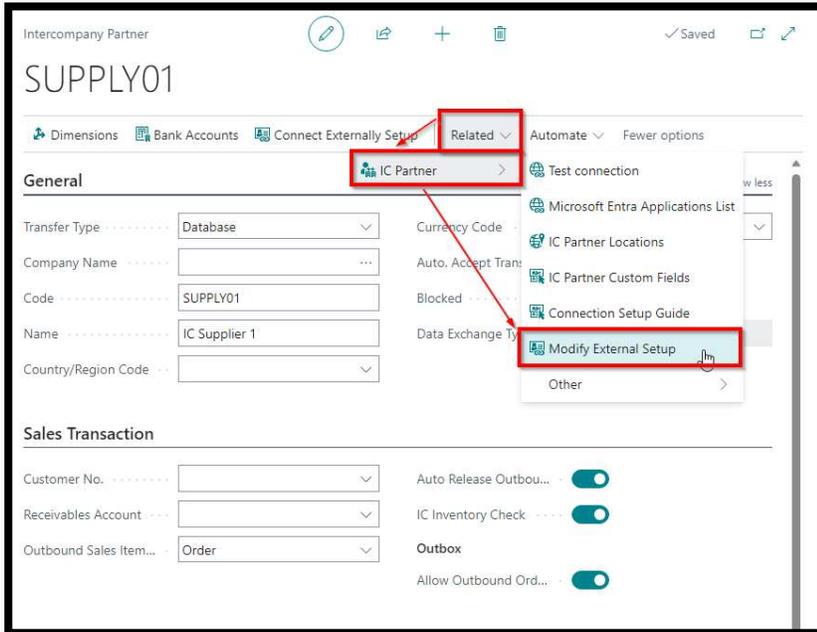


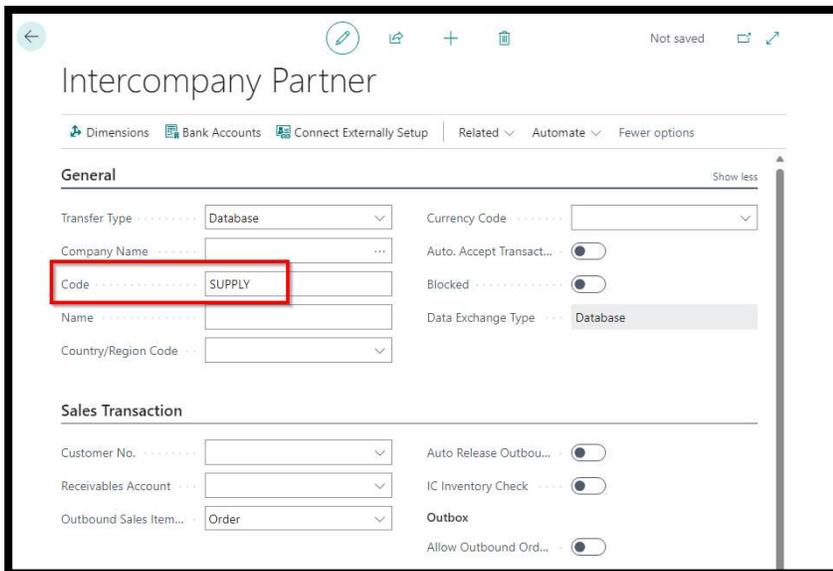
Setup new Intercompany Partners with Connect Externally Setup (v23)

When upgrading the Intercompany app, the existing setup for existing intercompany partners' connection will be transferred to the new setup fields.

You will be able to see / modify the existing setup for the partner here:



If you want to setup connection for new intercompany partners, create a new partner card and populate the Code field:



Follow the setup steps in the Connect Externally Setup:

The screenshot shows the 'Intercompany Partner' setup page for a partner named 'SUPPLY'. The 'Connect Externally Setup' tab is highlighted with a red box. The page is divided into two main sections: 'General' and 'Sales Transaction'. In the 'General' section, the 'Transfer Type' is set to 'Database', 'Code' is 'SUPPLY', and 'Data Exchange Type' is 'Database'. In the 'Sales Transaction' section, 'Outbound Sales Item...' is set to 'Order'. Several toggle switches are visible, including 'Auto. Accept Transact...', 'Blocked', 'Auto Release Outbou...', 'IC Inventory Check', and 'Allow Outbound Ord...'. The 'Connect Externally Setup' tab is highlighted with a red box.

The screenshot shows the 'IC Partner Web Service Setup' welcome screen. It contains a 'Welcome' message and a 'Let's get started' section. At the bottom, there are three buttons: 'Back', 'Next', and 'Finish'. The 'Next' button is highlighted with a red box.

IC Partner Web Service 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.

Let's get started

Choose Next to start creating a connection to a partner in a different environment.

Back **Next** Finish

IC Partner Web Service 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 Web Service Instance

Current Web Service Tenant

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 Web Service Instance *

IC Partner's Web Service Tenant

IC Partner's Company Name *

Authentication details
Provide information about the Microsoft Entra authentication application that will be used to connect with the partner.

Client ID

Client Secret

Token Endpoint

Redirect URL

Populate the mandatory fields under Intercompany Partner's connection details.

You can find the values to use here *in your Partner Company*. You can copy the values from the greyed out fields on the IC Partner Web Service Setup page under Your connection details in your partner company:

IC Partner Web Service 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 Web Service Instance

Current Web Service Tenant

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 Web Service Instance *

IC Partner's Web Service Tenant

IC Partner's Intercompany ID

IC Partner's Company Name *

Authentication details
Provide information about the Microsoft Entra authentication application that will be used to connect with the partner.

Client ID

Client Secret

Token Endpoint

Redirect URL

Populate the Client ID and Client Secret fields under Authentication Details and click on Next.

IC Partner Web Service 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 Web Service Instance

Current Web Service Tenant

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 Web Service Instance

IC Partner's Web Service Tenant

IC Partner's Company Name

Authentication details
Provide information about the Microsoft Entra authentication application that will be used to connect with the partner.

Client ID

Client Secret

Token Endpoint

Redirect URL

Back **Next** Finish

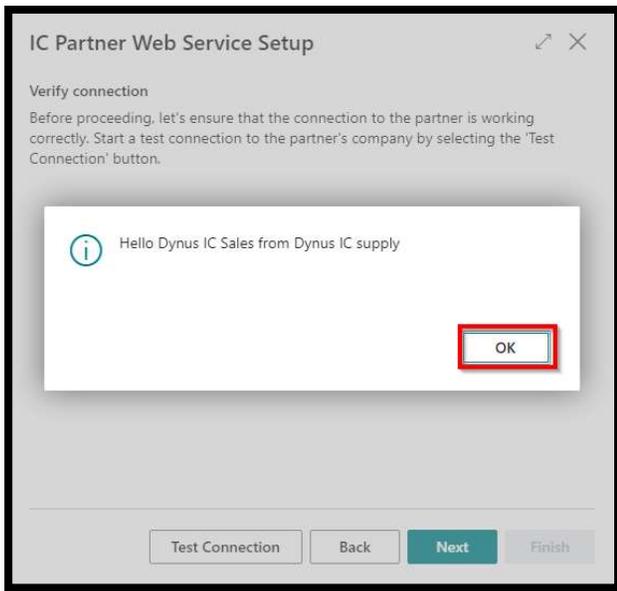
Test the connection. *Be aware that you can only finish the setup if the connection succeeds. And the info that you have entered in the previous steps will only be saved once you have clicked on Finish:*

IC Partner Web Service Setup

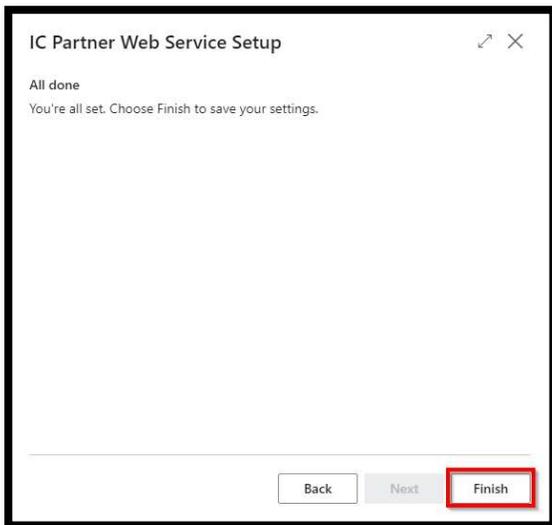
Verify connection
Before proceeding, let's ensure that the connection to the partner is working correctly. Start a test connection to the partner's company by selecting the 'Test Connection' button.

Test Connection Back Next Finish

Click on OK on the connection message and then click on Next:



Now you can click on Finish, which will save your entered values in the setup guide:



Now you are ready to specify the setup details for your Intercompany Partner with a working connection:

The screenshot shows the 'Intercompany Partner' setup page for a partner named 'SUPPLY'. The page is divided into several sections: General, Sales Transaction, Purchase Transaction, and Web Service. The 'General' section includes fields for Transfer Type (Database), Company Name (Dymus IC supply), Code (SUPPLY), Name (Dymus IC supply), and Country/Region Code. It also has toggle switches for Auto Accept Transaction, Blocked, and Data Exchange Type (API). The 'Sales Transaction' section includes fields for Customer No., Receivables Account, and Outbound Sales Item (Order), along with toggle switches for Auto Release Outbound, IC Inventory Check, Outbox, and Allow Outbound Order. The 'Purchase Transaction' section includes fields for Vendor No., Payables Account, Outbound Purch. Item (Order), and Cost Distribution in LCY, along with toggle switches for Transfer P/I Line Desc., IC Discount % (0.00), IC Discount Type (Purchase Price), and Post Purch. Receipt. The 'Web Service' section includes a field for Auto import inbox (No Handling).

If you want to skip the Connect Externally Setup guide, you can also go directly to the Modify External Setup page and enter the values. From here you can optionally test the connection:

The screenshot shows the 'Intercompany External Setup - TEST RNI' dialog box. The dialog box is overlaid on the 'Intercompany Partner' setup page. It contains the following fields: IC Partner Code (TEST RNI), IC Partner's Connection URL (https://api.businesscentral.dynamics.com/v2.0/da), IC Partner's Web Service Instance (Hera), IC Partner's Web Service Tenant, IC Partner's Company ID (Dymus IC supply), Client ID (80e53902-55e5-445d-884e-99f6a32acc31), Client Secret (masked with dots), Token Endpoint, and Redirect URL. Below the fields, there is a 'Verify connection' section with the text 'Before proceeding, let's ensure that the connection to the partner is working correctly.' and a button labeled 'Click here to test the connection.' which is highlighted with a red box. At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons.