



INSITE PORTAL

This document contains information about the InSite portal functionality in TRIMIT BC13

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CONTENTS

Introduction	1
InSite setup in TRIMIT BC13	2
InSite profile	2
InSite user setup	5
InSite setup on portals	6

INTRODUCTION

TRIMIT InSite portal allows viewing a set of different statistical data. This data can be presented as charts, gauges, grids as well as exported as PDF and Excel files. InSite portal does not require a specific data setup, it uses already existing standard statistical data from TRIMIT BC. If there is no such a data in the ERP system, then there will be nothing to show on InSite portal.

The InSite portal is aimed for company management personnel and should give the overview over the company's statistical key data such as: balance, revenue, order intake, customer top 10, product top 10 and more.

The functionality described is the functionality in **TRIMIT for Business Central BC 13**.

The pictures in this White Paper are based on the demo database for **TRIMIT for Business Central BC 13** (based on Microsoft Dynamics 365 Business Central) in the demo company **TRIMIT for Business Central BC 13** (based on CRONUS International Ltd. from Microsoft Dynamics 365 Business Central).

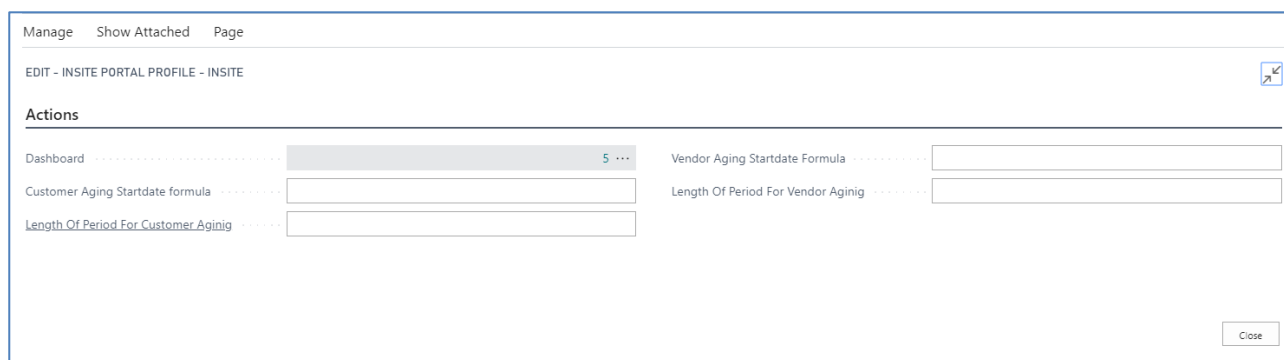
INSITE SETUP IN TRIMIT BC13

The main InSite related setup is done in **Sales Statistic Setup List** page (open via **Tell me Sales Statistic Setup List**). Records where **Allow on Portals** equals to **TRUE** will be shown in **Choose Chart** drop down field on **Create new dock** page in PIR.

Read more about the sales statistic's setup in **White Paper – TRIMIT Extended Sales Statistics BC13**.

INSITE PROFILE

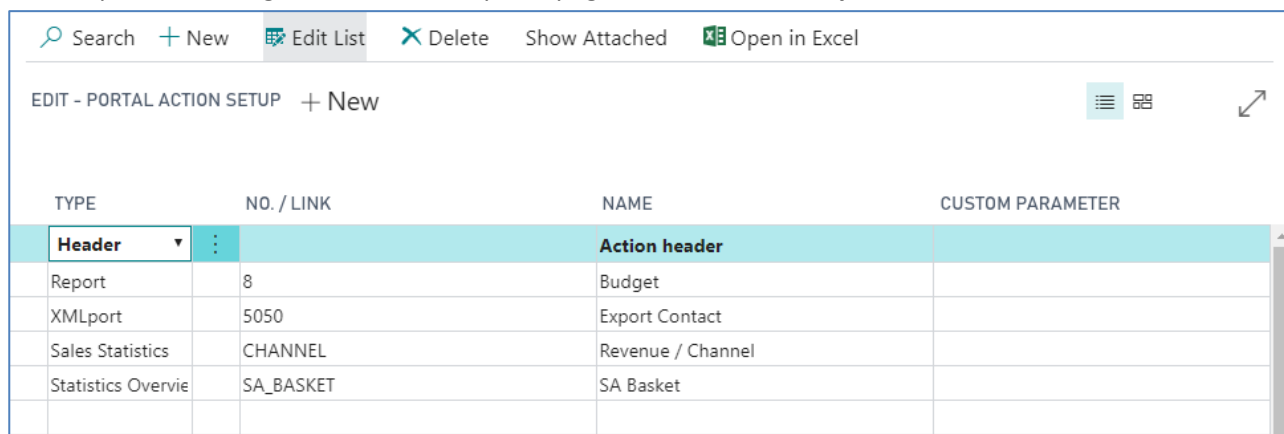
InSite portal profile addresses the setup for the following docks on InSite portal dashboard: **Action**, **Customer gaging** and **Vendor gaging**. InSite portal profile page can be opened via **Tell me Portal Profile List**:



DESCRIPTION OF THE FIELDS IN INSITE PORTAL PROFILE

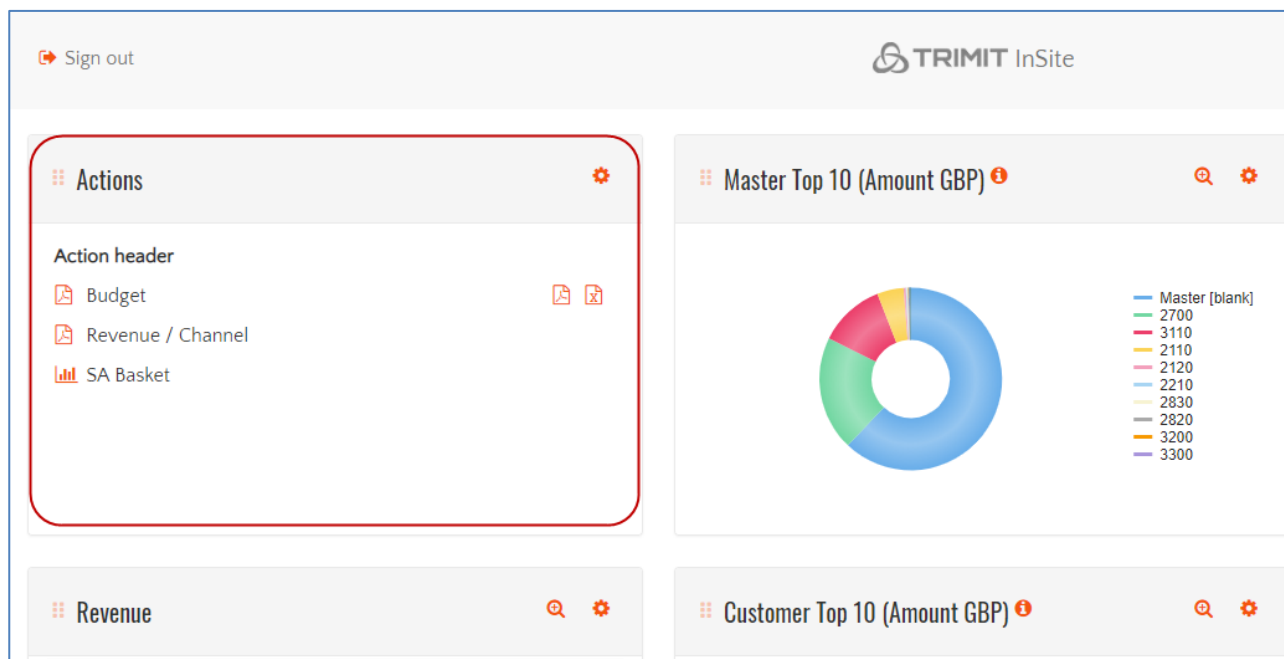
DASHBOARD

Specify actions via **Portal Action Setup** page. These actions will then be shown on the **Actions** dock in InStore portal. Clicking in this field will open a page **Portal Action Setup**:



TYPE	NO. / LINK	NAME	CUSTOM PARAMETER
Header		Action header	
Report	8	Budget	
XMLport	5050	Export Contact	
Sales Statistics	CHANNEL	Revenue / Channel	
Statistics Overview	SA_BASKET	SA Basket	

Reflection in the **Actions** dock on InSite portal:



DESCRIPTION OF THE COLUMNS IN PAGE PORTAL ACTION SETUP

TYPE

Available values are *Header*, *Report*, *XML Port*, *Sales Statistics*, *Statistics Overview* and *Link*.

Sales Statistics is represented as a report on portal.

Statistics Overview is represented as either chart or a gauge on portal. It combines several sales statistics and shows them on a single page on portal. Read more about Statistics Overview in **White Paper – Extended Sales Statistics**

NO. / LINK

Select the value depending on the value selected in column **Type**

NAME

Inserted manually or automatically depending on the value selected in column **Type**

CUSTOM PARAMETER

This column is not mandatory. Customer can provide a free parameter, but it will not be reflected on portal by default.

CUSTOMER AGING STARTDATE FORMULA

This field is not mandatory. Use values of date expression format, e.g. 1M, 1Y etc. The starting date for customer aging is calculated based on the date expression in this field. The calculation relies on a work date as a reference date. If this field is left blank, then the system will use the work date minus one day as customer aging start date. This field is identical to the one on **Customer – Summary Aging** report (open via **Tell me Customer – Summary Aging**)

On InSite dash board:

Customer Aging			
	.. 01/23/19	Balance	
30000 John Haddock Insurance Co.	110,020.08	349,615.40	
3000 The Furniture Shop UK	62,500.00	62,500.00	
20000 Selangorian Ltd.	49,633.17	96,049.99	
2000 The Fashion Store UK	38,764.69	38,764.69	
49633663 Autohaus Mielberg KG	4,050.00	7,924.80	
Others	4,285.59	455,640.64	
Total (LCY)	269,253.53	1,010,495.52	

LENGTH OF PERIOD FOR CUSTOMER AGING

This field is not mandatory. Use values of date expression format, e.g. 1M, 1Y etc. Set date expression to calculate the length that is based on the start date specified in **Customer Aging Startdate Formula** field. If the field is left blank, then the date expression is set to default “+1M” by the system. This field is identical to the one on **Customer – Summary Aging** report (open via **Tell me Customer – Summary Aging**).

VENDOR AGING STARTDATE FORMULA

This field is not mandatory. Use values of date expression format, e.g. 1M, 1Y etc. The starting date for vendor aging is calculated based on the date expression in this field. The calculation relies on a work date as a reference date. If this field is left blank, then the system will use the work date minus one day as vendor aging start date. This field is identical to the one on **Vendor – Summary Aging** report (open via **Tell me Vendor – Summary Aging**).

On InSite dash board:

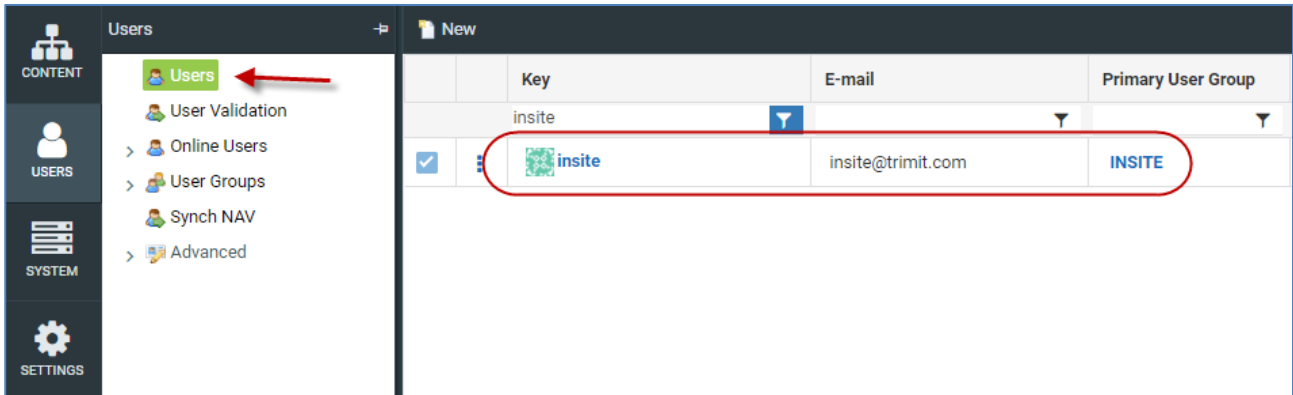
Vendor Aging			
	.. 01/23/19	Balance	
30000 CoolWood Technologies	35,430.00	-93,998.66	
01863656 American Wood Exports	3,020.02	-77,793.33	
01254796 Progressive Home Furnishings	0.00	-107,616.03	
31580305 Beekhuysen BV	0.00	-728.39	
32554455 PURE-LOOK	0.00	-606.99	
Others	-83,669.32	-141,764.18	
Total (LCY)	-45,219.30	-422,507.58	

LENGTH OF PERIOD FOR VENDOR AGING

This field is not mandatory. Use values of date expression format, e.g. 1M, 1Y etc. Set date expression to calculate the length that is based on the start date specified in **Vendor Aging Startdate Formula** field. If the field is left blank, then the date expression is set to default “+1M” by the system. This field is identical to the one on **Vendor – Summary Aging** report (open via **Tell me Vendor – Summary Aging**).

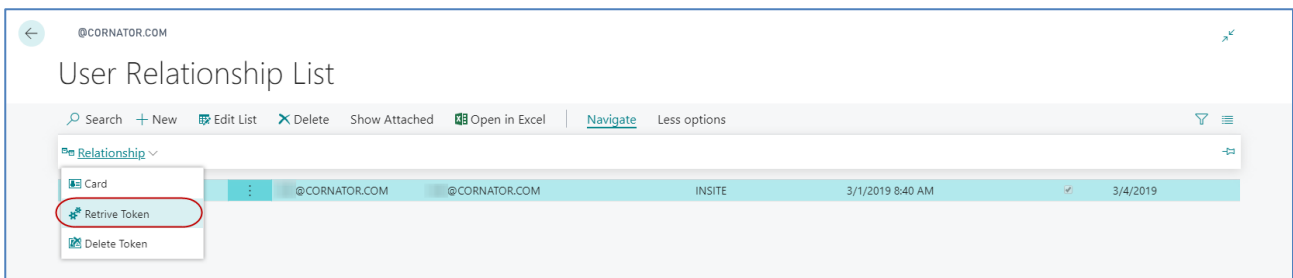
INSITE USER SETUP

A user for the InSite portal has to be created in Modelyn admin.



This user has to be added to InSite user group and synchronized with TRIMIT BC.

In TRIMIT BC, this user has to be related to a **Type NAV User** in **User Relationship Management** (open via **Tell me User Relationship Management**).

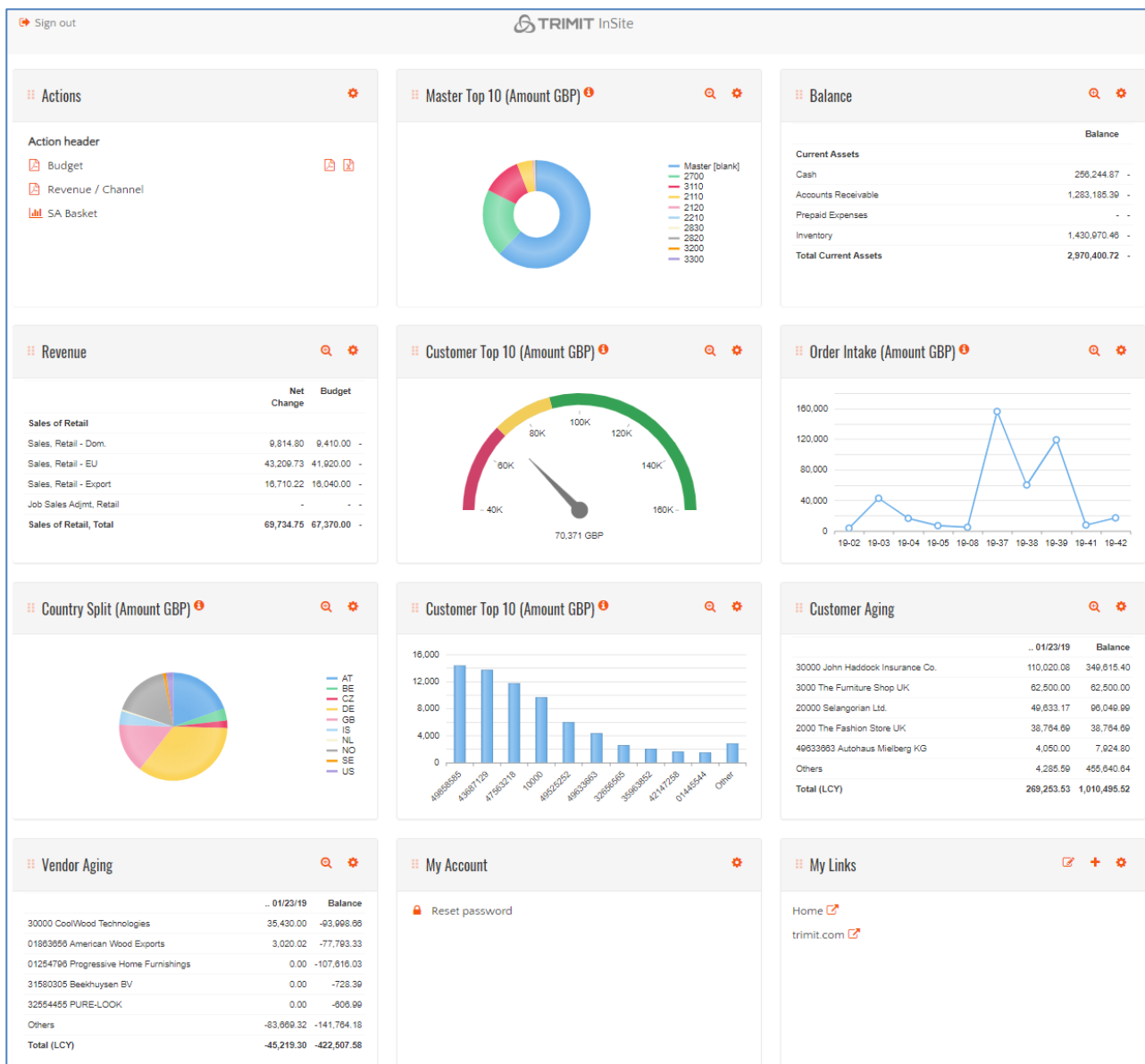


In order to open statistics related portal content from within TRIMIT BC – it is required to retrieve a token in **User Relationship List** page. Read more about retrieving token and resolving portal instances in **White Paper – TRIMIT Portals NAV Setup** and **White Paper – TRIMIT ConnectPortal Instances**.

NOTE: in order to only use InSite portal, it is not required to retrieve a portals token, portal user can only be related to a NAV User in **User Relationship Management** in TRIMIT BC.

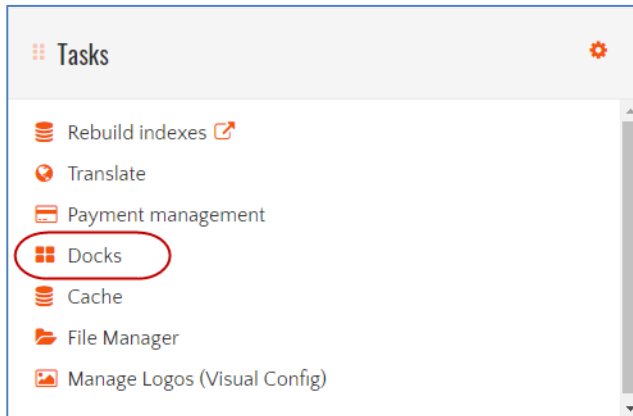
INSITE SETUP ON PORTALS

The InSite portal consists of a single dashboard. The dashboard has the following default docks: **Customer Aging**, **Vendor Aging**, **My Account** and **My Links**. Other dock with statistical data can be added via TRIMIT PIR.

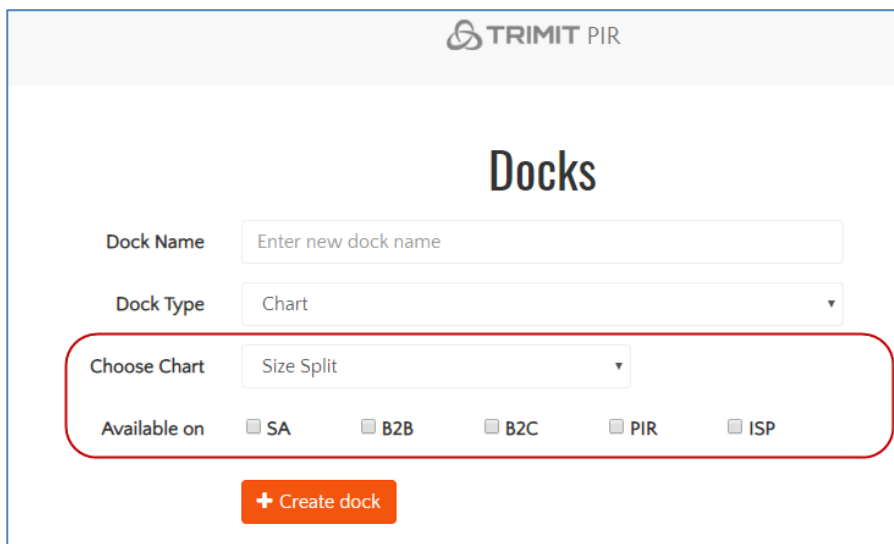


Setting up statistic chart docks for the InSite portal begins from PIR. Here it is needed to create a new dock per each statistical chart or gauge. Read more about TRIMIT PIR in **White Paper – Portals Product Information Repository**.

On a PIR dash board click **Docks** in dock **Tasks**:



On page **Docks** enter a new dock name and select value in field **Dock Type**. Available options are *HTML*, *Chart*, *Gauge* and *Account Schedule*. InSite portal related options are *Chart*, *Gauge* and *Account Schedule*. Selecting one of these options will activate new fields **Choose Chart** and **Available on**:



The screenshot shows the 'Docks' form in the TRIMIT PIR system. It includes fields for 'Dock Name' (with placeholder 'Enter new dock name'), 'Dock Type' (set to 'Chart'), 'Choose Chart' (set to 'Size Split'), and 'Available on' (with checkboxes for SA, B2B, B2C, PIR, and ISP). A red circle highlights the 'Choose Chart' and 'Available on' section. A '+ Create dock' button is at the bottom.

If **Dock Type** is set to *Chart* or *Gauge*, then **Choose Chart** drop down field will display all sales statistics set to be available on portals:



Docks

Dock Name

Dock Type

Chart

Choose Chart

Size Split

Size Split

Amount Per Product Type

Budget Follow-Up

Country Split

Customer Top 10

Drill Down

DrillDown Master

Master Top 10

Order Intake

Available on

PIR

ISP

on

SA

B2B

Sales statistics set to be available on portals in TRIMIT BC:

SALES STATISTICS SETUPS LIST

Search

New

Manage

Report

Show Attached

Open in Excel

Actions

Less options

Views

Filter list by:

Allow on Portals

Yes

Filter...

STATUS	SETUP NO.	NAME	CALCUL... VALUE	DETAILED BY	GROUP BY 1	GROUP BY 2	GROUP BY 3	DEFAULT BY PAGE ACTION	DATA SOURCE	AL... ON PO...	DATA SERIES	FILTE...
Active	BASKET01	Size Split	Revenue	Variant 2				Page	Real-time	✓	1	Yes
Active	BASKET02	Amount Per Product Type	Revenue	Master	Item Statist...			Page	Real-time	✓	1	Yes
Active	BASKET03	Budget Follow-Up	Revenue	Sell-to Cust...				Page	Real-time	✓	2	Yes
Active	COUNT_SP...	Country Split	Revenue	Country/Re...				Page	Statistic Data	✓	1	No
Active	CUST10	Customer Top 10	Revenue	Sell-to Cust...				Page	Statistic Data	✓	1	No
Active	DRILLDOWN	Drill Down	Revenue	Master	Sell-to Cust...			Page	Real-time	✓	0	No
Active	DRILLDOWN...	DrillDown Master	Revenue	Variant 1				Page	Real-time	✓	0	No
Active	MASTERTO...	Master Top 10	Revenue	Master				Page	Statistic Data	✓	1	No
Active	ORDERINT	Order Intake	Order Intake	Week				Page	Statistic Data	✓	1	No

In case if **Dock Type** is set to *Account Schedule* then **Choose Chart** drop down will have the following options:



Docks

Dock Name

Dock Type Account Schedule ▼

Choose Chart Balance ▼ 

Balance

Balance

Revenue

Available on

+ Create dock

Account schedules can be set in **Account Schedule Requests** page under **Tell me Account Schedule Requests**.

ACCOUNT SCHEDULE REQUESTS								
Search + New Manage Process Show Attached Open in Excel Actions Less options								
SETUP NO.		DESCRIPTION	ACC. SCHEDULE NAME	COLUMN LAYOUT NAME	START DATE FORMULA	END DATE FORMULA	ALLOW ON PORTAL	FILTER IN DASHBOA...
BALANCE	:	Balance	M-BALANCE	M-BALANCE	-CY	CY	☒	☒
REVENUE		Revenue	REVENUE	ACT/BUD	-CY	CY	☒	☒

Account schedule dock can only be available on InSite portal.

Read more about account schedule request in a **White Paper – TRIMIT RTC Features 2017**.