Global Master Data Sync

Manage your Master Data in one place and synchronize to all Business Central companies subscribing to the data.

1

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Step-by-step Getting Started Guide

Begin by activating the Global Master Data Sync by pressing the notification and complete the wizard.

Sub Test	Sales \lor	Purchasi	ng∨	Inventory	/	Posted Do	cuments \smallsetminus	Setup & E	xten:
Sales Orders	Items C	ustomers	Item Jo	ournals S	Sales	s Journals	Cash Receipt	Journals	Tra
imes Global Ma	aster Data Syno	c is installed	but not ye	t activated	St	art Trial to act	tivate Global Ma	ister Data Syi	nc

Then begin the getting started process by creating an empty company that will be the subscriber company. Open the created company.

Search for Global Master and open Global Master Setup to start the setup.



		+	۱.	√ SAVED	
Global Master Set	up				
General					
Company Type	•	Par	tner ID SU	JBSCRIBER	
Master Company					
Auto Update Record		Exh	nange Record Set · · · · · ●		
Create IC Files					
Subscriber Company					Show le
Handle IC Files		Arc	chive IC File Location		
Synch. Record Set		Ma	ximum No. of Atte		10
Only Synch. Net Chan		Cre	eate Success Log E	\supset	
File Location					

Open the company which will be the master company. In this example we use the CRONUS company.

Begin by activating the Global Master Data Sync by pressing the notification and completing the wizard. This will create the permission set for all users in the database. Going forward all users have this permission set for the companies they can enter.

Dynamics 365 Business Central						Q	٥	?	A
CRONUS Danmark Sales Purchasing	TELL ME WHAT YOU WANT TO DO	∠ ×							
Sales Orders Items Customers Item Journals Sale	global master					2			
× Global Master Data Sync is installed but not yet activated	Go to Pages and Tasks	Show all (7)				~			
HEADLINE	> Global Master Setup	Administration							
Good evening, Denr	> Global Master IC File Log	Lists	+ Sales Credit Memo + Subscription Order	> Tasks > Sales	> Reports > History				
Schumacherl	> Global Master Partner List	Administration							
Schumacher.	Go to Reports and Analysis	Show all (4)							
00	Global Master Record Data	Reports and Analysis							
Activities	E Global Master Record ID Updates	Reports and Analysis							
Activities V SALES QUOTES - OPEN SALES ORDERS - OPEN	Global Master Obsolete Record IDs	Reports and Analysis							
0 0	Didn't find what you were looking for? Try exploring								

Search for Global Master and open Global Master Setup to start the setup. Configure the app as shown.

		+ 1	√ SAVED	
Global Master Set	up			
General				
Company Type · · · · · · Master	•	Partner ID	MASTER	
Master Company				
Auto Update Record 🔹 🛑		Exhange Record Se	t · · · · · · 🚺	
Create IC Files · · · · · · · ·				
Subscriber Company				Show less
Handle IC Files		Archive IC File Loca	ition	
Synch. Record Set		Maximum No. of A	tte	0
Only Synch. Net Chan		Create Success Log	E	
File Location				

Search for Global Master and open Global Master Partner List.

Dynamics 365 Busine	ss Central								?	A
	CRONUS Danmark Sale	es ~ Purchasing ~	TELL ME WHAT YOU WANT TO DO	∠ ×						
	Sales Orders Items Customer	rs Item Journals Sale	global master					2		
	× Global Master Data Sync is install	ed but not yet activated	Go to Pages and Tasks	Show all (7)				~		
	HEADLINE		> Global Master Setup	Administration	+ Sales Credit Memo) Tacks	> Reports			
	Good eveni	ng, Deni	> Global Master IC File Log	Lists	+ Subscription Order	> Sales	> History			
	Schumache	r!	Slobal Master Partner List	Administration						
			Go to Reports and Analysis	Show all (4)						
			E Global Master Record Data	Reports and Analysis						
	Activities		E Global Master Record ID Updates	Reports and Analysis						
	Activities ~ SALES QUOTES - OPEN	SALES ORDERS - OPEN	Global Master Obsolete Record IDs	Reports and Analysis						
	0	0	Didn't find what you were looking for? Try exploring							

Create a new Partner Card and complete the card as shown. Please note that the company name should be the same as the company created in the beginning.

	Actions Navigate Fewer	options		
General				Show
ID	SUBSCRIBER	Modified By	ABDOM\DSC	
Description	Subscriber	Modified On	31-01-2020 23:40	
Data Exchange Type	Database	Set Record Data to Sy		
On Hold				
Servername · · · · · · · · · · · · · · · · · · ·		User ID · · · · · · · · · · · · · · · · · ·		
Company Name	Sub test			
Database				
	Sub tes	1		

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Search for Global Master and open the Global Master Data Template List.

Dynamics 365 Business Central										Ø	?	A
CRONU	JS Danmark Sales	✓ Purchasing ✓	TELL ME WHAT YOU WANT TO DO		$\scriptstyle \swarrow \times$							
Sales Ord	ders Items Customers	Item Journals Sale	Global Master						2			
× Glob	oal Master Data Sync is installed	but not yet activated	Go to Pages and Tasks		Show less (3)				~			
HEADLINE	E		> Global Master Setup	Administration		L Color Conditi Marra). Tasla). Descente				
Go	od evenir	ng, Denr	> Global Master IC File Log	Lists		+ Subscription Order	> Sales	 History 				
Sch	Schumacherl		> Global Master Partner List	Administration								
SCI	iumachei	:	> Global Master Data Template List	Lists								
• 0			> Create and send Global Master IC file	Tasks								
Activitie	5		> Create / Update Global Master Record Data	Tasks								
Activitie SALES QU	es∨ JOTES - OPEN	SALES ORDERS - OPEN	> Update and synchronize Company with Global Master Data	Tasks								
0		0	Go to Reports and Analysis		Show all (4)							
0		0	Didn't find what you were looking for? Try exploring									
>See mo	ore	>See more										

Create a new template for VAT Business Posting Group as below. Note that the Sequence no specifies in which order the data template will be synchronized.

DA	TA TEMPLATE											
\vee	/BPG											
Ne	w Actions	Navig	ate Fewer op	tions								
Ge	enerelt											
Co	de		VBPG			Sequence	No			10		
De	scription		VAT Busines	s Posting Group		Bundling Classification						
Ma	aster Partner ID		MASTER			Status · ·		Under Develo	pment	•		
Ow	vner Company Name		CRONUS Da	CRONUS Danmark			Dn ·····					
Тур	De		Normal Ten	nplate	•	On Hold						
Tab	ole ID · · · · · · · · ·				323 …	Config. Ter	mplate Code			\sim		
Tab	ole Caption		VAT Busines	s Posting Group								
Lin	es Manage									53		
	FieldID ↑		Synch. Sequence No.	Field Caption		Valida	Comment	Relation Table No.	Field Data Template Code	Infor Field		
->	→ 1	÷.	0	Code				0				

Choose to insert all fields from table or choose fields from table.

DATA TEMPLATE





Go back to the template list.

Now create the next 4 templates in the same way. You should create the templates as shown.

GLOBAL MASTER DAT	A TEMPLATE LIST						
✓ Search New	Manage 🛛 🕅 Open in Excel	Navigate	Fewer options				
Code	Description	Table ID	Table Caption	Туре	Parent Template Code	Sequence No. ↑	Master Partner ID
VBPG :	VAT Business Posting Group	323	VAT Business Posting Group	Normal Templ		10	MASTER
VPPG	VAT Product Posting Group	324	VAT Product Posting Group	Normal Templ	1	10	MASTER
GBPG	General Business Posting Group	250	Gen. Business Posting Group	Normal Templ	••	20	MASTER
GPPG	General Product Posting Group	251	Gen. Product Posting Group	Normal Templ		20	MASTER
COA	Chart Of Account	15	G/L Account	Normal Templ		100	MASTER



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Create a new template as shown. Enter the Table ID before changing the type to Sub Template.

DATA	TEMPLATE						Ø +	1			
D[) - CO	А									
New	Actions	Navig	gate Fewer op	otions							
Gene	erelt										
Code			DD - COA]	Sequence	No			1000	
Description · · · · · · · · Default Dimension - COA]	Bundling (Classification				
Master Partner ID · · · · · · · MASTER						Status Under Development					
Owner Company Name · · · · · · CRONUS Danmark					Released (Dn ·····					
Туре			Sub Templa	ate 🔻		On Hold					
Table	ID • • • • • • • • • •			352 …	Config. Template Code					\sim	
Table	Caption · · · · · ·		Default Dim	ension							
Lines	Manage									E	
	FieldID ↑		Synch. Sequence No.	Field Caption		Valida	Comment	Relation Table No.	Field Data Template Code	Infor Field	
\rightarrow	1	÷	0	Table ID				0			
	2		0	No.				0			
	3		0	Dimension Code		1		348			

DATA TI	EMPLATE					- +	Î				
DD) - CO	А									
New	Actions	Navigat	e Fewero	ptions							
Code ·			DD - COA		Sequence	≥ No. · · · · · · · · · · · · · · · · · · ·			1000		
Descrip	tion · · · · · ·		Default Dir	mension - COA	Bundling Classification						
Master	Partner ID		MASTER		Status · · · · · · · · · · Under Development						
Owner	Company Name		CRONUS E)anmark	Released On						
Type ·			Sub Temp	late 🔻	On Hold						
Table ID)			352 …	Config. T	emplate Code			~		
Table C	aption		Default Dir	mension							
Lines	Manage								E		
	FieldID 1		Synch. Sequence No.	Field Caption	Valida	Comment	Relation Table No.	Field Data Template Code	Infor Field		
\rightarrow	1	÷	0	Table ID	1		0				
	2		0	No.	✓		0				
	3		0	Dimension Code			348				
	4		0	Dimension Value Code	✓		0				
	5		0	Value Posting	✓		0				
	7		0	Multi Selection Action			0				
	8000		0	ParentId	✓		0				
	8001		0	DimensionId	✓		348				
	8002		0	DimensionValueId	•		349				

Go back to the template list. Create a new template for Dimension as shown. Please note that the Table ID should be entered before changing the Type to Sub template. Insert all fields as previously.

DATA	TEMPLATE				 + 						
DI	MENSI	DN									
New	Actions	Navigat	e Fewer option	ns							
Gene	erelt										
Code			DIMENSION		Sequence I	Vo			10		
Descri	ption · · · · · · · ·		Dimensions		Bundling C	lassification					
Maste	r Partner ID		MASTER		Status · · ·		Under Develop	ment	•		
Owner	r Company Name		CRONUS Da	nmark	Released On						
Туре			Sub Templa	te 🔻	On Hold						
Table I	D · · · · · · · · · · · · · · ·			348	Config. Ten	nplate Code			~		
Table (Caption		Dimension						2		
Lines	Wallage										
	FieldID ↑		Synch. Sequence No.	Field Caption	Validate	Comment	Relation Table No.	Field Data Template Code	Inform Field		
\rightarrow	1	:	0	Code	•		0				
	2		0	Name			0				
	3		0	Code Caption			0				
	4		0	Filter Caption	•		0				
	5		0	Description	•		0				
	6		0	Blocked			0				
	7		0	Consolidation Code			0				
	8		0	Map-to IC Dimension Code			411				
	8000		0	ld			0				
	8001		0	Last Modified Date Time	•		0				

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Go back to the Template list. Create a new template for Dimension Value as shown. Please note that the Table ID should be entered before changing the Type to Sub Template. Insert all fields as previously.

DATA TEMP	PLATE					 + 	۱ ا			
DIM	iensic	DNS	VALU	JE						
New	Actions N	lavigate	Fewer optio	าร						
Generelt	t									
Code · · · ·			DIMENSION	S VALUE	Sequence	No			50	
Description	Description			Value	Bundling C	lassification				
Master Par	Master Partner ID				Status		Under Develor	ment		
iviastei rai	Master Partner ID				Status		onder Develop	ment		
Owner Con	mpany Name		CRONUS Da	nmark	Released C)n · · · · · · · · · · · · · · · · · · ·				
Туре			Sub Templa	te 🔻	On Hold					
Table ID · ·				349 …	Config. Ter	nplate Code				
Lines	Manage								E	
	FieldID ↑	Sy	nch. Sequence No.	Field Caption			Relation Table	Field Data Tanalata		
\rightarrow	1	÷			Validate	Comment	No.	Code	Inform Field	
	2		0	Dimension Code	Validate 🕑	Comment	No. 348	Code	Inform Field	
	2		0	Dimension Code Code	Validate	Comment	No. 348 0	Code	Inform Field	
	3		0 0 0	Dimension Code Code Name	Validate	Comment	No. 348 0 0	Code	Inform Field	
	3		0 0 0	Dimension Code Code Name Dimension Value Type	Validate	Comment	No. 348 0 0 0	Code	Inform Field	
	3 4 5		0 0 0 0	Dimension Code Code Name Dimension Value Type Totaling	Validate Val	Comment	No. 348 0 0 0 0	Code	Inform Field	
	3 4 5 6		0 0 0 0 0	Dimension Code Code Name Dimension Value Type Totaling Blocked	Validate Validate Validate Validate Validate Validate Validate	Comment	No. 348 0 0 0 0 0	Code	Inform Field	
	3 4 5 6 7		0 0 0 0 0 0	Dimension Code Code Name Dimension Value Type Totaling Blocked Consolidation Code	Validate Validate V	Comment	No. 348 0 0 0 0 0 0 0	Code	Inform Field	
	2 3 4 5 6 7 8		0 0 0 0 0 0 0 0	Dimension Code Code Name Dimension Value Type Totaling Blocked Consolidation Code Indentation	Validate Val	Comment	No. 348 0 0 0 0 0 0 0 0 0 0	Code	Inform Field	
	2 3 4 5 6 7 8 9		0 0 0 0 0 0 0 0 0 0	Dimension Code Code Name Dimension Value Type Totaling Blocked Consolidation Code Indentation Global Dimension No.	Validate Val	Lomment	No. 348 0 0 0 0 0 0 0 0 0 0 0 0 0	Code	Inform Field	
	3 4 5 6 7 8 9 10			Dimension Code Code Name Dimension Value Type Totaling Blocked Consolidation Code Indentation Global Dimension No. Map-to IC Dimension Code Map-to IC Dimension Value Code	Validate Val	Lomment	No. 348 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Code	Inform Field	
	3 4 5 6 7 8 9 10 11 11			Dimension Code Code Name Dimension Value Type Totaling Blocked Consolidation Code Indentation Global Dimension No. Map-to IC Dimension Code Map-to IC Dimension Value Code Dimension Value ID	Validate Val	Lomment	No. 348 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Code	Inform Field	

Go back to the Template list. Mark the template for Dimension, and open the Subordinary Data Template:

✓ Search New	Manage	Open in Excel	Navigate	Fewe	r options
Masterdata \vee His	story \sim				
Record Filters		ess Posting Group		323	VAT Business Posting Group
🜆 Subscribers		ict Posting Group		324	VAT Product Posting Group
🛱 Subordinary Data Te	emplate	usiness Posting Group		250	Gen. Business Posting Group
GPPG	General F	Product Posting Group		251	Gen. Product Posting Group
COA	Chart Of	Account		15	G/L Account
DD - COA	Default D)imension - COA		352	Default Dimension
DIMENSION	Dimensio	ns		348	Dimension
DIMENSIONS	Dimensio	ons Value		349	Dimension Value

GLOBAL MASTER DATA TEMPLATE LIST

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	50501							
	s کر	earch	+ New	🐯 Edit List	📋 Delete	# # S	Getup Rela	ation
		Subordi	inary Data T	emplate 1		S	ub TableID) (
	\rightarrow						()
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Dpen Setup SUBORDINARY Subordi Subordi	Relation	n Filters: LINK Edit Lis	st 📋 Delet	e 📌 Setup Relati Sub TableID	on Filters 🛛 🖬 Op Sub Table Caption	oen in Exce	√ S 21 ···	AVED
Open Setup SUBORDINARY	Relation TEMPLATE New nary Data Ter SIONS VALU	n Filters: LINK Edit Lis mplate ↑	it 📋 Delet	e * Setup Relati Sub TableID 349	on Filters II Op Sub Table Caption Dimension Value	oen in Exce	√ S 2	AVED

Make sure that the setup is as shown:

Go back until you reach the template list. Mark the template for Default Dimension – COA and open the Subordinary Data Template:

GLOBAL MASTER DATA TEMPLATE LIST

O Search New	Manage	Copen in Excel	Navigate	Fewe	r options
Masterdata \vee	History \smallsetminus	_			
Record Filters		ess Posting Group		323	VAT Business Posting Group
🜆 Subscribers		ict Posting Group		324	VAT Product Posting Group
🛱 Subordinary Data	a Template	usiness Posting Group		250	Gen. Business Posting Group
GPPG	General	Product Posting Group		251	Gen. Product Posting Group
COA	Chart Of	Account		15	G/L Account
DD - COA	: Default [Dimension - COA		352	Default Dimension

SUBORDINARY TEMPLATE LINK

✓ Search	+ New	🐯 Edit List	📋 Delete	∦ [#] Setup Relation
Subordir	nary Data Te	emplate 1		Sub TableID S
\rightarrow				0



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Open the Setup relation Filters:

SUBORDINARY TEMPLATE LINK

Q	Search	+ New	🐯 Edit List	1	📋 Delete 🛛 🗱 Setup Relation Filters		💶 Open in E	
	Subor	dinary Data Te	emplate 1			Sub TableID	Sub Table	Caption
\rightarrow	DIME	NSION				348		



Check that the setup is as shown:

'EMPLATE FILTER												
)	O Search	+	New	🐯 Edit List	📋 Delete	Open in Exce	l.					
	Sub Table	∎ID ▼		Sub Table Caption		Sub FieldID ↑	Sub Field Caption	Link Type	TableID	Table Caption	FieldID	Field Caption
\rightarrow	3	48	÷	Dimension		1	Code	Field	352	Default Dimension	3	Dimension Code

Go back until you reach the Global Master Data Template List. Mark the Template for Chart of Account, and open the Subordinary Data Template:

(GLOBAL MASTER	DATA TEMPLAT	'E LIST		
	✓ Search Net	w Manage	Open in Excel	Navigate	Fewer options
	Masterdata \sim	History \smallsetminus			
	📑 Record Filters		ss Posting Group	323	VAT Business F
	🜆 Subscribers		t Posting Group	324	VAT Product P
	🚟 Subordinary D	ata Template	siness Posting Group	250	Gen. Business
	GPPG	General I	Product Posting Group	251	Gen. Product F
	COA	: Chart Of	Account	15	G/L Account

Press the Look up Value and choose the template for Default Dimension:

SUBORDINARY TEMPLATE LINK Search + New 🞲 Edit List 前 Delete 📌 Setup Relation Subordinary Data Template 1 ŝ Sub TableID \rightarrow 0 . . . 26 **Open Setup Relation Filters:** 🗱 Setup Relation Filters ✓ Search + New 🞲 Edit List 📋 Delete 💶 Open in Excel 🛛 😶 Subordinary Data Template 1 Sub TableID Sub Table Caption \rightarrow DD - COA 352



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Check that the page looks like shown:

TE	MPLATE FI	LTER											√ SAVED	ď	7 ^K
,	O Search	+	New	👿 Edit List	📋 Delete	Open in Exce	21							Y	=
	Sub Table	ID T		Sub Table Caption		Sub FieldID ↑	Sub Field Caption	Link Type	TableID	Table Caption	FieldID	Field Caption		Filter	
-	÷ 3	52	:	Default Dimensio	n	1	Table ID	Filter	15	G/L Account				15	
	3	52		Default Dimensio	on	2	No.	Field	15	G/L Account	1	No.			

Go back until the Global Master Data Template List. Open each template one at the time and change the status from Under Development to Released.

DATA TEMPLATE		 + 1 	
VBPG			
New Actions Navigate	Fewer options		
Generelt			
Code · · · · · · · · · · · · · · · · · · ·	VBPG	Sequence No.	10
Description	VAT Business Posting Group	Bundling Classification	
Master Partner ID	MASTER	Status · · · · · · Released	•
Owner Company Name	CRONUS Danmark	Released On 01-02-2020 16:09	
Туре	Normal Template	On Hold	
Table ID · · · · · · · · · · · · · · · · · ·	323	Config. Template Code	\sim
Table Caption	VAT Business Posting Group		

Go back to the Global Master Data Template List. Mark each template and open the Subscribers:

GLOBAL MASTER DATA TEMPLATE LIST

✓ Search New Manage	Dpen in Excel	Navigate
Masterdata \checkmark History \checkmark	_	
Record Filters	าร	
🜆 Subscribers	ess Posting Group	
🚟 Subordinary Data Template	ct Posting Group	
CRDC Comment	Business Destine Course	



Enter the Subscriber partner as a subscriber for each template.

DAT	A TEMPLATE SUBS	CRIBERS						NOT SAVED	ď	2
۶	Search + New	🐯 Edit List	📋 Delete	Process	Report	V Open i	n Excel	Actions	Y	≡
	Subscriber Partner ID ↑	Subscriber Comp	oany Name	Comment		Set Rec Data to	Data Log	Data Logged On	Obs	Erro
\rightarrow	SUBSCRIBER	Sub test								

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Go back to the role center and search for the Global Master Partner List and open it:

TELL ME WHAT YOU WANT TO DO		2	\times
global master pa			
Go to Pages and Tasks			
> Global Master Partner List	Administration		
> Update and synchronize Company with Global Master Data	Tasks		

Edit the card for the subscriber and unmark the On Hold.

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Business Central will now create the Subscriber IC File log for the subscriber. Once it is completed, open the subscriber company. Search for Update and synchronize Company with Global Master data.

TELL ME WHAT YOU WANT	TO DO		\swarrow \times
global master			
Go to Pages and Tasks			Show less (3)
> Global Master Setup		Administration	
> Global Master IC File	Log	Lists	
> Global Master Partner	List	Administration	
> Global Master Data Te	emplate List	Lists	
> Create and send Glob	al Master IC file	Tasks	
> Create / Update Glob	al Master Record Data	Tasks	
> Update and synchron	ize Company with Global Master Data	Tasks	Д

It will now synchronize the received data from the Master company into the right tables. Once it has completed, open the Chart of Accounts to check that the Chart of Accounts now contain accounts. Try to edit the name of an account. You should get an error as below:

×	01010	÷	Salg af vare og y	de
Validation Results		de		
Name is controlled by Global Master and cannot be changed locally.		de		
	01200		ruge	_

36 Open the master company again and open the Chart of Accounts.

Create a new account by your own choice. Remember the new number and name.

Delete an account by your own choice. Remember the number of the deleted account.

Go back to the role center and search for Create and Send Global Master IC File:

TELL ME WHAT YOU WANT TO DO		2	\times
global master IC			
Go to Pages and Tasks			
> Global Master IC File Log	Lists		
> Create and send Global Master IC file	Tasks		

Didn't find what you were looking for? Try exploring

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37

Business Central will now create the Subscriber IC File log for the subscriber. Once it is completed, open the subscriber company.

Search for Update and synchronize Company with Global Master data.

TEL	L ME WHAT YOU WANT TO DO		ZX
glo	bal master		
Go	to Pages and Tasks		Show less (3)
>	Global Master Setup	Administration	
>	Global Master IC File Log	Lists	
>	Global Master Partner List	Administration	
>	Global Master Data Template List	Lists	
>	Create and send Global Master IC file	Tasks	
>	Create / Update Global Master Record Data	Tasks	
>	Update and synchronize Company with Global Master Data	Tasks	

When the synchronize is completed. Open the Chart of Accounts.

Check that the new account now is created and the deleted one does not exist anymore.