



SOLUTION SPOTLIGHT

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL & DATABASICS EXPENSE

MEET THE RIGOROUS REQUIREMENTS OF CANADIAN EXPENSE REPORTING BY INTEGRATING MICROSOFT DYNAMICS 365 BUSINESS CENTRAL WITH DATABASICS EXPENSE

THE SITUATION

Canadian organizations have long sought to find solutions that can automate their expense reporting and integrate with their existing accounting platforms and services. Federal directives, coupled with province-specific tax rates, multiple languages, and international travel, make managing the collection, reimbursement, and accounting of employee expenses an administrative burden and corporate liability.

Input Tax Credits (ITCs) for GST/HST, if missed or calculated incorrectly, can have a significant impact on the bottom line.

As Canadian organizations migrate their accounting systems to the cloud, Microsoft Dynamics 365 Business Central (Business Central) offers a complete Enterprise Resource Planning (ERP) solution to support the accounting and recording of expenses and taxes. However, for a truly comprehensive solution, integrating a proven third-party expense reporting platform such as **DATABASICS Expense** is critical.

THE CHALLENGE: GOVERNMENT REQUIREMENTS

Canadian companies are caught in a tug-of-war between federal and provincial revenue agencies battling for enforcement rights, producing ever-changing requirements for taxes and compliance. These include:

MULTIPLE TAX TYPES

Organizations need to account for four types of taxes:

- **Two provincial taxes** – Provincial Sales Tax (PST) and Quebec Sales Tax (QST)
- **Good and Services Tax (GST)** – the 5% federal tax (GST)
- **Harmonized Sales Tax (HST)** – the combination of GST and the applicable PST, when submitted to the Canada Revenue Agency and dispersed to the Provinces, as opposed to being submitted to each province directly

Since each province enforces a unique tax code, adherence can be challenging. What's more, various types of expenses are taxed differently. For example, food is taxed in different ways, depending on whether it is eat-in or take-away and whether the drink is hot or cold. Therefore, an employer needs to collect a couple of different data points related to GST, HST, and PST when accounting for employee expenses, including the business amount (for write-off), and the sales tax type and amount (for recovery).



MULTIPLE LANGUAGES

With two official languages, Québec's Charter of the French Language sets out detailed rules that regulate the language of computer software in Quebec, while English is the standard for software across most of Canada. If a company is operating in Quebec and other regions, they will need software that provides multi-language support including French.

MILEAGE TRACKING

Canada's mileage tracking requirements imposes a different rate for reimbursement once a traveler has exceeded 5,000km in a given year. This rolling tally and 5,000km threshold creates countless opportunities for mistakes and headaches when it comes to tracking and reimbursement.

These shifting rules and regulations make accurate expense reporting especially challenging. By integrating **DATABASICS** Expense with **Business Central**, organizations have the tools in place to account for these unique Canadian government requirements and more.

THE CHALLENGE: ORGANIZATIONAL REQUIREMENTS

In addition to meeting government requirements, most organizations also have their own internal needs that should be addressed by their expense management solution. These include:

EASE OF USE

If a solution is too difficult to use, it will never be fully adopted by its intended users. Tools should include features that make ease of use a priority. These can include remote capabilities, automated tax tracking using OCR receipt and invoice management, multiple language support, mobile apps, and direct deposits for rapid reimbursement.

CORPORATE POLICY DEVELOPMENT & ENFORCEMENT

Every company has its own internal priorities and policies. Utilizing an expense management solution that allows for custom configurations such as approval workflows and notifications makes the expense and accounting process even more efficient. When this happens, businesses obtain necessary information and employees are reimbursed as quickly as possible.

INTERNATIONAL TRAVEL

International travel further complicates matters. For those users traveling internationally and working on billable projects, an expense management solution will need to handle integrated multi-currency support and foreign exchange rates automatically in order to maintain accurate records. For users outside of Canada, accounting for currency, language, data, formats, and expense type distinctions must be localized.



INTEGRATION

Integrating expense management and accounting practices is critical for optimizing workflows, validating compliance standards, and maintaining operational continuity. However, to maximize efficiency, businesses require tools and systems that are proven to work well together.



Together, Microsoft Dynamics 365 Business Central and DATABASICS Expense streamline critical accounting processes and create better methodologies for ensuring effectiveness, compliance, and continuity. This ensures that every box is checked when it comes to operational requirements.

THE SOLUTION: BUSINESS CENTRAL AND DATABASICS EXPENSE

With over two decades of experience meeting the most demanding expense management challenges for organizations worldwide, **DATABASICS** has a proven track record of addressing government and organizational requirements for Canadian organizations leveraging **Business Central**.

DATABASICS cuts through this complex web of requirements to deliver unparalleled support services and advanced functionality that addresses industry and organization-specific expense reporting requirements, such as:

Journaling

Labour and expense details

Accounts Payable

Expense and vendor payables

Project/Job Journal

Labour and expense project details

Multi-currency Settings

Canada, United States and international

Provincial Tax Systems

Multiple PST and QST

Multi-company Environments

Canada, United States and international

Together, **Business Central** and **DATABASICS** provide a comprehensive expense management solution, allowing Canadian organizations to integrate, automate, and comply with greater ease.



Endeavour Solutions is a Microsoft Gold Partner for ERP, CRM, and Cloud applications, their consultants support more than 600 active clients throughout North America including clients using Dynamics 365 Business Central. Over the years, Endeavour has been named multiple times to the Microsoft President's Club – The top 5% of Microsoft Partners Worldwide.

Learn more about **DATABASICS**, visit:
www.data-basics.com/integration/dynamics365/



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DATABASICS is driven to meet the most demanding time and expense management challenges for organizations throughout the world with a combination of deep expertise, next-gen technology and a focus on the unique needs of each customer. Powered by decades of experience, **DATABASICS** is in the business of solving time and expense problems with solutions that are the right choice for today and easily adapt to the uncertainties of tomorrow. Time and expense are better together, which is why **DATABASICS** addresses these two critical business processes with absolute ease in one solution.

Award-winning 24/7 Customer Support

Stevie Awards and Best in Biz Awards year after year

