



POWERED BY  DUG

# DYNAMICS CON LIVE

MAY 2024



**UNVEILING THE ROBUSTNESS OF  
MICROSOFT DYNAMICS 365 BUSINESS  
CENTRAL'S INTERCOMPANY FEATURES**



# Today's Presenters



**Claude Rustom**

Senior Application Consultant

450-954-4633

[Crustom@innovia.com](mailto:Crustom@innovia.com)



**Holly Kutil**

Customer Success Manager

216-202-7024

[Hkutil@innovia.com](mailto:Hkutil@innovia.com)





Multiple Transactions?

## Main Benefits?

Subsidiaries in multiple international markets or regions?

What do you think?

One User working on Different Companies?

Businesses with more than one legal entity??

Short/Lack in Employees?

# MAIN BENEFITS



Spend less time

Automate more

Manage in more details



# KEY FEATURE

## **Intercompany Transaction**

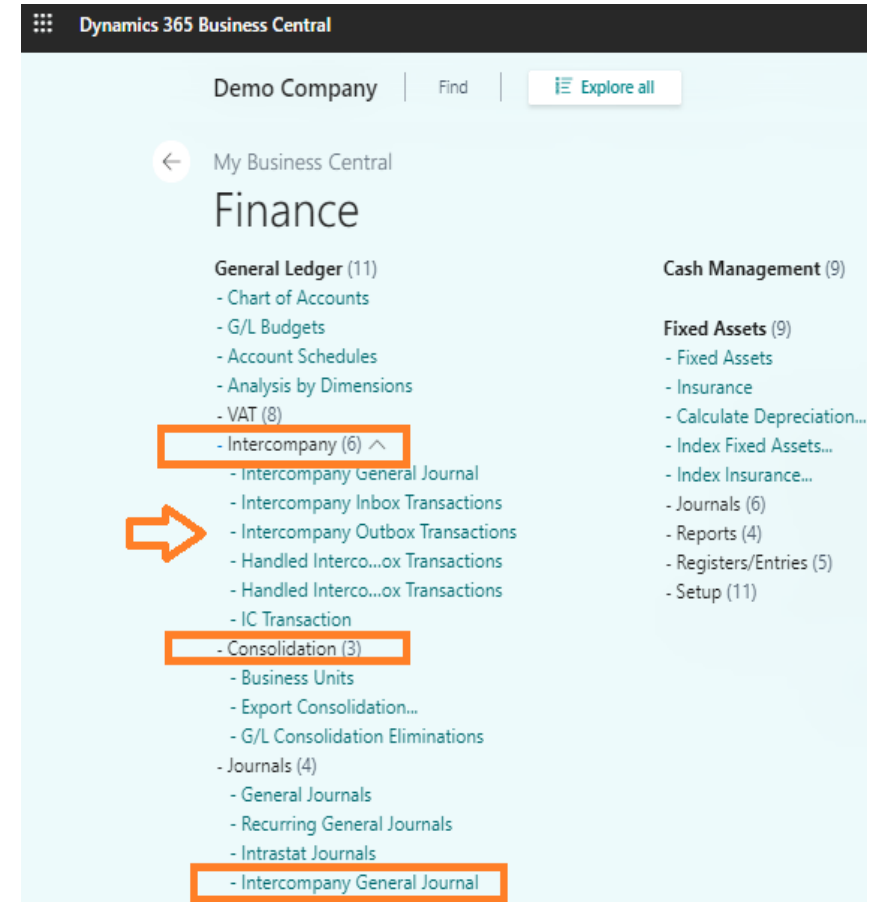


- ✓ Instant transaction execution
- ✓ Inventory search across multiple companies
- ✓ Order modifications across multiple companies
- ✓ Cross-company posting
- ✓ Automated posting of Sales Orders
- ✓ Automated posting of Intercompany journals



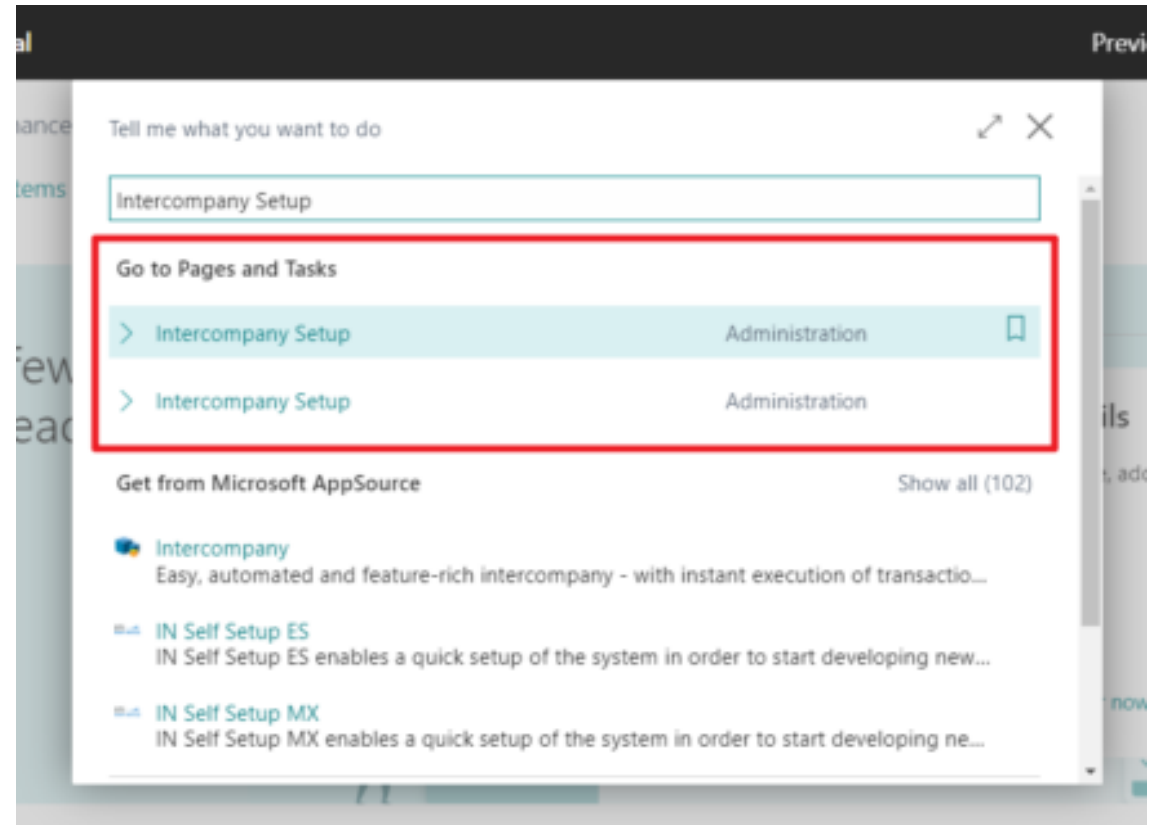
# IMPORTANT STEPS FOR BC - IC

- ✓ Setup Intercompany Chart Of Account
- ✓ Setup Intercompany Dimensions
- ✓ Setup Intercompany Partners as Customers and Vendors
- ✓ Specify the Bank Accounts to use for the IC Partners
- ✓ Setup Which item you want to use:
  - ✓ Item No.
  - ✓ Common Item Number
  - ✓ Item Reference



# INTERCOMPANY SETUP

- ✓ Fill in the IC Information
  - ✓ IC Partner Code
  - ✓ IC Inbox Type
  - ✓ Auto. Send Transactions
  - ✓ Transaction Notifications
  - ✓ Default IC Gen. Jnl. Template
  - ✓ Default IC Gen. Jnl. Batch







✓ Saved



# Intercompany Setup

[Add IC Partner](#) [IC Chart of Accounts](#) [IC Dimensions](#) | [Actions](#) [Automate](#) [Fewer options](#)



## General

IC Partner Code .....

IC Inbox Type .....

Synchronisation Partner .....

IC Inbox Details .....

Auto. Send Transactions .....

Transaction Notifications .....

Default IC Gen. Int. Template .....

Default IC Gen. ←



✓ Saved



**Intercompany Partners** [+ Add](#) [Remove](#) [New Line](#) [Delete Line](#)

Code ↑	Name	Country/Region Code	Currency Code	Inbox Type	Inbox Details
→ <a href="#">ICP20</a>	Cronus Cardoxy Sales		DKK	File Location	
<a href="#">ICP30</a>	Cronus Cardoxy Procurement		EUR	File Location	

# ICP20

[Dimensions](#) [Bank Accounts](#) [Connect Externally Setup](#) | [Related](#) [Automate](#) [Fewer options](#)

## General

Show more

Transfer Type .....

Country/Region Code .....

Folder Path .....

Currency Code .....

Code .....

Auto. Accept Transacti...

Name .....

Blocked .....

## Sales Transaction

Customer No. ....

Outbound Sales Item ...

Receivables Account ...

## Purchase Transaction

Vendor No. ....

Outbound Purch. It...

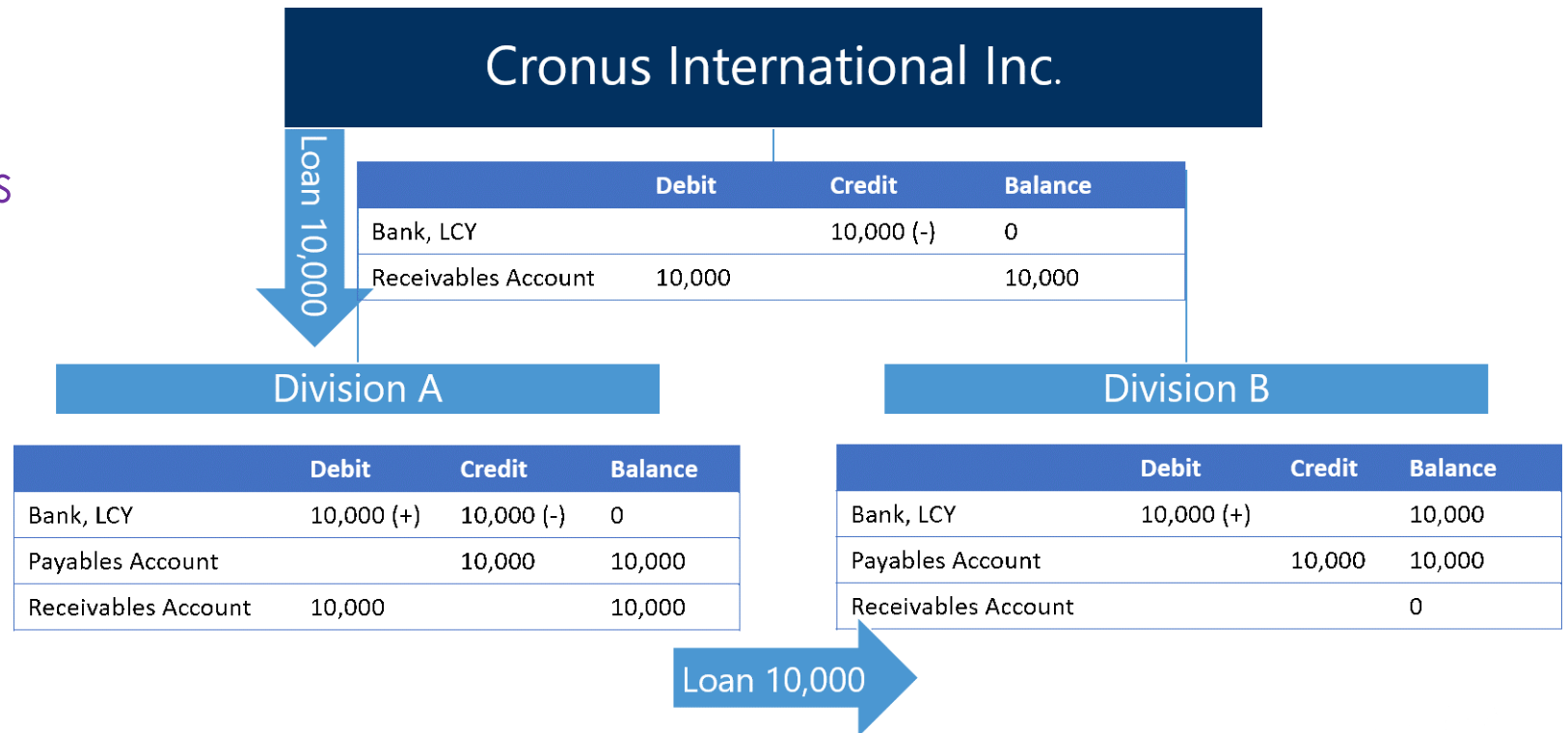
Payables Account .....

Cost Distribution in \$ .....



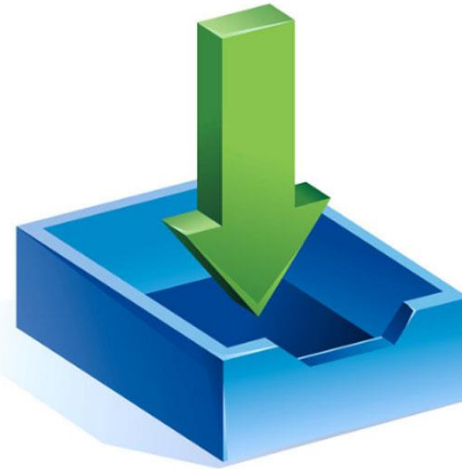
# INTERCOMPANY TRANSACTIONS

- ✓ General journal entries
- ✓ Purchase and sales orders
- ✓ Purchase and sales invoices
- ✓ Credit memos
- ✓ Return orders



# MANAGE THE INTERCOMPANY INBOX AND OUTBOX

- ✓ Intercompany Inbox Transactions
- ✓ Handled IC Inbox Transactions
- ✓ Intercompany Outbox Transactions
- ✓ Handled IC Outbox Transactions
- ✓ What can we do in the Above Transactions:
- ✓ Accept Transaction, Reject Transaction,
- ✓ Return to inbox and Recreate Inbox
- ✓ Transactions



# MAKE INTERCOMPANY TRANSACTIONS ACROSS BC ENVIRONMENTS



- ✓ Do you have multiple companies in Multiple Countries?
  - ✓ Do You have Multiple Tenants?
  - ✓ Are you doing transactions between these Companies/Tenants?
- \* Now It's easy to set up an intercompany partnership between companies that operate in different Business Central environments.





# How to do that?

Intercompany Partner

ICP20

Dimensions Bank Accounts **Connect Externally Setup** Related Automate Fewer options

### IC Partner Cross-Environment Setup

**Welcome**

This setup guide will help you create a connection to a partner company in a different environment. Before you continue, make sure that the partner has enabled this extension in their company. You will need some information about their environment.

**Review the terms and conditions**

By enabling this feature, you consent to your data being shared with a Microsoft service that might be outside of your organization's selected geographic boundaries and might have different compliance and security standards than Microsoft Dynamics Business Central. Your privacy is important to us, and you can choose whether to share data with the service. To learn more, follow the link below.

I accept

[Privacy and Cookies](#)

Back Next Finish

### IC Partner Cross-Environment Setup

**Your connection details**

Provide some information about the partner's company that you will link to. For reference, this is the information for your company.

Current Connection URL .....

Current Company ID .....

Intercompany ID .....

Company Name .....

**Intercompany Partner's connection details**

Provide the information below to create an intercompany partner from a different environment.

IC Partner's Connection URL .. \*

IC Partner's Company ID .....

Back Next Finish





Q & A

Thank you for joining us today!

Connect With Us



Claude Rustom



Holly Kutil





Q&A