INSTALLATION OF TRIMIT 26.2 ON-PREMISES

This Document contains information regarding the installation of **TRIMIT 26.2** for **Microsoft Dynamics 365 Business Central on-premises 2026 release wave 2**, with at least **Build 29.0.XXXXX.XXXXX**.
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 26.2.XXXXX** can be downloaded here or via AppSource.
The package for **TRIMIT Data and Test 26.2.XXXXX** can be downloaded here.

TRIMIT also has special Apps regarding **Shop Floor** and regarding **Sustainability**.
They can be downloaded here or via AppSource.
You can also find the Installations Guides for these two Apps 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:

- Installation of **at least Microsoft Dynamics 365 Business Central 2026 release wave 2**, Build **29.0.XXXXX.XXXXX** (simply take the last released Update of 2026 release wave 2)
- See System requirements for Business Central 2026 release wave 2 - Business Central | Microsoft Learn for more details regarding the requirements for an on-premises Installation.
- Customer Business Central License
- Installation of TRIMIT on the Microsoft Dynamics 365 Business Central on-premises 2026 release wave 2
- 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: 26.2
Date: 28-10-2026

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CLIENT/SERVER FOR 365 BUSINESS CENTRAL

TRIMIT 26.2 is advised to be installed on **at least** **Microsoft Dynamics 365 Business Central 2026 release wave 2,** Build **29.0.XXXXX.XXXXX**
TRIMIT 26.2 can also be installed on any Update of **Microsoft Dynamics 365 Business Central 2026 release wave 2** – BC29.1, BC29.2, BC29.3. etc.

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL LICENSE FILE

TRIMIT 26.2 requires a Microsoft Dynamics 365 Business Central license file.
Request this from Microsoft Order Central or via MyTRIMIT, where you need to create the Customer first, after which you can determine which License you need for this Customer:
https://my.trimit.com/sales/licenses/create-customer.html in case of Embedded Licenses.

TRIMIT 26.2

Content of the package:
1) **TRIMIT** Application (No. 6 in the picture below)
2) **Release documentation**

Translation Worksheets for partners to supply TRIMIT with corrected/additional translations will be published on a separate page on MyTRIMIT:
https://my.trimit.com/product/product-download/translations.html

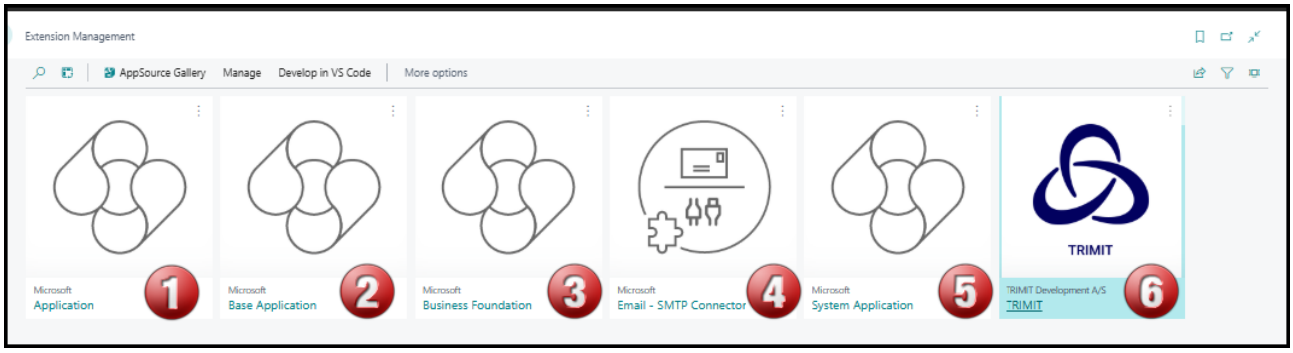
INSTALLATION PROCESS

1. Install the localized **Microsoft Dynamics 365 Business Central 2026 release wave 2**, with **at least** Build **29.0. XXXXX.XXXXX**, which includes at least the four Extensions:
   Application, Base Application, Business Foundation and **System Application**. (Nos. 1, 2, 3 and 5 in the picture below)
   There might however be other localized extensions.
   Follow the instructions provided by Microsoft.

2. Publish and Install the **TRIMIT** Application (No. 6 in the picture below).
   While installing the **TRIMIT** Application, also the Permission Sets of TRIMIT will be written to the database.

3. In case it is not already published and installed: Publish and Install the **Email – SMTP Connector** Application (No. 4 in the picture below). This is necessary if you want to use the TRIMIT E-Mail functionality, especially for the TRIMIT e-commerce.

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See the following link for how to install the necessary extensions:
https://docs.microsoft.com/en-us/dynamics365/business-central/dev-itpro/developer/devenv-how-publish-and-install-an-extension-v2

LOCALIZATIONS

Be aware that the Localizations are now handled in the Microsoft **Base Application** (No. 2 in the picture above).

PRECONDITIONS

- **Microsoft Dynamics 365 Business Central 2026 release wave 2,** with **at least** Build **29.0.XXXXX.XXXXX** is established with the Customers Business Central License file.

For an installation of TRIMIT for Demo purposes, see Installation Process for Demo Purposes

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EXTRA TRIMIT (PTE) APPS

TRIMIT SHOP FLOOR APP

This App will enhance the functionality of TRIMIT with the possibility of Time Registration based on the Operations of Production Orders that the user is working on, but also to register Arrival/Leaving on a Workday.

NOTE
This App is also available on AppSource of Microsoft.
The guide for the **TRIMIT Shop Floor App** can be found here.

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/Output/Consumption of Items that have gotten this Certificate.
This App will also be able to set up the information that you want to see on a Digital Product Passport (DPP).

NOTE
To use the **TRIMIT Sustainability App**, you also need to install the **Sustainability App** of Business Central.
This App is also available on AppSource of Microsoft.
The guide for the **TRIMIT Sustainability App** can be found here.

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 install 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.

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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 install the Delogue PLM App.
With our TRIMIT AddOn for Delogue PLM, you can 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 can 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.

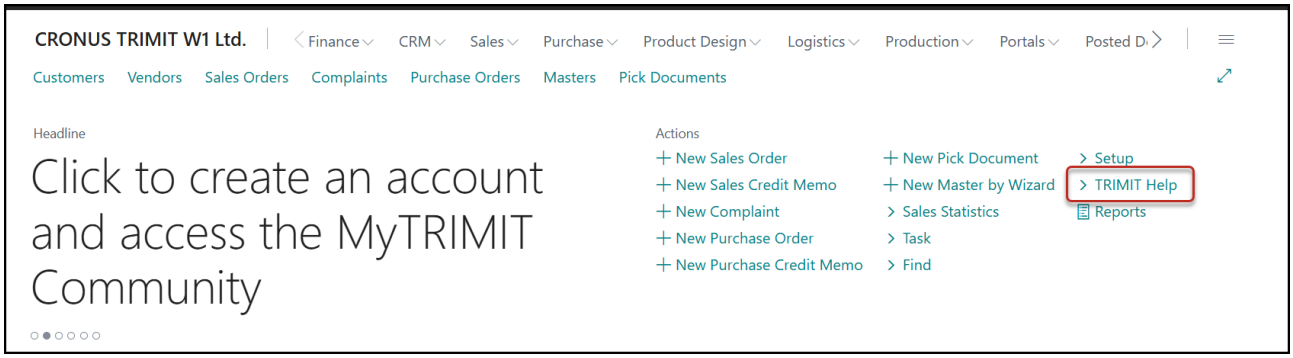
For these additional TRIMIT (PTE) Apps, you can find the appropriate guides in the download page for these Apps.

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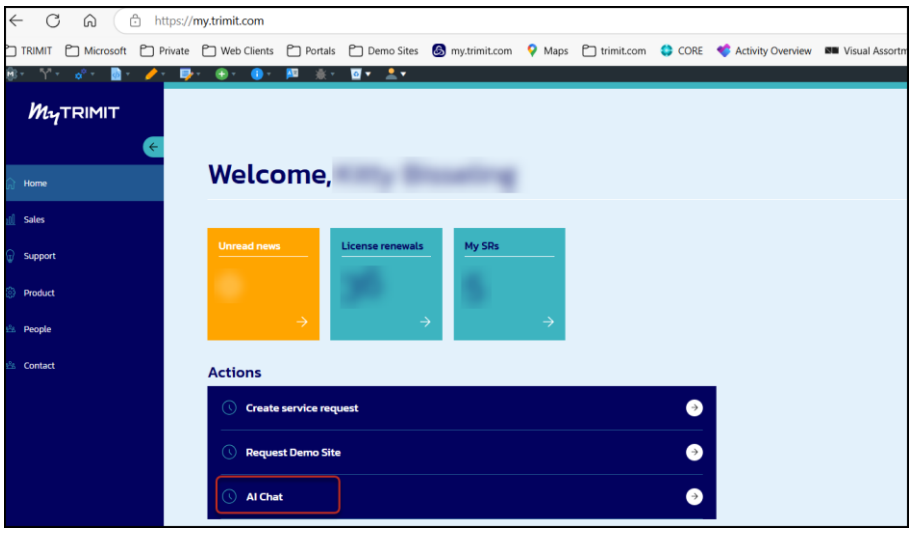
TRIMIT ONLINE HELP

TRIMIT 26.2 can 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***:

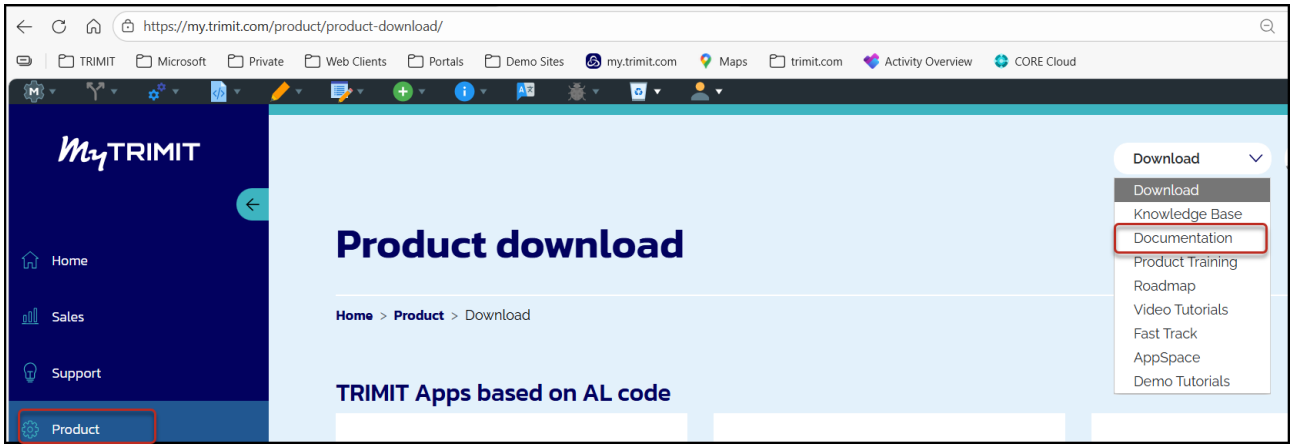


Clicking on **TRIMIT Help** will forward you to https://my.trimit.com/.
You can use the **AI Chat** to ask a question, which will answer based on our published White Papers.

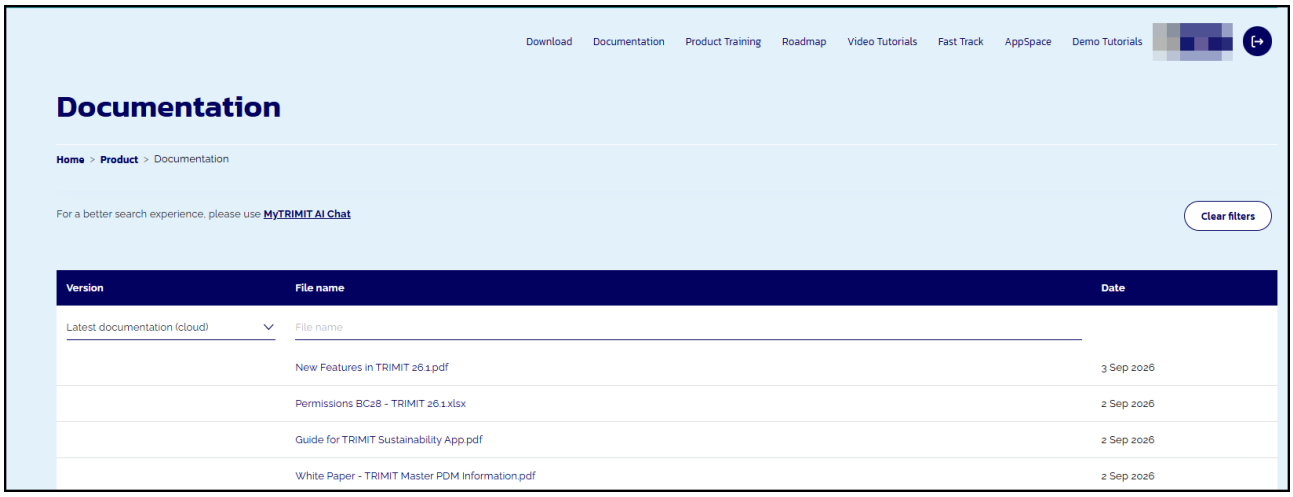


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Or you can go to ***Product, Documentation*** to view the content of any published White Paper based on the Filters you enter.



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



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TRIMIT LICENSE FILE

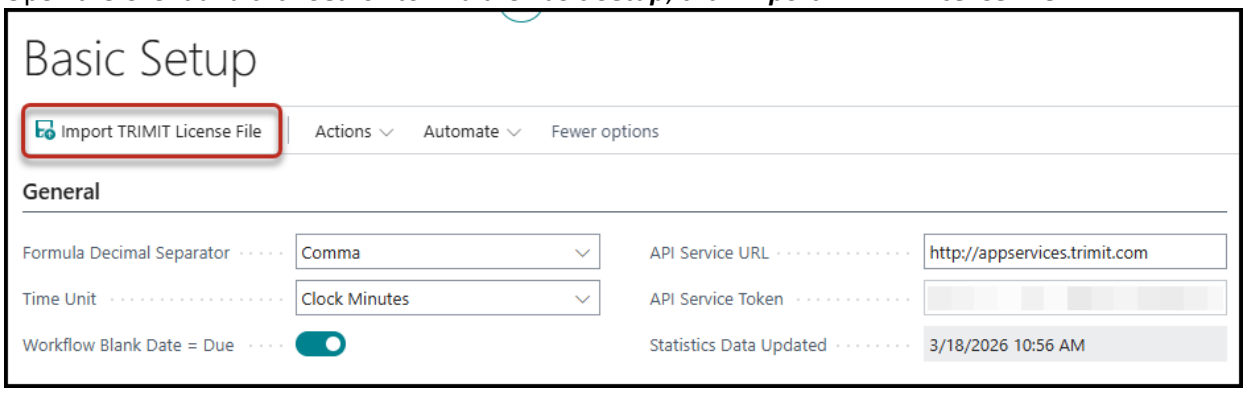
The TRIMIT License file is necessary for Customer Installations and works together with the Dynamics 365 Business Central License file. You can download the **TRIMIT License File** from MyTRIMIT here based on the order you placed for TRIMIT.

PRECONDITIONS

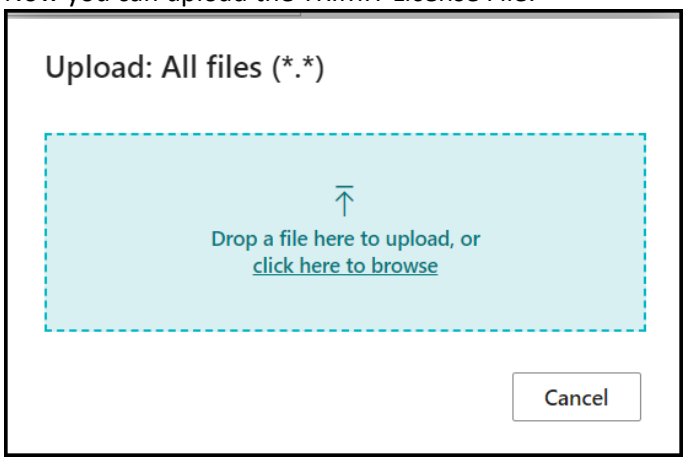
- **TRIMIT 26.2** is installed on the Database.
- The **TRIMIT License File** is placed on the network and can be accessed.

PROCEDURE

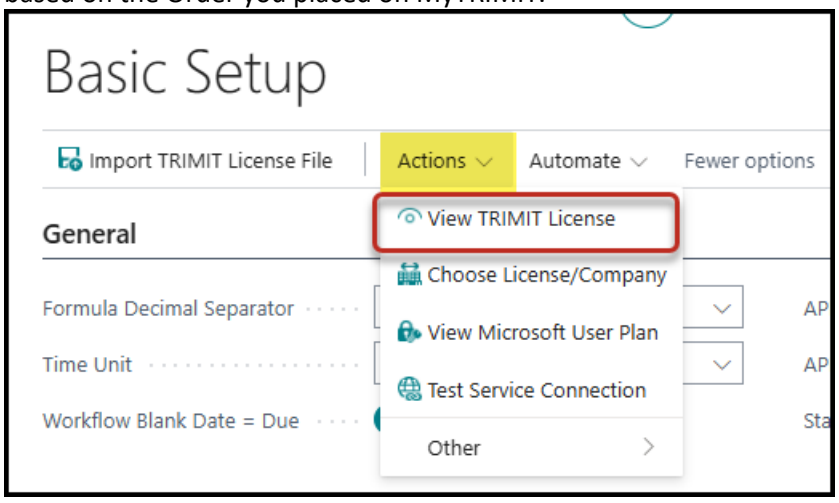
Open the Client and click **Search** to find the ***Basic Setup***, click ***Import TRIMIT License File***



Now you can upload the TRIMIT License File:



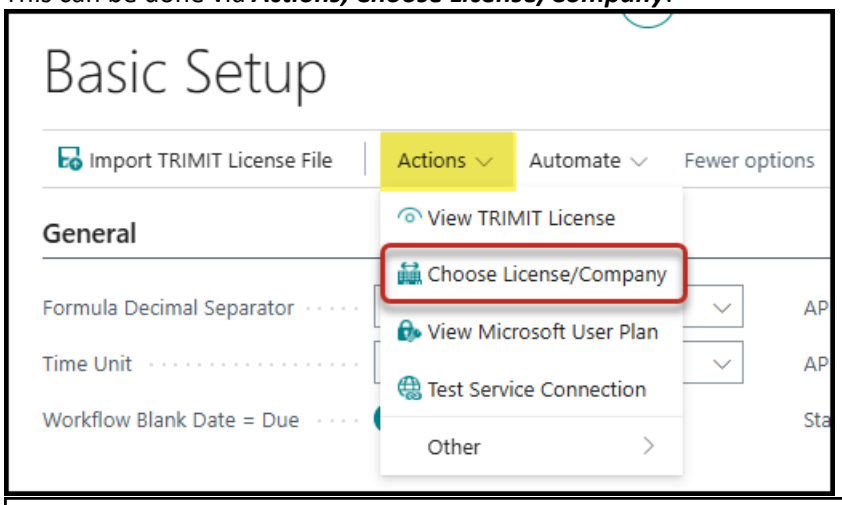
Via ***Actions, View TRIMIT License*** you can see the content of the TRIMIT License, and check if it is OK, based on the Order you placed on MyTRIMIT.

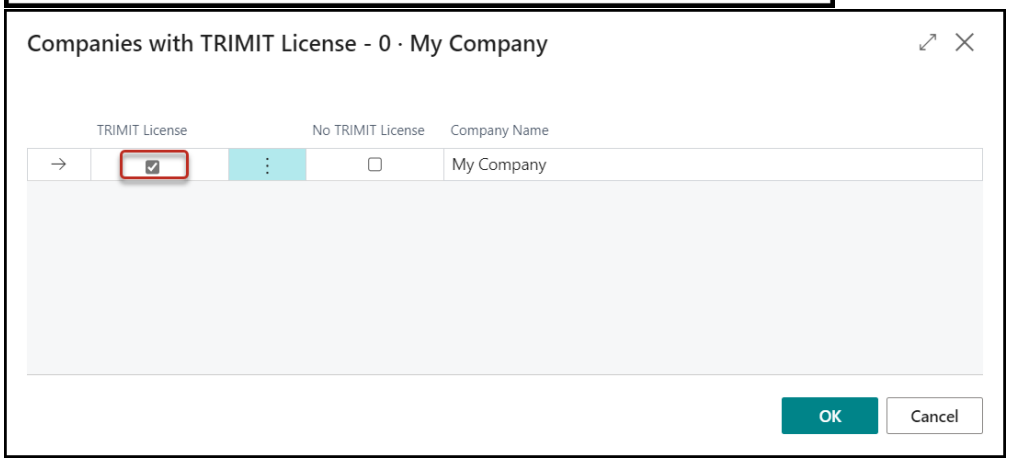


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Besides importing the TRIMIT License, you also need to Assign it to the right Companies, especially when working with TRIMIT Intercompany.
This can be done via ***Actions, Choose License/Company***.



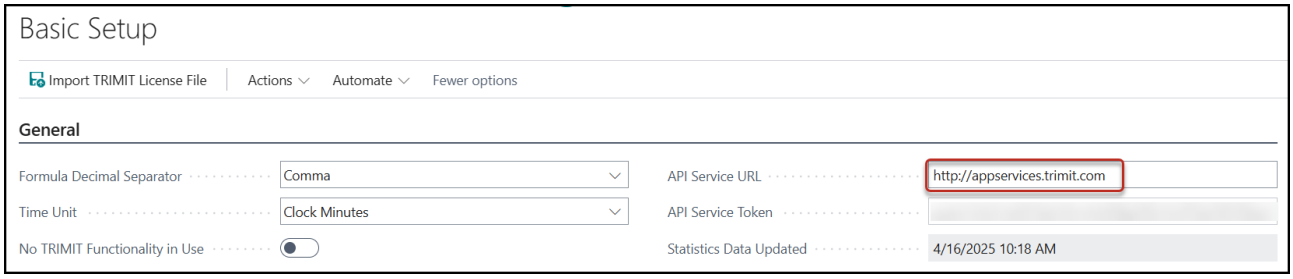


The TRIMIT License file is now installed.

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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.

DEMO COMPANY

INSTALLATION DEMO DATA PROCESS FOR DEMO PURPOSES

1) Install the **localized** Microsoft Dynamics 365 Business Central 2026 release wave 2, with **at least** Build **29.0.XXXXX.XXXXX**.
   Follow the instructions provided by Microsoft.
2) Make sure, you also import/have the default Demo Data of standard Business Central in the database (by installing the demo database of BC).
3) 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.
There are also separate Apps available to create Demo Date for **TRIMIT Shop Floor** and **TRIMIT Sustainability.**

You can find the Demo Scripts here.
You can find the White Papers here.

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INSTALLATION OF TRIMIT ON ACTIVE TRIMIT DATABASE

If you have a Customer Database on an BC13R2 or older version of TRIMIT and want to upgrade to TRIMIT 26.2, you need to consider the following:

1. Upgrade tools from TRIMIT BC13R2 to BC21 are available on MyTRIMIT.
2. Prepare already the database by re-coding the customization into Extensions and Codeunit Calls into Publishers.
3. After that the upgrade to the latest TRIMIT 23.1.XXXXX (based on BC22) is a simple upgrade. This step is however necessary regarding the TRIMIT Permission Sets, that are handled differently as off TRIMIT 22.2.
   Therefore, the old TRIMIT Permission Sets need to be 'converted' to Permission Sets with **Type** *User-Defined,* otherwise they will be deleted when upgrading to TRIMIT 23.1.
4. After that, the upgrade to the latest TRIMIT 26.2. is a simple upgrade.

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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

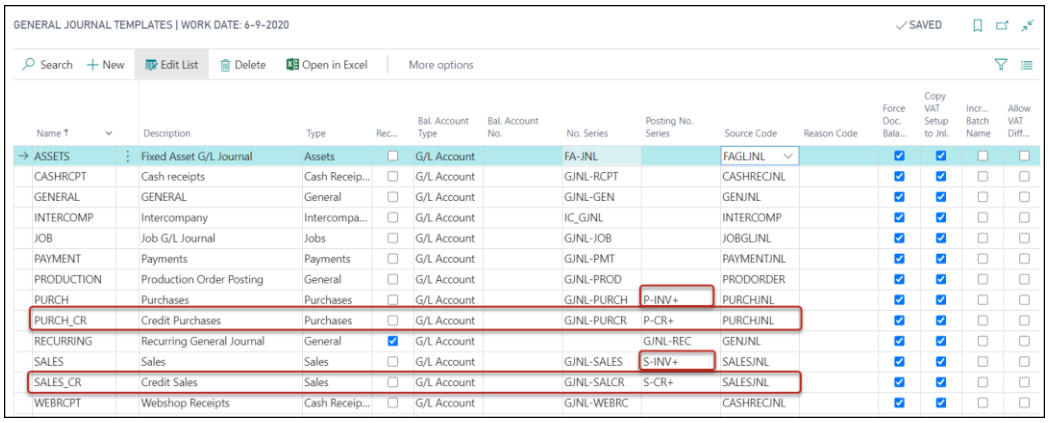
Add two new No. Series *GJNL-PURCR* and *GJNL-SALCR.*

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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