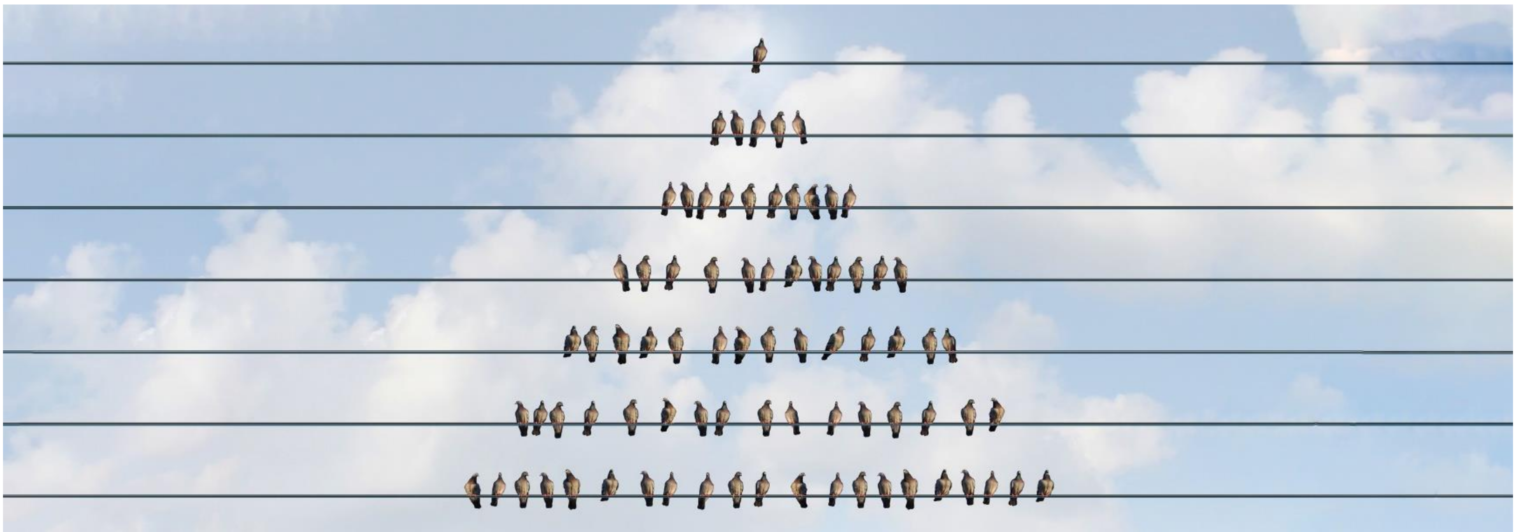
Quick Guide

Version: 3.00
July 30th 2024



Global Master

HOW TO SYNCRONIZE MASTER DATA BETWEEN COMPANIES

Microsoft Partner

itm8

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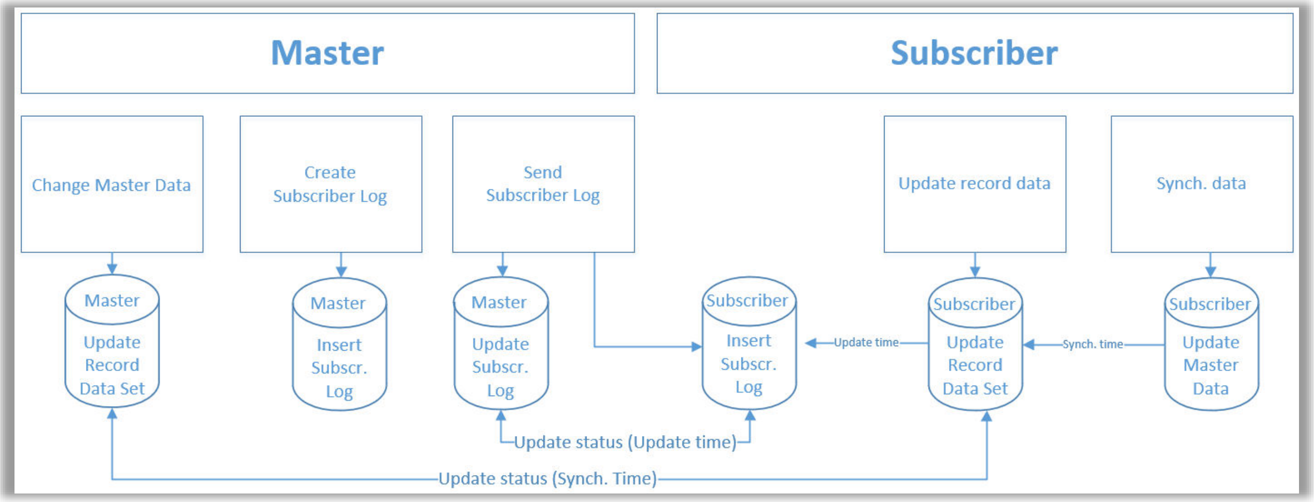
INTRODUCTION

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.



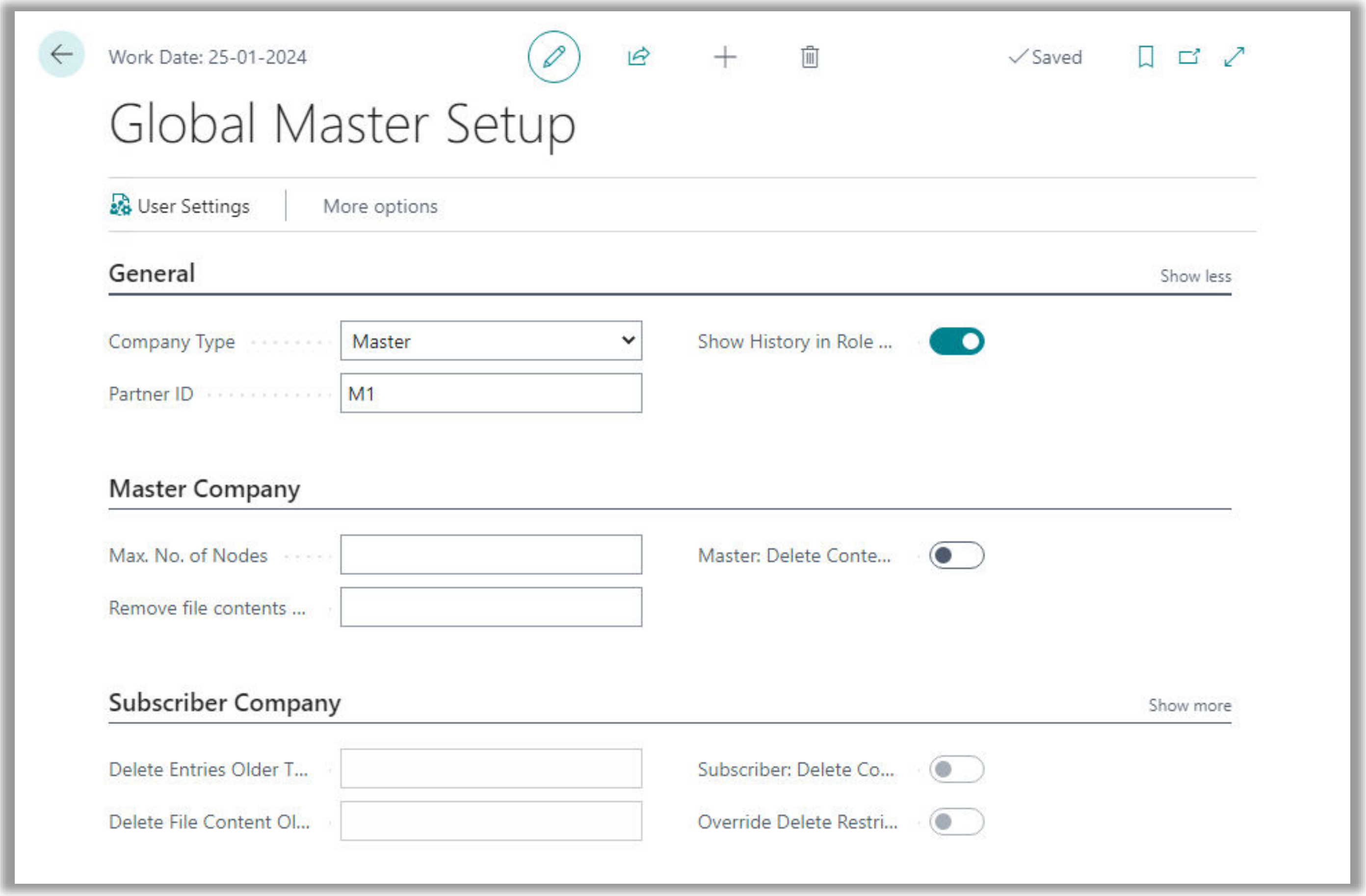
This Guide takes you through setup and synchronization step by step.

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.

SET UP MASTER COMPANY

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.



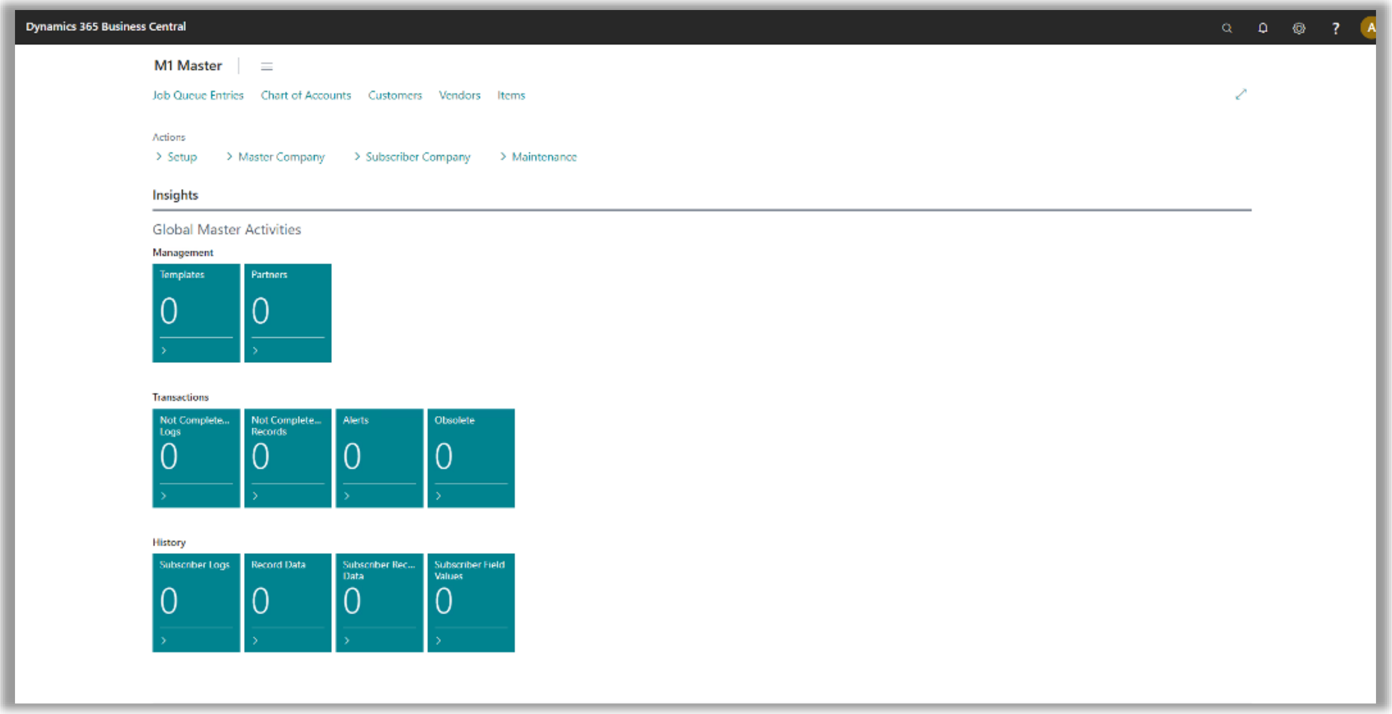
In the Global Master Setup page, you select "Company Type" *Master* and enter *M1* in the "Partner ID" field. This is sufficient for the basic master company setup.

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.

Setting up Role Center

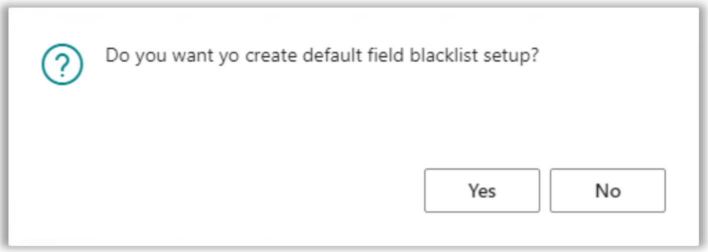
Getting the best overview and having direct and easy access to the vital functions in Global Master, is using the Global Master Role center. Select the profile 'Global Master Administrator' in My Settings.



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".

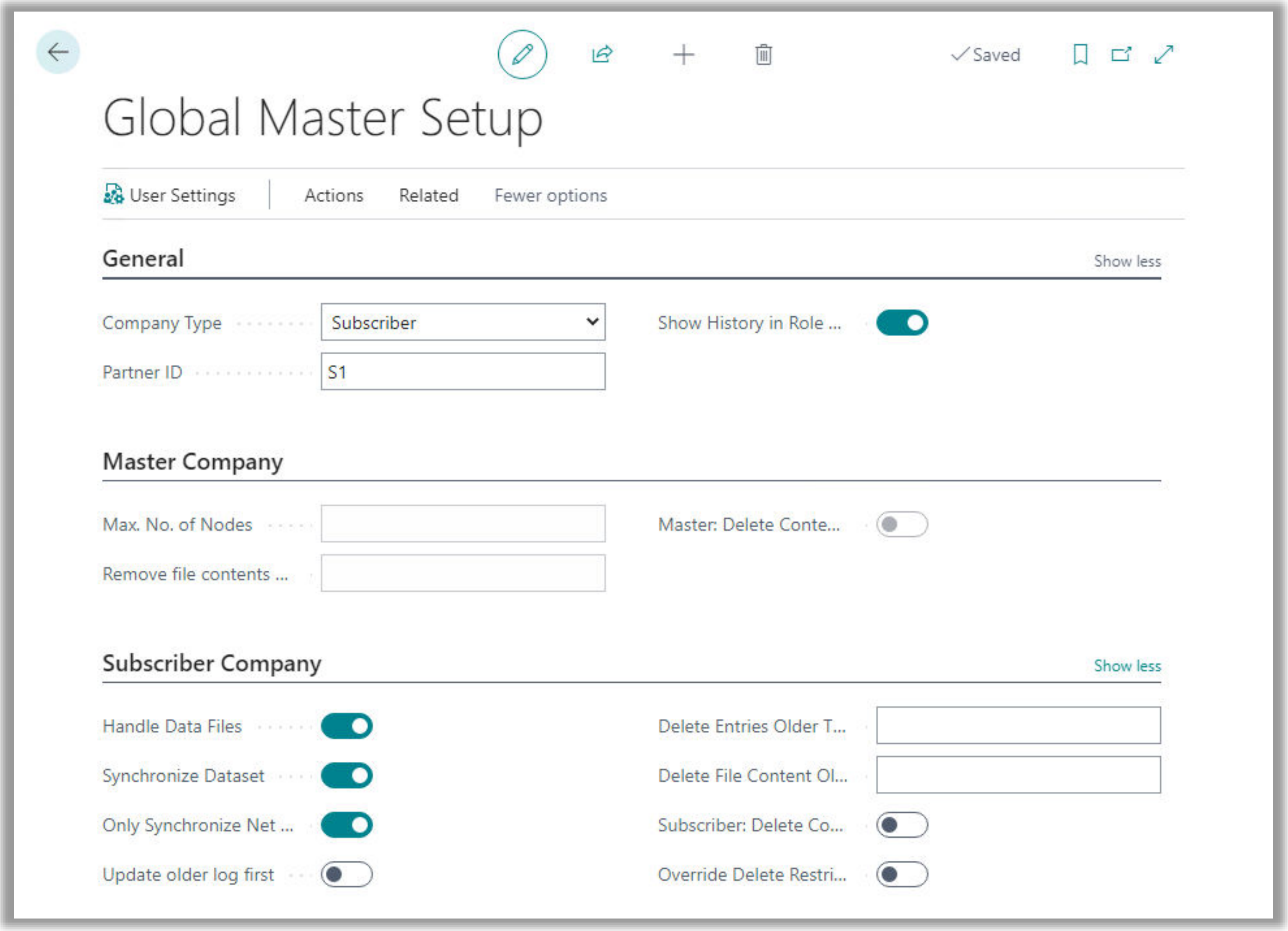


Click "Yes" to create the default blacklist. The fields listed in the blacklist will not be allowed to be added to a data template. Fields entered in a template before the field is blacklisted will remain as a field to be synchronized by the template. More fields can be added through the "Blacklist Setup"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

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.



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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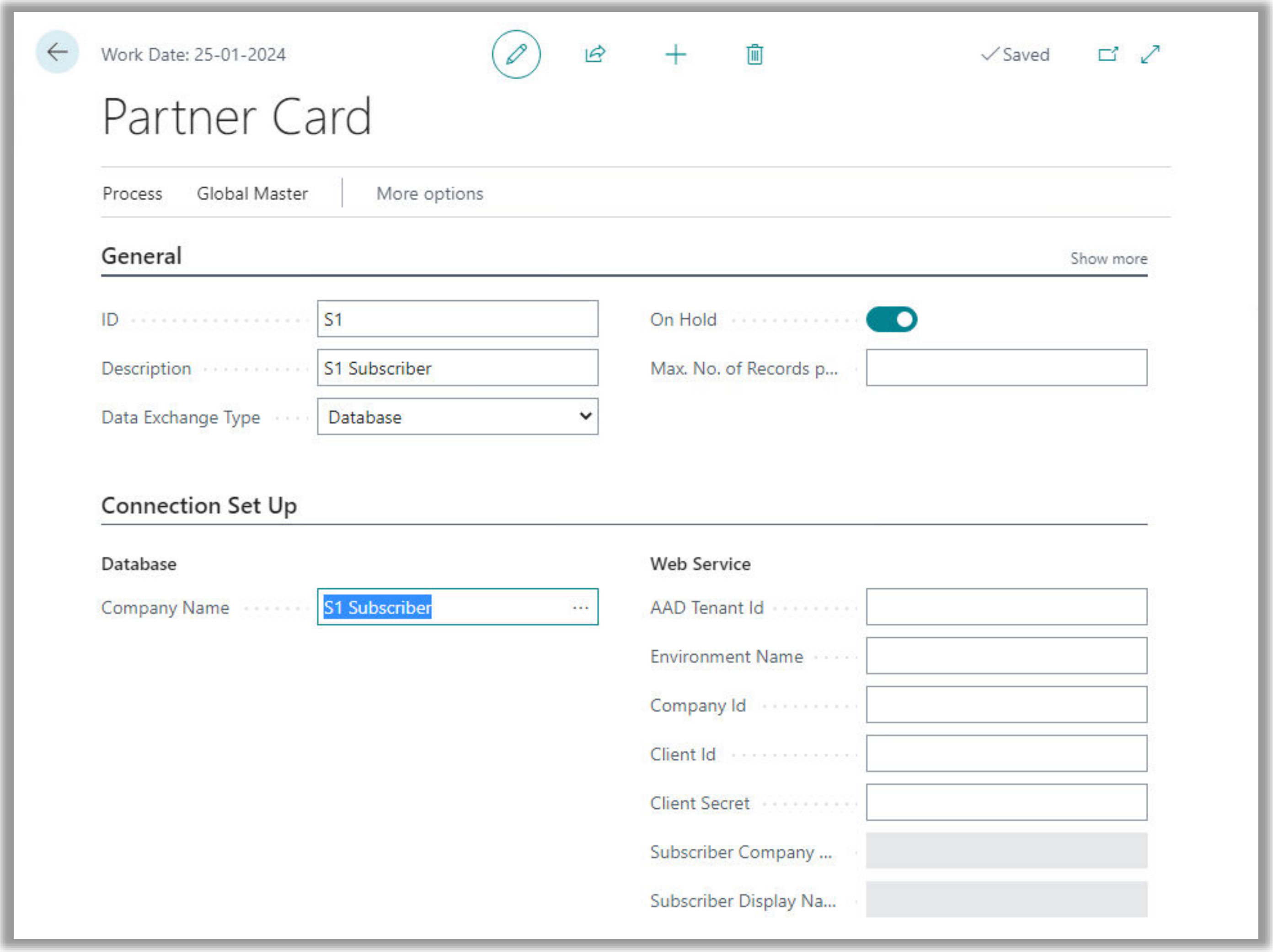
SET UP PARTNERS

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

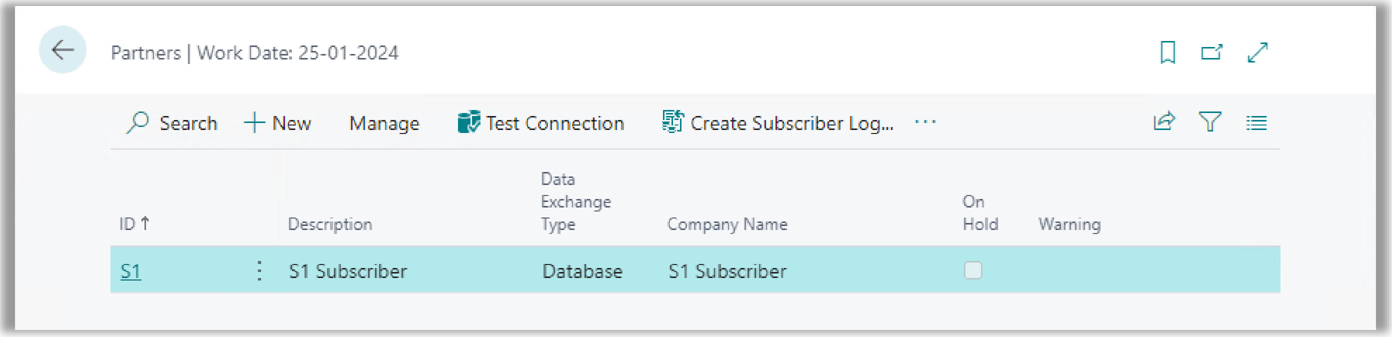


Enter *S1* in the "ID" field. The ID must correspond to an ID entered in the subscriber company which this partner is referring to.

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.

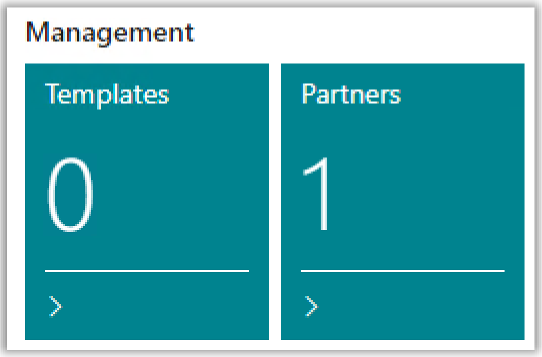
Until "On Hold" is unchecked, the partner cannot be synchronized.
Remove the checkmark in the "On Hold" field.



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”.

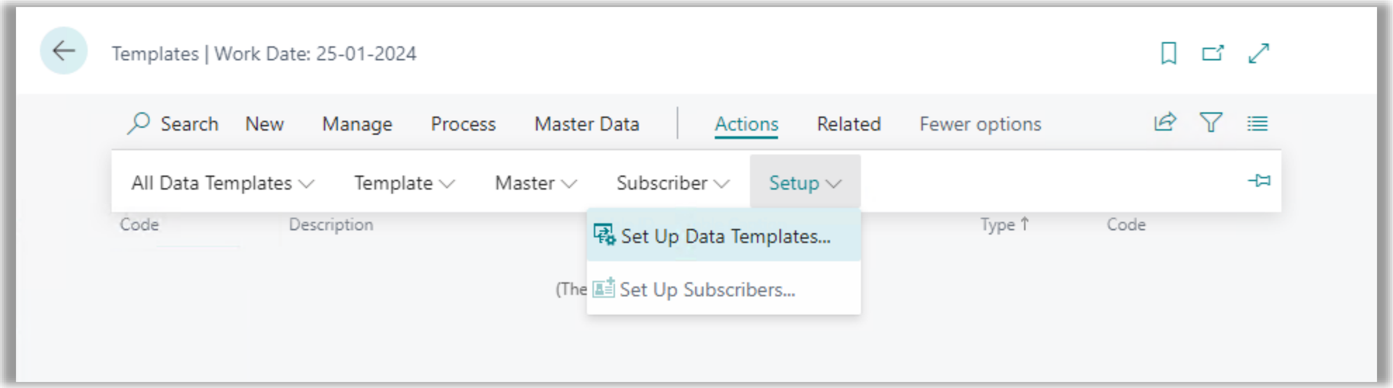
Success is when the two ID’s are corresponding correctly.

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.

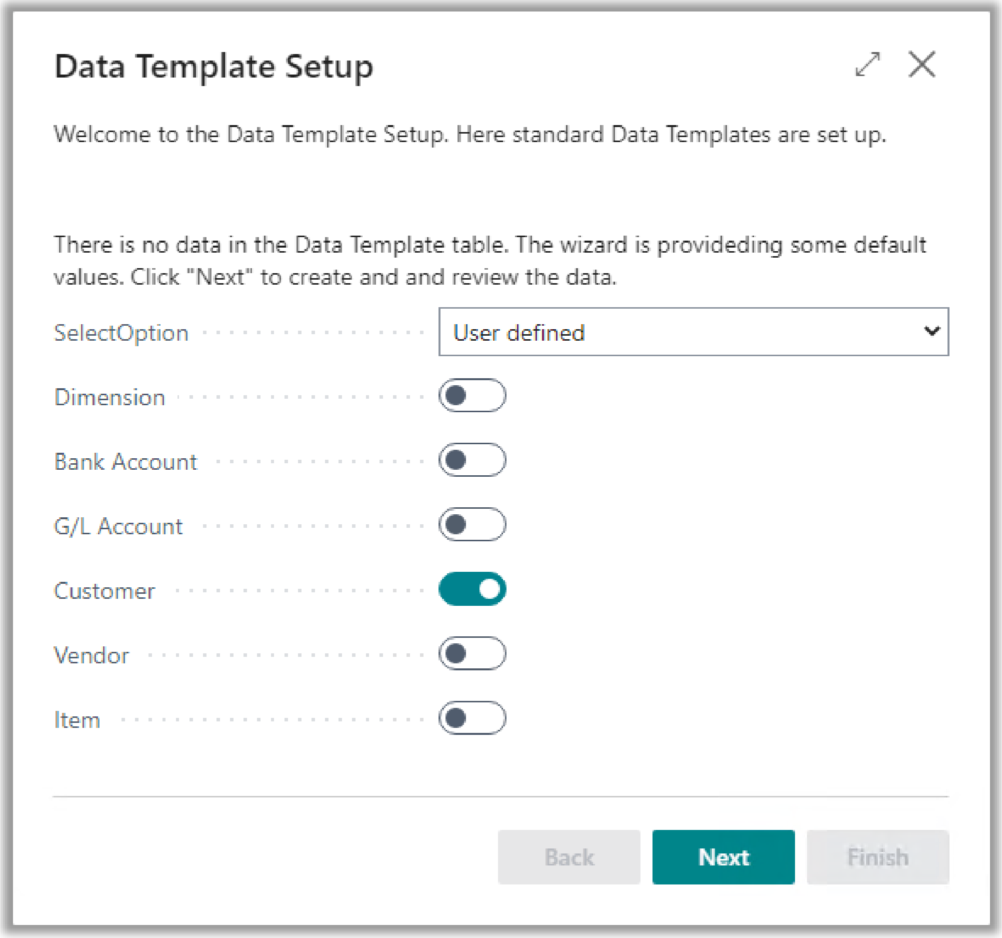


SET UP TEMPLATES

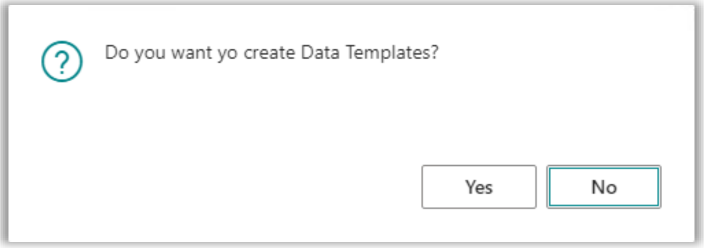
Access the Templates list from the role center. Open the Actions tab.



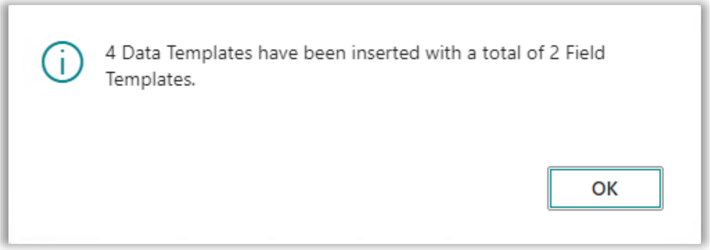
Click on the “Set up Data Templates” action button. Here you can select amongst some predefined areas for which default templates are available.



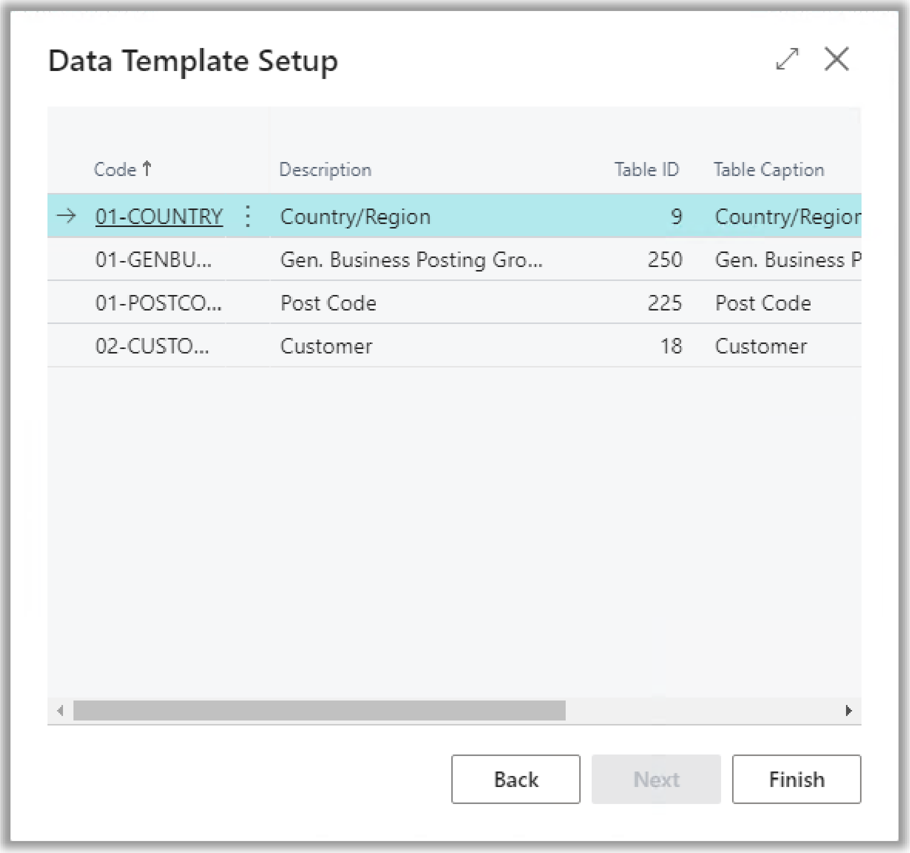
Select “Customer” and press the Next button.



Accept to have Data Templates created.



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.



Press Finish to end the making of default templates.

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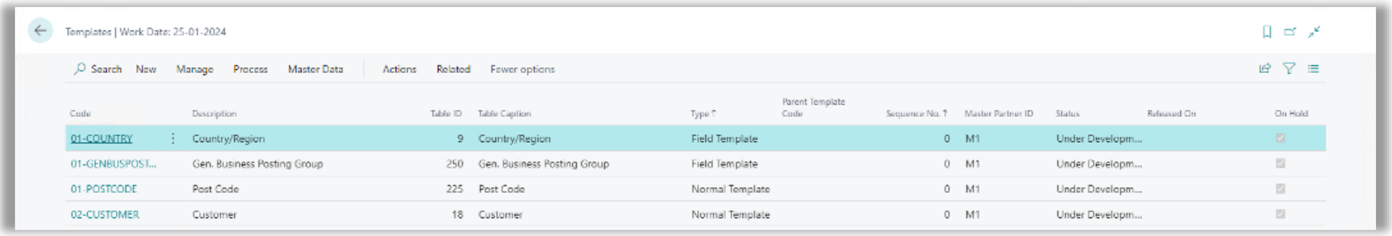
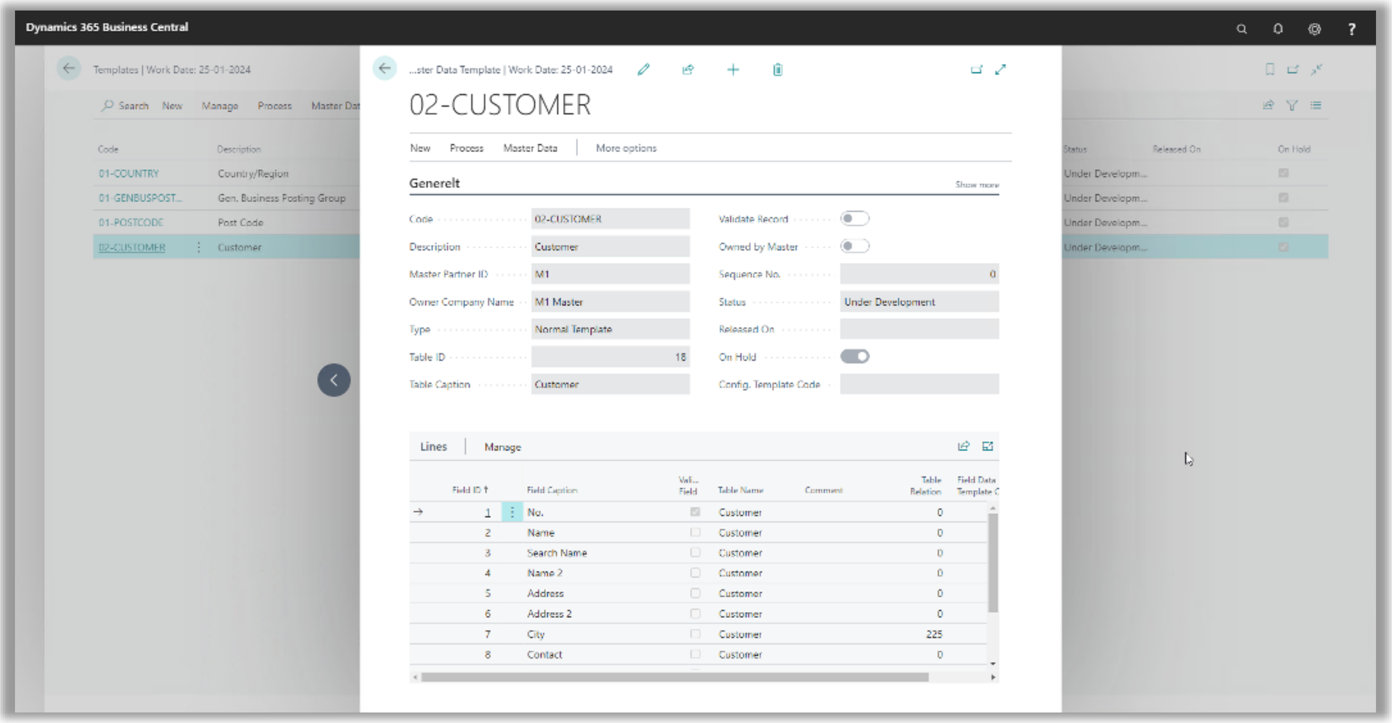


When first inserted, a data template is marked with status *Under Development*. In this state the template can be edited and template subscribers can be added.
There are three types of data templates. See deteiled description in the *Global Master Manual*.

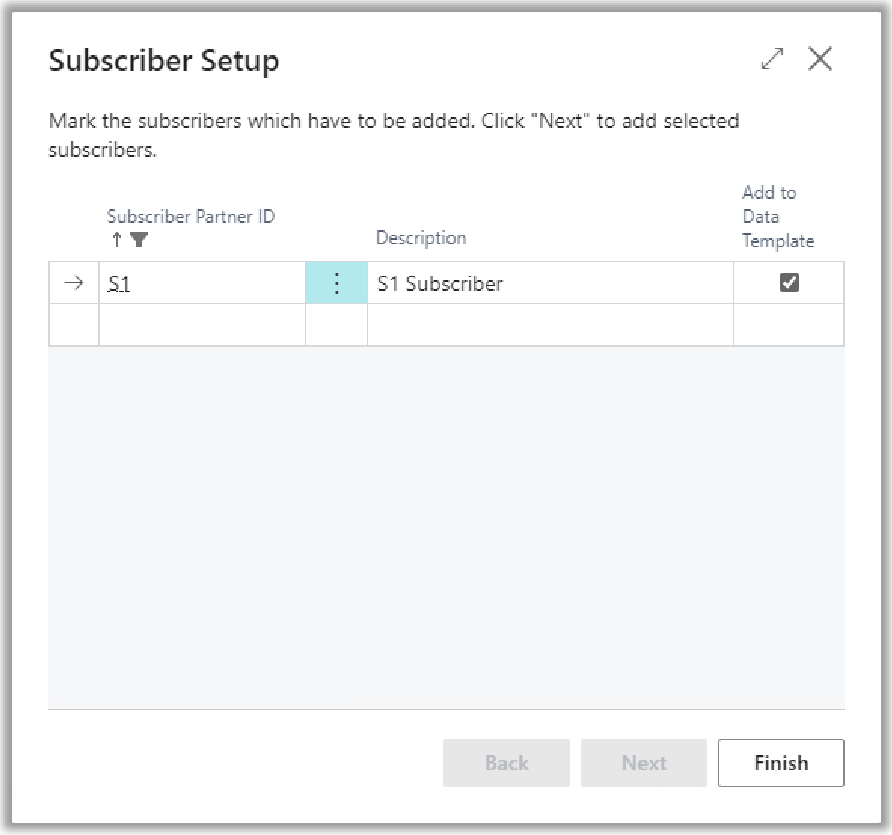
- A *Normal Template* is a template to be synchronized. The template holds all fields to be transferred.
- A *Field Template* is a template defining data for a field reference.
- A *Sub Template* defines attached reference data.



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.



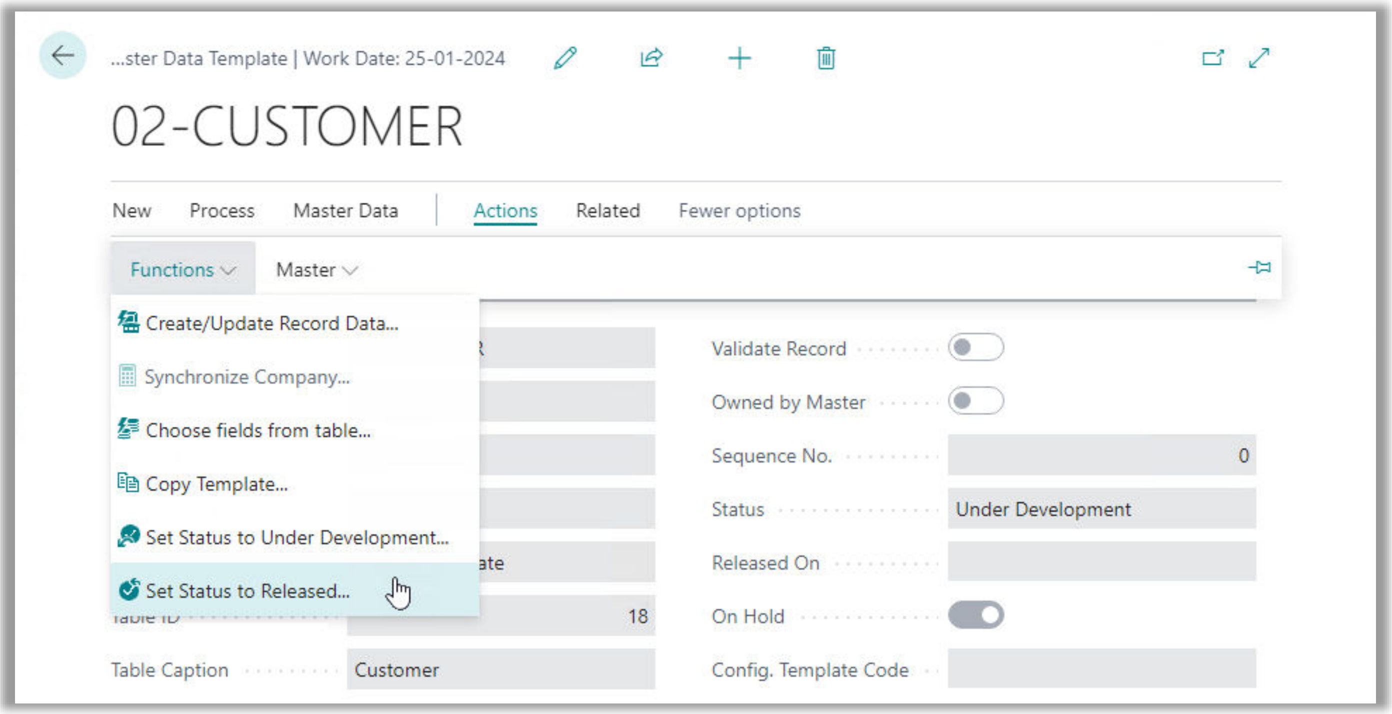
After clicking *Next*, please select the subscriber which corresponds to the partner setup. Pressing *Finish* ends the setup of this specific normal template.

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

Release templates

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

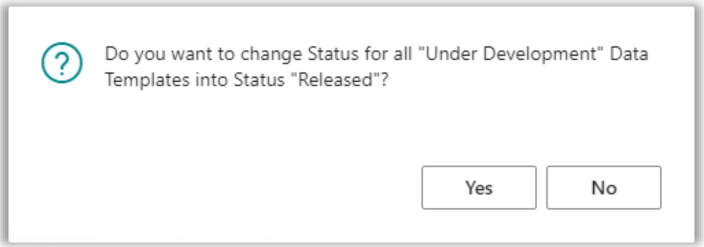
Approach for the quick guide walk-through: Release one template
In the Quick Guide example, we are releasing one template only, namely the '02-CUSTOMER' template.



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.

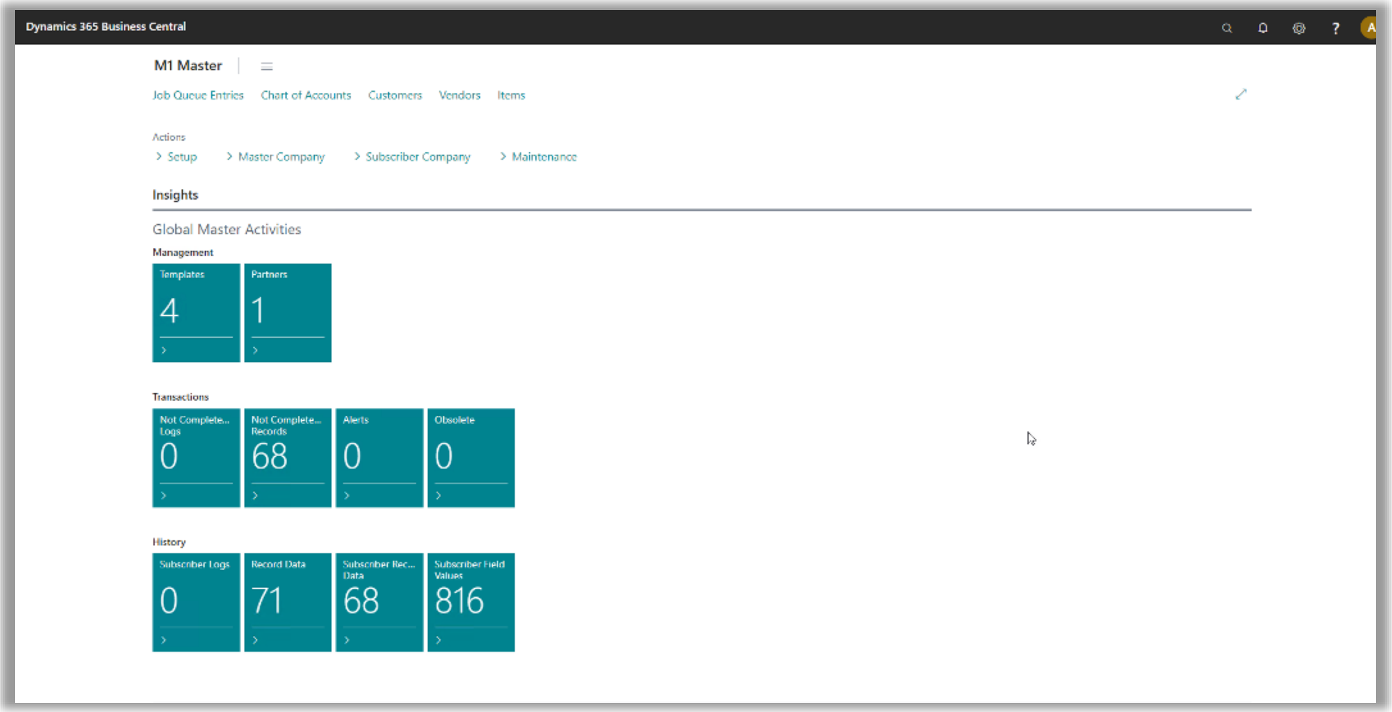


Accept by pressing "Yes".

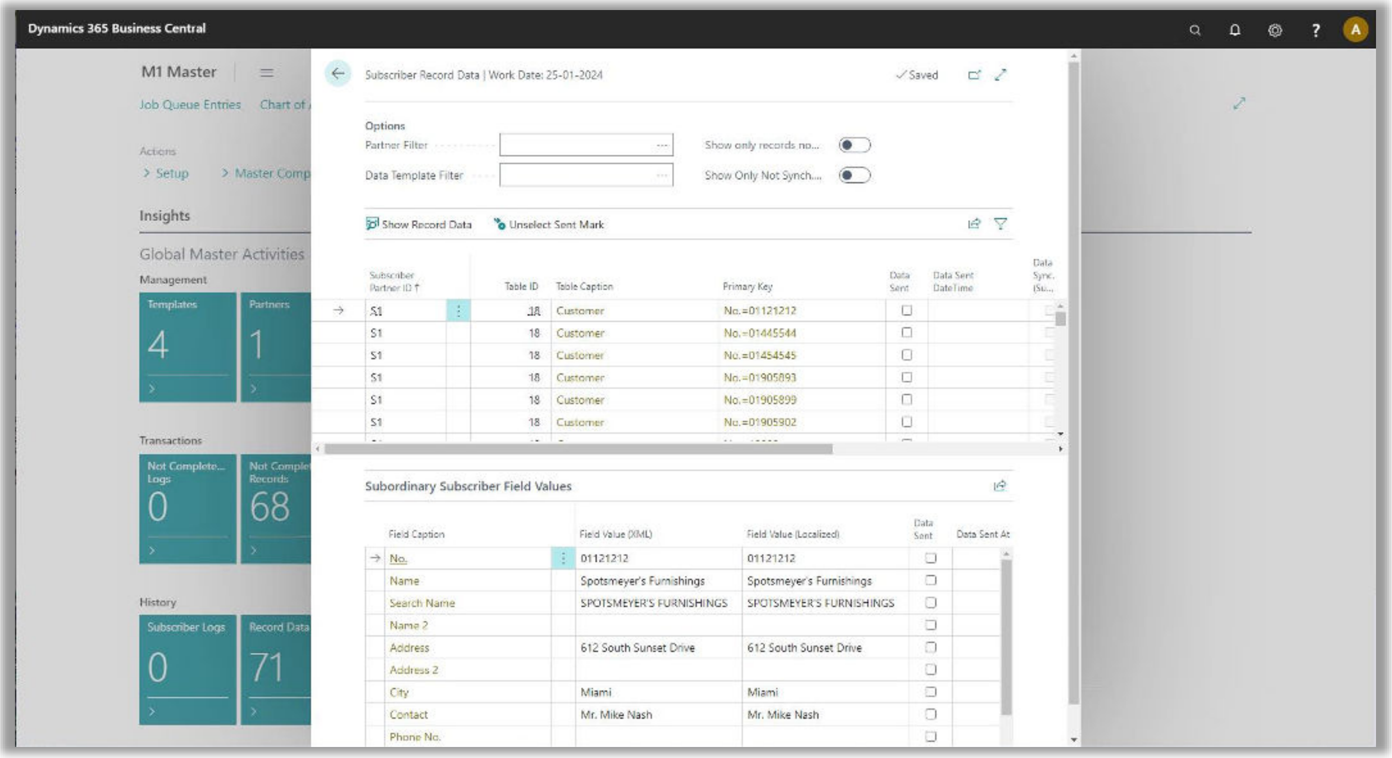
When releasing the templates, so called Record Data will be prepared. In the role center you will now see figures in "Record Data", "Subscriber Record Data" and "Subscriber Field Values".

READY TO SYNCHRONIZE

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



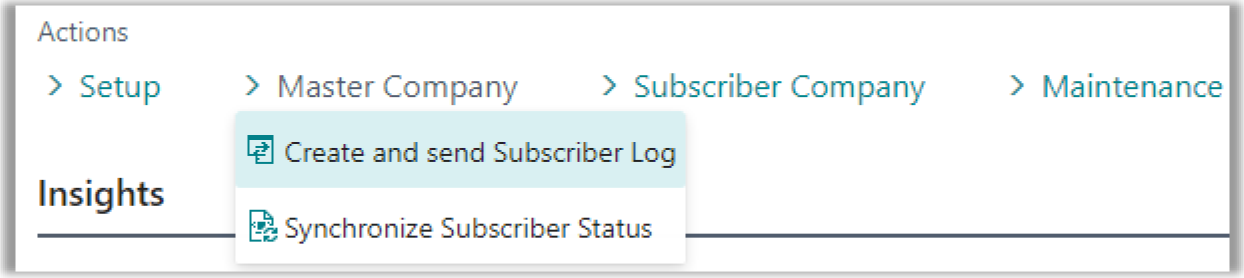
Subscriber Record Data and *Subscriber Field Values* are marked olive when not transferred and synchronized.

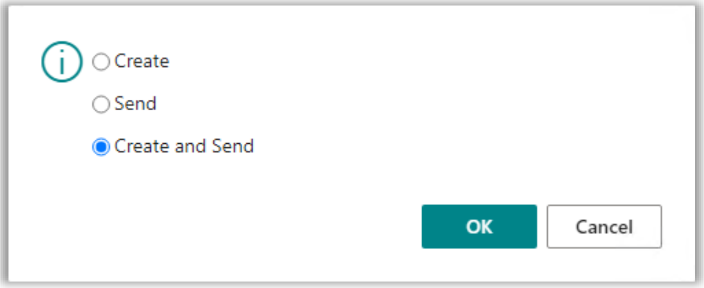


In these pages you can follow the status on the single records. Are data sent, are data synchronized?

CREATE AND SEND SUBSCRIBER LOG FROM MASTER COMPANY

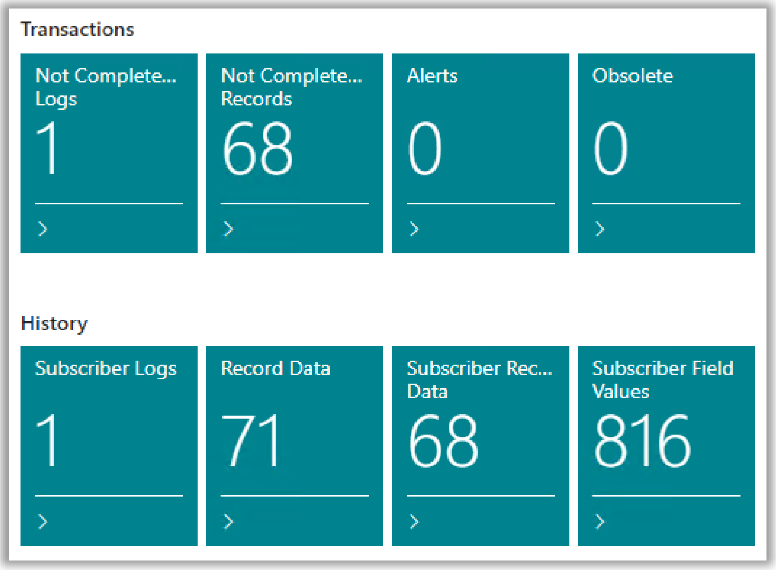
To activate the synchronization, press the "Create and send Subscriber Log" action button in the role centers ribbon.





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

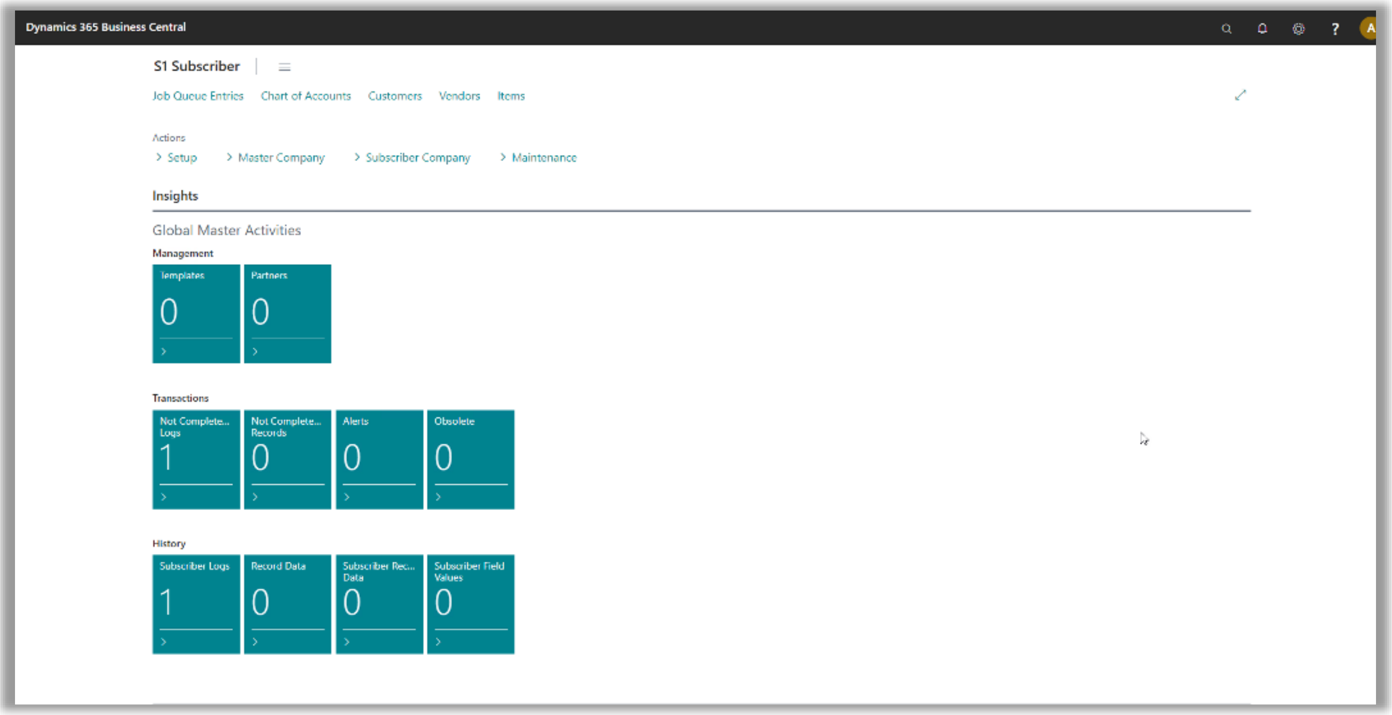
Subscriber Logs are created for the templates which are released.



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.

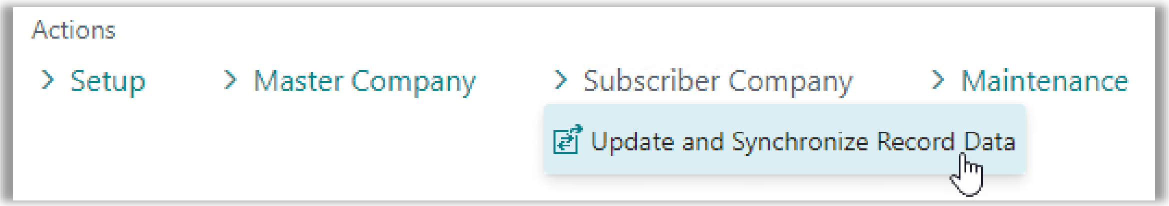
UPDATE AND SYNCHRONIZE RECORD DATA IN SUBSCRIBER COMPANY

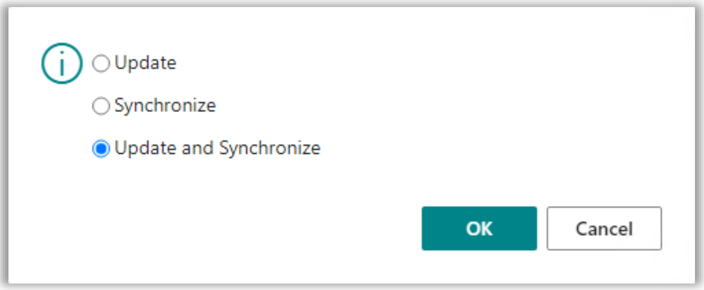
In the subscriber company, there are still a few tasks to be performed, before the data are received and ready to be used here.



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.

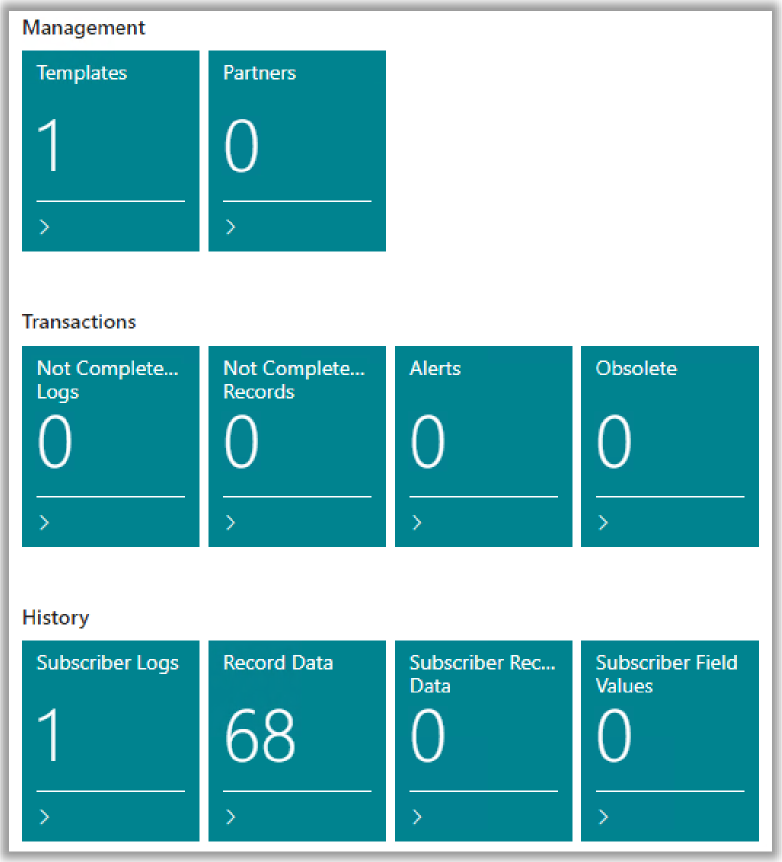
Press “Update and Synchronize Record Data” to proceed.

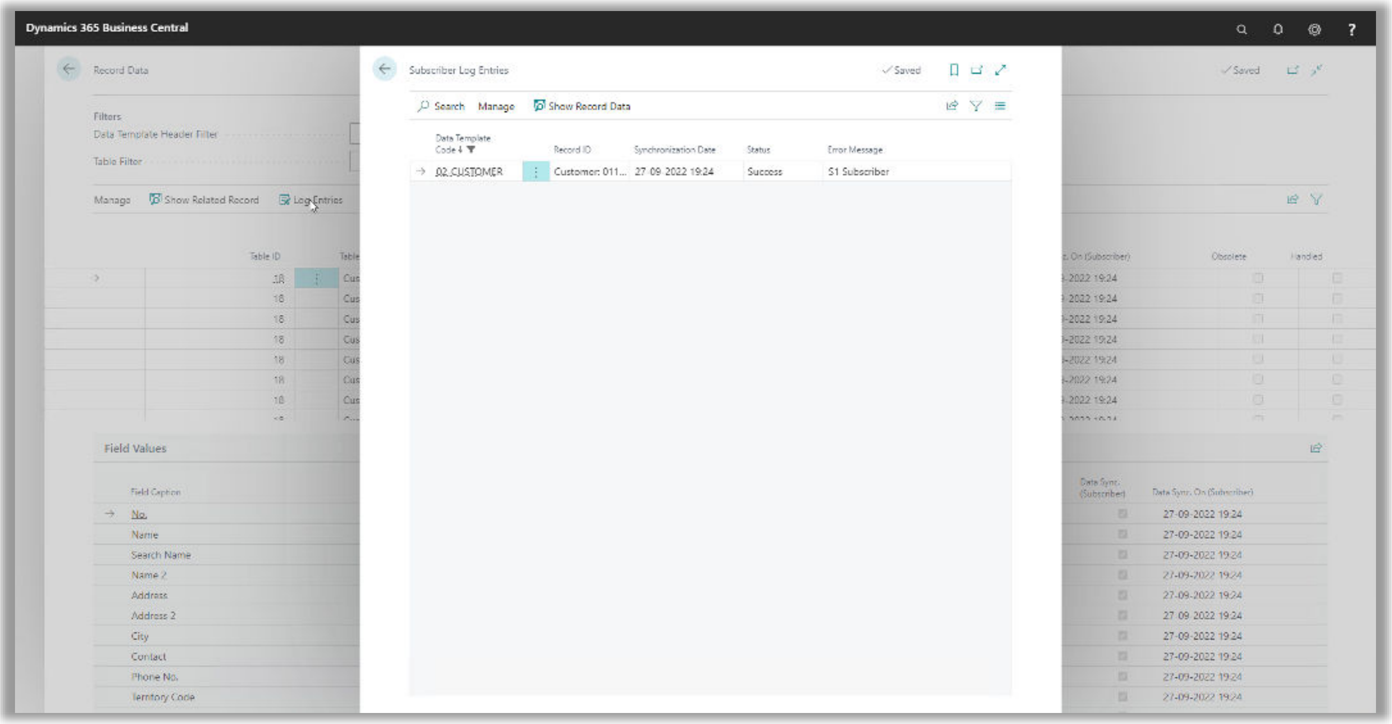




Select Update and Synchronize and click OK. Data are received and afterwards data are synchronized.

In the subscriber role center Record Data and Subscriber Log Entries are now present.



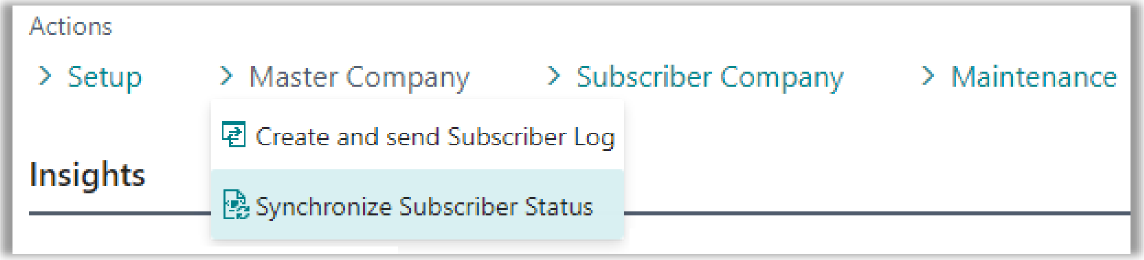


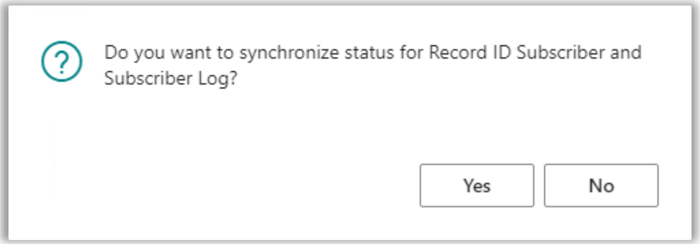
In the Subscriber Log Entries page, the status of the transactions should appear successful now.
Data are present in the tables to use. In this example data are available in the customer table.

SYNCHRONIZE SUBSCRIBER STATUS IN MASTER COMPANY

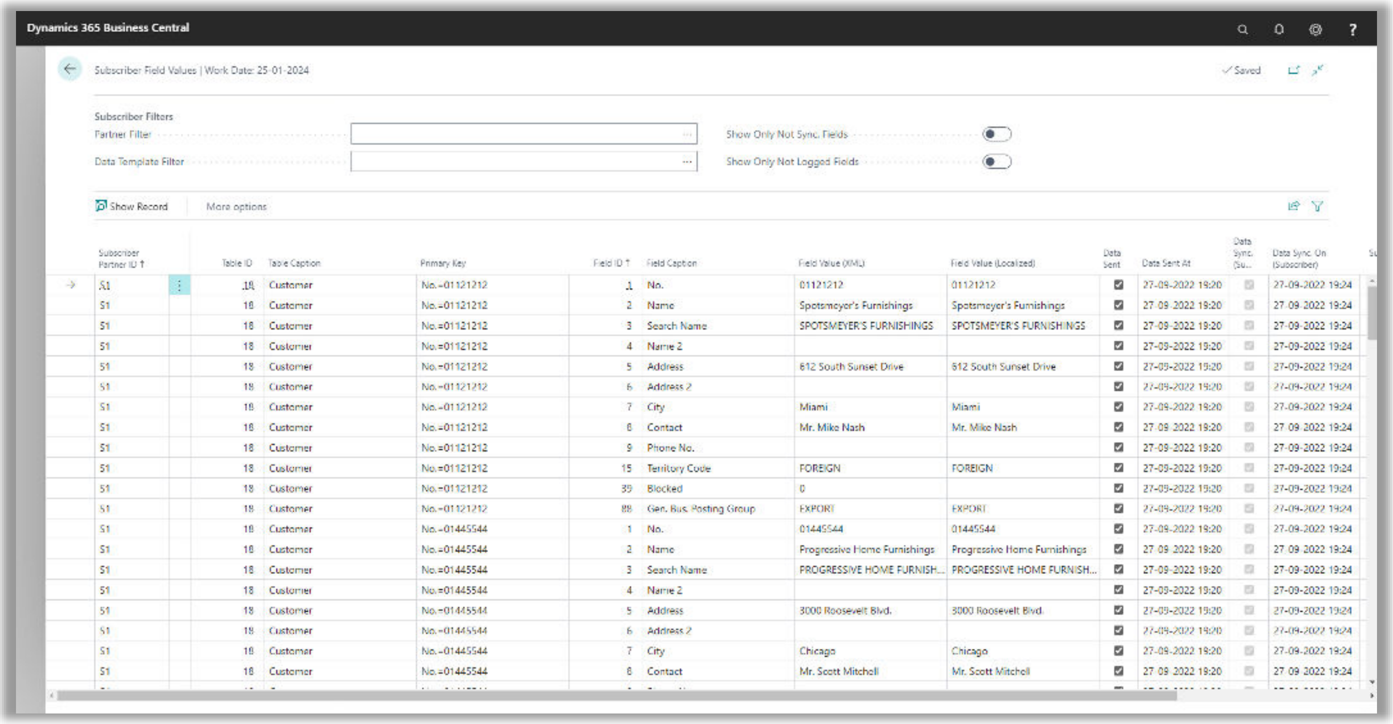
Now the subscriber company have been synchronized, we do have to fetch the subscriber status to complete the entire synchronization process.

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





Confirm to synchronize status by clicking “Yes”.



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.

Next steps

Continue synchronizing data manually

In the walk-through we synchronized one template only. There are three more templates thar 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 automatically synchronization. This must be set up in both master and subscriber.
Refer to the Global Master manual for further instructions.