Tutorial:

Create a new company from a template company in 2 minutes

Take a couple of minutes with To-Increase Connectivity Studio to resolve this frequent concern

Creating a new company is a common challenge in Microsoft Dynamics 365 and Dynamics AX 2012. When you're busy with an implementation, you will set up data in one application for a specific company. The challenge is to make that data available in other environments or other companies.

Creating a company is easy, but how can you easily initialize with a predefined setup? How can you import main accounts, parameters, customer groups, vendor groups, and other information? When you use To-Increase Connectivity Studio, you can easily import data from another, templated company.

The following example will work the same in Microsoft Dynamics AX 365 and Dynamics AX 2012. In this scenario, we assume that in our project data are copied from one company to another. Of course, this could easily be changed to ODBC to obtain data from another environment.

How to create a new company

The following manual steps are required to create a new company and load it with the template setup:

1. Create a new legal entity.
2. Create a chart of accounts.
3. Link the chart of accounts to the current company in the ledger setup (for this demo we use the existing setup). The steps required:
    a. Create a new calendar or use an existing one.
    b. Set the exchange rate type.
    c. Set the default currency.
4. Run a Connectivity Studio project to import the setup.

Create a new legal entity.

 First, you create a new legal entity with the names *Company copy 1* and *ID CC1*. In addition to this. you specify the language as *EN-US*.

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Now you can switch to this company.

Create a chart of accounts.

Next, you create a new chart of accounts called *CC1 Shared*.

Link the chart of accounts to the current company in the ledger setup.

Next, you create a new ledger setup and select your chart of accounts and the currency.

Run a Connectivity Studio project to import the setup.

Before you can run the project, you need to set up the template information in Connectivity Studio.
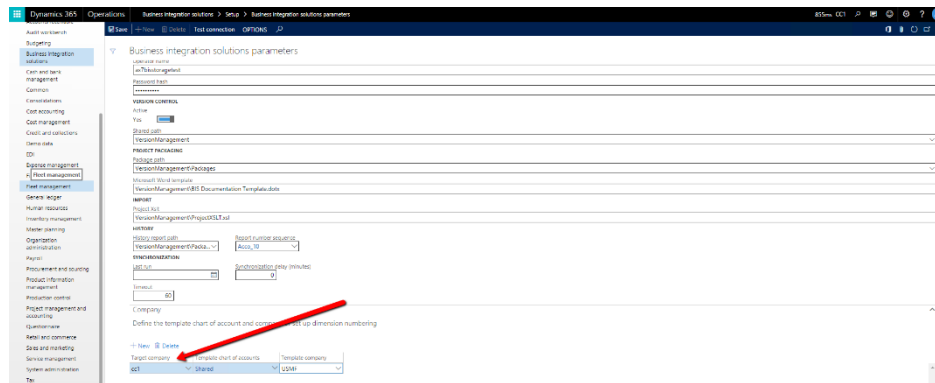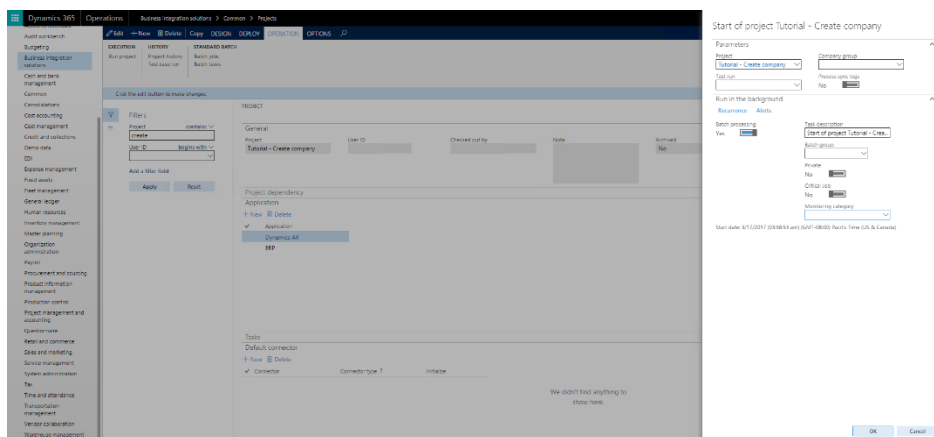

Download and install the new project

Download the file and import the file using the "Import configuration" option in periodic.
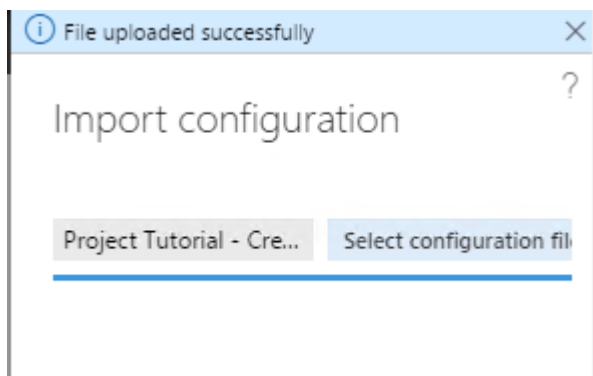
Run the project in a batch.

Now you can open the project called *Tutorial - Create company* in Connectivity Studio and run it. Run the project in a batch to get the best performance.

After that, you can review the results.

Thanks for following along. We hope you found this tutorial useful. Please contact Johan van Veldhuizen, Product Manager for Business Integration Solutions at To-Increase, at jvveldhuizen@to-increase.com if you have questions or want to learn more about the solutions.