

Avanade Master Data Synchronization User Documentation

Dynamics 365 for Finance and Operations



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Document Information:

This document describes business functionality relating to Avanade Master Data Synchronization.

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1. Introduction

The modern ERP system, regulates the flow of information and document, for the typical business process, in an enterprise. The basis for the illustration and controlling of the processes are master data used in the system, which are administered based on the concerned structure of the firm per client.

Over the virtual clients (also see chapter 7 “cross-client tables”), which is standard functionality, tables can be made available centrally for all clients.

Additionally, “Master data synchronization” (or) “Multi Company” module is a tool, with which a table or even individual fields from a table can be administered cross-client.

1.1 Levels of the master data administration

Data administration per client / company accounts

Data of a legal entity are summarized over a company account (standard). Partly, these data are already comprehensive with Dynamics 365 for operations. (E.g. global directory).

Module “Master data synchronization”

The central data that are to be partially used in other company accounts can be distributed over “Master data synchronization” tools into other clients. The synchronization ensures the updating during recording, changing, or deletion over all defined company accounts (common use of certain data segments). The module “Master data synchronization” is a very powerful tool for the synchronization of individual tables.

1.2 Master data synchronization

The parameterization of the master data synchronization determines more than just a superficial, an understanding of the databases, tables and data models. The conditions for the employment of this tool are the parameterization in a test environment and thorough tests of the settings.

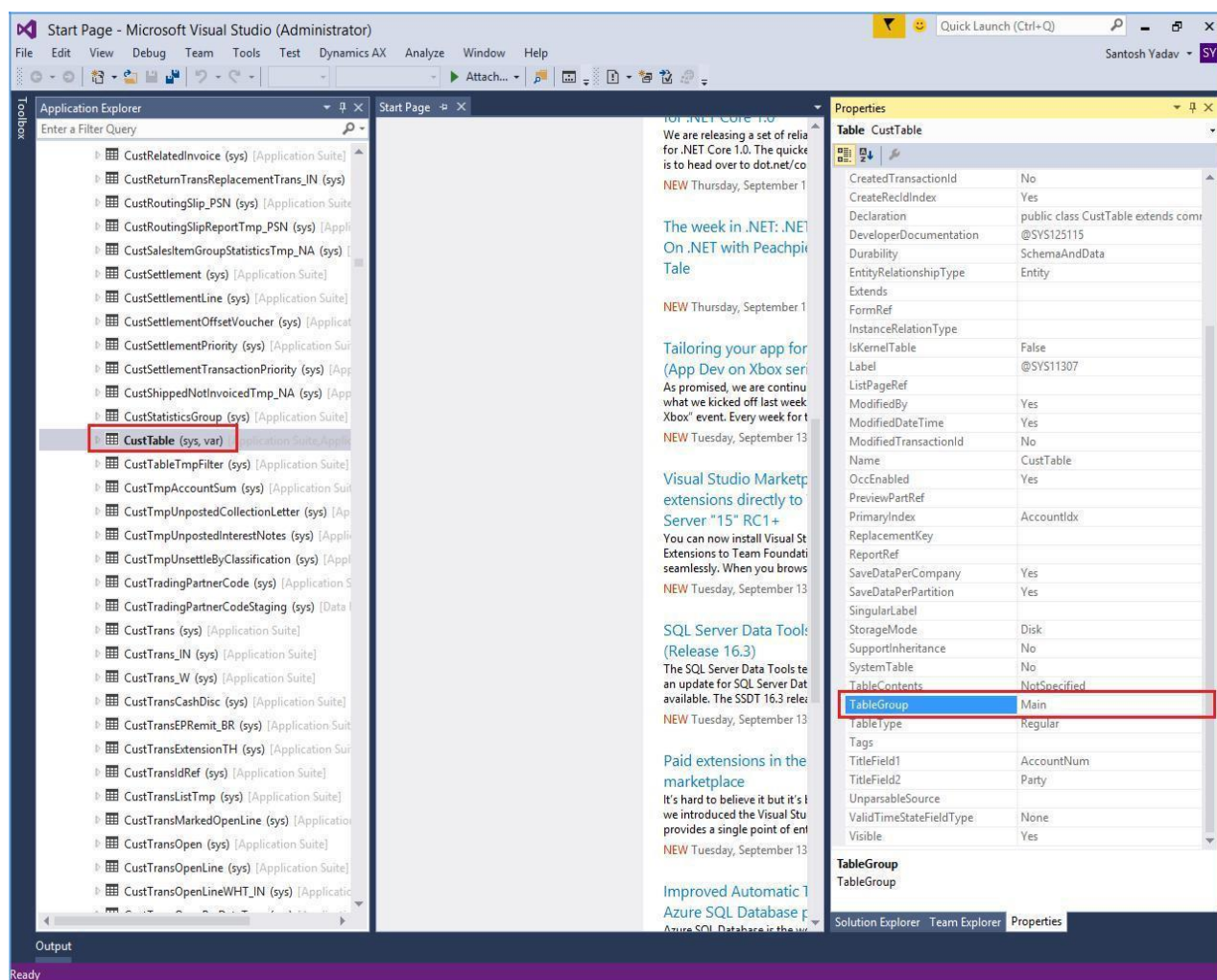


1.3 Limitations

Although multi company tool offers extensive synchronization possibilities, we need to ensure that meaningful data is distributed beyond the client limits based on individual cases.

1.3.1 Tables

Technically it is so that only the tables which are allocated in the Table Group "Main", "Group" or "Parameter" are available for the selection. Further Table Group is also possible, however the individual case is to be always checked.





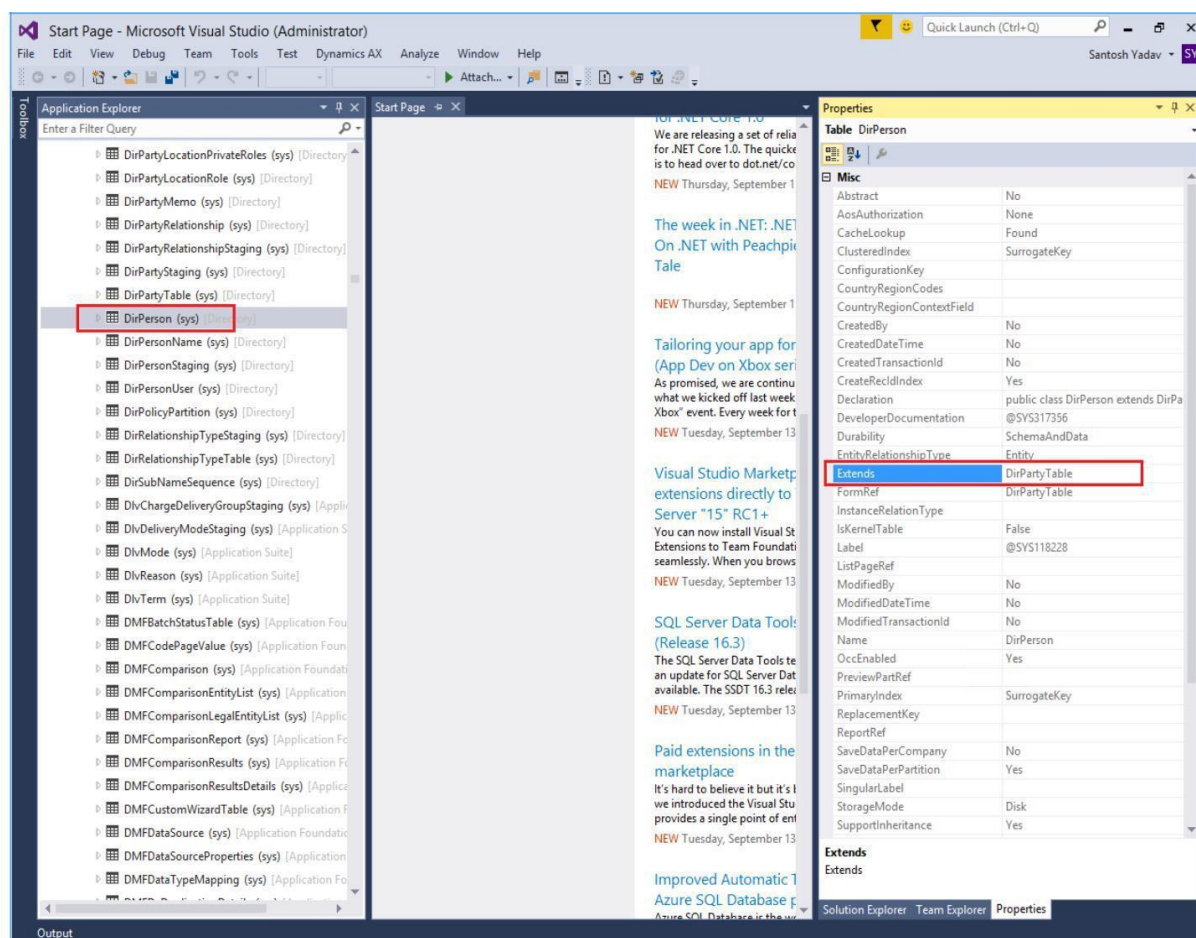
1.3.2 Several clients in a table

The tables which differ in the data set of the client (DataAreald) are to be excluded from the synchronization. There are exceptions in the synchronization of special tables (e.g. article) that have already been considered. The admission of further tables in principle is possible, however individual cases needs to be checked.

1.3.3 Extends

Extends are the tables which have another table or View as a basis. Therefore, no data can be maintained and/or changed in these tables. This must take place in principle at the data origination.

In the following illustration, an example of such a table can be seen.





1.3.4 Virtual Company Accounts

"Virtual company Accounts" functionality is deprecated in Dynamics 365 for Operations. This functionality cannot be used any more for the synchronization of master data. However, Master data synchronization tool supports the tables, which used virtual company accounts for synchronization of master data in earlier versions.

1.3.5 Other limitations

There can be limitations even with individual fields. Especially in the fields where the data content can be global or only local.

Example: If a worker is approved only in an enterprise / a client and not in others, however the field is included in the synchronization.

In such a case, we can exclude the corresponding field from the synchronization.

1.4 System- / Module upgrades

Dynamics 365 for operations can be developed further by Microsoft. Therefore, it is concerned for changes and/or extensions again and again with the tables. This fact, reflects that, all tables in a synchronization must be checked with each update.

Therefore, a functional examination of the master data synchronization into the updates procedure must be planned.

Approach (see next picture):

1. Each table is to be updated - > check whether new fields have been added. If we click on "Refresh" button, added/deleted/updated fields get updated in the "Fields" section.
2. Activate the Info-Flag - > if not already permanently active, the Info-Flags should be activated, and are executed in the organizational process by the functional department. These should also examine the result.

These procedures should be tested according to the User Acceptance test.



Dynamics 365 ▾ Finance and Operations Organization > > Base Data > Synchronization parameters USMF 🔍 🗨️ 😊 ⚙️ ?

Save + New Delete GENERAL OPTIONS 🔍

SYNCHRONIZATION PARAMETERS

Vendor groups Lines Header

Table definitions

✓	Synchronize	Table name	Table name	Synchronization group ↑	Apply filter	Always synchr...	Synchronize de...	Synchroniz...	Block after in...	Initialize	Notify a
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ledger/Journal...	Name of journal		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	CustParameters	Customer parameters	Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CustTable	Customers	Customers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	InventTable	Items	Products	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	VendGroup	Vendor groups	Vendors ▾	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	VendParamete...	Vendor parameters	Vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	VendTable	Vendors	Vendors	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

General

IDENTIFICATION

Table name
VendGroup

Table name
Vendor groups

SYNCHRONIZATION

Synchronize
Yes ☒

Always synchronize
Yes ☒

Batch synchronization
No ☐

Synchronize document references
Yes ☒

Block after insert
No ☐

Initialize
Yes ☒

DELETE

Synchronize deletion
No ☐

Force delete all
No ☐

MISCELLANEOUS

Synchronization group
Vendors ▾

Apply filter
No ☐

Reference table ID
4285

INFO

Notify after insert
Yes ☒

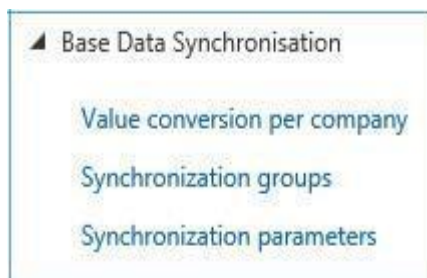
Notify after update
Yes ☒

2. Call Synchronization

The synchronization can be called by any client, since the tables of the synchronization are global.

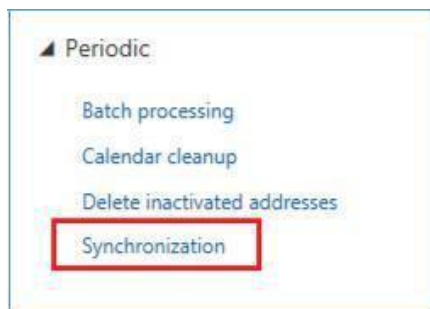
Synchronization facility:

Call: [Client] > Organization administration > Setup > **Base data synchronization**



Synchronization execution:

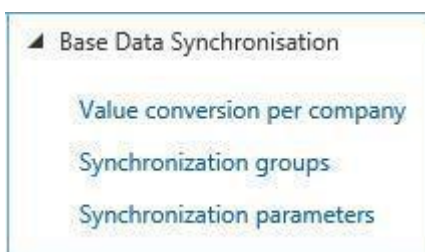
Call: [Client] > Organization administration > Periodic > **Synchronization**



2.1 Parameterization

The screen for the settings of the master data synchronization can be found under

Call: [Client] > Organization administration > Settings > **Base data synchronization**



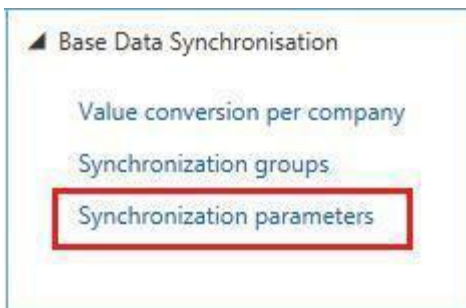
For the Parameterization, it does not matter as in which client the settings are made, since these are valid cross-client.

2.2 Screen for synchronization settings

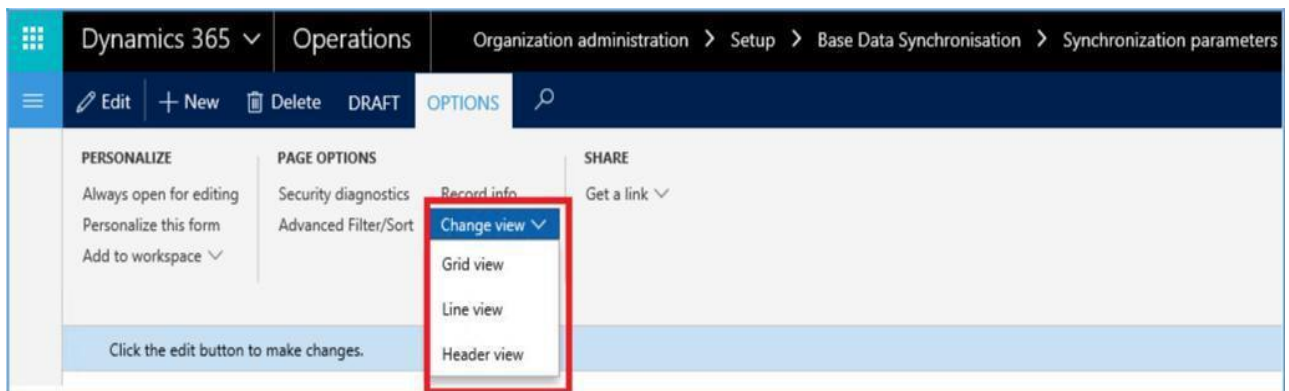
As per the form pattern used in Dynamics 365 for operations, there are UI changes in Synchronization settings screen.

Below is the Navigation path for synchronization parameters form.

Call: [Client] > Organization administration > Settings > Base data synchronization > **Synchronization parameters**



As per standard, the synchronization settings screen provides 3 views. Below screenshot explains different views available.





2.2.1 Grid view

This is the default view once the form opens. User can update the setup in the tables by clicking on "Edit" button. The user can navigate to the line view by clicking on table name.

Dynamics 365 ▾ Finance and Operations Organization > > Base Data > Synchronization parameters USMF 🔍 🗨️ 😊 ⚙️ ? AD

Save + New Delete GENERAL OPTIONS 🔍

SYNCHRONIZATION PARAMETERS

Filter

✓	Synchronize	Table name	Table name	Synchronization group ↑	Apply filter	Always synchronize	Synch...	Synch...	Bloc...	Initi...	N...	No...	Batch synchronization
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CustGroup	Customer groups		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	DlvTerm	Terms of delivery		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	DocuRef	Document references		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LedgerJournalName	Name of journal		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	CustParameters	Customer parameters	Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CustTable	Customers	Customers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	InventTable	Items	Products	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	VendGroup	Vendor groups	Vendors ▾	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	VendParameters	Vendor parameters	Vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	VendTable	Vendors	Vendors	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2.2.2 Header view

Dynamics 365 ▾ Finance and Operations Organization > > Base Data > Synchronization parameters USMF 🔍 🗨️ 😊 ⚙️ ?

Save + New Delete GENERAL OPTIONS 🔍

SYNCHRONIZATION PARAMETERS

Vendor groups

Lines **Header**

Table definitions

✓	Synchronize	Table name	Table name	Synchronization group ↑	Apply filter	Alw...	Synch...	Synch...	Bloc...	Initialize	Not...	No...	Batch synchronization
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LedgerJournal...	Name of journal		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	CustParameters	Customer parameters	Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CustTable	Customers	Customers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	InventTable	Items	Products	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	VendGroup	Vendor groups	Vendors ▾	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	VendParamete...	Vendor parameters	Vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	VendTable	Vendors	Vendors	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

General

IDENTIFICATION

Table name

VendGroup

Table name

Vendor groups

SYNCHRONIZATION

Synchronize

Yes ☒

Always synchronize

Yes ☒

Batch synchronization

No ☐

Synchronize document references

Yes ☒

Block after insert

No ☐

Initialize

Yes ☒

DELETE

Synchronize deletion

No ☐

Force delete all

No ☐

MISCELLANEOUS

Synchronization group

Vendors ▾

Apply filter

No ☐

Reference table ID

4285

INFO

Notify after insert

Yes ☒

Notify after update

Yes ☒



2.2.3 Line view

Dynamics 365 ▾ Finance and Operations Organization > > Base Data > Synchronization parameters USMF 🔍 🗨️ 😊 ⚙️ ?

Save + New Delete GENERAL OPTIONS 🔍

SYNCHRONIZATION PARAMETERS

Vendor groups Lines Header

INFO

Notify after insert
Yes ☒

Notify after update
Yes ☒

Yes ☒ Synchronize deletion
No ☐

Block after insert
No ☐ Force delete all
No ☐

4285

Field setup

Select all Deselect all

✓	Synchronize	Lock	Copy only when a record is inserted	Field name	Field label	Use the default value	Default value
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ClearingPeriod	Time between invoice ...	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ExcludeFromSignup_PSN	Exclude from search re...	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Name	Description	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PaymTermId	Terms of payment	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TaxGroupId	Default tax group	<input type="checkbox"/>	

settings for source and destination

Companies Number sequences

SOURCE AND TARGET LEGAL ENTITY

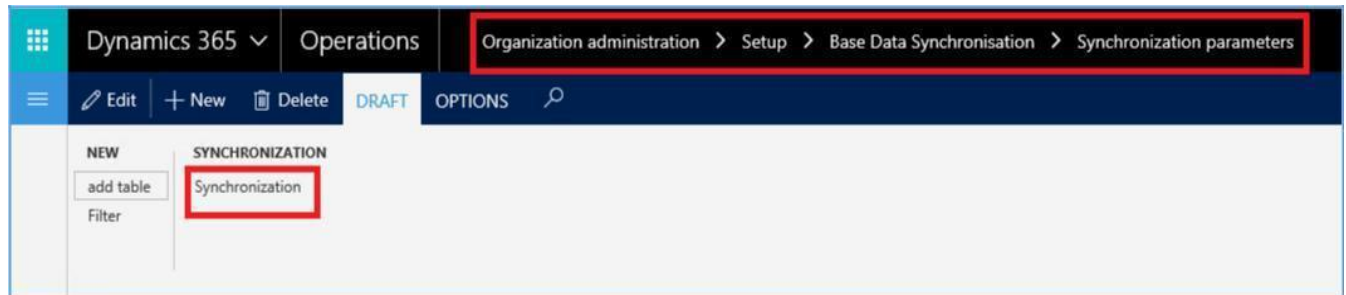
+ New Delete Filter Value conversion

✓	From company	Name	Company relation	To company	Name	Apply filter	Update only
<input checked="" type="checkbox"/>	USMF	Contoso Entertainment System USA	Table	GLSI	Contoso Consulting	Table filter	<input type="checkbox"/>

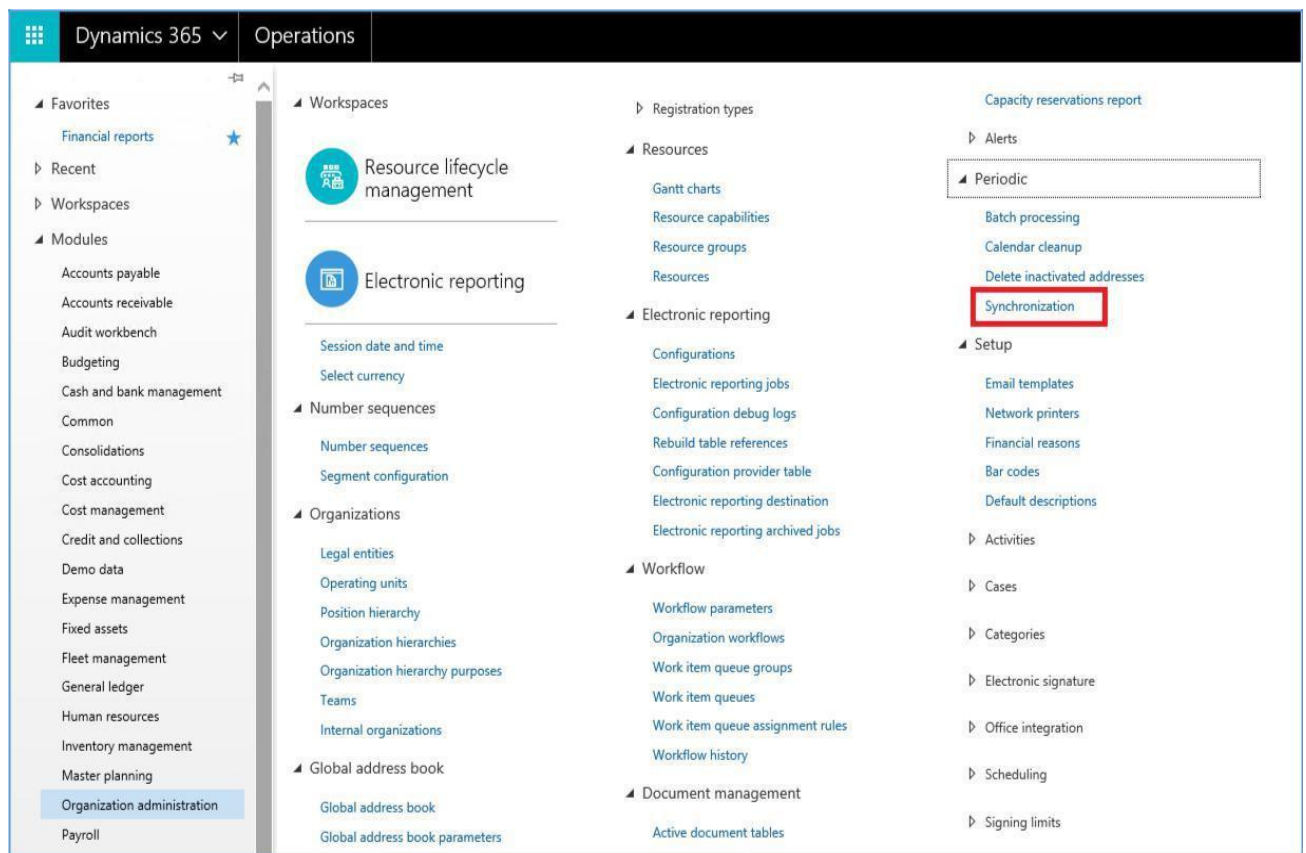
2.2.4 Execution of the synchronization

The synchronization can be called once over the button “Synchronization” in

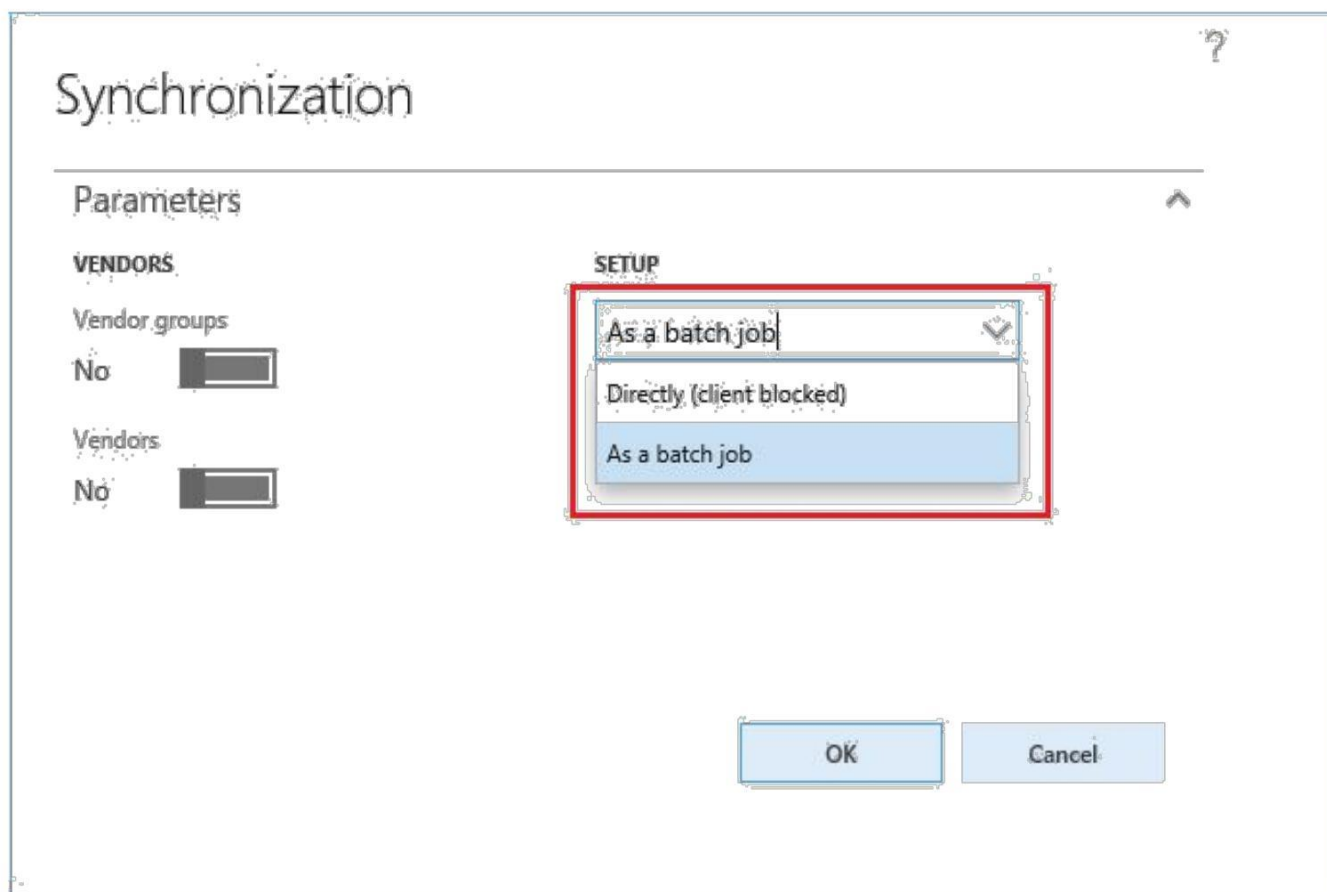
Synchronization parameters form



or over the periodic job



In both the cases, the following screen is called, thereby, all the tables with the active flag are synchronized on clicking “OK” button. For test purposes, the flag can also be switched on or off separately. The groups are dynamic and can be switched on and/or off in the synchronization groups form.



Periodic synchronization could be run as a background batch job with multi-tasking enabled. This will speed up the synchronization.

2.3 Initial position “synchronize customer master”

The following examples and settings are based on the approval that a master client “SY1” and two further clients “SY2” and “SY3” are present.

2.4 Terms

Master client - > client from which data is to be synchronized.

Synchronization client - > client(s) into which data is to be synchronized.

2.5 Basic setting

Path: Organization administration - Setup - Base data synchronization - Synchronization parameters

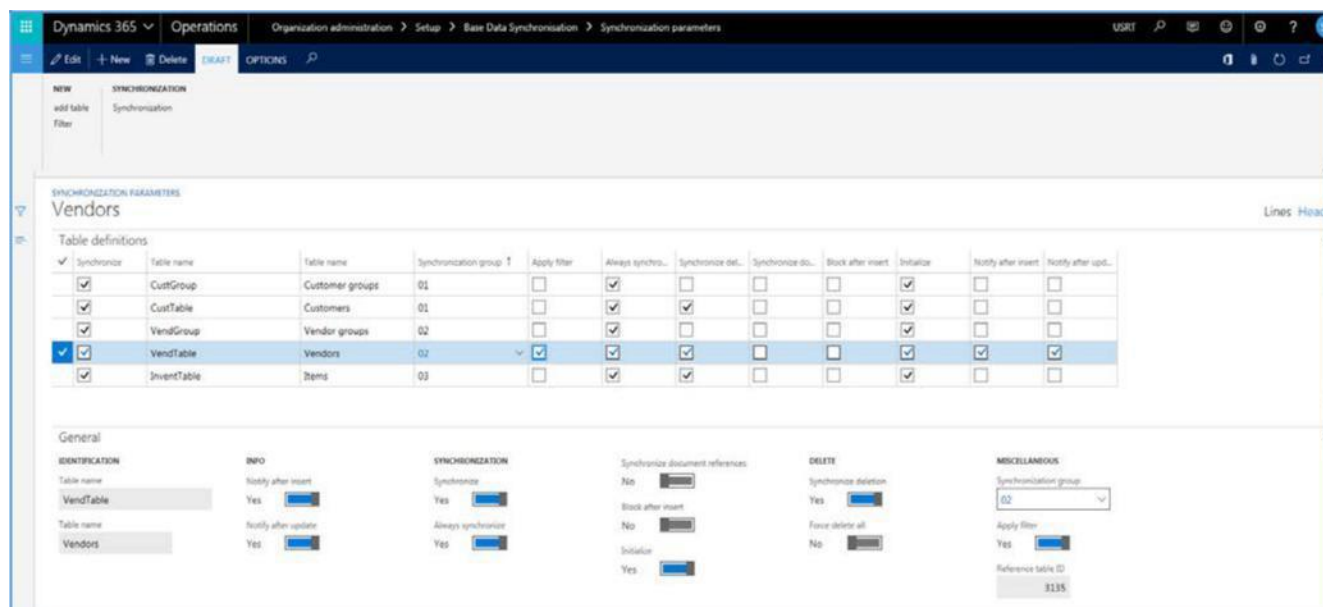


Table definitions

✓ Synchronize	Table name	Table name	Synchronization group	Apply filter	Always synchro...	Synchronize del...	Synchronize do...	Block after insert	Initialize	Notify after insert	Notify after upd...
✓	CustGroup	Customer groups	01		✓				✓		
✓	CustTable	Customers	01		✓	✓			✓		
✓	VendGroup	Vendor groups	02		✓				✓		
✓	VendTable	Vendors	02	✓	✓	✓			✓	✓	✓
✓	InventTable	Items	03		✓	✓			✓		

General

IDENTIFICATION

Table name: VendTable

Table name: Vendors

INFO

Notify after insert: Yes

Notify after update: Yes

SYNCHRONIZATION

Synchronize: Yes

Always synchronize: Yes

DELETE

Synchronize document references: No

Block after insert: No

Initialize: Yes

Synchronize deletion: Yes

Force delete all: No

MISCELLANEOUS

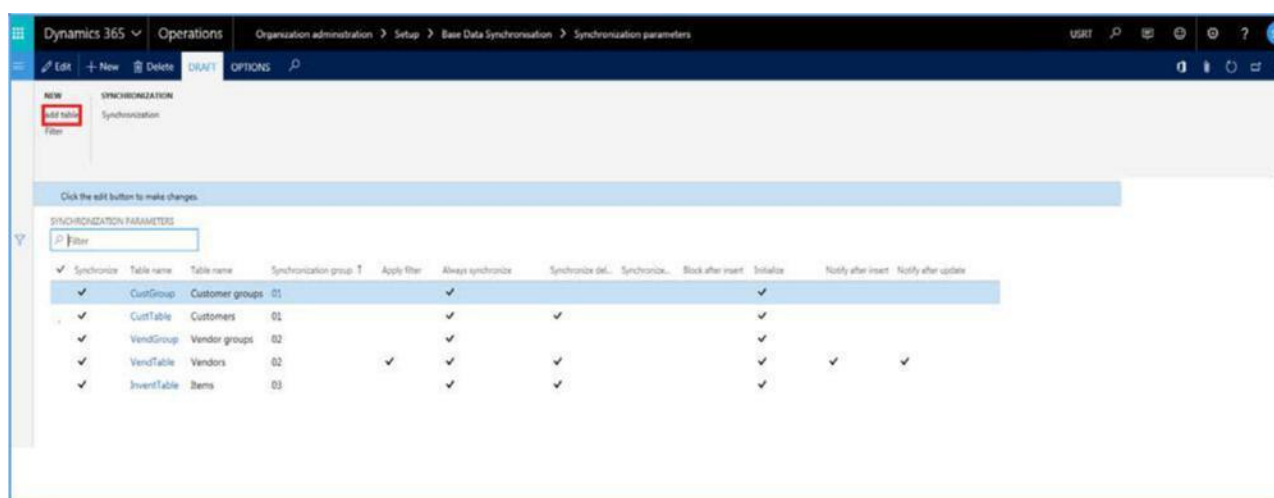
Synchronization group: 02

Apply filter: Yes

Reference table ID: 3135

At the first start, this screen is empty. Tables to be synchronized can be added here.

2.5.1 Insert Tables



NEW

add table

Filter

Click the edit button to make changes.

SYNCHRONIZATION PARAMETERS

Filter

✓ Synchronize	Table name	Table name	Synchronization group	Apply filter	Always synchro...	Synchronize del...	Synchronize do...	Block after insert	Initialize	Notify after insert	Notify after update
✓	CustGroup	Customer groups	01		✓				✓		
✓	CustTable	Customers	01			✓					
✓	VendGroup	Vendor groups	02		✓				✓		
✓	VendTable	Vendors	02	✓	✓	✓			✓	✓	✓
✓	InventTable	Items	03		✓	✓			✓		



Dynamics 365 Finance and Operations

SYNCHRONIZATION PARAMETERS

Filter

✓ Synchronize	Table name	Table name	Synchronization group
<input checked="" type="checkbox"/>	CustGroup	Customer groups	
<input type="checkbox"/>	DlvTerm	Terms of delivery	
<input checked="" type="checkbox"/>	DocuRef	Document references	
<input checked="" type="checkbox"/>	Ledger/JournalName	Name of journal	
<input type="checkbox"/>	CustParameters	Customer parameters	Customers
<input checked="" type="checkbox"/>	CustTable	Customers	Customers
<input type="checkbox"/>	InventTable	Items	Products
<input checked="" type="checkbox"/>	VendGroup	Vendor groups	Vendors
<input type="checkbox"/>	VendParameters	Vendor parameters	Vendors
<input checked="" type="checkbox"/>	VendTable	Vendors	Vendors

Tables

- ✓ Name ↑
- Accountant_BR
- AccountantLogisticsLocation_BR
- AccountantLogisticsLocationRol...
- AccountantStaging
- AccountingDistribution
- AccountingDistributionTemplate
- AccountingDistributionTemplate...
- AccountingEvent
- ACOCostCenterAttributeValue_BR
- ACOCostCenterTypeStaging
- ACOJournalName_BR
- ACOJournalNameStaging
- ACOJournalTable_BR
- ACOJournalTransOverHead_BR
- ACOParameters_BR
- ACOProdCostTable_BR
- ACOProdOverHeadCostTrans_BR
- ActualWorkItemEntry
- AddressCountryRegionBLWI
- AddressCountryRegionGroupBL...
- AddressTypeTable_RU
- AddressZipCodeImportLog_NL
- InventoryTable
- InventoryTable
- ADOFormTestRelatedTable

OK Cancel

A list of the tables is displayed with the button "add table". Details for the selected tables are found in this documentation under "5 remarks to individual tables".

Cross-client Tables cannot be selected for the synchronization, since its data sets are already available for all clients. The following message appears when Cross client tables are selected.

Dynamics 365 Operations

Organization administration > Setup > Base Data Synchronization > Synchronization parameters

NEW

add table

Filter

Click the edit button to make changes.

Check table: The table 'Fiscal calendar' can't be used, because its data is already saved company-independent.

SYNCHRONIZATION PARAMETERS

Filter

✓ Synchronize	Table name	Table name	Synchronization group	Apply filter	Always synchron...	Synchronizer del...	Synchronizer dis...	Block after insert	Initialize	Notify after insert	Notify after upd...
<input checked="" type="checkbox"/>	CustGroup	Customer groups	Customer		✓	✓			✓		
<input checked="" type="checkbox"/>	CustTable	Customers	Customer		✓	✓		✓	✓	✓	✓
<input checked="" type="checkbox"/>	VendGroup	Vendor groups	Vendors	✓	✓	✓			✓	✓	✓
<input checked="" type="checkbox"/>	VendTable	Vendors	Vendors		✓	✓			✓		

Button "Filter"

As soon as a table is added, the button "Filter" becomes active. More information about the possibilities of filter are found under "2.8.1 filter possibilities".



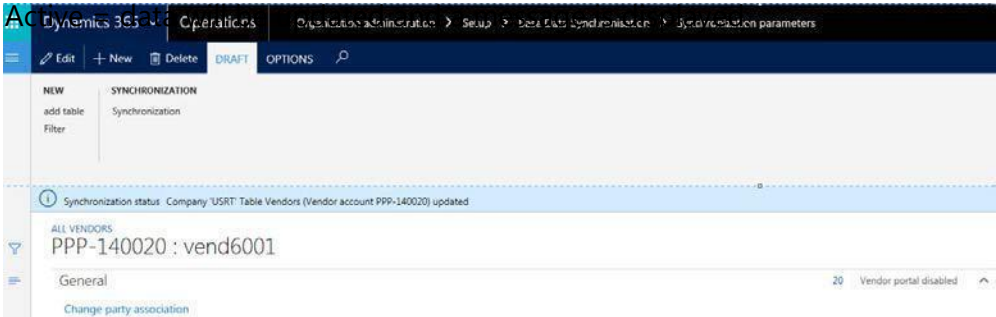
2.6 Settings per table

Table name	Table name	Synchronization group	Apply filter	Always synch...	Synchronize def...	Synchronize do...	Block after insert	Initialize	Notify after insert	Notify after upd...
<input checked="" type="checkbox"/>	CustGroup	Customer groups	01	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	CustTable	Customers	01	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	VendGroup	Vendor groups	02	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	VendTable	Vendors	02	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	InventTable	Items	03	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

General	INFO	SYNCHRONIZATION	Synchronize document references	DELETE	MISCELLANEOUS
IDENTIFICATION Table name CustTable Table name Customers	INFO Notify after insert No Notify after update No	SYNCHRONIZATION Synchronize Yes Always synchronize Yes	Synchronize document references No Block after insert No Initialize Yes	DELETE Synchronize deletion Yes Force delete all No	MISCELLANEOUS Synchronization group 01 Apply filter No Reference table ID 10347

All settings of the selected table are found in the "general" section of Synchronized parameters form.

Field	Description
Identification	
Table name	Table name in the data model (English)
Table name	Table name in the language of the interface
Info	
Notify after Insert	<p>Active = a data set is created and message is displayed.</p> <p>Recommendation: Active (eventually "not active")</p>

Notify after Update	 <p>Recommendation: Active (eventually “not active”)</p>
Synchronization	
Synchronize	<p>The table is synchronized, if the flag is active.</p> <p>IMPORTANT: Settings for fields are possible only if the flag is activated.</p> <p>Recommendation: Active</p>
Always synchronize	<p>If the flag is active, all the fields with the setting “synchronize” are overwritten with the values of the master client, regardless of whether a change on the field took place or not.</p> <p>If this flag is not active, then only the changed fields are synchronized with the values of the master client.</p> <p>Recommendation: Not active (possible performance problems)</p>
Synchronize Document references	<p>If linked documents are to be synchronized with data sets, this flag must be active.</p> <p>IMPORTANT: The table “DocuRef” must be synchronized likewise. See: “3 Synchronize document references”</p> <p>Recommendation: check in individual cases</p>
Block after insert	<p>If this flag is active, data sets are locked and must be first released in the synchronization clients.</p> <p>See: “4 post basket function (block flag)” CustTable (customers) VendTable (vendors) InventTable (products / articles) ProjTable (projects) smmBusRelTable (prospective clients)</p> <p>Recommendation: check in individual cases, meaningful with customers, vendors and articles</p>

Initialize	<p>Data sets are initialized with creation of values (INIT Values) on table or parameters in accordance with standard.</p> <p>Subsequently, the synchronization takes place, with which the deviating values of the INIT-Values are overwritten with the values of the master client, unless the field is synchronized or standard values are defined.</p> <p>Note: The initialized values do not correspond to the standard values of the MultiCompany.</p> <p>Sequence:</p> <ol style="list-style-type: none"> 1. INIT with values 2. Synchronization or standard values <p>Recommendation: Active</p>
Delete	<p>General:</p> <p>Deletion of master data sets is only possible if it is not a component of archiving data.</p>
Synchronize deletion	<p>If the flag is active, the deletion of data in the master client is synchronized.</p> <p>There are standard tests on validity (document booking available Y/N etc.).</p> <p>Recommendation: Active</p>
Force delete all	<p>Deletes the data set, only if the data set in all the clients that can be synchronized could be deleted.</p> <p>Recommendation: Not active</p>
Miscellaneous	
Synchronization group	<p>Select the group in which the tables which can be synchronized need to be assigned.</p>
Apply Filter	<p>With this flag, it is controlled whether filter functions can be used for selected table. The actual filter settings can be executed in the header per table and lower range per synchronization client.</p> <p>Whether the header or client filter is used, is decided by the corresponding setting in "source and target legal entity".</p> <p>See: "2.8.1 filter possibilities"</p> <p>Recommendation: check in individual cases</p>
Reference table ID	<p>ID of the table in the development environment</p>



2.6.1 Contact information, addresses and postal addresses

Contact information, addresses and postal addresses are stored cross-client over the global directory. If the partial allocation of the individual customers, vendors and prospective customer are synchronized at the same time, then the information will also be visible in the synchronization clients. There is however no copy of the data set, which can administer each client separately.

2.7 Settings per table for fields

To be able to carry out the field settings, it must be changed in the line view of the selected table and the editing mode button must be activated by checking “Synchronize” checkbox.

Field name	Field label	Use the default value
AccountNum	Customer account	<input type="checkbox"/>
AccountStatement	Account statement	<input type="checkbox"/>
AMMated_RU	AMMated	<input type="checkbox"/>
AgencyLocationCode	Agency location code	<input type="checkbox"/>
AuthorityOffice_IT	Authority office	<input type="checkbox"/>
BankAccount	Bank account	<input type="checkbox"/>
BankCentralBankPurposeCode	Central bank purpose code	<input type="checkbox"/>
BankCentralBankPurposeText	Notes	<input type="checkbox"/>

The view sub-divides the three registers “general”, “field setup” as well as “settings for source and destination”. In the register “general” previously discussed settings concerning the table can be carried out.

Field settings are possible only if the flag “synchronize” is activated on the table definition.

Fields can be selected separately for the synchronization. A help are the two buttons “select all” and “deselect all”.



Field setup

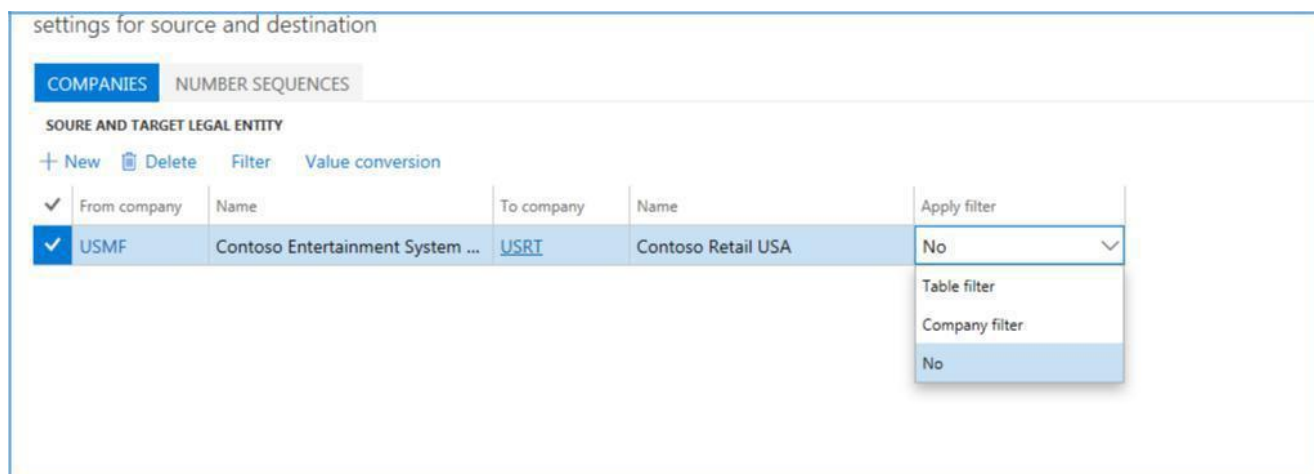
Select all Deselect all

✓	Synchronize	Lock	Copy only when a record is inserted	Field name	Field label	Use the default value	Default value
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AccountNum	Customer account	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AccountStatement	Account statement	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Affiliated_RU	Affiliated	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AgencyLocationCode	Agency location code	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AuthorityOffice_IT	Authority office	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BankAccount	Bank account	<input type="checkbox"/>	

Field	Description
Synchronize	<p>It controls whether a field is synchronized.</p> <p>Important:</p> <p>There are some fields that must be completely synchronized (e.g. account number). In these cases the flag is set according to the standard and cannot be changed.</p>
Lock	<p>If the flag is active, the fields in the synchronization client cannot be changed.</p> <p>Important:</p> <p>If a flag cannot be synchronized (see above), this flag cannot be set as well.</p>
Copy only when a record is inserted	<p>If the flag is active, the field is copied only during the first insertion (creation) of the data set. Subsequently, it is no more synchronized.</p> <p>It is possible to deactivate this flag whenever required. Once this flag is deactivated normal synchronization occurs.</p>
Module <i>(only conditionally visible)</i>	<p>This column is displayed only if subordinate tables are automatically synchronized at the same time. This is the case for example with the article master (InventTable).</p>
Field name	The field name in the data model (English)
Field Label	The field label in the language of the interface

Use the default value	The flag controls whether the value in "Default value" column is used with the creation of a data set. The field will not be synchronized in the future. This function is not to be mixed up with the function initializing.
Default value	Client-independent default value for the fields while creation of a data set. In order to ensure that the value is used, the flag "use the default value" must be active. Note: If the value serves as a reference for another table, then it is to be ensured that the data set with the value exists in the reference table of the synchronization client.

2.8 Specify Synchronization clients



settings for source and destination

COMPANIES NUMBER SEQUENCES

SOURCE AND TARGET LEGAL ENTITY

+ New Delete Filter Value conversion

✓	From company	Name	To company	Name	Apply filter
✓	USMF	Contoso Entertainment System ...	USRT	Contoso Retail USA	No

Table filter
Company filter
No

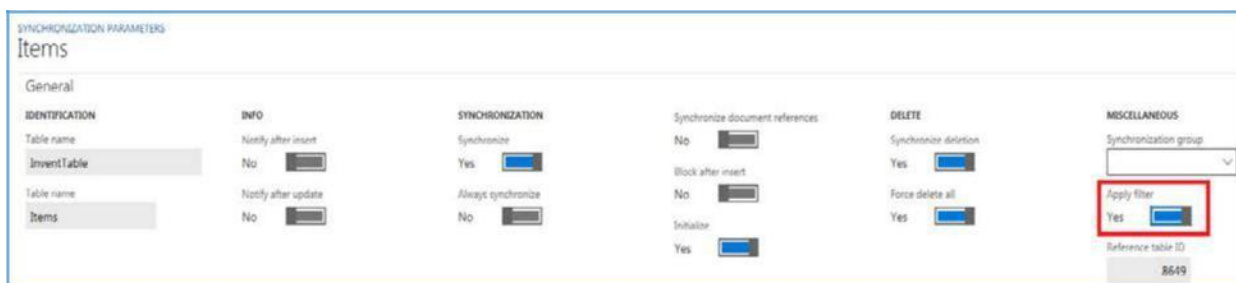
The clients for the synchronization can be specified per table in this screen.

Field	Description
From company	Master client
Name	Name of the Master client
To company	Synchronization client
Name	Name of the Synchronization client
Apply filter	For details see "2.8.1 filter possibilities"
Update Only	When checked, the data gets synchronized only when the data is updated in the master client.

2.8.1 Filter possibilities

The extent of synchronized data can be limited by applying filters. This is particularly helpful, when trying to synchronize only specific records in the table instead of the complete master data.

To ensure that the Filter is used, the flag “Apply Filter” must be activated per table.



The screenshot shows the 'Items' table configuration page with the following settings:

IDENTIFICATION	INFO	SYNCHRONIZATION	Synchronize document references	DELETE	MISCELLANEOUS
Table name: <input type="text" value="InventoryTable"/>	Notify after insert: <input type="checkbox"/>	Synchronize: <input checked="" type="checkbox"/>	Synchronize document references: <input type="checkbox"/>	Synchronize deletion: <input checked="" type="checkbox"/>	Synchronization group: <input type="text"/>
Table name: <input type="text" value="Items"/>	Notify after update: <input type="checkbox"/>	Always synchronize: <input type="checkbox"/>	Block after insert: <input type="checkbox"/>	Force delete all: <input checked="" type="checkbox"/>	Apply filter: <input checked="" type="checkbox"/>
			Initiator: <input checked="" type="checkbox"/>		Reference table ID: <input type="text" value="8649"/>

Filters can be set up in 2 ways

1. Table Filter: Filter per table
2. Company Filter: Filter per synchronization client

The decision of which filter is active depends upon the selection made under “Apply Filter” drop down in “Settings for Source and destination” section.

If “No” option is selected for “Apply Filter” then all the master data gets synchronized, even if “Apply filter” checkbox is checked in the “General” section of the table settings.



Dynamics 365 ▾ Operations Organization administration > Setup > Base Data Synchronisation > Synchronization parameters

Save + New Delete DRAFT OPTIONS

NEW SYNCHRONIZATION

add table: Filter

SYNCHRONIZATION PARAMETERS

Customers

General

Field setup

Select all Deselect all

✓	Synchronize	Lock	Copy only when...	Field name	Field label	Use the default...	Default value
✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AccountNum	Customer account	<input type="checkbox"/>	
✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AccountStatement	Account statement	<input type="checkbox"/>	
✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Affiliated_RU	Affiliated	<input type="checkbox"/>	
✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AgencyLocationCode	Agency location code	<input type="checkbox"/>	
✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AuthorityOffice_IT	Authority office	<input type="checkbox"/>	
✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BankAccount	Bank account	<input type="checkbox"/>	

settings for source and destination

COMPANIES NUMBER SEQUENCES

SOURCE AND TARGET LEGAL ENTITY

+ New Delete Filter Value conversion

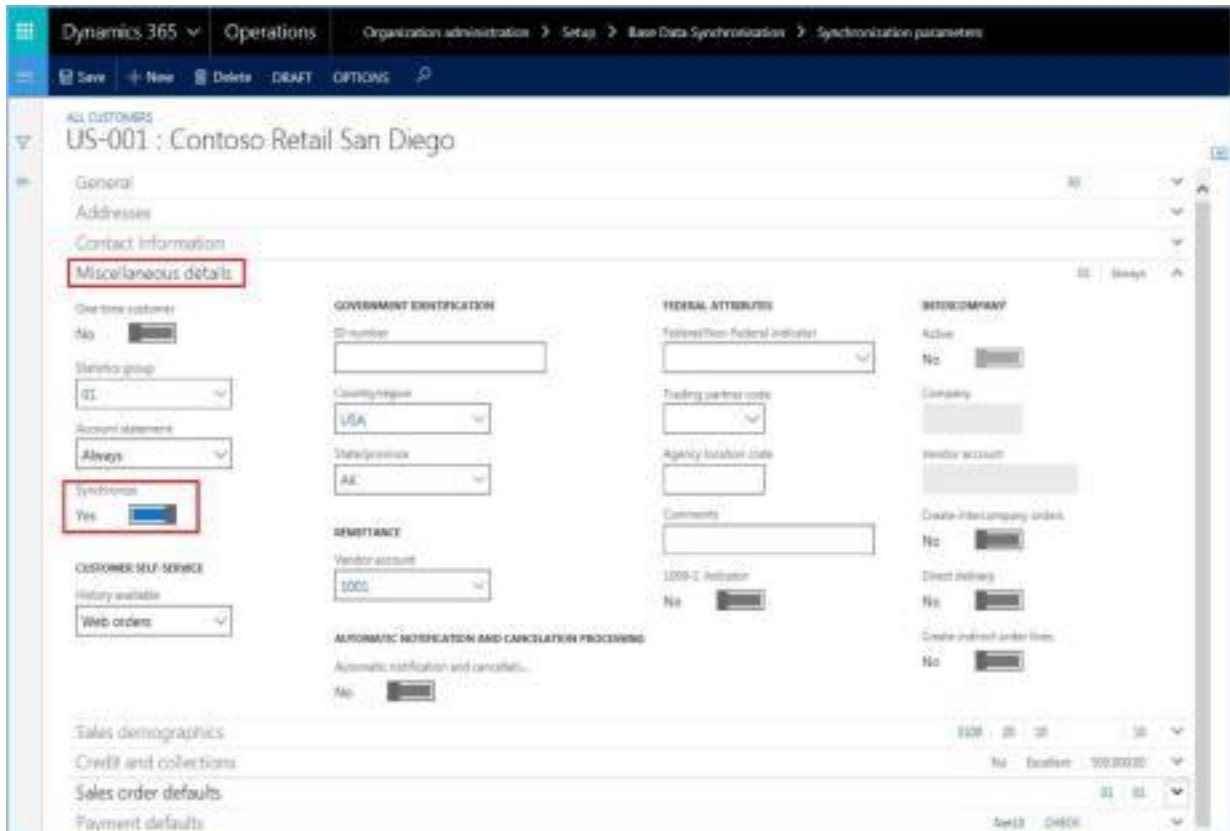
✓	From company	Name	To company	Name
✓	USMF	Contoso Entertainment System ...	us01	us01

Apply filter
No
Table filter
Company filter
No

use Filter	Description
Filter of table (Default)	Global filter is active. Definition of the filter criteria over the large button "Filter" in the menu list.
Filter of client	Considered filter, which is set up on the line of the client settings. Definition of the filter criteria over the small button "Filter" within the range of From and To Company.
No	No filter function, all master data are synchronized.

2.8.2 Exclude individual customers

In the debtor master, there is an additional possibility to exclude the synchronization for certain data set by means of a flag. The data set will be synchronized only if this flag is active.



2.8.3 Settings of Register number range

With settings in the "Number Sequence" it can be achieved that the number allocation for defined tables takes place from the "master client". The function is applicable for the following tables:

CustTable (Customers)

VendTable (Vendors)

InventTable (Products / Articles)

ProjTable (Projects)

smmBusRelTable (Prospective customer)

ContactPerson (Contacts)



In the following example, the debtor number in the clients 'SY2' and 'SY3' is fetched from the number sequence by the client 'SY1'.

SYNCHRONIZATION PARAMETERS
Customers

General

Field setup

Select all Deselect all

✓ Synchronize	Lock	Copy only when a record is inserted	Field name	Field label	Use the default value
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AccountNum	Customer account	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AccountStatement	Account statement	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Affiliated_RU	Affiliated	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AgencyLocationCode	Agency location code	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	AuthorityOffice_IT	Authority office	<input type="checkbox"/>

settings for source and destination

COMPANIES NUMBER SEQUENCES

+ New Delete

✓ Company	Master Company
SY3	SY1
SY2	SY1

2.8.4 Client dependent default value

In order to be able to use the function "client dependent default values", the flag "use the default" is not to be mixed up with the initializing function.

Furthermore, the corresponding setting of "source and target Legal entity" should be configured and selected.

Within the "Default values" under "Source and target Legal entity", the fields can be added for which have set up the flag "Use the default value" in the field settings. The client dependent default value is defined in the field "Default value". Besides, the flag "use the default value" must also be set up under the section "Default values".

Note: If the value serves as reference for another table, then it is to be ensured that the data set with the value exists in the reference table of the synchronization client.

The sequence of the application of standard values:

1. Client-dependent standard values (provided that the flag "use standard value" is set up)
2. Overall standard values (value with field settings)



Dynamics 365 Operations Organization administration > Setup > Base Data Synchronisation > Synchronization parameters

Save + New Delete DRAFT OPTIONS

Customers

General

Field setup

Field name	Default value	Field name	Default value
Company	Contoso Entertainment System	Currency	Currency
Country	USA	Currency	Currency
Currency	EUR	Currency	Currency
Currency	CAD	Currency	Currency

settings for source and destination

COMPANIES

SOURCE AND TARGET ENTITY

Source company	Target company	Source company	Target company
USA	USA	USA	USA
USA	USA	USA	USA
USA	USA	USA	USA

DEFAULT VALUES

Field name	Default value	Field name	Default value
Currency	Currency	Currency	CAD

2.8.5 Synchronization groups

To ensure that the synchronizations can be summarized visually, groupings are also possible that include the controlling function.

Dynamics 365 Operations Organization administration > Setup > Base Data Synchronisation > Synchronization groups

Edit + New Delete ACTIONPANETAB OPTIONS

Click the edit button to make changes.

Synchronization groups

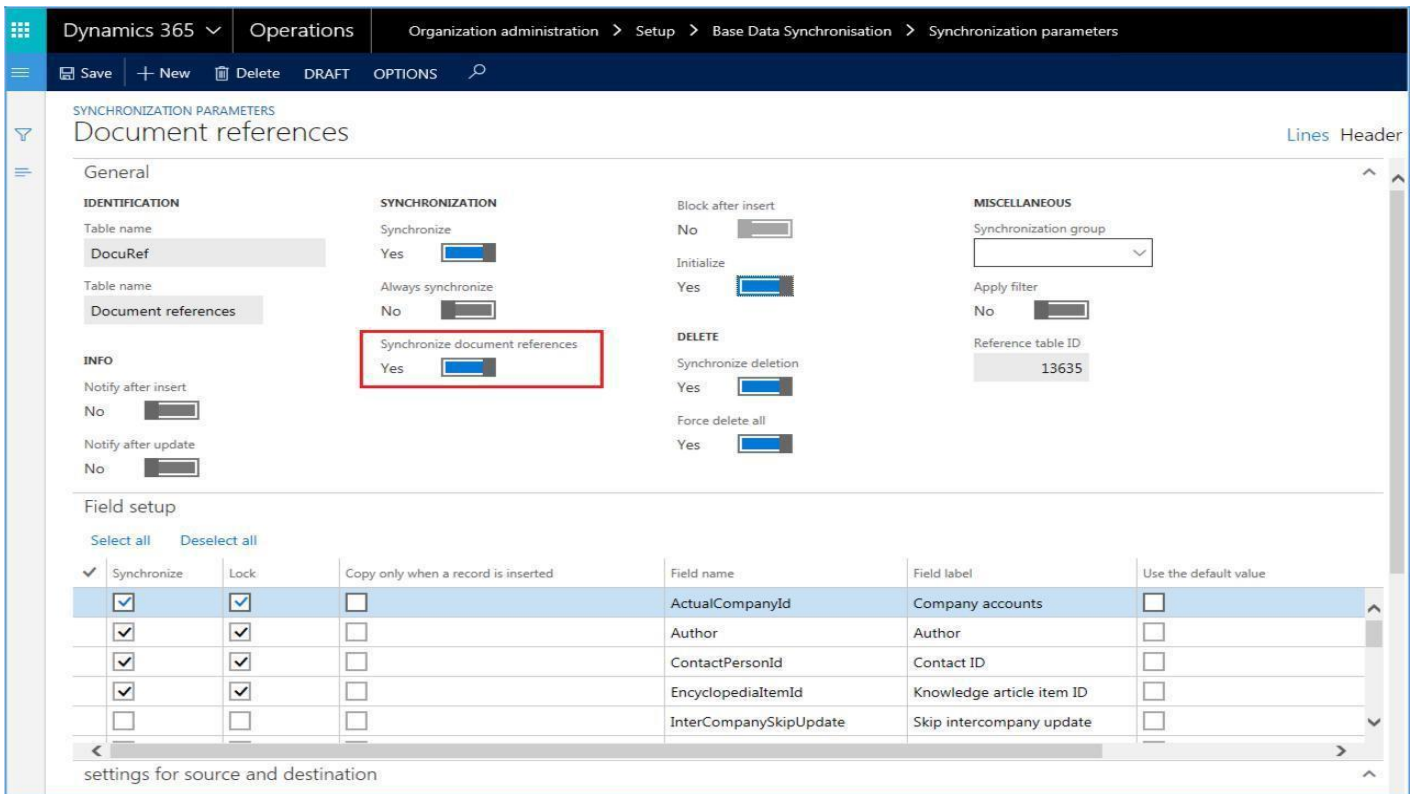
Filter

Synchronizati...	Description	Sync active
Customer		✓
Items		✓
Vendors		✓

Filters use	Description
Synchronization group	Grouping characteristic. <u>Application:</u> A synchronization Group can be assigned for several tables.
Description	Name of the synchronization group
Synch active	Here there is the possibility to take out individual groups from the synchronization

3 Synchronize Document references

To ensure that the setting “synchronize document references” become effective, the table definition “DocuRef - document reference” must be applied for the synchronization to be applied. Even the source and target client must be set up.



The screenshot shows the Dynamics 365 Operations interface for configuring synchronization parameters for 'Document references'. The breadcrumb trail is: Organization administration > Setup > Base Data Synchronisation > Synchronization parameters. The page title is 'SYNCHRONIZATION PARAMETERS Document references'. The 'General' tab is active, showing the following settings:

- IDENTIFICATION:** Table name: DocuRef; Table name: Document references.
- SYNCHRONIZATION:** Synchronize: Yes (checked); Always synchronize: No; Synchronize document references: Yes (checked, highlighted with a red box).
- Block after insert:** No (checked).
- Initialize:** Yes (checked).
- DELETE:** Synchronize deletion: Yes (checked); Force delete all: Yes (checked).
- MISCELLANEOUS:** Synchronization group: (empty dropdown); Apply filter: No (checked); Reference table ID: 13635.
- INFO:** Notify after insert: No (checked); Notify after update: No (checked).
- Field setup:** A table with columns: Synchronize, Lock, Copy only when a record is inserted, Field name, Field label, and Use the default value. The 'Synchronize' column has checkboxes for 'ActualCompanyId', 'Author', 'ContactPersonId', 'EncyclopediaItemId', and 'InterCompanySkipUpdate', all of which are checked.

At the bottom, there is a link for 'settings for source and destination'.

4 Post basket function (block- flag)

If the flag “block after insert” is active, a data set with creation is synchronized for the following tables

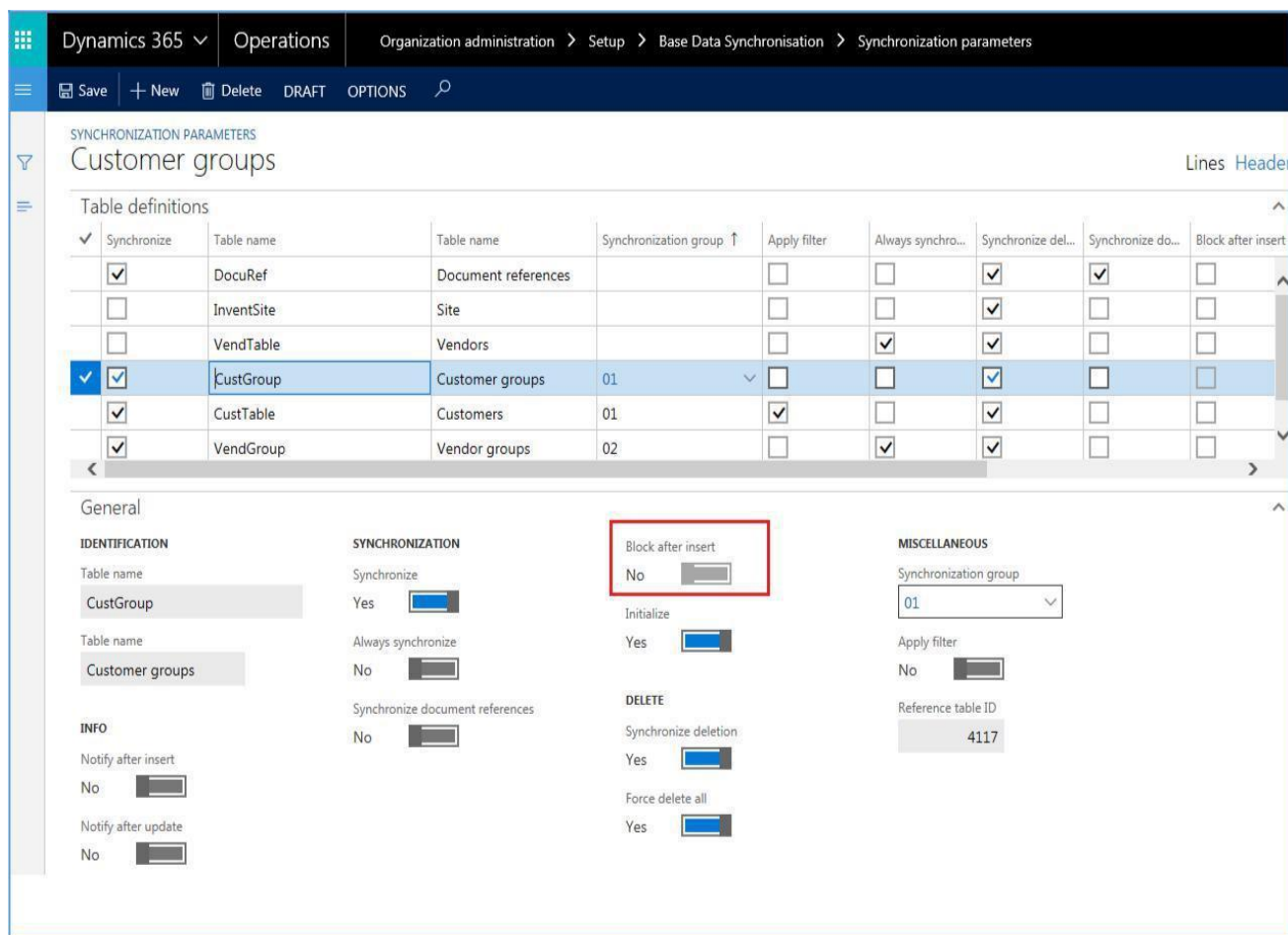
CustTable (Customers)

VendTable (Vendors)

InventTable (Products / Articles)

ProjTable (Projects)

smmBusRelTable (Prospective customer)



The screenshot shows the Dynamics 365 interface for Synchronization Parameters. The breadcrumb trail is: Organization administration > Setup > Base Data Synchronisation > Synchronization parameters. The page title is "Customer groups".

Table definitions

✓ Synchronize	Table name	Table name	Synchronization group ↑	Apply filter	Always synchro...	Synchronize del...	Synchronize do...	Block after insert
<input checked="" type="checkbox"/>	DocuRef	Document references		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	InventSite	Site		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	VendTable	Vendors		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	CustGroup	Customer groups	01	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	CustTable	Customers	01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	VendGroup	Vendor groups	02	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

General

IDENTIFICATION

Table name: CustGroup

Table name: Customer groups

INFO

Notify after insert: No

Notify after update: No

SYNCHRONIZATION

Synchronize: Yes

Always synchronize: No

Synchronize document references: No

Block after insert (highlighted in red): No

Initialize: Yes

DELETE

Synchronize deletion: Yes

Force delete all: Yes

MISCELLANEOUS

Synchronization group: 01

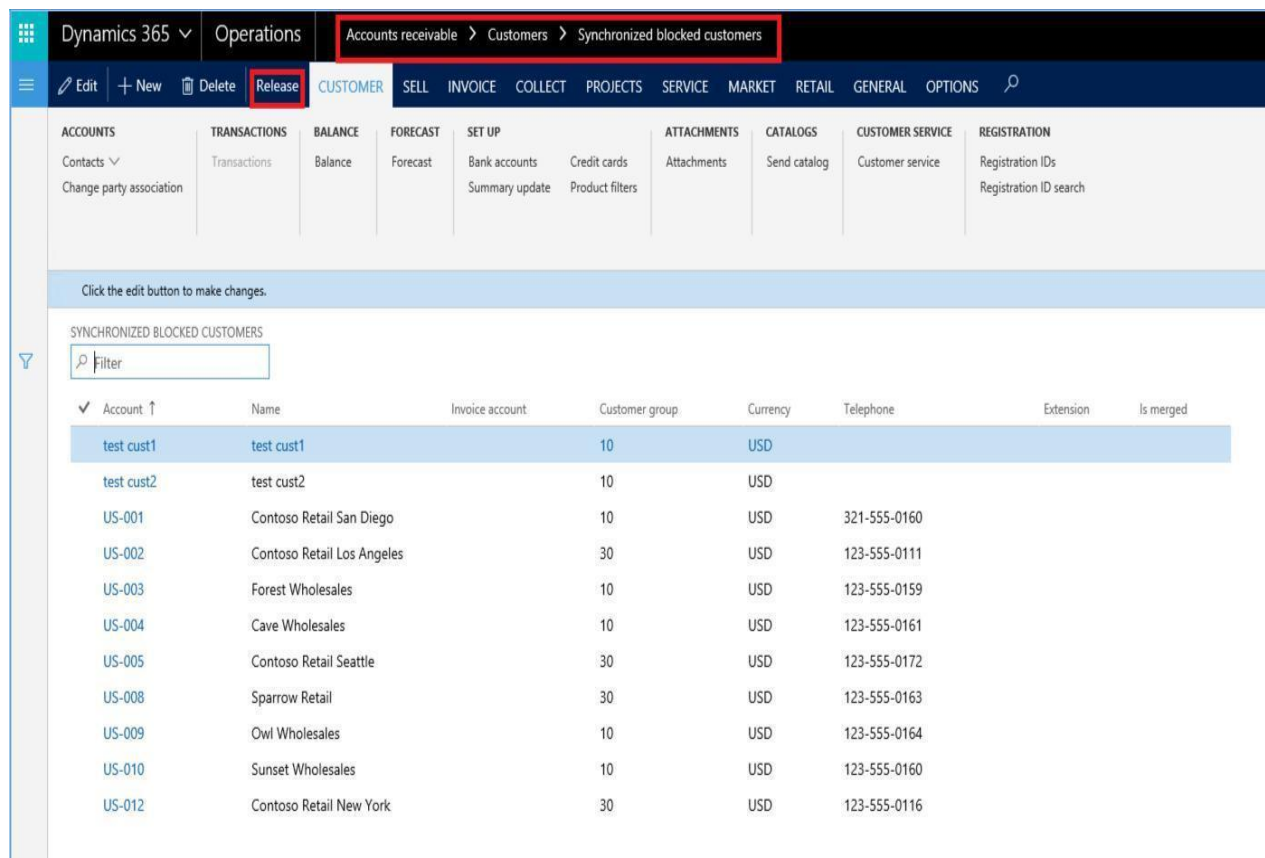
Apply filter: No

Reference table ID: 4117

However, the data is not displayed in the normal screens. The blocked data sets can be displayed and released in the corresponding menus under “synchronized closed...”.

4.1 Synchronized blocked Customers

After creation of the customers, these are displayed only in the screen “synchronized blocked Customers”.



Account	Name	Invoice account	Customer group	Currency	Telephone	Extension	Is merged
test cust1	test cust1		10	USD			
test cust2	test cust2		10	USD			
US-001	Contoso Retail San Diego		10	USD	321-555-0160		
US-002	Contoso Retail Los Angeles		30	USD	123-555-0111		
US-003	Forest Wholesales		10	USD	123-555-0159		
US-004	Cave Wholesales		10	USD	123-555-0161		
US-005	Contoso Retail Seattle		30	USD	123-555-0172		
US-008	Sparrow Retail		30	USD	123-555-0163		
US-009	Owl Wholesales		10	USD	123-555-0164		
US-010	Sunset Wholesales		10	USD	123-555-0160		
US-012	Contoso Retail New York		30	USD	123-555-0116		

The check flag is waived with “release” button and the debtor is visible in “All Customers” form. The following message appears after the release:



Dynamics 365 ▾ Operations Accounts receivable > Customers > Synchronized blocked customers

[Edit](#)
[+ New](#)
[Delete](#)
[Release](#)
[CUSTOMER](#)
[SELL](#)
[INVOICE](#)
[COLLECT](#)
[PROJECTS](#)
[SERVICE](#)
[MARKET](#)
[RETAIL](#)
[GENERAL](#)
[OPTIONS](#)

[ACCOUNTS](#)
[TRANSACTIONS](#)
[BALANCE](#)
[FORECAST](#)
[SET UP](#)
[ATTACHMENTS](#)
[CATALOGS](#)
[CUSTOMER SERVICE](#)
[REGISTRATION](#)

[Contacts](#)
[Transactions](#)
[Balance](#)
[Forecast](#)
[Bank accounts](#)
[Credit cards](#)
[Attachments](#)
[Send catalog](#)
[Customer service](#)
[Registration](#)

[Change party association](#)
[Summary update](#)
[Product filters](#)

ⓘ Synchronization status Table Customers (Customer account US-012) released

SYNCHRONIZED BLOCKED CUSTOMERS

Filter

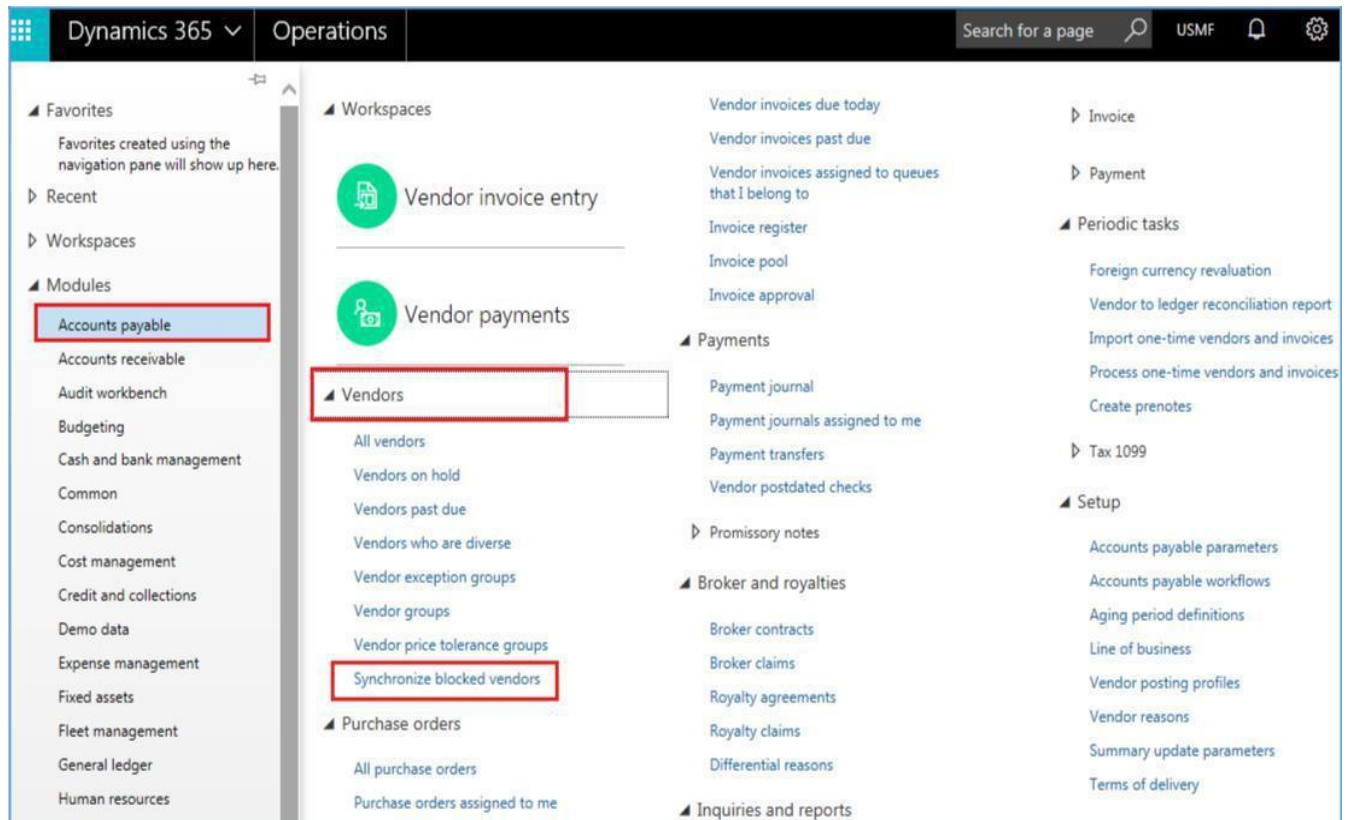
✓ Account ↑	Name	Invoice account	Customer group	Currency	Telephone
test cust1	test cust1		10	USD	
test cust2	test cust2		10	USD	
US-001	Contoso Retail San Diego		10	USD	321-555-0160
US-002	Contoso Retail Los Angeles		30	USD	123-555-0111
US-003	Forest Wholesales		10	USD	123-555-0159
US-004	Cave Wholesales		10	USD	123-555-0161
US-005	Contoso Retail Seattle		30	USD	123-555-0172
US-008	Sparrow Retail		30	USD	123-555-0163
US-009	Owl Wholesales		10	USD	123-555-0164
US-010	Sunset Wholesales		10	USD	123-555-0160



4.2 Synchronized blocked Vendors / Products / Projects / Prospective customer

The following tables are conducted in the same manner as the “synchronized blocked customers”, if the flag “block after insert” is set up.

Vendors





Products (articles)

The screenshot displays the Microsoft Dynamics 365 Operations navigation pane. The 'Products' menu item is highlighted with a red box. The 'Product information management' menu item is also highlighted with a red box. The 'Synchronized blocked items' menu item is highlighted with a red box. The 'Released product maintenance' menu item is highlighted with a blue circle. The 'Product variant model definition' menu item is highlighted with a blue circle. The 'Product readiness for discrete manufacturing' menu item is highlighted with a blue circle. The 'Product readiness for process manufacturing' menu item is highlighted with a blue circle. The 'All products and product masters' menu item is highlighted with a blue circle. The 'Products' menu item is highlighted with a blue circle. The 'Product masters' menu item is highlighted with a blue circle. The 'Products by category' menu item is highlighted with a blue circle. The 'Released products' menu item is highlighted with a blue circle. The 'Released products by category' menu item is highlighted with a blue circle. The 'Released product variants' menu item is highlighted with a blue circle. The 'Product configuration models' menu item is highlighted with a blue circle. The 'Synchronized blocked items' menu item is highlighted with a blue circle. The 'Bills of materials and formulas' menu item is highlighted with a blue circle. The 'Bills of materials' menu item is highlighted with a blue circle. The 'Formulas' menu item is highlighted with a blue circle. The 'Product conversions' menu item is highlighted with a blue circle.

Dynamics 365 ▾ **Operations**

- ▲ Favorites
 - Favorites created using the navigation pane will show up here.
- Recent
- Workspaces
- ▲ Modules
 - Accounts payable
 - Accounts receivable
 - Audit workbench
 - Budgeting
 - Cash and bank management
 - Common
 - Consolidations
 - Cost management
 - Credit and collections
 - Demo data
 - Expense management
 - Fixed assets
 - Fleet management
 - General ledger
 - Human resources
 - Inventory management
 - Master planning
 - Organization administration
 - Payroll
 - Procurement and sourcing
 - Product information management**
 - Production control
- ▲ Workspaces
 - Released product maintenance
 - Product variant model definition
 - Product readiness for discrete manufacturing
 - Product readiness for process manufacturing
 - ▲ Products
 - All products and product masters
 - Products
 - Product masters
 - Products by category
 - Released products
 - Released products by category
 - Released product variants
 - Product configuration models
 - Synchronized blocked items
 - ▲ Bills of materials and formulas
 - Bills of materials
 - Formulas
- All cases
 - My cases
 - My open cases
 - Open cases
 - My overdue cases
 - Cases assigned to me
 - Cases assigned to my queues
- ▲ Lean manufacturing
 - Lean schedule groups
 - Kanban rules
 - Circulating cards
- ▲ Costing
 - All released products with no active cost
 - All released products to configure
- ▲ Inquiries and reports
 - Bill of materials lines
 - Bill of materials where-used
 - Calculation details for cost and price
- ▲ Periodic tasks
 - Open product releases
 - Report as finished
 - Costing versions
 - Recalculate BOM levels
- Bills of materials and formulas
- Product conversions



Projects

Dynamics 365 ▾ Finance and Operations Organization > > Base Data > Synchronization parameters USMF

Audit workbench
Budgeting
Cash and bank management
Common
Consolidations
Cost accounting
Cost management
Credit and collections
Demo data
Expense management
Fixed assets
Fleet management
General ledger
Human resources
Inventory management
Master planning
Organization administration
Payroll
Procurement and sourcing
Product information management
Production control
Project management and accounting
Questionnaire
Retail
Sales and marketing
Service management
System administration
Tax
Time and attendance
Transportation management
Vendor collaboration
Warehouse management

- Workspaces
 - Project management
 - Projects**
 - All projects
 - My projects
 - Project contracts
 - Synchronize blocked projects** ★
- Project resources
 - Resources list
 - Resource availability
 - Resource fulfillment
 - My resource requests
- Item tasks
 - Item requirements
 - Project purchase requisitions
 - Project purchase orders
 - Project sales orders
 - Project requests for quotations
 - Project production orders
- Timesheets
 - All timesheets
 - My timesheets
 - My timesheets (Optimized for mobile)
 - Timesheets for my review
 - Timesheets for my review (Optimized for mobile)
 - Unposted timesheets
 - Deleted timesheets history
- Transactions
 - All project forecasts
 - Pending project transactions
 - My pending project transactions
 - Posted project transactions
 - My posted project transactions
 - Project invoices
 - Project invoice proposals
 - Project invoices
 - Intercompany customer invoice
 - Quotations
 - Project quotations
 - My project quotations
 - Expiring project quotations
 - My expiring project quotations
 - Grants
 - Grants
 - My grants
 - Grant transactions
 - Journals
 - Hour
 - Expense
 - Item
 - Fee
 - Beginning balance
 - Dynamics 365 for Project Service Automation integration journal
 - Inquiries and reports
 - Projects report
 - Project contracts report

- Project transactions report
 - Forecasts inquiries
 - Transactions inquiries
 - Resource scheduling inquiries
 - Committed costs inquiries
 - Retention inquiries
 - Focus reports
 - Validation reports
 - Actual transactions reports
 - Forecast transactions reports
 - Profit and loss reports
 - Consumption reports
 - WIP reports
 - Hour rate reports
 - Cash flow reports
 - Timesheets reports
 - Hour utilization reports
 - Project invoices reports
 - Committed costs reports
 - Payroll allocation reports
 - On account reports
 - Retention reports



Prospective customer

Dynamics 365 ▾ **Finance and Operations** **Organization** > > **Base Data** > **Synchronization parameters** **USMF** 🔍 🗨️ 😊 ⚙️

Audit workbench

Budgeting

Cash and bank management

Common

Consolidations

Cost accounting

Cost management

Credit and collections

Demo data

Expense management

Fixed assets

Fleet management

General ledger

Human resources

Inventory management

Master planning

Organization administration

Payroll

Procurement and sourcing

Product information management

Production control

Project management and accounting

Questionnaire

Retail

Sales and marketing

Service management

System administration

Tax

Time and attendance

Transportation management

Vendor collaboration

Warehouse management

Workspaces

Sales order processing and inquiry

Sales return processing

Customers

All customers

Recalculate credit limit

Relationships

Contacts

Prospects

All prospects

My prospects

Converted prospects

Imported prospect list

Synchronized blocked prospects ★

Leads

Opportunities

Marketing

Campaigns

Telemarketing

Sales quotations

All quotations

My quotations

Open quotations

Quotation update

Sales orders

All sales orders

Open orders

Intercompany orders

Sales journal

Order confirmation

Order shipping

Sales agreements

Sales agreements

Sales agreement fulfillment report

Sales returns

All return orders

Open return orders

Created return orders

Canceled return orders

Closed return orders

Prices and discounts

Find prices

Trade agreement journals

Customer price/discount groups

Item discount groups

Customer rebates

Rebate agreements

Rebates

Rebate program types

Rebate groups

Rebate update

Trade allowances

Trade allowance agreements

Bill back workbench

Customer category hierarchy

Templates

Trade allowance analysis

Funds

Deductions

Commissions

Commission calculation

Commission posting

Customer groups for commission

Item groups

Sales groups

Inquiries and reports

History

Order posting

Sales and marketing reports

Sales order reports

Sales agreement reports

Customer statistics

Sales statistics

Sales performance analysis

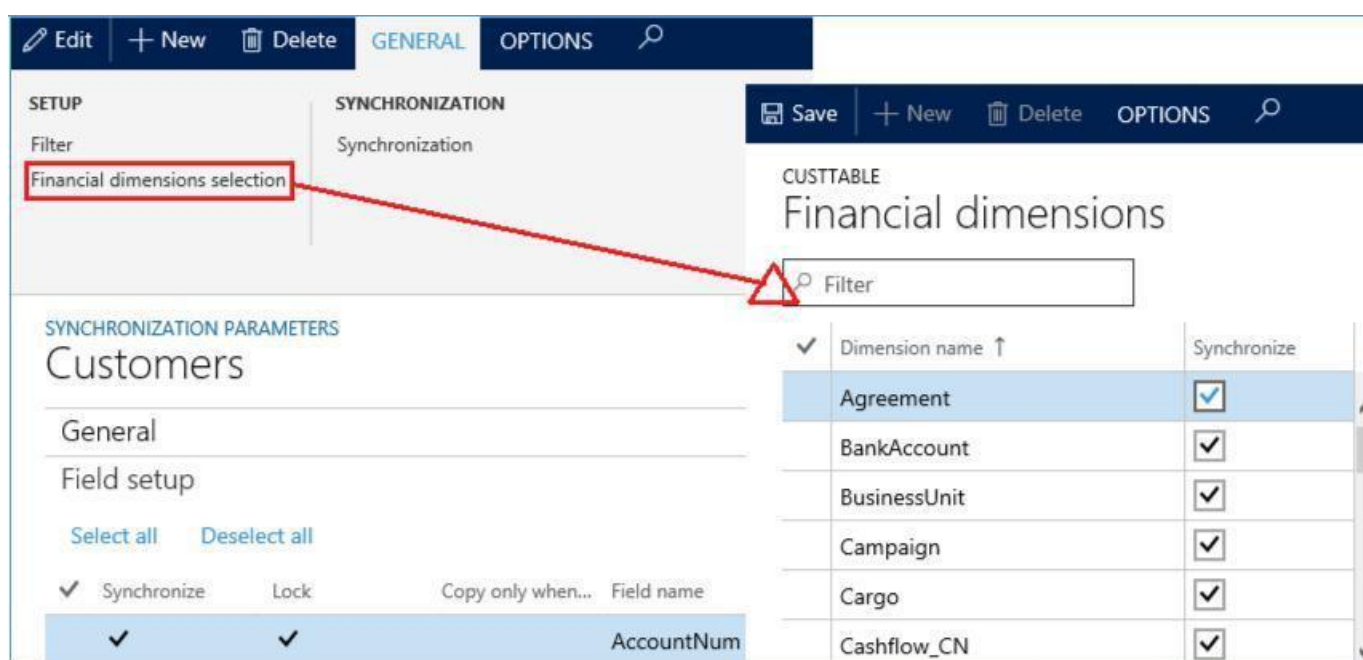
5 Extended Product Synchronization

Additional tables like WHSInventTable, WHSInventEnabled etc., are now included for synchronization. When releasing a product to a legal entity then synchronization will run. The synchronization sequence of sub tables is changed, so that the records are inserted by the synchronization instead of standard Dynamics business logic. Editing is also blocked for inventory dimension groups and reservation hierarchy on synchronized items.

6 Merge Synchronization for Financial Dimension

For synchronization of financial dimensions, it is possible to define which ones should be synchronized.

Source and target dimension will get merged as per the setup.



The screenshot shows the 'Financial dimensions' setup window in Microsoft Dynamics NAV. The 'SYNCHRONIZATION' tab is selected, and the 'SYNCHRONIZATION PARAMETERS' section is expanded. A red box highlights 'Financial dimensions selection' in the left pane, and a red arrow points to the 'Filter' field in the 'SYNCHRONIZATION PARAMETERS' section. The table below shows dimensions to be synchronized, with 'Synchronize' checked for all listed dimensions.

Dimension name	Synchronize
Agreement	<input checked="" type="checkbox"/>
BankAccount	<input checked="" type="checkbox"/>
BusinessUnit	<input checked="" type="checkbox"/>
Campaign	<input checked="" type="checkbox"/>
Cargo	<input checked="" type="checkbox"/>
Cashflow_CN	<input checked="" type="checkbox"/>

7 Price agreement relation conversion

For synchronization of price agreements (table PricDiscTable) the relation is now enabled for defining conversions. The intended use case is to synchronize sales prices to purchase prices or vice versa.

8 Improved value conversions for enumeration data types

For value conversion with enumeration data types the technical enumeration value name could be used for entering the destination value. This is helpful when working with different client languages. It is still possible to use the enumeration value (integer) or the label (not recommended).

Value conversion per company

Filter

Table name	Master comp...	Destination c...	Destination field	Destination value
PriceDiscTable	USMF	USRT	relation	

Name	Label
PricePurch	Price (pur
LineDiscPurch	Line disc.
MultiLineDiscPurch	Multiline
EndDiscPurch	Total disc
PriceSales	Price (sal
LineDiscSales	Line disco

9 Excel export for synchronization parameters

All synchronization parameters could be exported to an excel file for documentation and validation purposes.

Fixed assets
Fleet management
General ledger
Human resources
Inventory management
Master planning
Organization administration
Payroll
Procurement and sourcing
Product information management
Production control
Project management and accounting

Document content types
Document management parameters
Document types

Inquiries and reports
Print archive
Resources
Departments report
Capacity reservations report
Alerts
Export synchronization parameters

Export synchronization parameters

Records to include

Filter

TO SYNCHRONIZED TABLES

Synchronization group

Table name

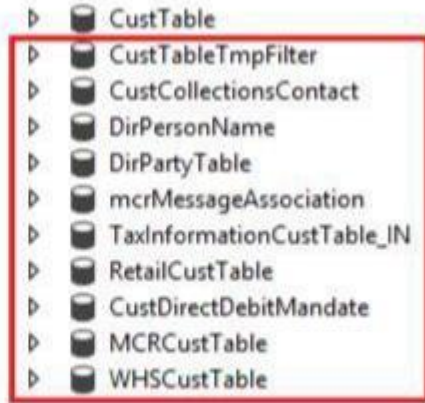
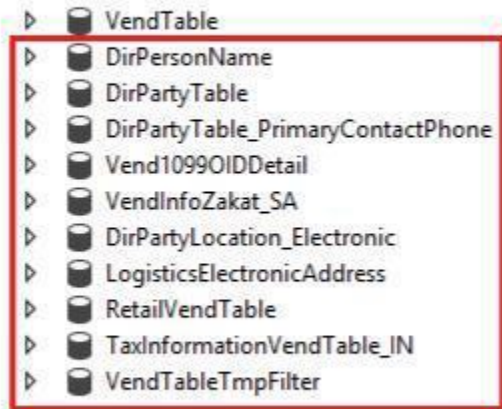
Synchronize deletion

TO SYNCHRONIZED FIELDS

Reference table ID

OK Cancel

10 Remarks on individual tables


























		 <p>the debtor view is not automatically synchronized at the same time.</p>
Supplier master VendTable	<p>Only the fields of the supplier's master (VendTable) are synchronized. Further fields from linked tables (red framework) displayed in the creditor view is not automatically</p>  <p>synchronized at the same time.</p>	
Article master InventTable	<p>For the InventTable, the following tables are synchronized at the same time (the Green framework):</p>	

InventTableModule (storage module parameter: Purchase / Storage / Sale)

InventItemLocation (Storage site
administration: Storage site article)

This becomes visible in the field settings in the
column "module".

Further fields from linked tables (red framework)
displayed in the article view are not
automatically synchronized at the same time.

- ▶  InventTable
- ▶  Purch
- ▶  Invent
- ▶  Sales
- ▶  InventItemLocation
- ▶  EcoResStorageDimensionGroupItem
- ▶  EcoResTrackingDimensionGroupItem
- ▶  InventItemGroupItem
- ▶  InventModelGroupItem
- ▶  EcoResProduct
- ▶  EcoResProductDimensionGroupProduct
- ▶  EcoResProductMasterModelingPolicy
- ▶  EcoResProductTranslation
- ▶  WHSInventTable
- ▶  WHSInventFixedLocation
- ▶  EcoResProductCategory
- ▶  EcoResCategoryDescendents
- ▶  EcoResCategory
- ▶  PdsCatchWeightItem
- ▶  RetailCategoryContainmentLookup
- ▶  RetailInventTable
- ▶  WHSReservationHierarchyItem
- ▶  MCRInventTable
- ▶  WHSProductVariantFixedLocation
- ▶  InventDim

Parts lists BOMTable	For the BOMTable, both the following tables are synchronized at the same time: BOMVersion (parts list version) BOM (parts list number)
Work plan RouteTable	For the RouteTable, the following tables are synchronized at the same time: Route version (Work plan version) Route (Processing step) RouteOpr (Processing step relations)
Addresses	Addresses are not synchronized, since these are stored in the global directory, which is cross-client. The partial allocation in the individual tables can be synchronized for customers, vendors or prospective customers. Thus, the

	respective addresses are displayed in the synchronized clients. There is however no copy of the data set, which can administer each client separately.
Contact information	The contact information is linked over the partial allocation. Even the contact information is evident in the synchronization clients provided that the partial allocation is synchronized at the same time. There is however no copy of the data set, which can administer each client separately.
Contacts Contact Person	The table Contact Person is not automatically synchronized at the same time with the customers, vendors or prospective customers. The contacts are stored separately per client and must therefore be synchronized separately.
Commercial agreements PricDiscTable	All agreements are stored in this table; there is no partitioning in purchase and sale or prices and discounts.

11 Legal Entity Group Sync

Legal entity group can be defined with entities and same can be used for syncing the data

Call: [Client] > Organization administration > Setup > **Base Data Synchronization > Synchronization Parameters**

settings for source and destination

Companies Number sequences

SOURE AND TARGET LEGAL ENTITY

+ New

Delete

Filter

Value conversion

Company relation

✓ From company	Name	Company relation	▼ To company	Name	Apply filter
USMF	Contoso Entertainment System ...	Group	MDS_Test1	MDS_Test1	Company filter

Set the filter criteria in “Settings for Source and destination” section to limit the extent of synchronized data as shown below

Dynamics 365
Finance and Operations

Save
+ New
Delete
GENERAL

SYNCHRONIZATION PARAMETERS
Customers

Field setup

Select all
Deselect all

	Synchronize	Lock	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

settings for source and destination

Companies
Number sequences

SOURCE AND TARGET LEGAL ENTITY

+ New
Delete
Filter
Value of

any	Name
	Contoso Entertainment System ...

Inquiry

Select query
Query used
Modify...

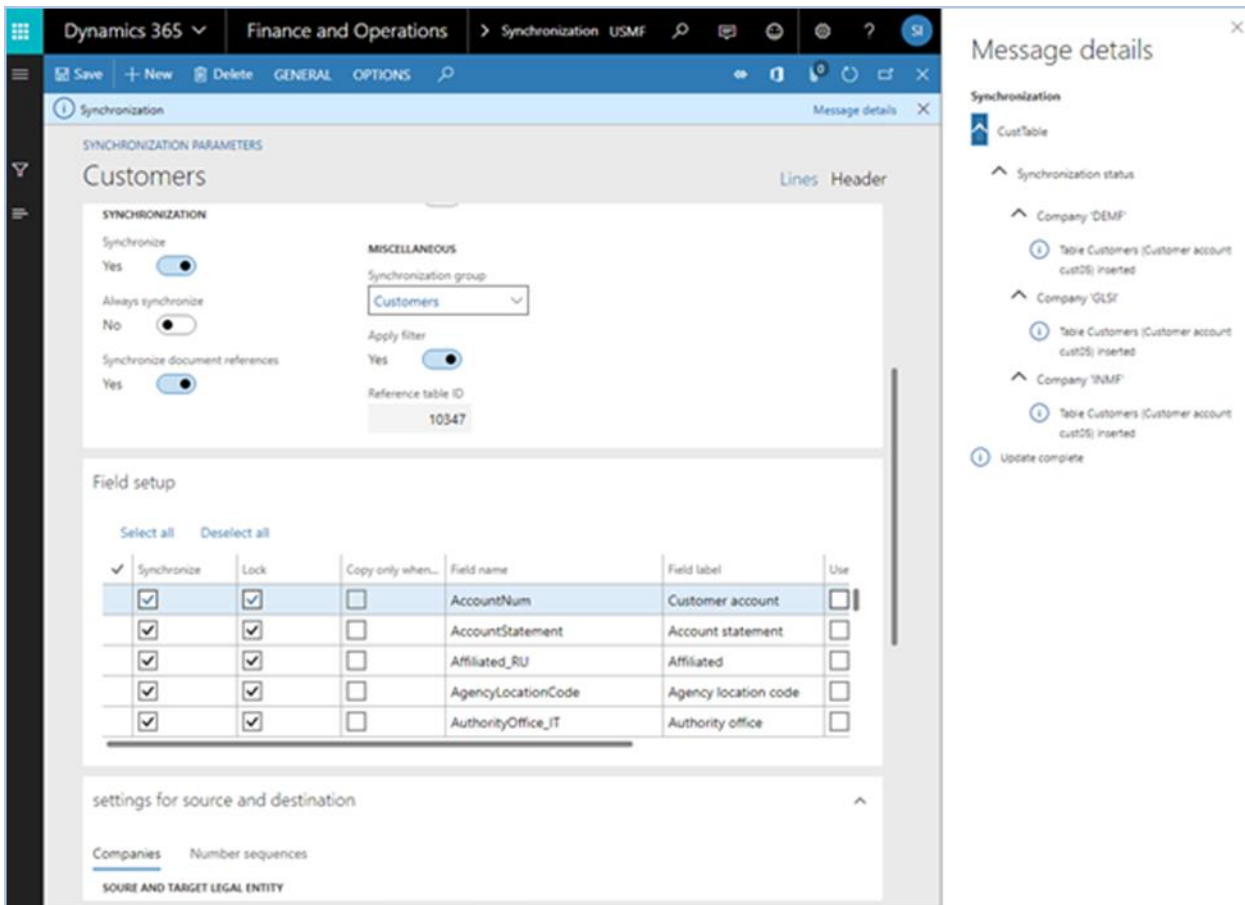
Range
Sorting
Joins

+ Add
Remove

	Table	Derived table	Field	Criteria
<input checked="" type="checkbox"/>	Customers	Customers	Customer account	cust05

☒ Replace the criteria value on lookup

OK
Reset
Cancel



The screenshot shows the Dynamics 365 Synchronization interface for the 'Customers' entity. The interface is divided into several sections:

- SYNCHRONIZATION PARAMETERS:** Includes toggle switches for 'Synchronize' (Yes), 'Always synchronize' (No), and 'Synchronize document references' (Yes). It also has a 'Miscellaneous' section with a 'Synchronization group' dropdown set to 'Customers', an 'Apply filter' toggle (Yes), and a 'Reference table ID' field with the value '10347'.
- Field setup:** A table with columns: Synchronize, Lock, Copy only when..., Field name, Field label, and Use. The 'Synchronize' column has checkboxes for 'AccountNum', 'AccountStatement', 'Affiliated_RU', 'AgencyLocationCode', and 'AuthorityOffice_IT'. The 'Lock' column has checkboxes for 'AccountNum', 'AccountStatement', 'Affiliated_RU', 'AgencyLocationCode', and 'AuthorityOffice_IT'. The 'Copy only when...' column has checkboxes for 'AccountNum', 'AccountStatement', 'Affiliated_RU', 'AgencyLocationCode', and 'AuthorityOffice_IT'. The 'Field name' column contains 'AccountNum', 'AccountStatement', 'Affiliated_RU', 'AgencyLocationCode', and 'AuthorityOffice_IT'. The 'Field label' column contains 'Customer account', 'Account statement', 'Affiliated', 'Agency location code', and 'Authority office'. The 'Use' column has checkboxes for 'AccountNum', 'AccountStatement', 'Affiliated_RU', 'AgencyLocationCode', and 'AuthorityOffice_IT'.
- Message details:** A sidebar on the right showing the synchronization status. It includes a 'Synchronization' section with a 'CustTable' dropdown. Below it, there are sections for 'Synchronization status' and 'Update complete'.

settings for source and destination

Companies Number sequences

SOURCE AND TARGET LEGAL ENTITY

The data will be synced and can be viewed in respective entities defined in the group

12 Data Sync run in Batch

Call: [Client] > Organization administration > Setup > **Base Data Synchronization** > **Synchronization Parameters** > **CustTable**

SYNCHRONIZATION PARAMETERS

Customers Lines Heade

General

IDENTIFICATION Table name CustTable Table name Customers INFO Notify after insert Yes <input checked="" type="checkbox"/> Notify after update Yes <input checked="" type="checkbox"/>	SYNCHRONIZATION Synchronize Yes <input checked="" type="checkbox"/> Always synchronize No <input type="checkbox"/> Synchronize document references Yes <input checked="" type="checkbox"/> Block after insert No <input type="checkbox"/>	Initialize No <input type="checkbox"/> Batch synchronization Yes <input checked="" type="checkbox"/> DELETE Synchronize deletion No <input type="checkbox"/> Force delete all No <input type="checkbox"/>	MISCELLANEOUS Synchronization group Customers Apply filter Yes <input checked="" type="checkbox"/> Reference table ID 10347
--	--	--	--

Enable Batch Synchronization from synchronization parameters and synchronize using general tab and opt "As a batch job" as shown in the below image

Synchronization

Parameters

PRODUCTS

Items

Yes



SETUP

As a batch job



Directly (client blocked)

As a batch job

Save + New Delete CUSTOMER SELL INVOICE COLLECT PROJECTS SERVICE MARKET RETAIL GENERAL

ACCOUNTS TRANSACTIONS BALANCE FORECAST SET UP ATTACHMENTS CATALOGS CUSTOMER SERVICE REGISTRATION

Contacts Change party association Transactions Balance Forecast Bank accounts Credit cards Attachments Send catalog Customer service Registration IDs Registration ID search

Customers - Batch job is added to the batch queue.

ALL CUSTOMERS

cus001 : cus0001

General 02

CUSTOMER

Account
cus001

Type
Organization

Name
cus0001

Search name
cus0001

Customer group
02

Classification group

ORGANIZATION DETAILS

Number of employees
0

Organization number

ABC code
None

DUNS number

OTHER INFORMATION

Address books

Language
en-us

13 Database logging

To be able to track the changes at master data, Dynamics 365 for operations offers the logging on database level in the standard. Thereby logging tables can be added to follow actions such as insertion, deletion, update and/or key rename. The user is displayed over the flag "master data synchronization", if the table for master data synchronization was arranged. The logging settings are cross client.

Path: System administration - Setup - Database Log setup

Dynamics 365

Finance and Operations

System administration > Setup > Database log setup

USMF

Save

+ New

Delete

OPTIONS

Database log setup

Filter

Table name	Field name	Type of change ↑ ↓	Signature controlled	Base Data Synchronisation
POS registers	Store number	Insert	<input type="checkbox"/>	<input type="checkbox"/>
POS registers	Default payment method	Insert	<input type="checkbox"/>	<input type="checkbox"/>
POS registers	EFT POS register number	Insert	<input type="checkbox"/>	<input type="checkbox"/>
POS registers	Hardware profile	Insert	<input type="checkbox"/>	<input type="checkbox"/>
Payment services	Payment service	Insert	<input type="checkbox"/>	<input type="checkbox"/>
Payment services	Connector properties	Insert	<input type="checkbox"/>	<input type="checkbox"/>
Payment services	Test mode	Insert	<input type="checkbox"/>	<input type="checkbox"/>
POS functionality profile	Audit	Insert	<input type="checkbox"/>	<input type="checkbox"/>
RetailOnlineChannelPaymentCo...	Reference	Insert	<input type="checkbox"/>	<input type="checkbox"/>
RetailOnlineChannelPaymentCo...	Connector	Insert	<input type="checkbox"/>	<input type="checkbox"/>
RetailOnlineChannelPaymentCo...	Property	Insert	<input type="checkbox"/>	<input type="checkbox"/>
Customer direct debit mandates		Insert	<input type="checkbox"/>	<input type="checkbox"/>
POS hardware profiles	ABC code	Insert	<input type="checkbox"/>	<input type="checkbox"/>
POS hardware profiles	EFT service	Insert	<input type="checkbox"/>	<input type="checkbox"/>
POS hardware profiles	Service ID	Insert	<input type="checkbox"/>	<input type="checkbox"/>
POS hardware profiles	Configuration	Insert	<input type="checkbox"/>	<input type="checkbox"/>
POS hardware profiles	Connector	Insert	<input type="checkbox"/>	<input type="checkbox"/>
POS hardware profiles	Description	Insert	<input type="checkbox"/>	<input type="checkbox"/>

The actions and changes of a data set can be tracked over

Path: System administration - Inquiries - Database - Database log”.

Dynamics 365 ▾ Operations System administration > Inquiries > Database > Database Log									
Clean up log Reinsert Database Log Refresh Signature review 🔍									
Database Log									
OVERVIEW HISTORY									
✓	Reference table...	Table name	Company	Record identification	Type of change	Created date and time	Created by	Creator name ▾	Signed
	3135	Vendors	us01	1001.22565449580	Delete	2/14/2017 01:23:52 AM	Admin	sushma.devi...	<input type="checkbox"/>
	3135	Vendors	us01	1003.22565450328	Delete	2/14/2017 01:23:52 AM	Admin	sushma.devi...	<input type="checkbox"/>
	3135	Vendors	us01	104.22565450329	Delete	2/14/2017 01:23:52 AM	Admin	sushma.devi...	<input type="checkbox"/>
	3135	Vendors	us01	AirCarrier.52565455594	Delete	2/14/2017 01:23:30 AM	Admin	sushma.devi...	<input type="checkbox"/>
	3135	Vendors	us01	US_TX_001.22565425475	Delete	2/14/2017 01:23:34 AM	Admin	sushma.devi...	<input type="checkbox"/>
	3135	Vendors	us01	US-108.5637144828	Delete	2/14/2017 01:23:34 AM	Admin	sushma.devi...	<input type="checkbox"/>
	3135	Vendors	us01	US-110.22565427693	Delete	2/14/2017 01:23:34 AM	Admin	sushma.devi...	<input type="checkbox"/>
	4117	Customer groups	us01	10.Wholesales customers	Insert	2/13/2017 01:50:59 AM	Admin	sushma.devi...	<input type="checkbox"/>
	4117	Customer groups	us01	10.Wholesales customers	Delete	2/14/2017 01:22:57 AM	Admin	sushma.devi...	<input type="checkbox"/>
	4117	Customer groups	us01	100.Intercompany retail custom...	Insert	2/13/2017 01:50:59 AM	Admin	sushma.devi...	<input type="checkbox"/>
	4117	Customer groups	us01	100.Intercompany retail custom...	Delete	2/14/2017 01:22:59 AM	Admin	sushma.devi...	<input type="checkbox"/>

14 Cross-client tables

Tables are equipped with the characteristic “Save **Data Per Company**”. This characteristic can be set on “**No**” in the development environment. Thus, the table is global and is no more led per client. The data sets of this table are valid for all clients (without exception).

Note: There can be data loss and inconsistencies, if the table already contains data sets during the conversion. This variant should be used only with empty tables.

15 Installation

The complete module can be activated/deactivated in the configuration screen.

Path: System administration – Setup - License configuration

