

# Table of Contents

## Dokumentacja

[Intercompany Insights](#)

[Installing Intercompany Insights](#)

[Setting up Intercompany Insights](#)

[Working with Intercompany Insights](#)

[Release Notes](#)

# Intercompany Insights

Intercompany Insights is an extension of the Inventory functionality in Dynamics 365 Business Central that allows you to check and view item availability in remote companies.

The solution provides global companies or groups of companies that operate and work across multiple locations, databases and tenants with real-time and transparent overviews of item availability and effective filtering options.

The core of the Inventory Insights functionality consists in the possibility to check inventory availability per item or item variant in the companies selected. In addition, the app enables you to view item quantity on sales, purchase and manufacturing documents. Inventory availability information can be displayed from sales and purchase documents and in the inventory journal.

Another information that can be checked in remote company, are the customer balances.

TO	SEE
Install the application	<a href="#">Installing Intercompany Insights</a>
Learn more about how to set up the application to enable multiple companies to share and view item availability information	<a href="#">Setting up Intercompany Insights</a>
Read about how to use the application in order to send or receive item availability information	<a href="#">Working with Intercompany Insights</a>

Working with Intercompany Insights ensures the following benefits:

- enhanced inventory management functionality for multi-company organizations working with Dynamics 365 Business Central,
- smooth integration with the Inventory area in Dynamics 365 Business Central,
- improved control and insight into inventory levels in each location within a group,
- fast inventory availability calculation per subsidiary, location, item and item variant,
- accurate response to customer requests based on the up-to-date overview of inventory levels,
- streamlined replenishment and inventory transfers between locations/subsidiaries.
- reduction of slow-moving stock levels.

## See Also

[IT.integro business solutions](#)

# Installing Intercompany Insights

This article shows the application installation.

## Requirements

1. BC Instance with NavUserPassword authentication must exist.

Additional Requirements for onPremise installation:

- There must be a service account for the NUP instance (can be the same as for other instances). It must have the "Log on as a Service" permission.
- There must be SSL certificate installed on and trusted by each communicating server. It can be either an external CA certificate, or a self-signed added as trusted on each server.
- The service account must have permissions to the certificate private key.

See more at [Authentication and Credential Types for Dynamics 365 Business Central](#).

2. User account with password or Web Service Access Key, that has permissions to both companies, or multiple users.

## OnPremise Installation

It must be first published and synchronized using [Powershell Cmdlets](#)

Then it can be installed from the **Extension Management** page.

## OnCloud Installation

The application must be added from the [AppSource](#).

## Sandbox Installation

In sandbox environment application can be both published and installed from the **Extension Management** page.

1. Upload the file as an extension. Choose **Extensions, Manage** and **Upload Extension**:

Select the file in the **Select .app** file field, then select the **Accept** toggle button and **Deploy**:

2. Wait until the deployment of the extension is completed.

# Setting up Intercompany Insights

This article describes the general setup for the Intercompany Insights application, including the settings for item availability information, endpoints and locations.

## Endpoints

*Endpoints* are the remote companies from which data is received. Endpoint setup requires a web service address and credentials.

To access the endpoint list, choose the  icon and enter **ICI Endpoints** and select the related link.

TELL ME WHAT YOU WANT TO DO



ici endpoints

### Go to Pages and Tasks

> ICI Endpoints

Administration

Choose the **New** or **Edit** actions to open the **ICI Endpoint** card page:

## ICI Endpoint

Actions

### General

Code

Web Services Authent... Basic

Name

Web Services Userna...

Enabled

Web Services Password

Web Services Address

The **ICI Endpoint** page contains the following fields:

FIELD	EXPLANATION
<b>Code</b>	Specifies a unique code of the endpoint.
<b>Name</b>	Specifies an additional description for the endpoint.
<b>Enabled</b>	By unmarking this field, you can disable the endpoint without removing it from the endpoint list.
<b>Web Services Address</b>	Specifies an address of the web services published in the remote company.
<b>Web Services Authentication</b>	Specifies the authentication type used for the remote company.

FIELD	EXPLANATION
<b>Web Services Username</b>	Specifies the name of a user in the remote company.
<b>Web Services Password</b>	Specifies the password of the remote user.
<b>LY Code</b>	Specifies the currency of the remote company. Used when exchanging customer balances.

To check the web services address, open the **Web Services** page in the remote company and copy the content of the **OData V4 URL** field from the lines with *ICIAvailabilityWS* in the **Service Name** field.

← WEB SERVICES | WORK DATE: 27.01.2022

Search + New Edit List Delete Reload Open in Excel Actions

Service Name ↑	All Ten...	Publ...	OData V4 URL
ICIAvailabilityWS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	http://newcontainer:7048/BC/ODataV4/Company('CRONUS%20International%20

## General Setup

By defining the setup, you can specify if and what information should be sent if a company receives a web service call for availability information.

To access the setup card, choose the  icon and enter **ICI Setup** in search engine.

←

# ICI Setup

## General

Enable ICI Availability

Include Location Code

Include Empty Location Code

Show Only Non-zero ...

The following fields are available on the **ICI Setup** card:

FIELD	EXPLANATION
<b>Enable ICI Availability</b>	Specifies if the company can send the availability information when requested.
<b>Include Location Code</b>	Specifies if the availability information that is sent should be split per location code or shown as a total value.
<b>Include Empty Location Code</b>	Specifies if entries with no value in the <b>Location Code</b> field should be included.

FIELD	EXPLANATION
<b>Show Only Non-zero Availability</b>	Specifies if information about items that are not available should be sent.

## Locations

To specify which locations should be included in the availability information that is sent, use the new **Include in ICI Availability** field that has been added on the **Location Card** page.

# Location Card

Process   Location   |   Navigate   Fewer options

## General

Code ..... \*

Use As In-Transit .....

Name .....

**Include in ICI Availabi...**

## See also

[Working with Intercompany Insights](#)

[Key Usage Scenarios](#)

# Working with Intercompany Insights

This article describes the features of the Intercompany Insights application. It guides you on how to use the **Availability Overview** page and describes the enhancements added on the sales and purchase card pages.

## ICI Availability Overview

**ICI Availability Overview** is a page that stores and shows detailed information about items that are kept in remote companies. It enables you to check the availability of items in remote locations. To ensure the the availability data is up-to-date and refresh the page by using a web service call, choose the **Refresh** action.

← ICI AVAILABILITY OVERVIEW | WORK DATE: 27.01.2022 🔍 📄 🔄

🔍 Search 📊 Calculate 📄 Open in Excel | Actions Fewer options 🔍 ☰

ICI Endpoint Name	Item No. ↑	Variant Code ↑	Location Code ↑	Base Unit of Measure	Availability	Inventory	Gross Requirement	Planned Order Receipt	Scheduled Receipt	Planned Order Releases	Last Check Date & Time	Qty. on Component Lines	Qty.
Cronus Domestic	1000			PCS	934,00	1 070,00	242,00	2,00	104,00	2,00	01.06.2020 16:28	2,00	
Cronus Domestic	1000	1		PCS	108,00	120,00	12,00	0,00	0,00	0,00	01.06.2020 16:28	0,00	
Cronus Domestic	1000	2		PCS	20,00	20,00	0,00	0,00	0,00	0,00	01.06.2020 16:28	0,00	
Cronus Domestic	1000	3		PCS	30,00	30,00	0,00	0,00	0,00	0,00	01.06.2020 16:28	0,00	
Cronus Domestic	1001			PCS	894,00	995,00	104,00	0,00	3,00	0,00	01.06.2020 16:28	0,00	
Cronus Domestic	1100			PCS	18,00	152,00	136,00	0,00	2,00	0,00	01.06.2020 16:28	31,00	
Cronus Domestic	1110			PCS	380,00	400,00	20,00	0,00	0,00	0,00	01.06.2020 16:28	0,00	
Cronus Domestic	1120			PCS	10 010,00	10 010,00	10,00	0,00	10,00	0,00	01.06.2020 16:28	0,00	
CRONUS Internatio...	1000		RED	PCS	100,00	100,00	0,00	0,00	0,00	0,00	01.06.2020 16:28	0,00	
CRONUS Internatio...	1000		YELLOW	PCS	30,00	30,00	0,00	0,00	0,00	0,00	01.06.2020 16:28	0,00	
CRONUS Internatio...	1000	1		PCS	12,00	0,00	0,00	0,00	12,00	0,00	01.06.2020 16:28	0,00	
CRONUS Internatio...	1001			PCS	6,00	5,00	3,00	0,00	4,00	0,00	01.06.2020 16:28	0,00	
CRONUS Internatio...	1100			PCS	116,00	152,00	36,00	0,00	0,00	0,00	01.06.2020 16:28	31,00	
CRONUS Internatio...	1110			PCS	400,00	400,00	0,00	0,00	0,00	0,00	01.06.2020 16:28	0,00	
CRONUS Internatio...	1120			PCS	9 980,00	9 990,00	10,00	0,00	0,00	0,00	01.06.2020 16:28	0,00	

The following fields are available on the **ICI Availability Overview** page:

FIELD	EXPLANATION
<b>ICI Endpoint Name</b>	Specifies the name of a remote endpoint. Select the field to view or edit the information.
<b>Item No., Variant Code</b>	Specifies the identifier of an item in the remote company.
<b>Location Code</b>	The field is filled in only if the remote company is set to send its location code.
<b>Base Unit of Measure</b>	Specifies a base unit of measure used in the remote company.
<b>Availability</b>	The value in this field is calculated by using the following formula: <i>Inventory + Scheduled/Planned Receipt - Gross Requirement</i> .
<b>Inventory</b>	Specifies the inventory quantity value on the basis of the respective item card in the remote company.
<b>Gross Requirement, Planned Order Receipt, Scheduled Receipt, Planned Order Releases</b>	The values in in these fields are calculated as on the <b>Inventory Availability by Variant</b> or <b>Inventory Availability by Location</b> pages
<b>Last Check Date &amp; Time</b>	Specifies the time of the last data refresh.

FIELD	EXPLANATION
Different <b>Quantity</b> fields	All further fields are filled in on the basis of the respective fields on the remote item card.

## Sales and Purchase Document Cards

Inventory Insights offers some enhancements within sales and purchase document cards available in Dynamics 365 Business Central. The improvements include:

1. New actions that enable you to view and refresh the **ICI Availability Overview** page.
2. A new field showing the total intercompany availability for an item/variant combination in the selected line. By selecting the field, you can access the overview page.
3. A new FactBox with availability details for an item/variant combination in the selected line. The FactBox also includes the refresh action.

The screenshot displays the Dynamics 365 Business Central interface for a sales order. The top navigation bar shows 'SALES ORDER | WORK DATE: 27.01.2022'. The main section is titled '1004 · Spotsmeyer's Furnishings'. Below this, there are tabs for 'Process', 'Release', 'Posting', 'Prepare', 'Order', 'Request Approval', 'Print/Send', 'Navigate', 'Actions', and 'Fewer options'. The 'General' section contains fields for Customer Name (Spotsmeyer's Furnis), Contact (Mr. Mike Nash), Posting Date (27.01.2022), Order Date (27.01.2022), Due Date (31.01.2022), and IIC Status Code. The 'Lines' section shows a table with columns for Item, Event, Period, Variant, Location, and BOM Level. A tooltip for 'ICI Availability' is visible, stating 'The sum of ICI availability from endpoints.' and 'Press Ctrl+F1 to learn more'. The 'Details' section on the right is titled 'ICI Availability' and contains a 'SUMMARY' table with the following data:

SUMMARY	
Item No.	1001
Variant Code	
Availability	<b>900,00</b>
Inventory	1 000,00
Gross Requirement	107,00
Planned Order Receipt	0,00
Scheduled Receipt	7,00
Planned Order Releases	0,00
Last Check Date & Time	01.06.2020 16:28

Below the summary, there are sections for 'DETAILS', 'GROSS REQUIREMENT', 'PLANNED ORDER RECEIPT', and 'SCHEDULED RECEIPT'. The 'GROSS REQUIREMENT' section shows: Qty. on Sales Orders (107,00), Qty. on Purchase Orders (1,00), Qty. on Service Order (0,00), Qty. on Job Order (0,00), Scheduled Need (Qty.) (0,00), Trans. Ord. Shipment (Qty.) (0,00), Planning Issues (Qty.) (0,00), Qty. on Asm. Component (0,00), and Qty. on Purch. Return (0,00). The 'PLANNED ORDER RECEIPT' section shows: Planned Order Receipt (Qty.) (0,00) and Purch. Req. Receipt (Qty.) (0,00). The 'SCHEDULED RECEIPT' section shows: FP Order Receipt (Qty.) (6,00).

These features are available on all types of sales and purchase documents, and also on the **Item Journals** and **Planning Worksheets** pages.

## ICI Customer Balance Overview

**ICI Customer Balance Overview** stores information about remote customer balances. If remote company is using different currency, the amounts are calculated, and the used exchange rate is stored as well. The page can be refreshed using the **Refresh** Action. It will send a web service call using current filter on **Customer No.**



Dynamics 365 Business Central

ICI CUSTOMER BALANCE OVERVIEW | DATA ROBOCZA: 27.01.2022

Wyszukaj Refresh Show Details Otwórz w programie Excel

Endpoint Name	Customer No.	Currency Code	Balance	Overdue Balance	Currency Exchange Rate	Balance (LCY)	Overdue Balance (LCY)	Last Update
CRONUS DK	01121212	DKK	0,00	0,00	0,12	0,00	0,00	14.09.2020 16:48
Cronus USA	01121212	USD	0,00	0,00	0,65	0,00	0,00	14.09.2020 16:48
CRONUS DK	01445544	DKK	1 499,03	0,00	0,12	175,09	0,00	14.09.2020 16:48
Cronus USA	01445544	USD	1 499,03	0,00	0,65	972,61	0,00	14.09.2020 16:48
CRONUS DK	01454545	DKK	222 241,32	0,00	0,12	25 957,79	0,00	14.09.2020 16:48
Cronus USA	01454545	USD	222 241,32	0,00	0,65	144 195,50	0,00	14.09.2020 16:48
CRONUS DK	01905893	DKK	0,00	0,00	0,12	0,00	0,00	14.09.2020 16:48
Cronus USA	01905893	USD	0,00	0,00	0,65	0,00	0,00	14.09.2020 16:48
CRONUS DK	01905899	DKK	0,00	0,00	0,12	0,00	0,00	14.09.2020 16:48
Cronus USA	01905899	USD	0,00	0,00	0,65	0,00	0,00	14.09.2020 16:48
CRONUS DK	01905902	DKK	0,00	0,00	0,12	0,00	0,00	14.09.2020 16:48
Cronus USA	01905902	USD	0,00	0,00	0,65	0,00	0,00	14.09.2020 16:48
CRONUS DK	10000	DKK	168 364,41	0,00	0,12	19 664,96	0,00	14.09.2020 16:48
Cronus USA	10000	USD	168 364,41	0,00	0,65	109 238,87	0,00	14.09.2020 16:48
CRONUS DK	20000	DKK	96 049,99	0,00	0,12	11 218,64	0,00	14.09.2020 16:48

Using the **Show Details** action, another web service is called, which shows actual Customer Ledger Entries from remote company. The details are not stored locally, so every use of the action issues a web request.

Dynamics 365 Business Central

ICI CUSTOMER BALANCE DETAILS | DATA ROBOCZA: 27.01.2022

Wyszukaj Otwórz w programie Excel

Document Type	Document No.	Description	Currency Code	Posting Date	Original Amount	Amount	Remaining Amount	Due Date
Invoice	103028	Order 6005	DKK	19.01.2022	4 101,88	4 101,88	4 101,88	19.02.2022
Invoice	103001	Invoice 103001	DKK	24.01.2022	8 182,35	8 182,35	8 182,35	24.02.2022
Credit Memo	104001	Credit Memo 104001	DKK	16.01.2022	-292,84	-292,84	-292,84	16.01.2022
Invoice	103015	Order 101001	DKK	09.01.2022	8 269,04	8 269,04	8 269,04	06.02.2022
Invoice	00-9	Opening Entries, Customers	DKK	31.12.2021	50 778,50	50 778,50	50 778,50	31.01.2022
Invoice	00-16	Opening Entries, Customers	DKK	31.12.2021	33 852,35	33 852,35	33 852,35	31.01.2022
Invoice	00-11	Opening Entries, Customers	DKK	31.12.2021	63 473,13	63 473,13	63 473,13	31.01.2022

## Customer Statistics

There are two new fields on the **Customer Statistics** factbox: **ICI Balance (LCY)** and **ICI Overdue Balance (LCY)**. They are the sum corresponding fields of all **ICI Customer Balance Overview** entries for specific customer. Both fields can be clicked to show the filtered view on entries.

SERVICE	
Outstanding Serv. Orders (L...	6,63
Serv Shipped Not Invoiced(...	0,00
Outstanding Serv.Invoices(L...	49,16
PAYMENTS	
Payments (LCY)	143 872,42
Refunds (LCY)	0,00
Last Payment Receipt Date	16.01.2022
Total (LCY)	<b>170 558,20</b>
Credit Limit (LCY)	0,00
Overdue Amounts (LCY) as ...	-292,84
Total Sales (LCY)	17 100,96
Invoiced Prepayment Amou...	0,00
ICI CUSTOMER BALANCE	
ICI Balance (LCY)	128 903,83
ICI Overdue Balance (LCY)	0,00

## See also

[Setting up Intercompany Insights](#)

[Key Usage Scenarios](#)

# Release Notes

## 1.2.1

- Fix to compile under BC15.

## 1.2

### New features:

- New field on ICI Setup to split large request into multiple messages.
- Endpoint Code filter on Availability Overview used to limit requests.
- Possibility to select multiple lines to use with the Refresh ICI Availability action.
- Possibility to create job queues to update ICI availability and balances.

## 1.1.1

### New features

- Added extension field, factbox and actions to Job Planning Lines page.

### Bugfixes

- Fix for building addresses with tenant.

## 1.1

### New features

- Functionality to check remote customer balances.

## 1.0

### Initial Version