

## Global Master

# HOW TO SYNCHRONIZE MASTER DATA BETWEEN COMPANIES

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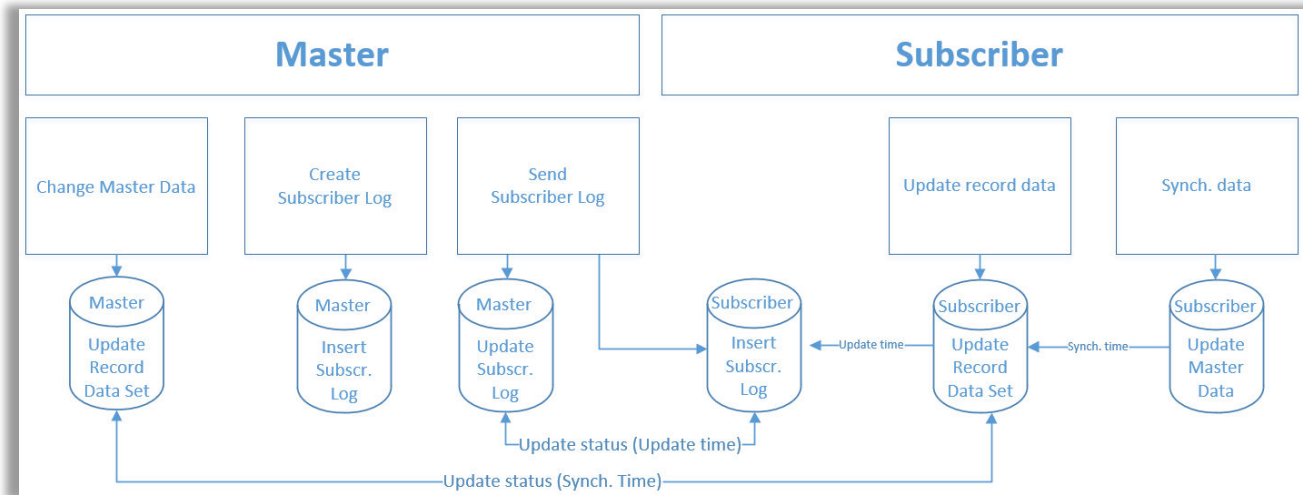
# INTRODUCTION

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Global Master is a tool used to synchronize data between companies.

In the most basic scenario, we need a master company holding data to be synchronized, and a subscriber company which is subscribing to data from the master company.

We do have to define what data to synchronize in the master company and afterwards we need to perform some tasks to transfer the data.



This Guide takes you through setup and synchronization step by step.

Here we will work with a scenario including a master company “M1 Master” and a subscriber company “S1 Subscriber”. The examples will use the Windows Client.

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## SET UP MASTER COMPANY

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Start the Dynamics 365 Business Central Windows Client and select the master company to be set up. In this example our master company is named “M1 Master”.

Go to the Global Master Setup. Find the page in Departments, Global Master or using the search field at the right top corner of the Windows Client.

The screenshot shows the 'Global Master Setup' page in Dynamics 365 Business Central. At the top, it displays 'Work Date: 25-01-2024' and a 'Saved' status. The page is divided into three main sections: 'General', 'Master Company', and 'Subscriber Company'. In the 'General' section, 'Company Type' is set to 'Master' and 'Partner ID' is 'M1'. The 'Master Company' section includes 'Max. No. of Nodes' and 'Remove file contents ...' fields. The 'Subscriber Company' section includes 'Delete Entries Older T...' and 'Delete File Content Ol...' fields. There are also several toggle switches for 'Show History in Role ...', 'Master: Delete Conte...', 'Subscriber: Delete Co...', and 'Override Delete Restri...'.

In the Global Master Setup page, you select “Company Type” *Master* and enter *M1* in the “Partner ID” field. This is sufficient for the basic master company setup.

Selecting the Master company type the system activates the company to generate data for synchronization automatically.

The Partner ID’s are used to connect master and subscribers. This will be set up in the Partners section.

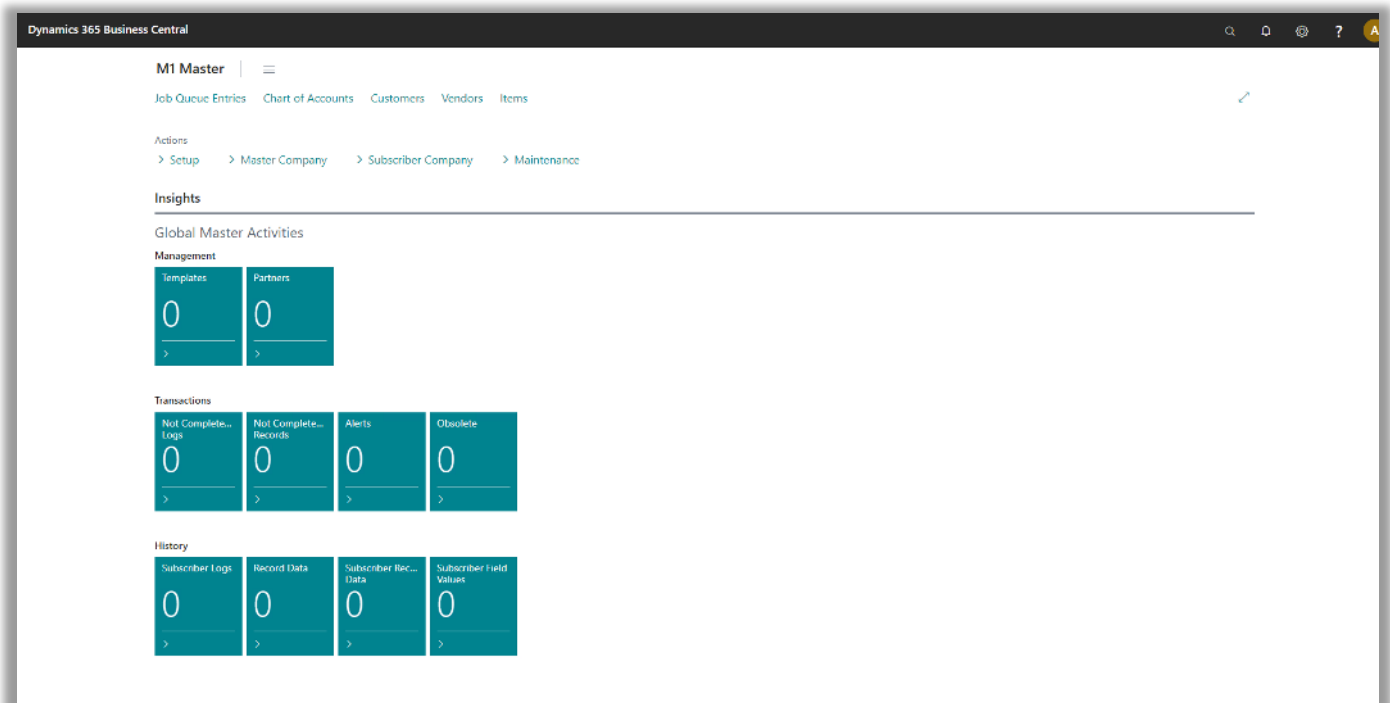
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## Setting up Role Center

Getting the best overview and having direct and easy access to the vital functions in Global Master, is using the Global Master Role center. Select the profile 'Global Master Administrator' in My Settings.



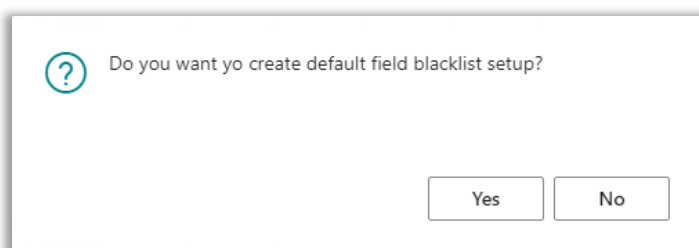
The Global Master Administrator role center has a group for Master Activities and a group containing Subscriber Activities.

Here you have direct access to the most used data and actions. This is your control center when working with Global Master.

In the Global Master manual, you will find description of all the details.

## Blacklist

Some fields are not suitable for synchronization. To define these the system offers a list of blacklisted fields. In the Global Master Setup page click on the "Set default Blacklist".



Click "Yes" to create the default blacklist. The fields listed in the blacklist will not be allowed to be added to a data template. Fields entered in a template before the field is blacklisted will remain as a field to be synchronized by the template. More fields can be added through the "Blacklist Setup" button.

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## SET UP SUBSCRIBER COMPANY

Having a master company, we also need a subscriber company. Select the company to be set up as a subscriber company. Our example is with a subscriber company called “S1 Subscriber”.

The company “S1 Subscriber” is empty. During the process described here, Global Master data and transferred data are the only data which will be filled in during the steps we are performing.

The screenshot shows the 'Global Master Setup' interface. At the top, there are navigation icons (back, edit, share, add, delete) and a 'Saved' status. Below the title, there are tabs for 'User Settings', 'Actions', 'Related', and 'Fewer options'. The main content is divided into three sections: 'General', 'Master Company', and 'Subscriber Company'. In the 'General' section, 'Company Type' is set to 'Subscriber' and 'Partner ID' is 'S1'. The 'Show History in Role ...' toggle is turned on. The 'Master Company' section has empty input fields for 'Max. No. of Nodes' and 'Remove file contents ...', and the 'Master: Delete Conte...' toggle is off. The 'Subscriber Company' section has three toggles turned on: 'Handle Data Files', 'Synchronize Dataset', and 'Only Synchronize Net ...'. It also has three input fields for 'Delete Entries Older T...', 'Delete File Content Ol...', and 'Subscriber: Delete Co...', and two more toggles: 'Override Delete Restri...' and 'Update older log first'.

In the Global Master Setup page, you select “Company Type” *Subscriber* and enter *S1* in the “Partner ID” field. You will see, that when selecting the subscriber type three fields in the Subscriber Company section are marked checked: “Handle Data Files”, “Synch. dataset” and “Only Synchronize Net Changes”.

Select “Show History in Role Center” for displaying the optional History group in the role center. This setting is to be set for each company you want to have the History group made visible.

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## SET UP PARTNERS

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Go back to the master company.

In the Partners section of the role center you can define the subscribers of the current master company.

The screenshot shows the 'Partner Card' configuration page. At the top, there is a navigation bar with a back arrow, 'Work Date: 25-01-2024', and icons for edit, share, add, and delete. A 'Saved' status is also visible. Below the navigation bar is the title 'Partner Card' and a breadcrumb trail: 'Process > Global Master > More options'. The main content area is divided into sections: 'General' and 'Connection Set Up'. The 'General' section includes fields for 'ID' (S1), 'Description' (S1 Subscriber), 'Data Exchange Type' (Database), and 'On Hold' (checked). The 'Connection Set Up' section is split into 'Database' and 'Web Service' sub-sections. The 'Database' section has a 'Company Name' field with 'S1 Subscriber' selected. The 'Web Service' section has fields for 'AAD Tenant Id', 'Environment Name', 'Company Id', 'Client Id', 'Client Secret', 'Subscriber Company ...', and 'Subscriber Display Na...'. The 'Company Name' field is highlighted with a blue border.

Enter *S1* in the “ID” field. The ID must correspond to an ID entered in the subscriber company which this partner is referring to.

The “Data Exchange Type” Database will suit us fine in our case, where both master and subscriber are in the same database.

Select the subscriber company *S1 Subscriber* in the “Company Name” field by looking up in the companies list.

Until “On Hold” is unchecked, the partner cannot be synchronized.  
Remove the checkmark in the “On Hold” field.

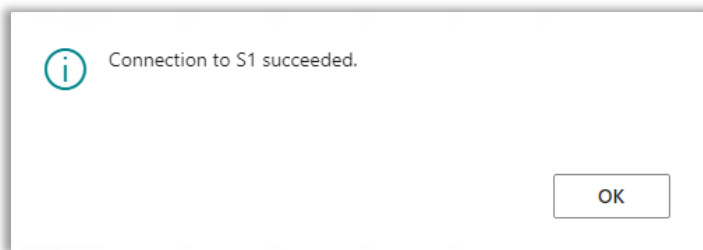
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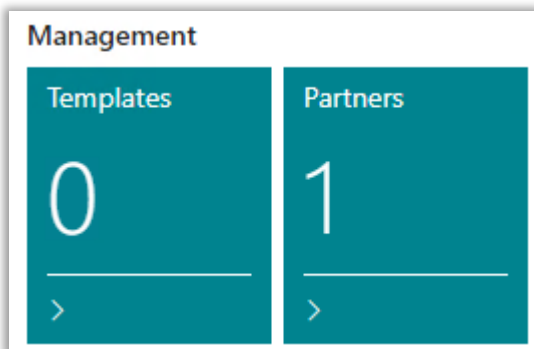
ID ↑	Description	Data Exchange Type	Company Name	On Hold	Warning
S1	S1 Subscriber	Database	S1 Subscriber	<input type="checkbox"/>	

In the Partners list you will now see the partner S1 not On Hold anymore. Validating if the master company and the subscriber company are setup correctly is easy by clicking the action button "Test Connection".



Success is when the two ID's are corresponding correctly.

After refreshing the role center page, you will see "1" in the Partners section. You might have to refresh the page to see number of Partners updated.

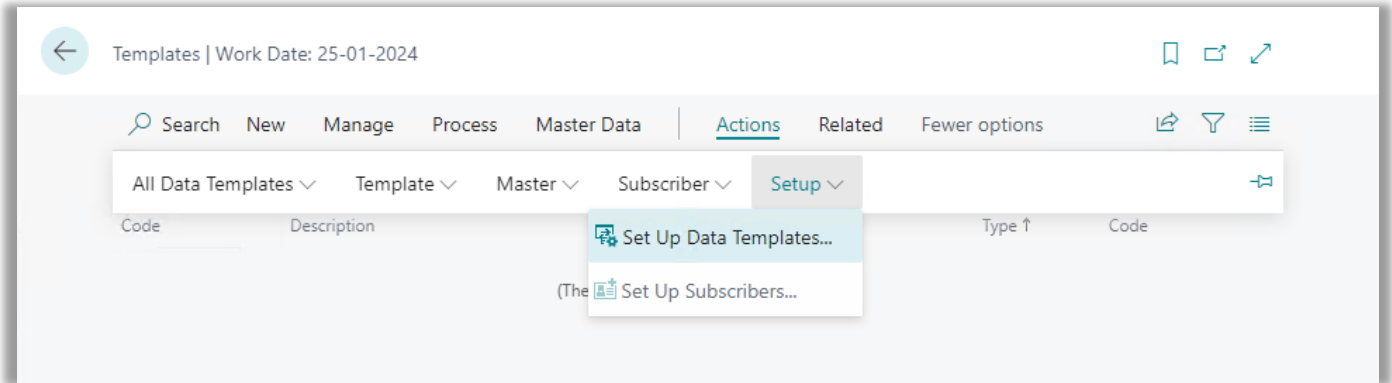


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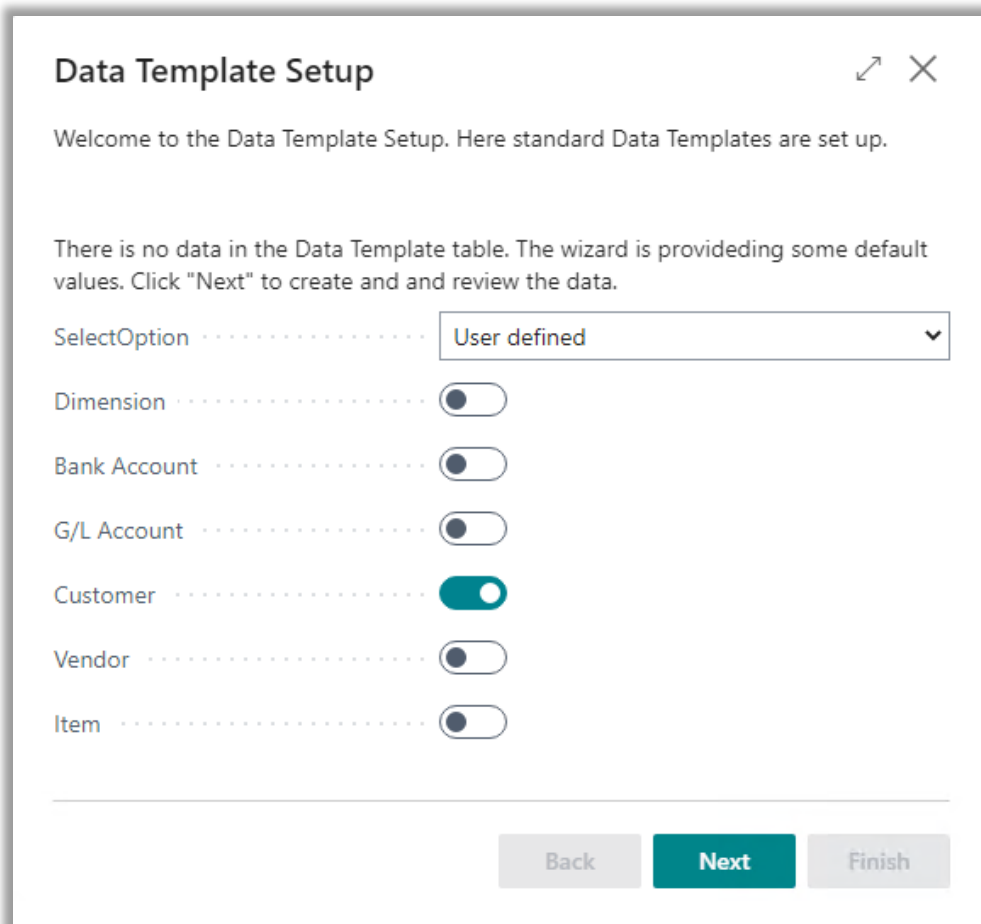


## SET UP TEMPLATES

Access the Templates list from the role center. Open the Actions tab.



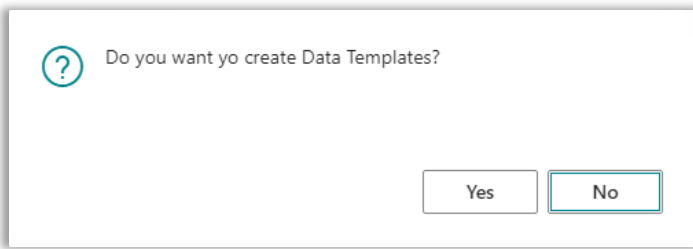
Click on the “Set up Data Templates” action button. Here you can select amongst some predefined areas for which default templates are available.



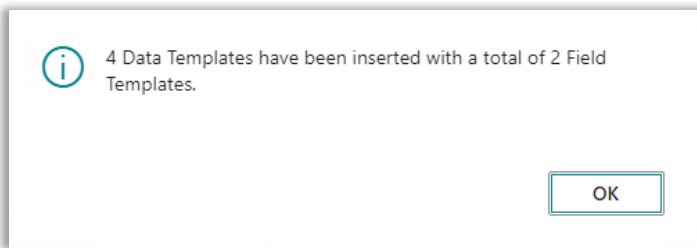
Select “Customer” and press the Next button.

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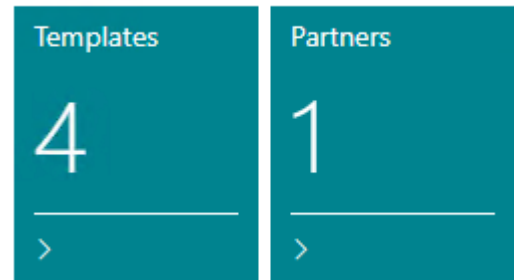
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Accept to have Data Templates created.



### Management



For the Customer area four Data Templates are created. Please note that default templates can be created only once. Therefore, it is important to select all areas of interest when creating default templates. These can always be deleted or modified later.

### Data Template Setup

Code ↑	Description	Table ID	Table Caption
→ <u>01-COUNTRY</u>	Country/Region	9	Country/Regior
01-GENBU...	Gen. Business Posting Gro...	250	Gen. Business P
01-POSTCO...	Post Code	225	Post Code
02-CUSTO...	Customer	18	Customer

Back Next Finish

Press Finish to end the making of default templates.

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Code	Description	Table ID	Table Caption	Type ↑	Parent template Code	Sequence No. ↑	Master Partner ID	Status	Released On	On Hold
01-COUNTRY	Country/Region	9	Country/Region	Field Template		0	M1	Under Developm...		<input type="checkbox"/>
01-GENBUSPOST...	Gen. Business Posting Group	250	Gen. Business Posting Group	Field Template		0	M1	Under Developm...		<input type="checkbox"/>
01-POSTCODE	Post Code	225	Post Code	Normal Template		0	M1	Under Developm...		<input type="checkbox"/>
02-CUSTOMER	Customer	18	Customer	Normal Template		0	M1	Under Developm...		<input type="checkbox"/>

When first inserted, a data template is marked with status *Under Development*. In this state the template can be edited and template subscribers can be added.

There are three types of data templates. See detailed description in the *Global Master Manual*.

- A *Normal Template* is a template to be synchronized. The template holds all fields to be transferred.
- A *Field Template* is a template defining data for a field reference.
- A *Sub Template* defines attached reference data.

**02-CUSTOMER**

Generelt

Code: 02-CUSTOMER | Validate Record:  | Owned by Master:  | Sequence No.: 0 | Status: Under Development | Released On: | On Hold:  | Config. Template Code:

Description: Customer | Master Partner ID: M1 | Owner Company Name: M1 Master | Type: Normal Template | Table ID: 18 | Table Caption: Customer

Field ID ↑	Field Caption	Val. Field	Table Name	Comment	Table Relation	Field Data Template C
1	No.	<input type="checkbox"/>	Customer		0	
2	Name	<input type="checkbox"/>	Customer		0	
3	Search Name	<input type="checkbox"/>	Customer		0	
4	Name 2	<input type="checkbox"/>	Customer		0	
5	Address	<input type="checkbox"/>	Customer		0	
6	Address 2	<input type="checkbox"/>	Customer		0	
7	City	<input type="checkbox"/>	Customer		225	
8	Contact	<input type="checkbox"/>	Customer		0	

## Add Template Subscriber

Only when a template subscriber is added to a data template, the template is ready to be released for synchronization.

You can use the “Set up Subscribers” guide to add subscribers to a given template. This action is found in the Templates list.

Alternatively, subscribers can be managed from the “Subscribers” action on the Navigate tab in either list or card page.

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### Subscriber Setup

Mark the subscribers which have to be added. Click "Next" to add selected subscribers.

	Subscriber Partner ID ↑ ▼		Description	Add to Data Template
→	S1	⋮	S1 Subscriber	<input checked="" type="checkbox"/>

Back Next Finish

After clicking *Next*, please select the subscriber which corresponds to the partner setup. Pressing *Finish* ends the setup of this specific normal template.

When working with more templates, you must add subscribers to all templates you want to synchronize.

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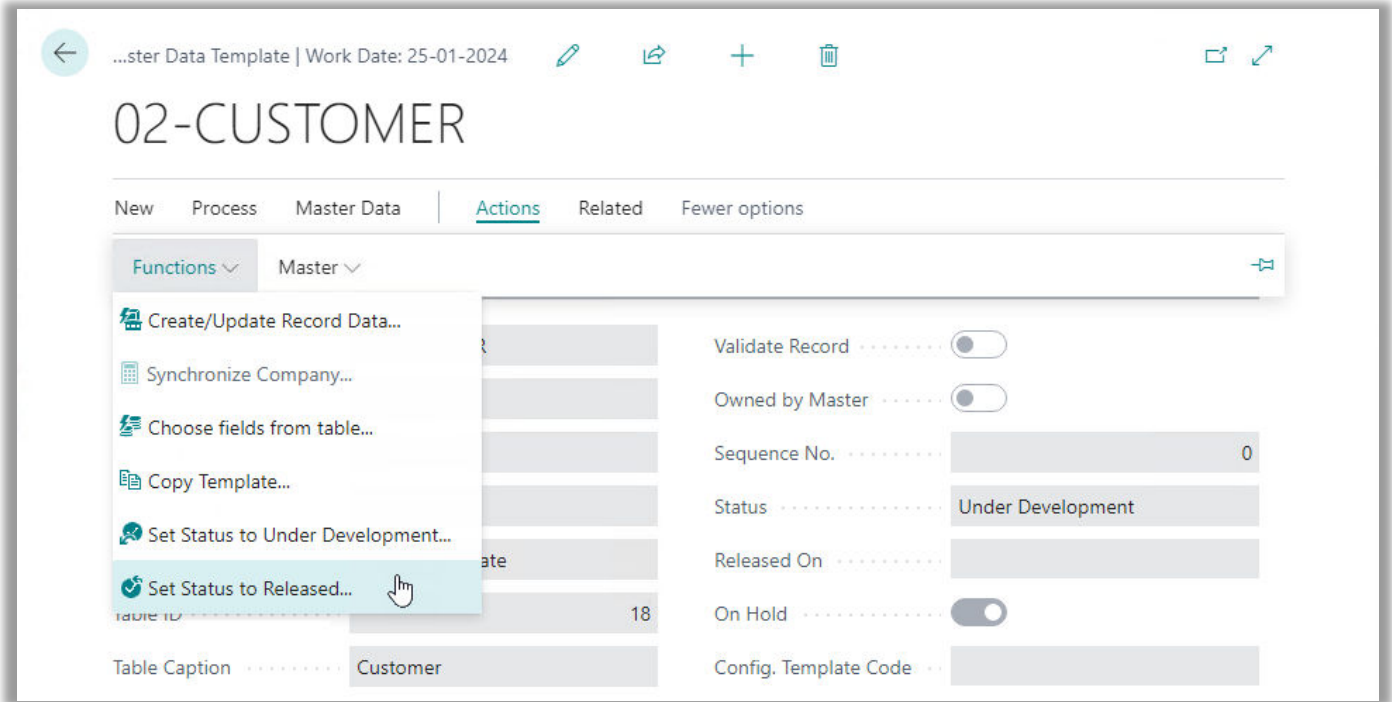
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## Release templates

Last step making the templates ready for synchronization is to release the templates.

### Approach for the quick guide walk-through: Release one template

In the Quick Guide example, we are releasing one template only, namely the '02-CUSTOMER' template.



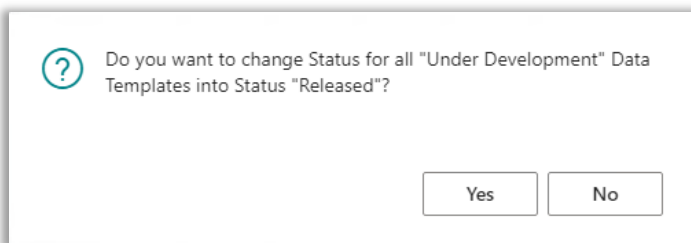
Change “Status” to Released using the function “Set Status to Released...”. Accept by clicking “Yes”. Then Record Data are prepared for synchronization.

### Alternative method: Release all templates by one click

To learn how to release multiple templates at the same time, please read this paragraph.

Be aware that the following screenshots are based on the scenario where only the template '02-CUSTOMER' is released. If you release all templates in your Quick Guide guided trial, the numbers in the role center will differ from the screenshots.

Click on the “Set Status Released” in the *All Data Templates* group of the action ribbon in the Templates list.



Accept by pressing “Yes”.

When releasing the templates, so called Record Data will be prepared. In the role center you will now see figures in “Record Data”, “Subscriber Record Data” and “Subscriber Field Values”.

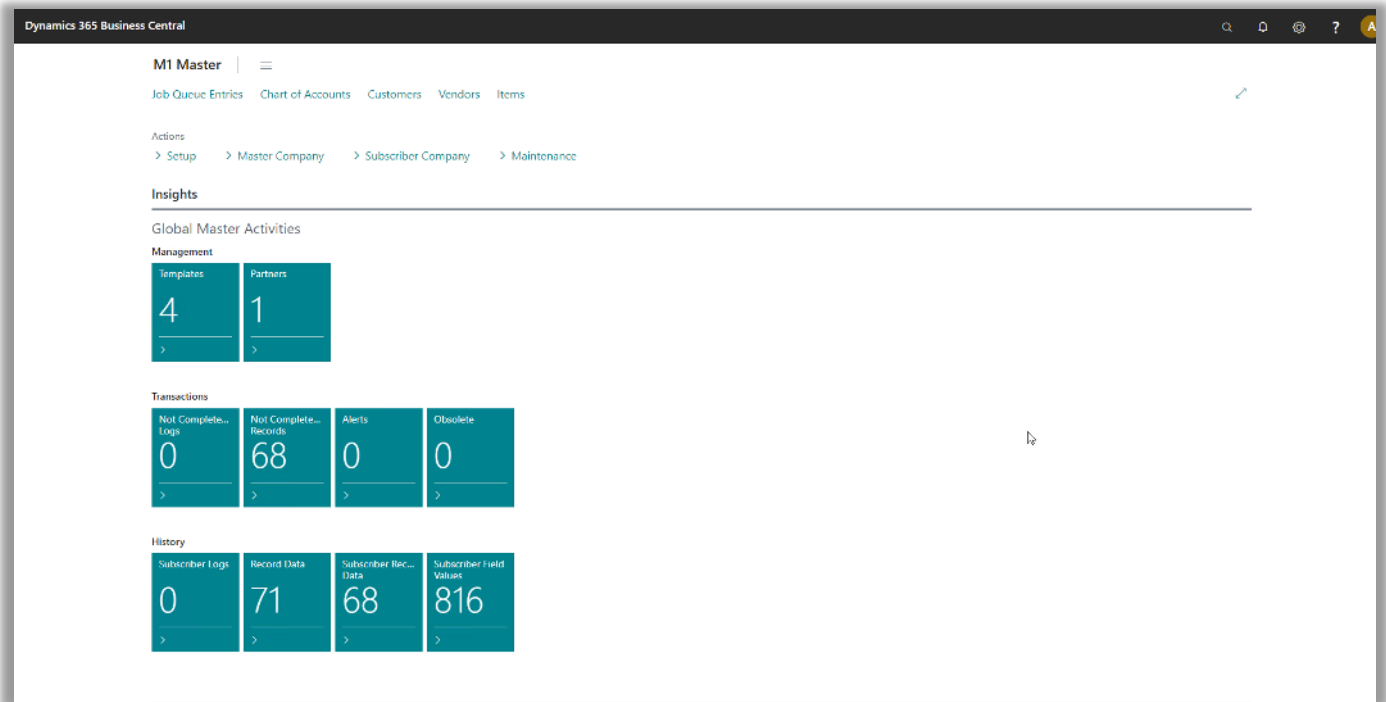
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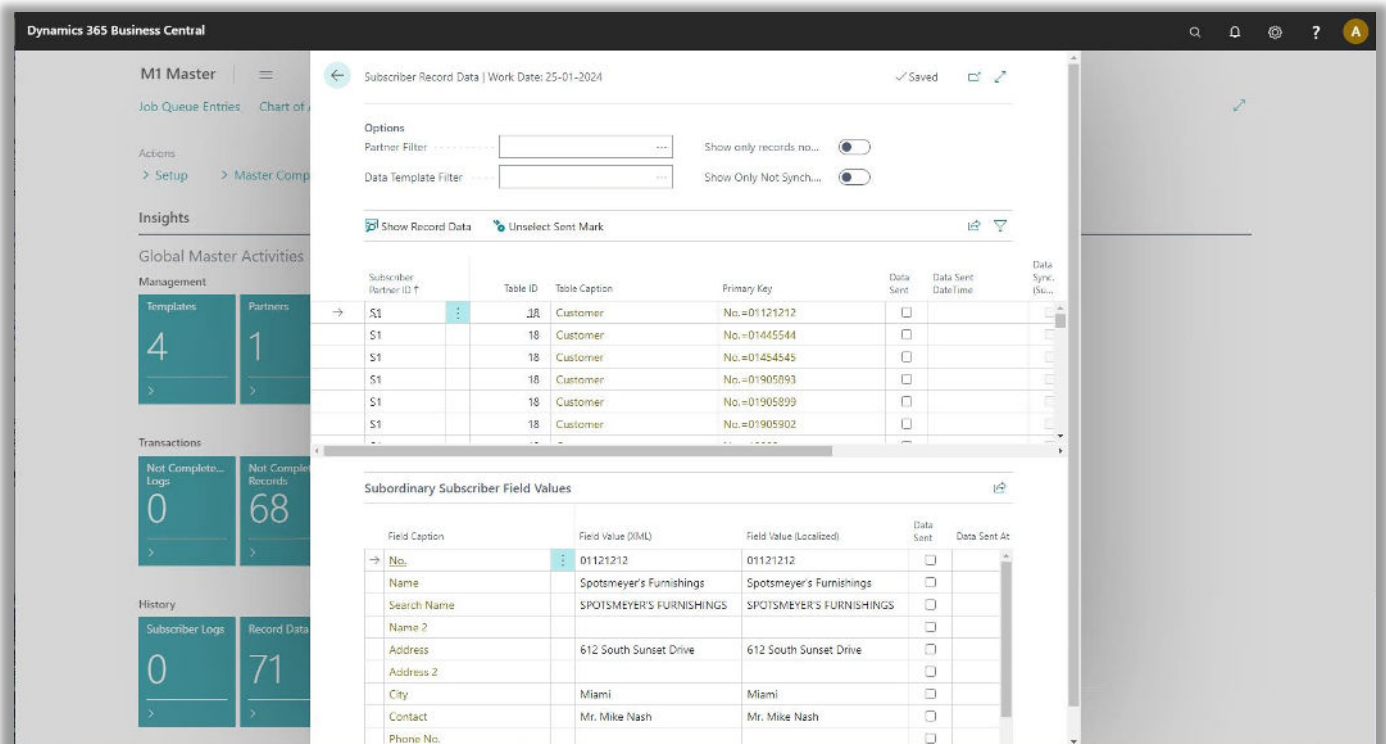
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# READY TO SYNCHRONIZE

After the templates were released, we now can see the data prepared for the synchronization.



Subscriber Record Data and Subscriber Field Values are marked olive when not transferred and synchronized.



In these pages you can follow the status on the single records. Are data sent, are data synchronized?

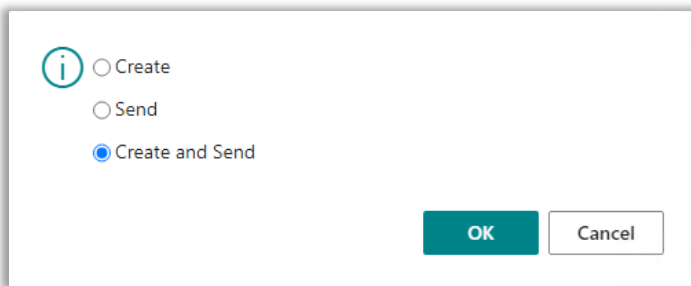
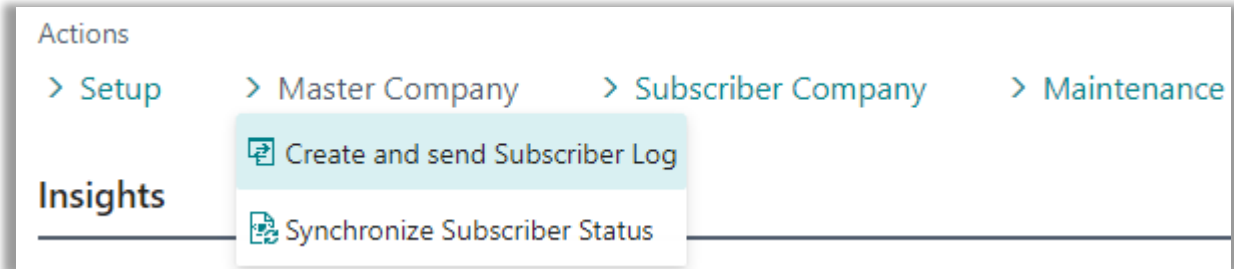
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## CREATE AND SEND SUBSCRIBER LOG FROM MASTER COMPANY

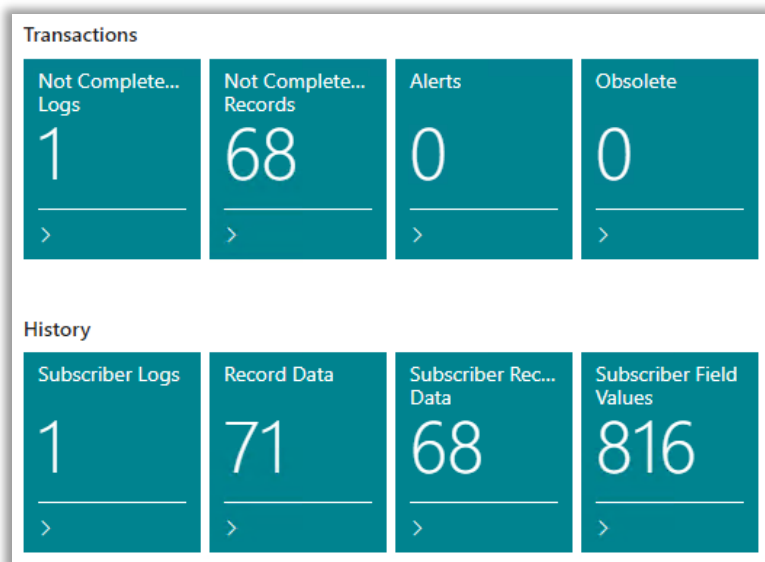
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To activate the synchronization, press the “Create and send Subscriber Log” action button in the role centers ribbon.



You can choose to create and send separately or performing both steps combined. Select “Create and Send” and press *OK*.

Subscriber Logs are created for the templates which are released.



One subscriber log for every template handled were created. In the *Subscriber Record Data* and *Subscriber Field Values* the records are now marked Sent. Still yellow since they are not synchronized in the subscriber company.

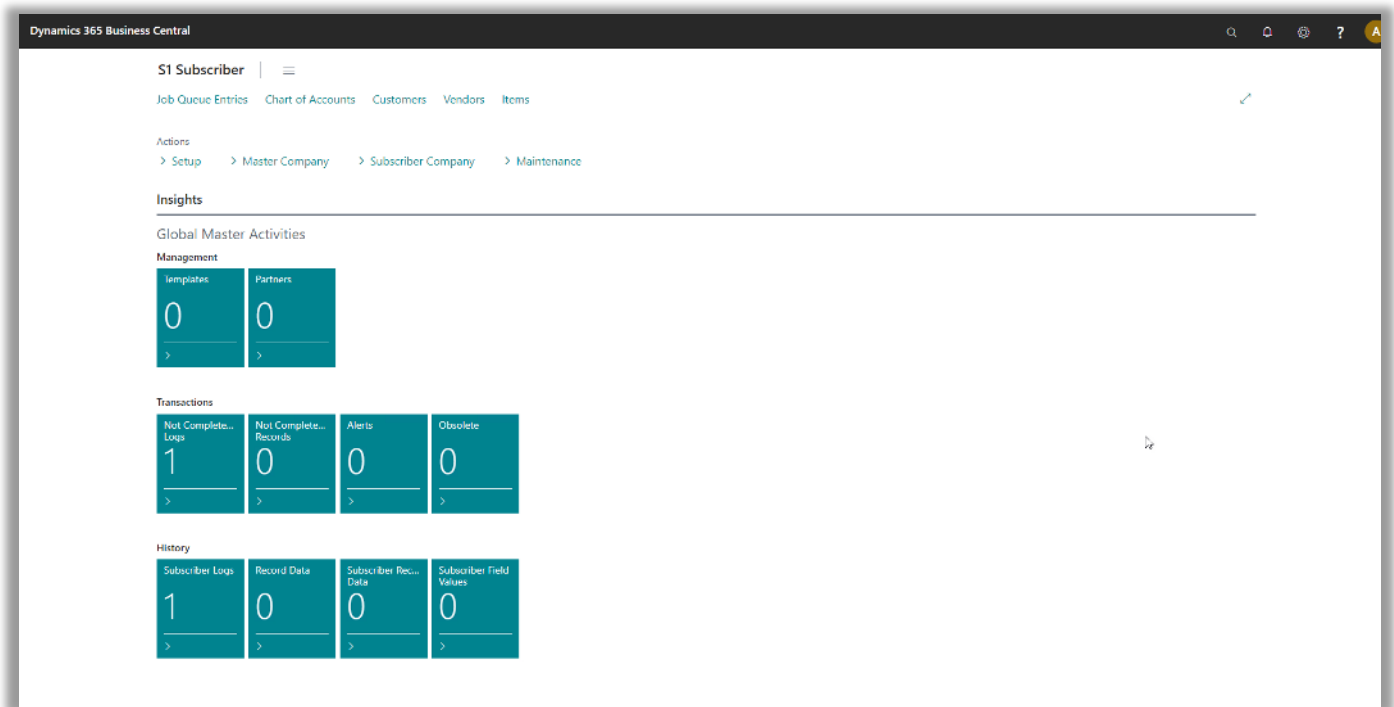
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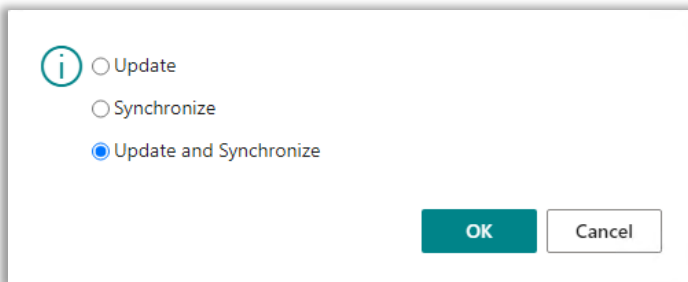
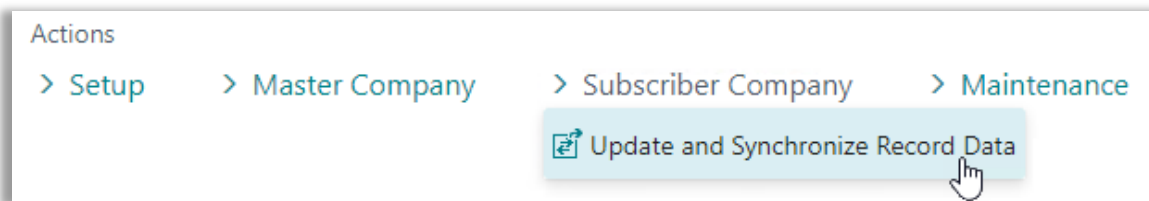
# UPDATE AND SYNCHRONIZE RECORD DATA IN SUBSCRIBER COMPANY

In the subscriber company, there are still a few tasks to be performed, before the data are received and ready to be used here.



The Subscriber Log has been updated when the Send activity was performed in the master company. In our example we can see that one template was sent.

Press “Update and Synchronize Record Data” to proceed.



Select Update and Synchronize and click OK. Data are received and afterwards data are synchronized.

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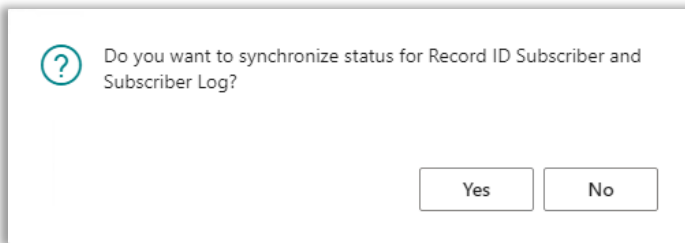
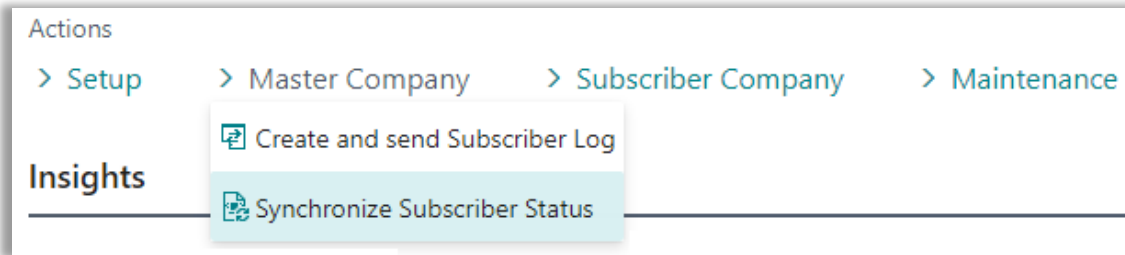




# SYNCHRONIZE SUBSCRIBER STATUS IN MASTER COMPANY

Now the subscriber company have been synchronized, we do have to fetch the subscriber status to complete the entire synchronization process.

Activate the “Synchronize Subscriber status” in the role centers action ribbon.



Confirm to synchronize status by clicking “Yes”.

The screenshot shows the 'Subscriber: Field Values' table in Dynamics 365. The table has columns for Subscriber Partner ID, Table ID, Table Caption, Primary Key, Field ID, Field Caption, Field Value (MMU), Field Value (Localized), Data Sent, Data Sent At, Data Sync (Y/N), and Data Sync On (Subscriber). The 'Data Sync' column shows 'Y' for all rows, indicating synchronization is complete. The 'Data Sync On' column shows the date and time for each synchronization.

Subscriber Partner ID	Table ID	Table Caption	Primary Key	Field ID	Field Caption	Field Value (MMU)	Field Value (Localized)	Data Sent	Data Sent At	Data Sync (Y/N)	Data Sync On (Subscriber)
S1	10	Customer	No.=01121212	1	No.	01121212	01121212	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01121212	2	Name	Spotsmeyer's Furnishings	Spotsmeyer's Furnishings	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01121212	3	Search Name	SPOTSMEYER'S FURNISHINGS	SPOTSMEYER'S FURNISHINGS	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01121212	4	Name 2			Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01121212	5	Address	812 South Sunset Drive	812 South Sunset Drive	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01121212	6	Address 2			Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01121212	7	City	Miami	Miami	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01121212	8	Contact	Mr. Mike Nash	Mr. Mike Nash	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01121212	9	Phone No.			Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01121212	15	Territory Code	FOREIGN	FOREIGN	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01121212	39	Blocked	0		Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01121212	88	Gen. Bus. Posting Group	EXPORI	EXPORI	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01445544	1	No.	01445544	01445544	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01445544	2	Name	Progressive Home Furnishings	Progressive Home Furnishings	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01445544	3	Search Name	PROGRESSIVE HOME FURNISH...	PROGRESSIVE HOME FURNISH...	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01445544	4	Name 2			Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01445544	5	Address	3000 Roosevelt Blvd.	3000 Roosevelt Blvd.	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01445544	6	Address 2			Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01445544	7	City	Chicago	Chicago	Y	27-09-2022 19:20	Y	27-09-2022 19:24
S1	10	Customer	No.=01445544	8	Contact	Mr. Scott Mitchell	Mr. Scott Mitchell	Y	27-09-2022 19:20	Y	27-09-2022 19:24

Now the lines are marked with “Data Synchronized” and they are not olive colored anymore. The synchronization process is completed. Customers have been transferred to the subscriber company.

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## Next steps

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### Continue synchronizing data manually

In the walk-through we synchronized one template only. There are three more templates that should have a subscriber attached, before the templates are released. Try this and follow the synchronization through.

### Handling changes

When data are changed the Record Data are being updated automatically, but the creation of subscriber logs and sending of these are going to be processed either manually or automatically when using the job queue.

### Job Queue

Set up job queue for automatic synchronization. This must be set up in both master and subscriber. Refer to the Global Master manual for further instructions.

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