

Global Master Data Sync

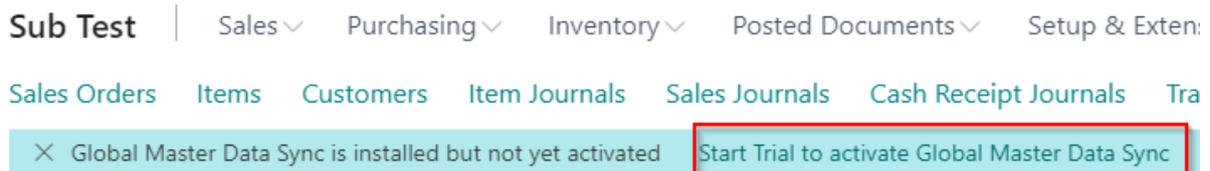
Manage your Master Data in one place and synchronize to all Business Central companies subscribing to the data.



Step-by-step Getting Started Guide

1

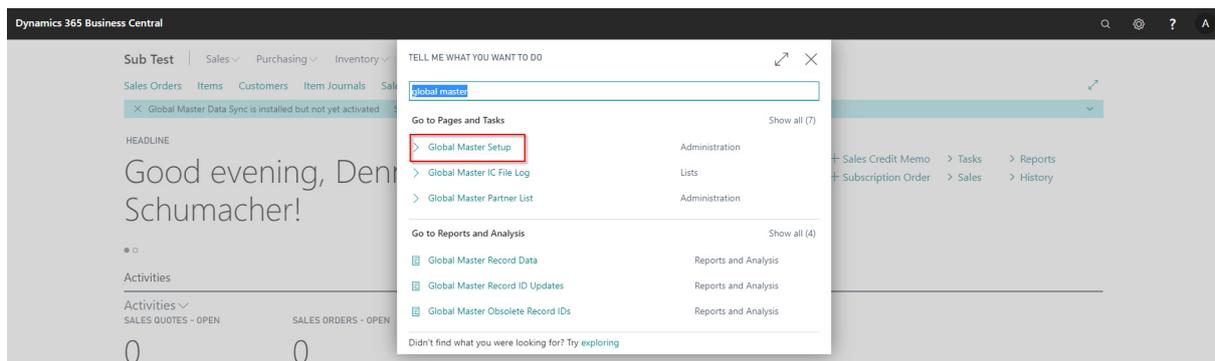
Begin by activating the Global Master Data Sync by pressing the notification and complete the wizard.



2

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.



3

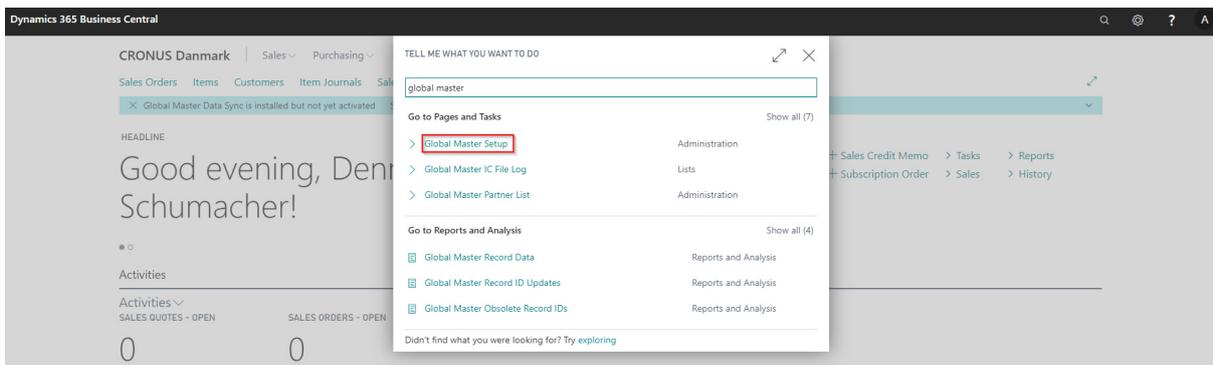
Configure the app as shown.

The screenshot shows the 'Global Master Setup' configuration page. At the top, there are navigation icons (back, edit, add, delete) and a 'SAVED' status indicator. The page is divided into three sections: 'General', 'Master Company', and 'Subscriber Company'.
- **General:** 'Company Type' is set to 'Subscriber' and 'Partner ID' is 'SUBSCRIBER'.
- **Master Company:** 'Auto Update Record ...' and 'Exchange Record Set' are both turned off. 'Create IC Files' is also turned off.
- **Subscriber Company:** 'Handle IC Files', 'Synch. Record Set', and 'Only Synch. Net Chan...' are all turned on. 'File Location' is an empty text box. 'Archive IC File Location' is an empty text box. 'Maximum No. of Atte...' is set to '10'. 'Create Success Log E...' is turned off. A 'Show less' link is visible on the right.

4

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.



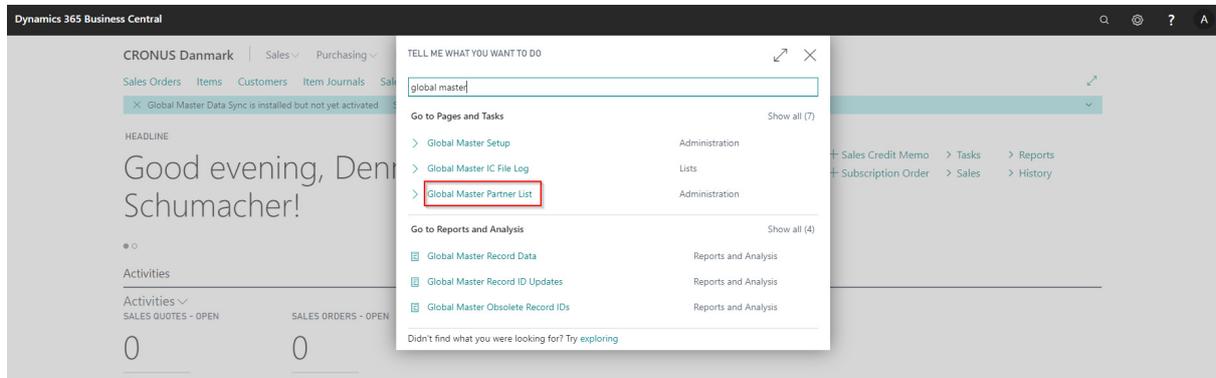
5

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

The screenshot shows the 'Global Master Setup' configuration page. At the top, there is a navigation bar with a back arrow, an edit icon, a plus sign, a trash icon, and a 'SAVED' status. The main title is 'Global Master Setup'. Below the title, there are three sections: 'General', 'Master Company', and 'Subscriber Company'.
- **General**: 'Company Type' is set to 'Master' and 'Partner ID' is 'MASTER'.
- **Master Company**: 'Auto Update Record ...' and 'Exchange Record Set' are both toggled on. 'Create IC Files' is also toggled on.
- **Subscriber Company**: 'Handle IC Files', 'Synch. Record Set', and 'Only Synch. Net Chan...' are all toggled off. 'Archive IC File Location' is empty. 'Maximum No. of Atte...' is set to 0. 'Create Success Log E...' is toggled off. 'File Location' is empty. A 'Show less' link is visible on the right.

6

Search for Global Master and open Global Master Partner List.



7

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.

Partner Card

Transfer Record Data | Actions | Navigate | Fewer options

General Show less

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

Azure Storage

Servername User ID

Database Name Password

Company Name Sub test ...

Database

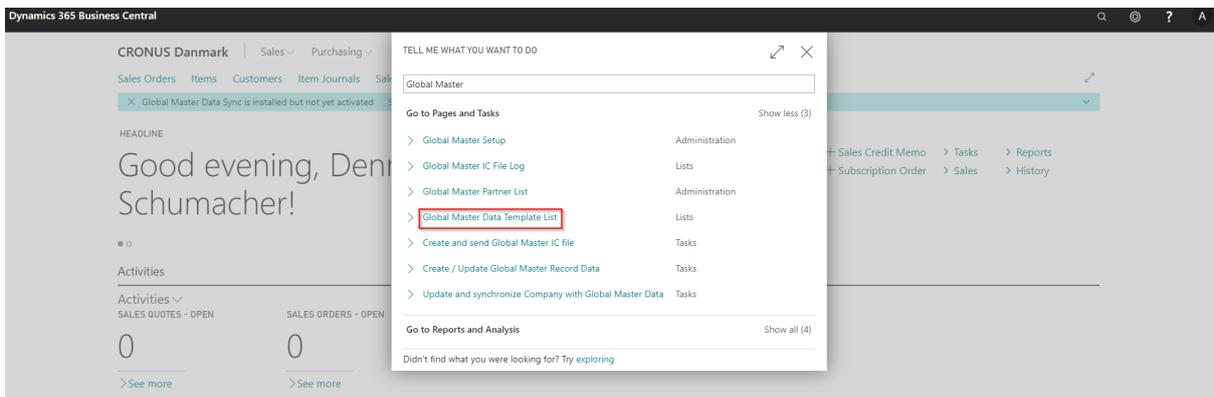
Company Name Sub test ...

File Location

Company Name Sub test ...

8

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



9

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.

DATA TEMPLATE

VBPG

New | Actions | Navigate | Fewer options

Generelt

Code VBPG Sequence No. 10

Description VAT Business Posting Group Bundling Classification

Master Partner ID MASTER Status Under Development

Owner Company Name CRONUS Danmark Released On

Type Normal Template On Hold

Table ID 323 Config. Template Code

Table Caption VAT Business Posting Group

Lines | Manage

	FieldID ↑	Synch. Sequence No.	Field Caption	Valida...	Comment	Relation Table No.	Field Data Template Code	Infor... Field
→	1	0	Code	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
				<input type="checkbox"/>				<input type="checkbox"/>

10

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

DATA TEMPLATE

VBPG

New | Actions | Navigate | Fewer options

Functions ▾

- Create / Update Record Data
- Sync. Company
- Insert all fields from table**
- Choose fields from table**

VBPG

VAT Business Posti

MASTER

CRONUS Danmark

11

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 DATA TEMPLATE LIST

Code	Description	Table ID	Table Caption	Type	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...		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

12

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

DATA TEMPLATE

DD - COA

New | Actions | Navigate | Fewer options

Generelt

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 On	
Type	Sub Template	On Hold	<input type="checkbox"/>
Table ID	352	Config. Template Code	
Table Caption	Default Dimension		

Lines | Manage

FieldID ↑	Synch. Sequence No.	Field Caption	Valida...	Comment	Relation Table No.	Field Data Template Code	Infor... Field
→ 1	0	Table ID	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
2	0	No.	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
3	0	Dimension Code	<input checked="" type="checkbox"/>		348		<input type="checkbox"/>

13

Insert all fields as done earlier. The completed template should look like this:

DATA TEMPLATE ✎ + 🗑

DD - COA

New | Actions | Navigate | Fewer options

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 On	
Type	Sub Template	On Hold	<input type="checkbox"/>
Table ID	352	Config. Template Code	
Table Caption	Default Dimension		

Lines | Manage 📄

FieldID ↑	Synch. Sequence No.	Field Caption	Valida...	Comment	Relation Table No.	Field Data Template Code	Infor... Field
→ 1	0	Table ID	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
2	0	No.	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
3	0	Dimension Code	<input checked="" type="checkbox"/>		348		<input type="checkbox"/>
4	0	Dimension Value Code	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
5	0	Value Posting	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
7	0	Multi Selection Action	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
8000	0	ParentId	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
8001	0	DimensionId	<input checked="" type="checkbox"/>		348		<input type="checkbox"/>
8002	0	DimensionValueId	<input checked="" type="checkbox"/>		349		<input type="checkbox"/>

14

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 ✎ + 🗑

DIMENSION

New | Actions | Navigate | Fewer options

Generelt

Code	DIMENSION	Sequence No.	10
Description	Dimensions	Bundling Classification	
Master Partner ID	MASTER	Status	Under Development
Owner Company Name	CRONUS Danmark	Released On	
Type	Sub Template	On Hold	<input type="checkbox"/>
Table ID	348	Config. Template Code	
Table Caption	Dimension		

Lines | Manage 📄

FieldID ↑	Synch. Sequence No.	Field Caption	Validate	Comment	Relation Table No.	Field Data Template Code	Infor... Field
→ 1	0	Code	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
2	0	Name	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
3	0	Code Caption	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
4	0	Filter Caption	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
5	0	Description	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
6	0	Blocked	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
7	0	Consolidation Code	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
8	0	Map-to IC Dimension Code	<input checked="" type="checkbox"/>		411		<input type="checkbox"/>
8000	0	Id	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
8001	0	Last Modified Date Time	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>

15

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 TEMPLATE ✎ + 🗑️

DIMENSIONS VALUE

New | Actions | Navigate | Fewer options

General

Code DIMENSIONS VALUE	Sequence No. 500
Description Dimensions Value	Bundling Classification
Master Partner ID MASTER	Status Under Development
Owner Company Name CRONUS Danmark	Released On
Type Sub Template	On Hold <input type="checkbox"/>
Table ID 349 ...	Config. Template Code
Table Caption Dimension Value	

Lines | Manage 🔗

FieldID ↑	Synch. Sequence No.	Field Caption	Validate	Comment	Relation Table No.	Field Data Template Code	Inform... Field
→ 1	0	Dimension Code	<input checked="" type="checkbox"/>		348		<input type="checkbox"/>
2	0	Code	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
3	0	Name	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
4	0	Dimension Value Type	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
5	0	Totaling	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
6	0	Blocked	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
7	0	Consolidation Code	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
8	0	Indentation	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
9	0	Global Dimension No.	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
10	0	Map-to IC Dimension Code	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
11	0	Map-to IC Dimension Value Code	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
12	0	Dimension Value ID	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>
8000	0	Id	<input checked="" type="checkbox"/>		0		<input type="checkbox"/>

16

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

GLOBAL MASTER DATA TEMPLATE LIST

Search New Manage 📄 Open in Excel Navigate Fewer options

Masterdata ▾ History ▾

- Record Filters
- Subscribers
- 📄 Subordinate Data Template

Business Posting Group		323	VAT Business Posting Group
Product Posting Group		324	VAT Product Posting Group
Business 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
DIMENSION	Dimensions	348	Dimension
DIMENSIONS ...	Dimensions Value	349	Dimension Value

17

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

SUBORDINARY TEMPLATE LINK

Search + New Edit List Delete Setup Relation

Sub TableID	Sub Table Caption
0	Dimension Value

18

Open Setup Relation Filters:

SUBORDINARY TEMPLATE LINK ✓ SAVED

Search + New Edit List Delete **Setup Relation Filters** Open in Excel

Sub TableID	Sub Table Caption	Sub TableID	Sub Table Caption
349	DIMENSIONS VALUE	349	Dimension Value

19

Make sure that the setup is as shown:

TEMPLATE FILTER

Search + New Edit List Delete Open in Excel

Sub TableID	Sub Table Caption	Sub FieldID	Sub Field Caption	Link Type	TableID	Table Caption	FieldID	Field Caption
349	Dimension Value	1	Dimension Code	Field	348	Dimension	1	Code

20

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

Search New Manage Open in Excel **Navigate** Fewer options

Masterdata History

Record Filters	Business Posting Group	323	VAT Business Posting Group
Subscribers	Product Posting Group	324	VAT Product Posting Group
Subordinary Data Template	Business 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

21

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

SUBORDINARY TEMPLATE LINK

Search + New Edit List Delete Setup Relation

Subordinate Data Template ↑	Sub TableID
→ [] ...	0

22

Open the Setup relation Filters:

SUBORDINARY TEMPLATE LINK

Search + New Edit List Delete Setup Relation Filters Open in Excel

Subordinate Data Template ↑	Sub TableID	Sub Table Caption
→ DIMENSION	348	

23

Check that the setup is as shown:

TEMPLATE FILTER

Search + New Edit List Delete Open in Excel

Sub TableID	Sub Table Caption	Sub FieldID ↑	Sub Field Caption	Link Type	TableID	Table Caption	FieldID	Field Caption
→ 348	Dimension	1	Code	Field	352	Default Dimension	3	Dimension Code

24

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

GLOBAL MASTER DATA TEMPLATE LIST

Search New Manage Open in Excel Navigate Fewer options

Masterdata History

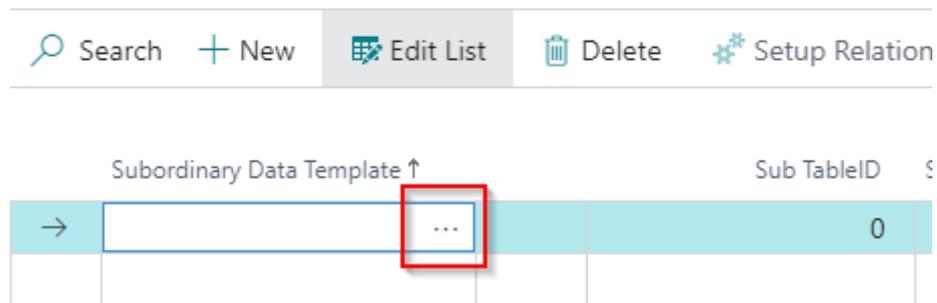
- Record Filters
- Subscribers
- Subordinate Data Template

	ss Posting Group	323	VAT Business P
	t Posting Group	324	VAT Product Pc
	usiness Posting Group	250	Gen. Business F
GPPG	General Product Posting Group	251	Gen. Product P
COA	Chart Of Account	15	G/L Account

25

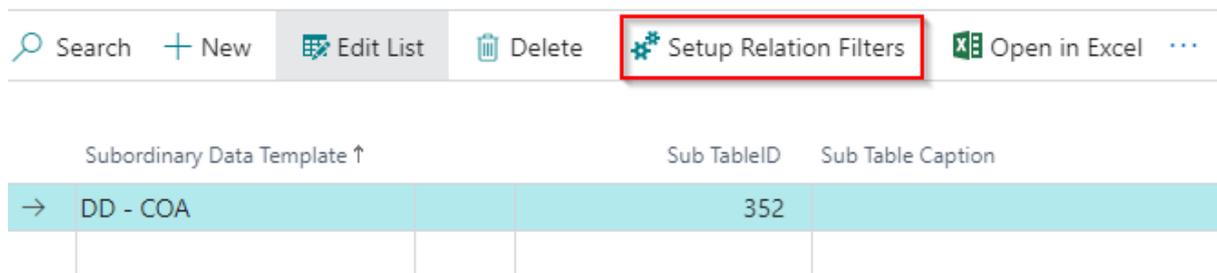
Press the Look up Value and choose the template for Default Dimension:

SUBORDINARY TEMPLATE LINK



26

Open Setup Relation Filters:



27

Check that the page looks like shown:

TEMPLATE FILTER ✓ SAVED

Search + New Edit List Delete Open in Excel

Sub TableID	Sub Table Caption	Sub FieldID	Sub Field Caption	Link Type	TableID	Table Caption	FieldID	Field Caption	Filter
→ 352	Default Dimension	1	Table ID	Filter	15	G/L Account			15
352	Default Dimension	2	No.	Field	15	G/L Account	1	No.	

28

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 ✎ + 🗑

VBPG

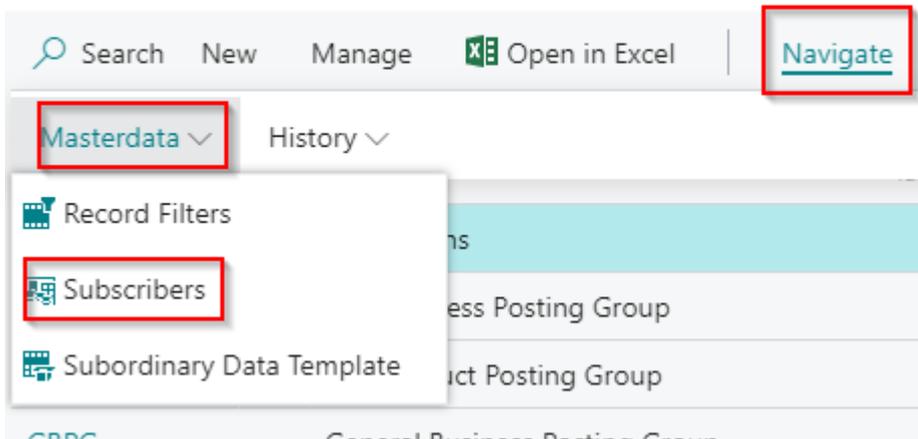
New | Actions | Navigate | Fewer options

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
Type	Normal Template	On Hold	<input type="checkbox"/>
Table ID	323	Config. Template Code	
Table Caption	VAT Business Posting Group		

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

GLOBAL MASTER DATA TEMPLATE LIST



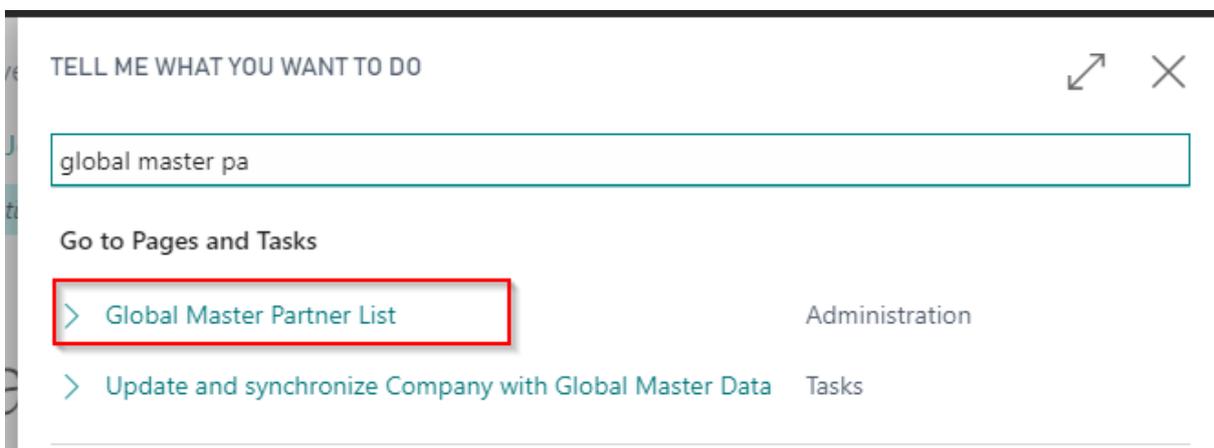
30 Enter the Subscriber partner as a subscriber for each template.

DATA TEMPLATE SUBSCRIBERS NOT SAVED  

Search + New Edit List Delete Process Report Open in Excel Actions  

Subscriber Partner ID ↑	Subscriber Company Name	Comment	Set Rec... Data to	Data Log...	Data Logged On	Obs...	Erro
→ SUBSCRIBER	Sub test		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

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



32

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

PARTNER CARD ✎ + 🗑️ ✓ SAVED 📄 🔗

SUBSCRIBER

📄 Transfer Record Data | Actions Navigate Fewer options

General Show less

ID	<input type="text" value="SUBSCRIBER"/>	Modified By	<input type="text" value="ABDOM\DSC"/>
Description	<input type="text" value="Subscriber"/>	Modified On	<input type="text" value="31-01-2020 23:47"/>
Data Exchange Type	<input type="text" value="Database"/>	Set Record Data to Sy...	<input type="checkbox"/>
On Hold	<input checked="" type="checkbox"/>		

Azure Storage

33

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

TELL ME WHAT YOU WANT TO DO ↗️ ✕

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](#)

34

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 ↗️ ✕

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 🔖

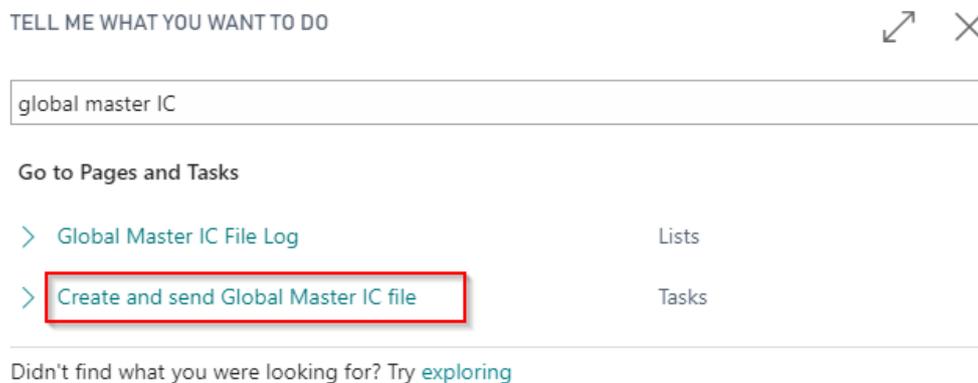
35 It will now synchronize the received data from the Master company into the right tables. Once it has completed, open the Chart of Accounts to check that the Chart of Accounts now contain accounts. Try to edit the name of an account. You should get an error as below:



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.

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

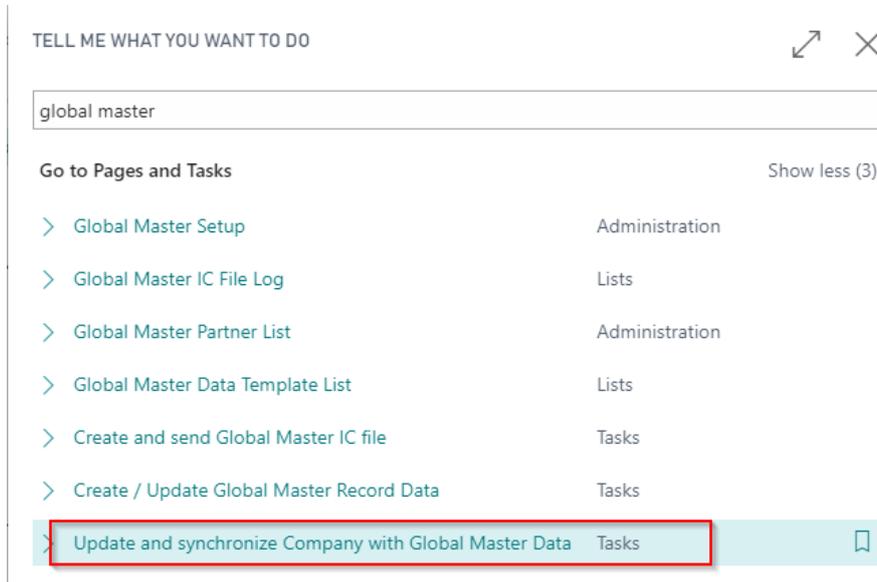
38 Go back to the role center and search for Create and Send Global Master IC File:



39

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.



40

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.