

# Triffin App Install Guide for BigCommerce

Straight after installing the Triffin App into BigCommerce you'll be shown our main onboarding window in the Triffin app. The process steps through all our other types of connections where you can pull data from to make the Triffin app offer the most it can. It also offers an opportunity to setup up some of our AI agents to offer overviews of certain data and enables deep dive chats too. However, you can also go through all these steps without connecting or setting up anything if you'd like, just continue through the connections steps and click the "I don't want to use" buttons for the AIs.

1 Connections 2 AI agents 3 Get started

Connections Step 1 of 7

## Welcome to Triffin

**Let's get you connected**

It's time to set up your accounts and connect your systems.

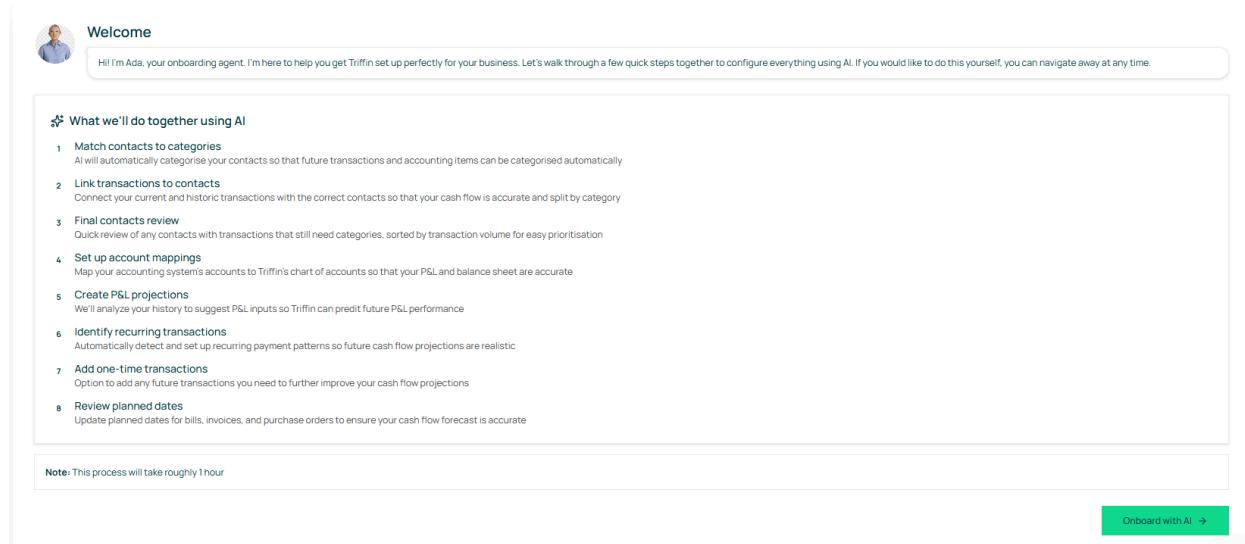
If you don't have all the information to hand, no problem, you can always connect them later in the application.

Need a hand? Speak with an expert

Let's begin



At the end of the onboarding process we explain our AI onboarding agent. Once your connections have completed pulling data then a banner will appear to enter this process - or you can manually start it (see below). This process can help you configure any extra manual steps required to get the most out of the app. Most of the manual tasks required relate to cashflow and management reports, which both rely heavily on an account connection. If you've chosen not to connect an account tool for now, then you can probably skip this step.



Welcome

Hi I'm Ada, your onboarding agent. I'm here to help you get Trifin set up perfectly for your business. Let's walk through a few quick steps together to configure everything using AI. If you would like to do this yourself, you can navigate away at any time.

**What we'll do together using AI**

- 1 Match contacts to categories
- 2 Link transactions to contacts
- 3 Final contacts review
- 4 Set up account mappings
- 5 Create P&L projections
- 6 Identify recurring transactions
- 7 Add one-time transactions
- 8 Review planned dates

Map your accounting system's accounts to Trifin's chart of accounts so that your P&L and balance sheet are accurate

We'll automatically categorise your contacts so that future transactions and accounting items can be categorised automatically

Connect your current and historic transactions with the correct contacts so that your cash flow is accurate and split by category

Quick review of any contacts with transactions that still need categories, sorted by transaction volume for easy prioritisation

Map your accounting system's accounts to Trifin's chart of accounts so that your P&L and balance sheet are accurate

We'll analyze your history to suggest P&L inputs so Trifin can predict future P&L performance

Automatically detect and set up recurring payment patterns so future cash flow projections are realistic

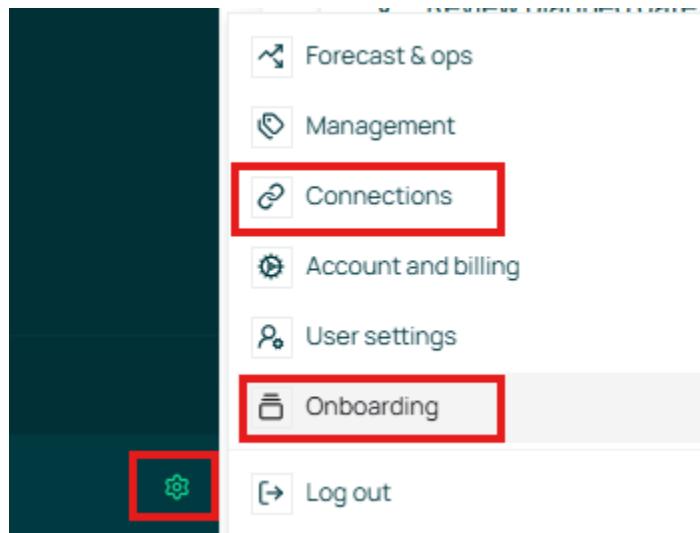
Option to add any future transactions you need to further improve your cash flow projections

Update planned dates for bills, invoices, and purchase orders to ensure your cash flow forecast is accurate

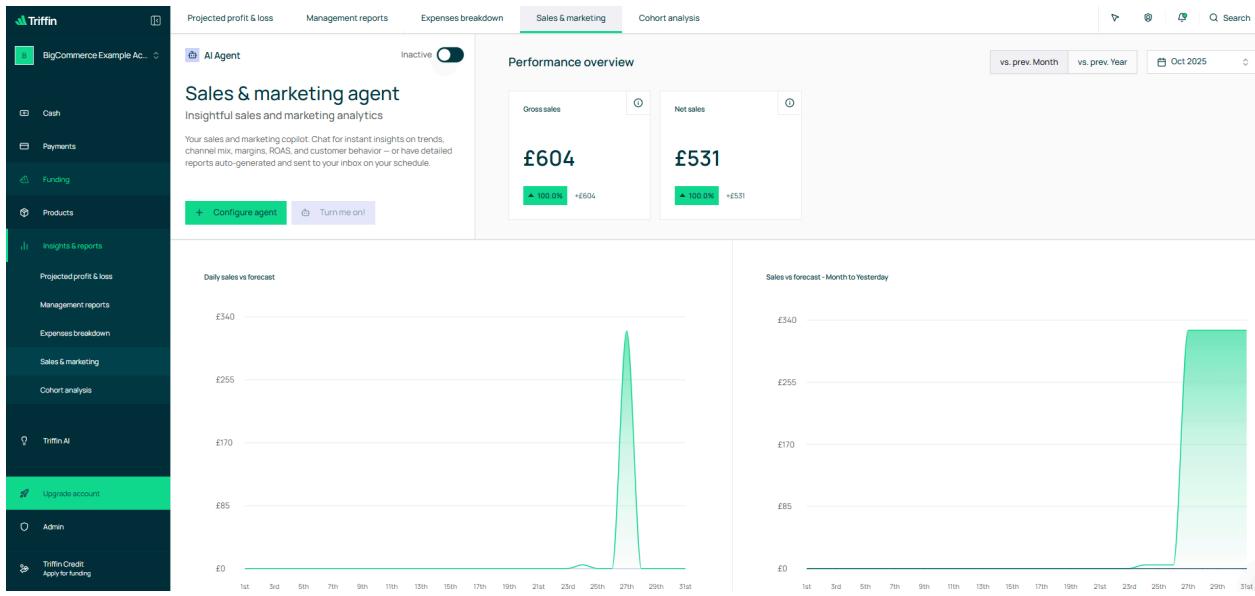
Note: This process will take roughly 1 hour

Onboard with AI →

You can manually reopen either onboarding journey from the cog menu whenever you'd like. You can also configure your connections from this menu (rather than via the onboarding journey). See "Onboarding" and "Connections" below:



If you're looking for the best section of the app to view your BigCommerce data, then that would be in "Insights & reports" -> "Sales & marketing". Here you can see charts and figures describing your sales. If you've added marketing connections these will also be combined with marketing spend to show return on ad spend and other such values. If you'd like you can turn on the sales & marketing AI agent. This will allow you to query your sales data using a natural language, rather than via charts, and allows for different breakdowns than those in the app.



Your sales data will also be used in “Insights & reports” -> “Projected profit & loss”. This page takes your sales, marketing and some other sources data and combines them with some manual profit and loss inputs to project the expected P&L for the current month to date. There is also a profit AI agent that can query this data, although this works better if you also have an accounting connection, so that it can query your historic closed accounts also. If you want to setup the manual profit and loss inputs, you can do so using the “Manage P&L inputs” in the top right or the “P&L Inputs” stage in the AI onboarding, where the AI onboarding agent will assist with the predicted values for some entries.

	MTD	YTD	Amounts	Percentages
Profit and loss	October 2025 (Projected) vs September			
Net Sales	£326	£0	£326	0%
Revenue	£0.04	£0	£0.04	0%
Discounts	(£78)	£0	(£78)	-100%
Returns	(£205)	£0	(£205)	-100%
Shipping	£5	£0	£5	0%
Gross Profit	£326	£0	£326	0%
Contribution Margin	£326	£0	£326	0%

Thank you for installing the Triffin app.  
 We hope our platform is useful for you.  
 Please reach out via intercom in the app if you have any questions.