

InterCoFlow — User Guide

Intercompany sync and consolidation for SAP Business One groups

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Contents

What InterCoFlow does

Roles

Signing in

Setting up InterCoFlow

The flow designer

Running a sync

Exceptions and approvals

Getting help

What InterCoFlow does

InterCoFlow keeps a group of SAP Business One companies in step. You draw how data should flow between your companies — one diagram per object type — and InterCoFlow replicates master data along those lines, records every write, and raises an exception instead of guessing when something does not line up.

Early release (October 2026): this release delivers:

- sign-in, users and the standard Setup tabs,
- **company nodes** with a connection Test and version check,
- the **flow designer**: one graph per object type, with validation and published versions,
- the **sync engine** for the P1 master data set — 28 object types including items, item groups, business partners, GL account structures, cost accounting, warehouses and bins, bills of materials, employees and exchange rates,
- **runs** with per-record diffs and dry-run, **exceptions** with retry / link / skip, **approvals**, cron schedules and a daily digest.

Intercompany documents (orders, invoices and the like) and real-time triggers are coming in later releases. Current syncs run on demand or on a schedule.

Until SAP companies are connected, InterCoFlow shows **demo data**, clearly labelled *demo*.

Roles

Role	Can do
Admin	Everything, including Setup and flow design
Approver	Approves creations and resolves conflicts
Operator	Starts runs and works exceptions
Viewer	Read-only

Signing in

Sign in with your email and password. The first time, you set your own password.

Setting up InterCoFlow

Follow the **Setup & Administration Guide** for the standard tabs. In InterCoFlow the order is:

1. **Billing:** choose your plan (Starter, Business or Enterprise). Plans cap how many B1 companies you can connect — 3, 10 or unlimited.
2. **Connections:** add each SAP company in the group and click **Test**. The version check warns when companies run different B1 patch levels.
3. **Users:** add admins, approvers, operators and viewers.
4. **Branding, Email SMTP** and **Email templates**.
5. **Exceptions & digest:** choose who receives the daily digest and where escalations go.

The flow designer

Open **Designer** and pick an object type — items, business partners, GL accounts and so on. Each object type gets its own diagram:

- **Nodes** are your SAP companies.
- **Arrows** are the direction data flows, for that object type only.

The designer autosaves a draft while you work. **Validate** checks the diagram before it can go live: no cycles, every company reachable, consolidation rules consistent, and nothing beyond what your plan allows. **Publish** freezes a numbered version — runs always execute a published version, never the draft, so you can prepare changes safely.

Running a sync

From the designer or the **Runs** page:

- **Dry-run** shows exactly what would change, record by record, without writing to SAP.
- **Run now** executes the published flow and lists a per-record diff of every write.
- **Schedules** run a flow on a cron pattern you set in Setup.

Every write InterCoFlow makes to SAP is recorded in the audit trail with the run that caused it.

Exceptions and approvals

When a record cannot be applied cleanly — a conflict, a missing dependency, a rejected write — InterCoFlow stops that record, not the whole run, and files an exception.

On the **Exceptions** page each item offers:

- **Retry** — after you fix the cause,
- **Link to existing** — when the target company already has the record under another key,
- **Skip** — leave this record out, with the reason kept on file,
- **Take** — assign it to yourself so two people do not work the same problem.

Creations that need sign-off wait on the **Approvals** page for an approver. Unresolved exceptions can escalate to a PSA support ticket, and the **daily digest** email summarises anything still open.

Getting help

Setup → Support opens a ticket with our support desk, and the Setup & Administration Guide covers registration, sign-in and the standard tabs in detail.