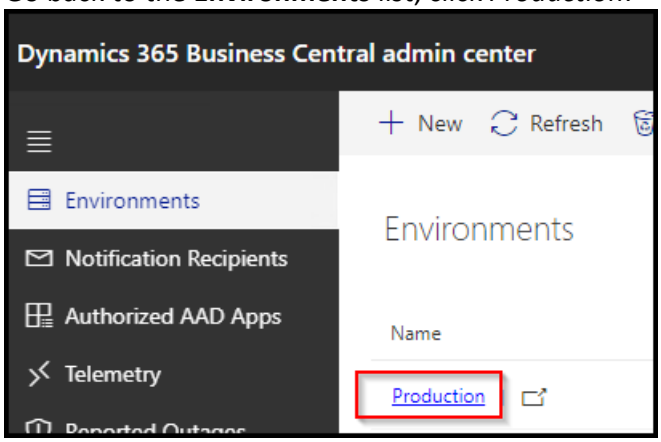
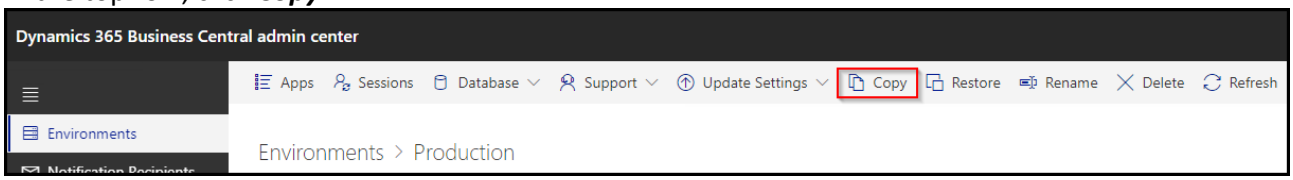
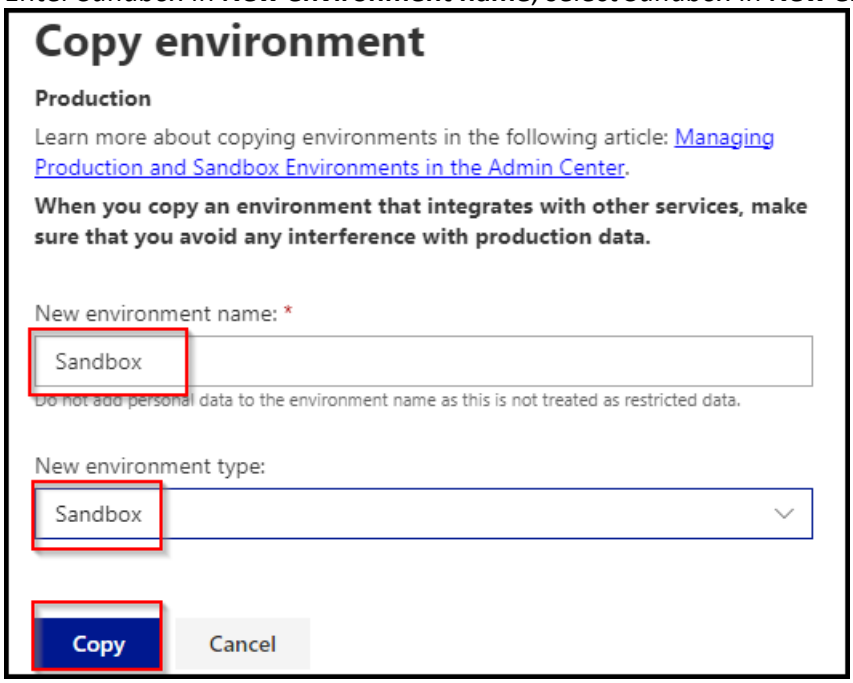
After that is all done, it is time to create a **Sandbox**.
Go back to the **Environments** list, click *Production*.



In the top row, click ***Copy***.



Enter *Sandbox* in **New environment name**, select *Sandbox* in **New environment type**, click ***Copy***.



You now have a **Production** environment with a **Sandbox** copy.

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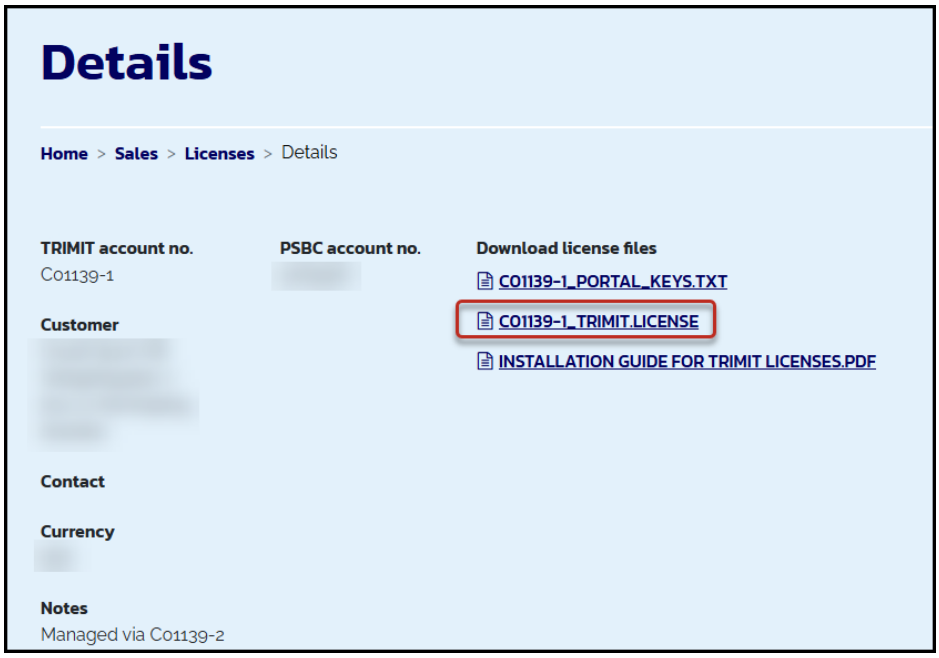
TRIMIT LICENSE FILE

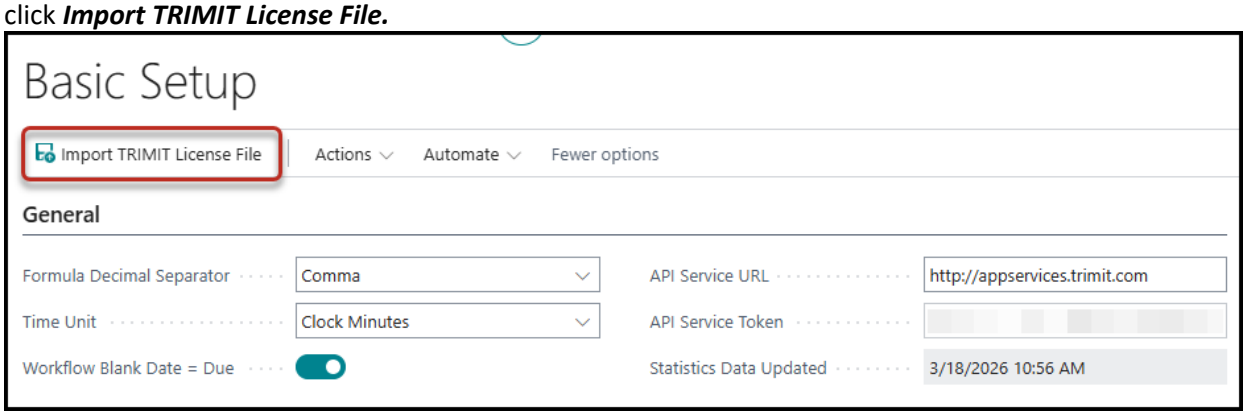
The TRIMIT License file is necessary for Customer Installations and works together with the Dynamics 365 Business Central License file. You can download the **TRIMIT License File** from the MyTRIMIT here based on the order you placed for TRIMIT by creating a Customer and determine which License you need.
The TRIMIT License is a secondary license file controlling access to TRIMIT modules within Business Central. This file is not to compare with the Business Central License file, and it is imported to the database in a different way.

The name of the TRIMIT License: *TRIMIT Customer Number-1_TRIMIT.LICENSE*
Example: *C012345-1_TRIMIT.LICENSE*



PROCEDURE

Open the database of Business Central and TRIMIT, and click **Search** to find the ***Basic Setup***, click ***Import TRIMIT License File.***



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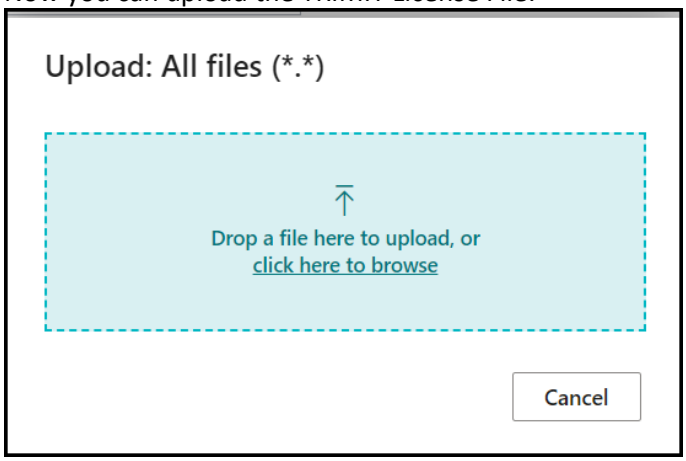
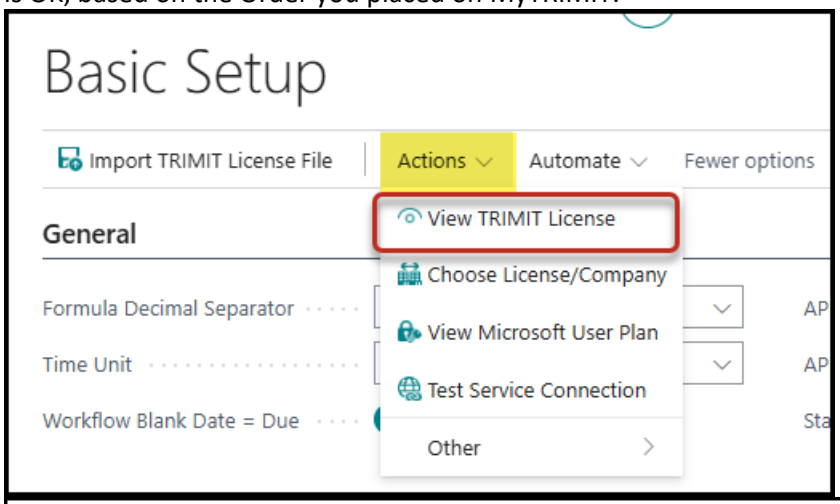
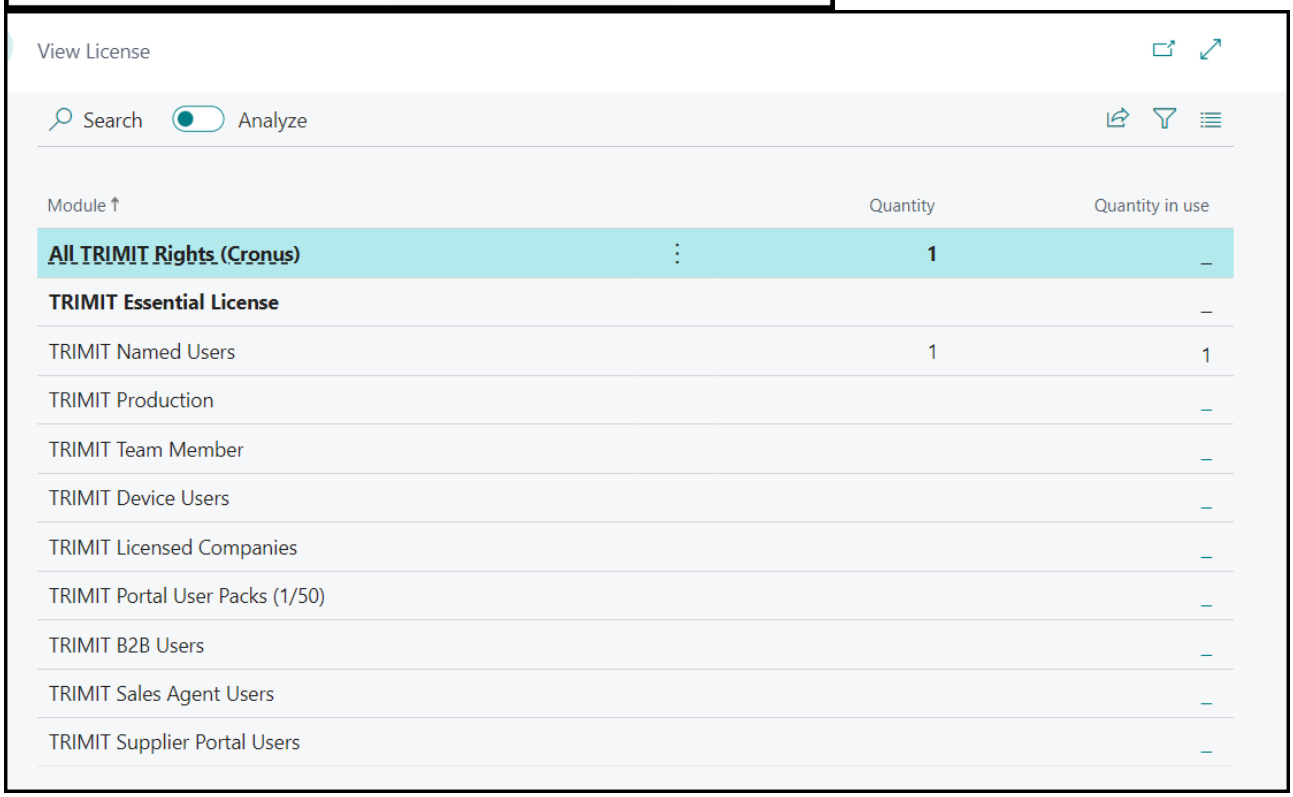
Now you can upload the TRIMIT License File:



Via ***Actions, View TRIMIT License*** you are able to see the content of the TRIMIT License, and check if it is OK, based on the Order you placed on MyTRIMIT.





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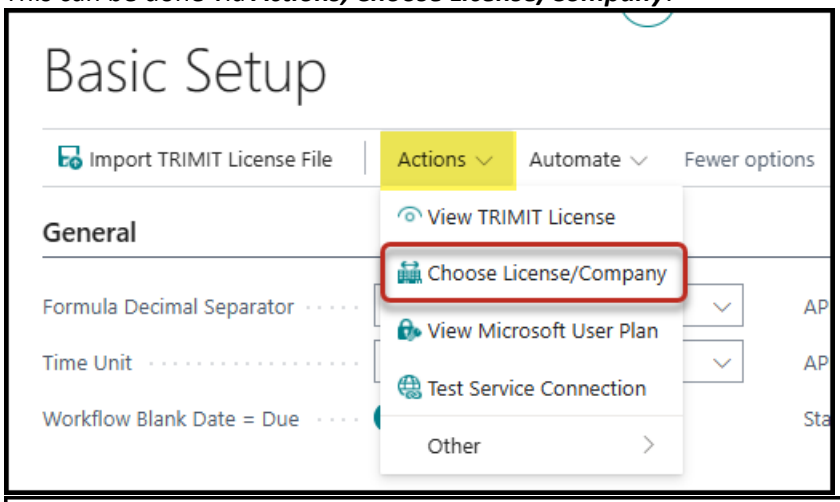
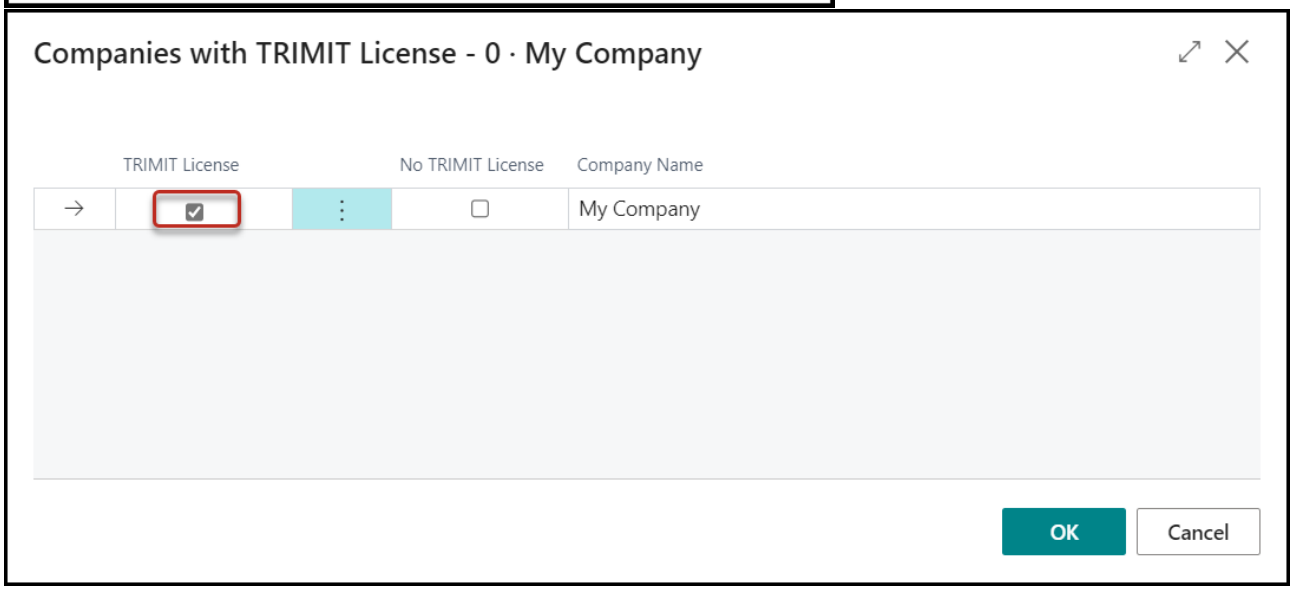
Besides importing the TRIMIT License, you also need to Assign it to the right Companies, especially when working with TRIMIT Intercompany.
This can be done via ***Actions, Choose License/Company***.





The TRIMIT License file is now installed.

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EXTRA TRIMIT PTE APPS

TRIMIT FOR TASKLET FACTORY

Specifically, if you also install and use the functionality of **Tasklet Factory**, you need to publish and install the special **TRIMIT AddOn Mobile WMS App** after you install the Tasklet Factory App.
This will enable the use of the TRIMIT Pick Document as the document for which you want to register the picked quantities on a handheld device for scanning by using **Tasklet Factory.**

TRIMIT FOR CONTINIA DOCUMENT CAPTURE

Specifically, if you also install and use the functionality of **Continia Document Capture**, you need to publish and install the special **TRIMIT AddOn Document Capture App** after you installed the Continia App.
Especially when you use the Document Capture App for incoming Purchase Orders, Receipts, and/or Invoices, you might get an error regarding the creation of the Lines.
In TRIMIT we use the special Matrix Lines and the underlying Item Lines, which requires a small addition while creating the Purchase Lines.

TRIMIT FOR FORNAV

Specifically, if you also install and use the functionality of **ForNAV**, you need to publish and install the special **TRIMIT AddOn ForNAV App** after you installed the ForNAV Apps.
For the TRIMIT Sales Document reports and TRIMIT PDM Reports for Masters, we created special reports that embrace the ForNAV approach of reports, also regarding the usage of Matrices and Pictures in these reports and according to our Report Layout Settings.

TRIMIT FOR CLICKLEARN

Specifically, if you also install and use the functionality of **ClickLearn**, you need to publish and install the special **TRIMIT AddOn ClickLearn App** after you install the ClickLearnHelp App.
This will show a ClickLearn icon on the TRIMIT Profiles (Role Centers) for capturing processes for ClickLearn.

TRIMIT FOR DELOGUE PLM

Specifically, if you also install and use the functionality of **Delogue PLM**, you need to publish and install the special **TRIMIT AddOn for Delogue PLM** after you installed the Delogue PLM App.
With our TRIMIT AddOn for Delogue PLM, you are able to easily connect Delogue PLM to your TRIMIT solution and therefore being able to get lots of Master/Item related data from Delogue PLM into the appropriate Tables of TRIMIT and Business Central.

TRIMIT FOR FRONT SYSTEMS

Specifically, if you also install and use the functionality of **Front Systems**, you need to publish and install the special **TRIMIT AddOn for Front Systems Integration** after you install the Front Systems App.
With our TRIMIT AddOn for Front Systems Integration, you are able to easily connect Front Systems to your TRIMIT solution and therefore being able to export Item/Inventory data to Front Systems and import orders from Front Systems into the appropriate Tables of TRIMIT and Business Central.

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TRIMIT SUSTAINABILITY APP

This App will enhance the functionality of Business Central Sustainability with extra possibilities to keep track of Sustainability Certificates, their Valid Dates and the Receipts/Shipments of Items that have gotten this Certificate.

NOTE
To use the **TRIMIT Sustainability App**, you also need to install the **Sustainability App** of Business Central.

For these additional TRIMIT PTE Apps, you can find the appropriate guide in the download page for these Apps.

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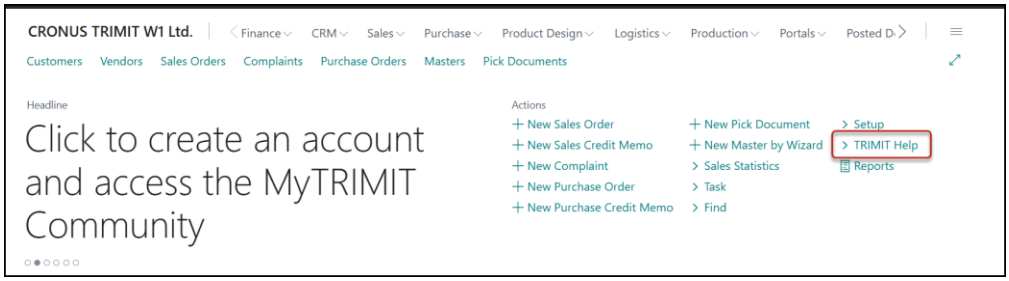
TRIMIT ONLINE HELP

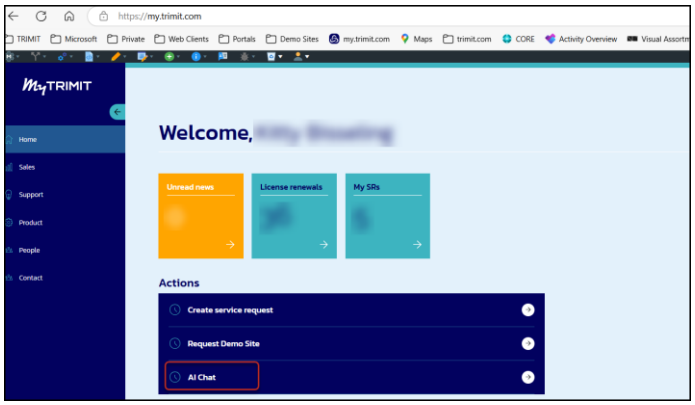
TRIMIT 26.1 is able to show all the published White Papers as Help for the TRIMIT Functionality.
These White Papers – all in English, are written for employees of our Partners and will only describe specific TRIMIT functionality and fields (not standard Business Central functionality and fields).
For this **TRIMIT Help**, you need to create an Account on https://my.trimit.com/ based on your companies e-mail address.

TRIMIT Help will be available via all our TRIMIT Profiles (Role Centers).
I.e., in ***TRM_SB - TRIMIT Small Business***:

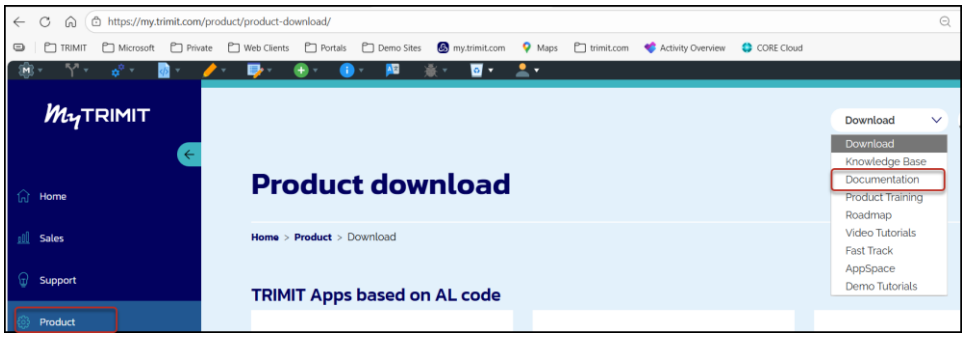


Clicking on **TRIMIT Help** will forward you to https://my.trimit.com/.

You can use the **AI Chat** to ask a question, which will answer based on our published White Papers and public information on the web.



Or you can go to ***Product, Documentation*** to view the content of any published White Paper based on the Filters you enter.



Drill-down option for ***Product*** depends on your origin (Customer, Partner, Employee).

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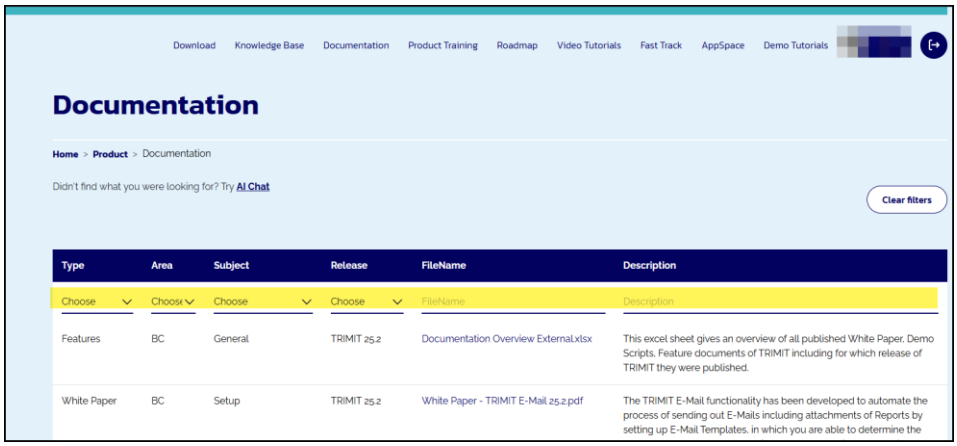
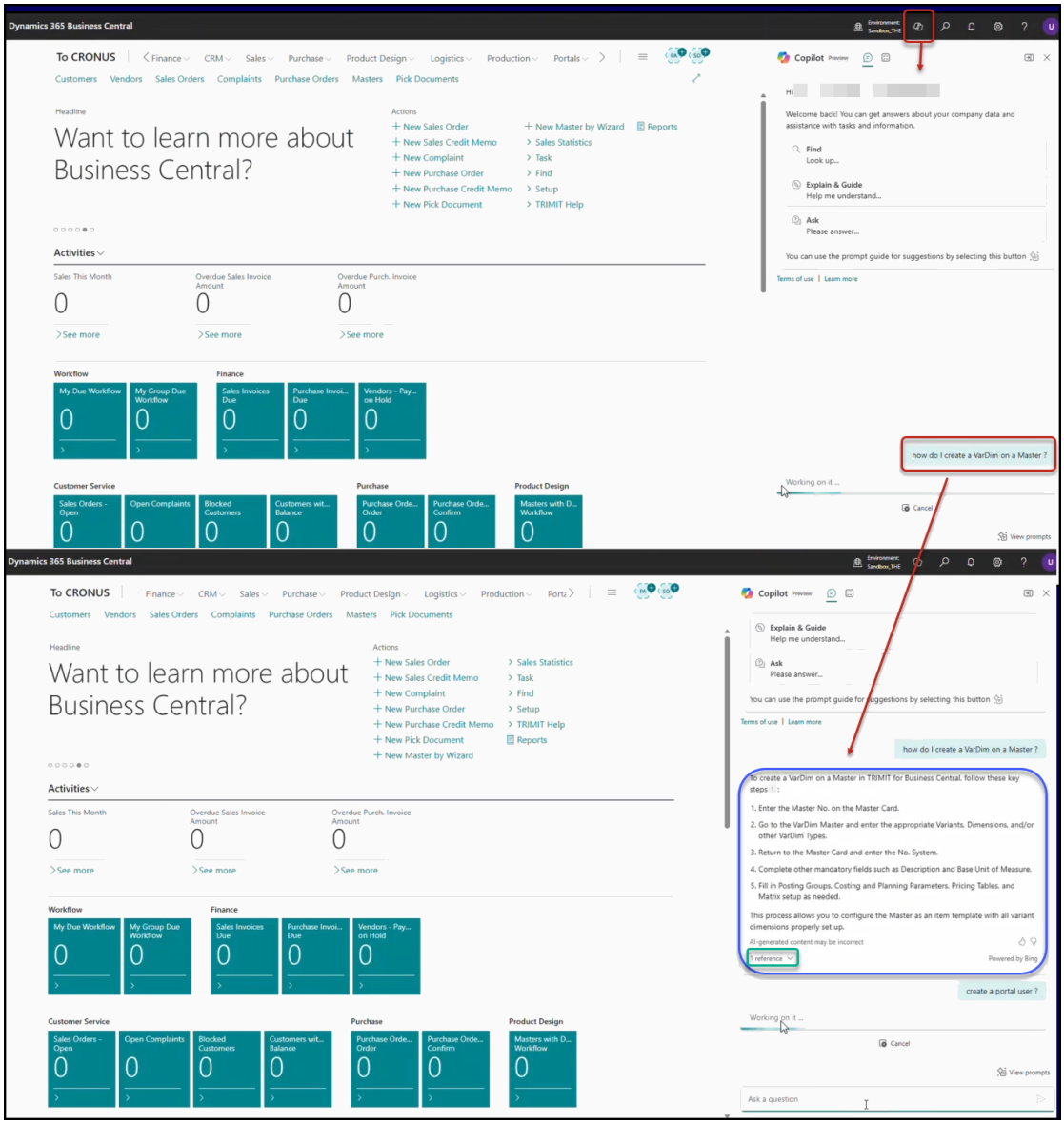


For **Cloud installations**, however, you are also able to use **Copilot** to get answers to your questions regarding the TRIMIT functionality. The basis for this is also the published TRIMIT White Papers.



When clicking on **Reference,** it will show you the TRIMIT White Paper(s) that were used to generate the answer.

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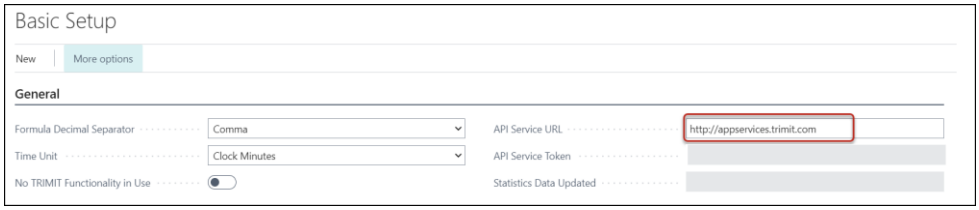
API SERVICE URL

When installing the **TRIMIT** App, the **API Service URL** in the **Basic Setup** will automatically be filled with: **http://appservices.trimit.com**



The **API Service Token** will be filled automatically by the system when needed if the **API Service URL** is filled will **http://appservices.trimit.com**. This might be the case for resizing pictures.

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DEMO COMPANY

INSTALLATION DEMO DATA PROCESS FOR DEMO PURPOSES

1) Make sure, you also import/have the default Demo Data of standard Business Central in the database based on the Configuration Package **XX.LNG.EVALUATION** where the *XX* stands for the Localization and *LNG* stands for the language.
2) See separate ***Guide for Creation of TRIMIT Data***

The Demo Data that can be created with the separate **TRIMIT Data and Test** App is used to create specific TRIMIT Data for the Demo Scripts and White Papers and can easily be used for demos to prospects or customers.
You can find the Demo Scripts here.
You can find the White Papers here.

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EXTRA LOCALIZED DATA (OPTIONAL)

This might not be necessary, because you would already have the default demo data of a localization, but checking might not hurt. Keep in mind that the descriptions or codes might differ from the pictures below, because they will be in your local language.

BE LOCALIZATION

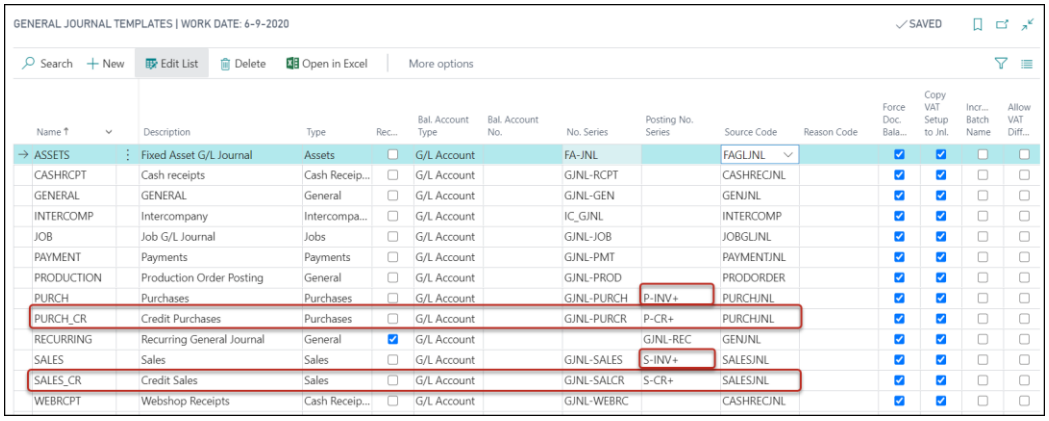
NO. SERIES

Add two new No. Series *GJNL-PURCR* and *GJNL-SALCR.*

Change the **Ending No**. of *GJNL-PURCH* and *GJNL-SALES*

Code	Description	Starting No.	Ending No.	Last Date Used	Last No. Used	Default Nos.	Manual Nos.	Date Order
GJNL-PROD	Production Journal +	G09001	G10000			☑	☑	☐
GJNL-PURCH	Purchase Journal	G03001	G03800			☑	☑	☐
GJNL-PURCR	Purchase Credit Journal +	G01801	G02000			☑	☑	☐
GJNL-RCPT	Cash Receipts Journal	G02001	G03000			☑	☑	☐
GJNL-REC	Recurring General Journal	G06001	G07000			☑	☑	☐
GJNL-SALCR	Sales Credit Journal +	G01801	G02000			☑	☑	☐
GJNL-SALES	Sales Journal	G01001	G01800			☑	☑	☐
GJNL-WEBRC	Webshop Receipt Journal +	WR000001	WR999999			☑	☐	☐

GENERAL JOURNAL TEMPLATES



Name	Description	Type	Rec...	Bal. Account Type	Bal. Account No.	No. Series	Posting No. Series	Source Code	Reason Code	Force Doc. Bala...	Copy VAT Setup to Jnl.	Incr... Batch Name	Allow VAT Diff...
ASSETS	Fixed Asset G/L Journal	Assets	☐	G/L Account		FA-JNL		FAGLJNL		☑	☑	☐	☐
CASHRCPT	Cash receipts	Cash Receip...	☐	G/L Account		GJNL-RCPT		CASHRECJNL		☑	☑	☐	☐
GENERAL	GENERAL	General	☐	G/L Account		GJNL-GEN		GENJNL		☑	☑	☐	☐
INTERCOMP	Intercompany	Intercompa...	☐	G/L Account		IC_GJNL		INTERCOMP		☑	☑	☐	☐
JOB	Job G/L Journal	Jobs	☐	G/L Account		GJNL-JOB		JOBGLJNL		☑	☑	☐	☐
PAYMENT	Payments	Payments	☐	G/L Account		GJNL-PMT		PAYMENTJNL		☑	☑	☐	☐
PRODUCTION	Production Order Posting	General	☐	G/L Account		GJNL-PROD		PRODORDER		☑	☑	☐	☐
PURCH	Purchases	Purchases	☐	G/L Account		GJNL-PURCH	P-INV+	PURCHJNL		☑	☑	☐	☐
PURCH_CR	Credit Purchases	Purchases	☐	G/L Account		GJNL-PURCR	P-CR+	PURCHJNL		☑	☑	☐	☐
RECURRING	Recurring General Journal	General	☑	G/L Account			GJNL-REC	GENJNL		☑	☑	☐	☐
SALES	Sales	Sales	☐	G/L Account		GJNL-SALES	S-INV+	SALESJNL		☑	☑	☐	☐
SALES_CR	Credit Sales	Sales	☐	G/L Account		GJNL-SALCR	S-CR+	SALESJNL		☑	☑	☐	☐
WEBRCPT	Webshop Receipts	Cash Receip...	☐	G/L Account		GJNL-WEBRC		CASHRECJNL		☑	☑	☐	☐

SALES & RECEIVABLES SETUP

Fill **Journal Templ. Sales Invoice** with *SALES*

Fill **Journal Templ. Sales Cr. Invoice** with *SALES_CR*

PURCHASE & PAYABLES SETUP

Fill **Journal Templ. Purchase Invoice** with *PURCH*

Fill **Journal Templ. Purchase Cr. Invoice** with *PURCH_CR*

TABLE 36 SALES HEADER

In all the records the field **Journal Template Name** has been filled with *SALES* or *SALES_CR*

TABLE 38 PURCHASE HEADER

In all the records the field **Journal Template Name** has been filled with *PURCH* or *PURCH_CR*

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TABLE 313 INVENTORY SETUP

Fill **Jnl. Templ. Name Cost Posting** with *GENERAL*
Fill **Jnl. Batch Name Cost Posting** with *DEFAULT*

NA LOCALIZATION

In table **General Journal Template,** the **Posting Report ID** needs to be changed from 3 to 10019
In table **Item Journal Template,** the **Posting Report ID** needs to be changed from (only) 703 to 10144
In table **Res. Journal Template,** the **Posting Report ID** needs to be changed from 1103 to 10198
In table **Job Journal Template,** the **Posting Report ID** needs to be changed from 1015 to 10217

CH LOCALIZATION

In **Sales & Receivables Setup** the field **Line Amt. Round LCY** needs to be filled with *0.01*

FI LOCALIZATION

In the **Sales & Receivables Setup** the following fields need to be filled:
Invoice No. must be *Yes*
Default No. must be *2026* *(Year related to the Work Date)*
Print Reference No. must be *Yes*

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