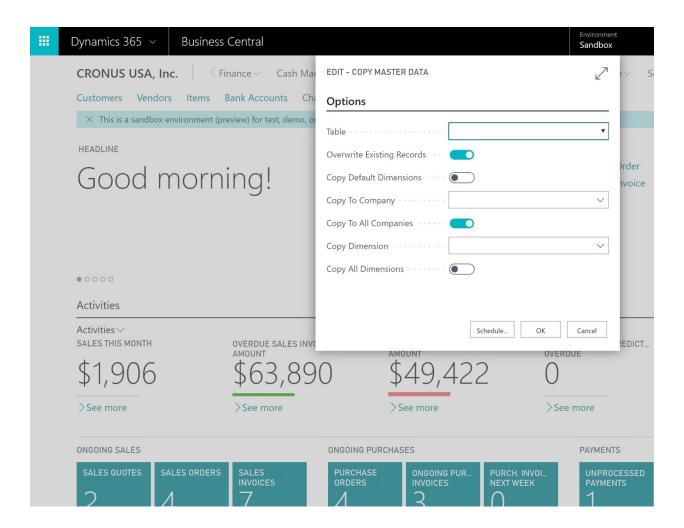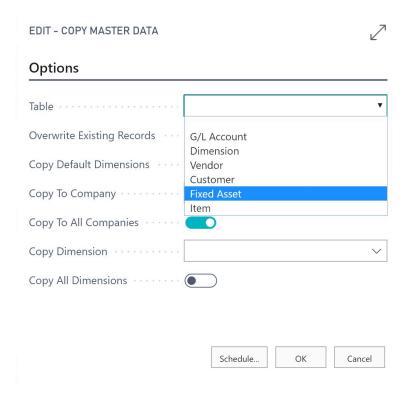# Copy Master Data

The Copy Master Data extension allows you to copy some master data records (Vendors, Customers, Fixed Assets, Items), as well as Dimension codes and values from the current company, to one or all other companies. This can be useful for organizations with many companies, where it would be very time-consuming or inconvenient to copy master data and dimensions manually.

When the Copy Master Data processing report is run, it will present you with 5 options:

- Table: This option allows you to select what kind of data you want to replicate. Select either 'G/L Account', 'Dimension', 'Vendor', 'Customer', 'Fixed Asset' or 'Item'

- Copy To Company: This option selects the specific company you want to replicate the data to

- Copy To All Companies: This option should be used when the data needs to be replicated to all companies. When this option is selected, the "Copy To Company" option is ignored.

- Copy Dimension: If the Table option is set to 'Dimension', this option allows you to select which Dimension Code (including all its Dimension Values) will be replicated. When the Table option is set to anything other than 'Dimension', this option is ignored.

- Copy All Dimensions: If the Table option is set to 'Dimension', this option allows you to replicate all Dimension Codes (along with all the Dimension Values). When the Table option is set to anything other than 'Dimension', this option is ignored.

When the options have been set, press Ok. When the replication is complete, you'll see a message indicating it's done.

EDIT – COPY MASTER DATA

Options

Table	▼
Overwrite Existing Records	G/L Account
	Dimension
Copy Default Dimensions	Vendor
	Customer
Copy To Company	**Fixed Asset**
	Item
Copy To All Companies	⬤ (on)
Copy Dimension	⌄
Copy All Dimensions	⬤ (off)

Schedule...   OK   Cancel

Notes:

- If a record with the same key does not exist, it will be created in the destination company.

- If a record already exists in the destination company (meaning a record with the same key is found), the data will be updated by Copy Master Data from the record in the current company, if the 'Overwrite Existing Records' option is selected. If this option is not selected, the existing record will not be modified.

- When the Table option is set to 'Dimension' and Copy Master Data is run, if the Dimension being replicated does not exist in the destination company, it will create the Dimension, and then copy all the dimension values for that Dimension to the destination company.

- The process can automatically create or update any Default Dimensions for any type of data being replicated. You can turn this feature on by selecting 'Copy Default Dimensions'.

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