

Simpro to Power BI Accelerator

Fast, governed reporting from quotes to cash.

Deliver decision-ready dashboards from Simpro with a clean, governed data model in Power BI. Choose a direct API connection or a Tugger managed pipeline. **Start fast. Scale safely.**

Connection options

- **Direct API.** Flexible, frequent refresh with incremental loads and full control in your Azure or Fabric environment.
- **Via Tugger.** Low maintenance extraction with monitoring, retries and managed scheduling. Ideal if you want a simpler pipeline.

What you get

- Prebuilt data model and dashboards across quotes, jobs, labour, materials, purchasing, inventory, invoicing and work in progress.
- Trusted KPIs for profitability, utilisation, margin and cash flow with audit-friendly definitions.
- Automated refresh and health checks so reports stay current without manual effort.
- Row-level security and role-based access aligned to Simpro teams and cost centres.

Key features

- **Dual connectivity.** Choose direct API or Tugger based on your needs. We advise on the best fit.
- **Fast start.** Proven templates for common use cases with room to tailor for your business.
- **Reliable refresh.** Incremental loads, error logging and alerting keep data flowing.
- **History that matters.** Optional snapshots for WIP, schedule changes and margin movement.
- **Extensible by design.** Join with finance and CRM to get an end-to-end picture of performance.
- **Hopton as a Service.** Ongoing enhancements, support and training under a simple monthly plan.

Delivery approach

1. **Discover.** Clarify objectives, KPIs and security requirements.
2. **Connect.** Set up API or Tugger pipeline and land data.
3. **Model.** Build a clean, governed semantic model for Power BI.
4. **Dashboards.** Configure role-specific views for finance, operations and leadership.
5. **Prove value.** Validate with real data and refine based on feedback.
6. **Operate.** Move into managed service for improvements and support.

Security and deployment

- **Your environment, or ours.** Deploy in your subscription or a Hopton-managed environment.
- **Data access control.** Row-level security aligned to Simpro roles and cost centres.
- **Audit ready.** Clear lineage, change control and refresh logs.

Ready to see it with your data? Book a 30-minute scoping call.

Hopton Analytics. High trust. Insight led. Practical decision intelligence.