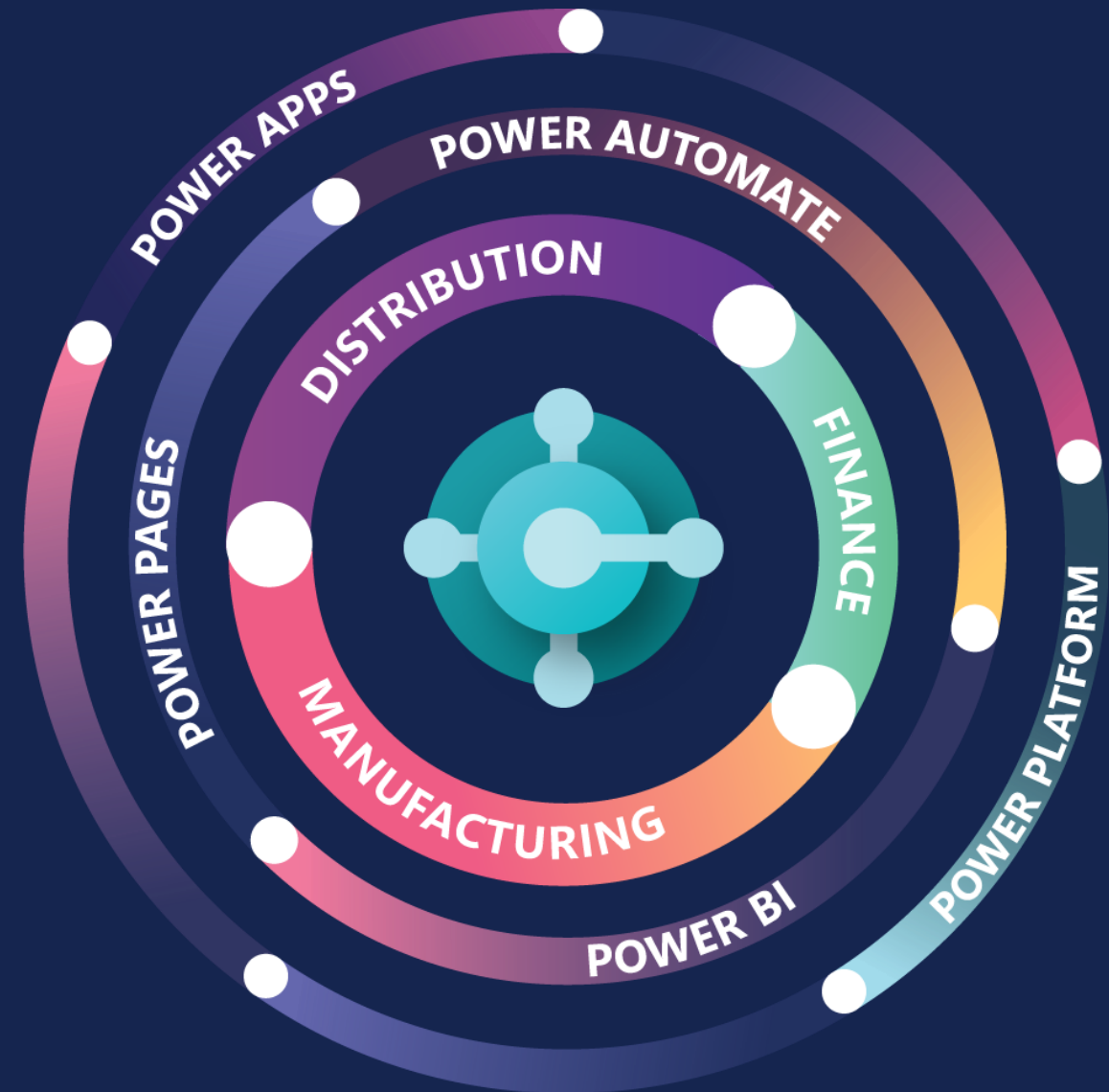


BUSINESS CENTRAL connect

Inconsistent or missing data
across multiple businesses –
is it costing you big?



15th & 16th OCTOBER 2024



Can you hear me?



Is everything clear?



~ 45 mins



Q & A



Hi!

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Multiple Businesses?

- Scenarios
 - Localised trading company non-UK
 - Non-localised trading company
 - New UK company

What we are going to cover

- Creating a new Company from scratch – LIVE demo!
- Trading between companies (aka I/C)
- Document Layout example



Company Creation

What we are going to do!

- Create a 'blank' BC company
- Set up 'Master Data Management'
- Process Initial Data Sync
- Review Process
- Import a master file example



Do!

Summary

- Creation of new Company
- Extended features of Master Data Setup
- Useful Data consistency featured

- Over to James



Intercompany

What is Intercompany

Salient points:

- Why is Intercompany used
 - What are Intercompany Transactions
 - Typical use of Intercompany





What does Business Central Intercompany Offer?

Key Features

- Data Management
 - Streamline Order Process
 - Streamline Sales Process
- Automation
 - Improved efficiency
 - Decrease human error
 - Invoicing, Posting and Reconciling



Demonstration of Order Process

Scenario

I need to order stock from our Supply Depo to fulfil the demand from our customers.

To do this we are going order stock from a Intercompany vendor. Receive then reconcile the payment.

Intercompany Setup

[Add IC Partner](#) [IC Chart of Accounts](#) [IC Dimensions](#) | [More options](#)

General

IC Partner Code	SALES UK	Auto. Send Transactions	<input checked="" type="checkbox"/>
IC Inbox Type	Database	Transaction Notifications	<input checked="" type="checkbox"/>
Synchronisation Partner	SUPPLY UK	Default IC Gen. Jnl. Template	INTERCOMP
IC Inbox Details		Default IC Gen. Jnl. Batch	DEFAULT

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

Intercompany Setup

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General

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

Code ↑	Name	Country/Regi... Code	Currency Code	Inbox Type	Inbox Details	Auto. Acc... Tran...	Cust
→ SALES UK	STD Sales	GB		Database	STD Sales	<input type="checkbox"/>	£00
STD ITEM REF	STD ITEM REF	GB		Database	STD ITEM REF	<input type="checkbox"/>	C00



Extending /Automating Business Central Intercompany

Key Points

Abakion Intercompany

- Used the same documents for Intercompany Transactions
- Improves the Intercompany Process by increasing automation
- ISV solution
- Automate vs Control

Demonstration of Order Process

- Scenario
 - Order stock from our Sister Company to fulfil the demand from our customers
 - To do this we are going order stock from an Intercompany vendor
 - Receive then reconcile the payment

Intercompany Setup

[Add IC Partner](#) [IC Chart of Accounts](#) [IC Dimensions](#) | [More options](#)

General

IC Partner Code IC Company Type

Dimension Handling ...

Sales

Auto Release Combined Invoice

Purchase

Default Buy-From Ve... Receipt posting date ...

Automatics

Auto Transfer Outbox... Auto Accept Outbox ...

Features

IC for Web Orders

Code ↑	Name	Country/Regi... Code	Currency Code	Inbox Type	Inbox Details
→ ABSALES	⋮ Sales Company 1			Database	
CRSALES	Cross Enviroments Sales			Database	

Intercompany Setup

[Add IC Partner](#) [IC Chart of Accounts](#) [IC Dimensions](#) | [More options](#)

General

IC Partner Code IC Company Type

Dimension Handling ...

Sales

Auto Release Combined Invoice

Purchase

Default Buy-From Ve... Receipt posting date ...

Automatics

Auto Transfer Outbox... Auto Accept Outbox ...

Features

IC for Web Orders

Code ↑	Name	Country/Regi... Code	Currency Code	Inbox Type	Inbox Details
→ ABSUPPLY	⋮ IC Supplier 1			Database	

What we covered

- Intercompany & Business Central
- Automating/Extending Business Central Intercompany

Useful Data consistency features

- Copy Item
- Templates?
- Item Categories
- Item Attributes
- Clever Data Validation
- CoPilot – e.g. import Sales Order Lines



Document Layouts

Key Points

Microsoft will phase out RDLC reports and supersede with Document Layouts (Word/Excel)

The Key Features of the layout are:

- Standard Word/Excel rules apply
- Ability to add conditions to the documents
- New features added in BC frequently

Labels are currently RDLC – you need to see Clever Labels!



Q&A

Resources

Master Data Setup

<https://learn.microsoft.com/en-us/dynamics365/business-central/admin-set-up-data-sync>

Business Central Intercompany

<https://learn.microsoft.com/en-us/dynamics365/business-central/intercompany-how-setup>

Item Copy

<https://learn.microsoft.com/en-gb/dynamics365/business-central/inventory-how-copy-items>

Templates

[Use new templates with same flexibility as configuration templates - Dynamics 365 Release Plan | Microsoft Learn](#)

Thank you.

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