EBT MIDDLE EAST LLC

BUSINESS CENTRAL

Enterprise Data Management

User Manual

EBT Middle East LLC

#310, The Business Center,

Khaled Bin Al Waleed St., Bur Dubai,

Dubai, United Arab Emirates

Tel: +971 04 4396 7428

www.ebtdubai.com

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Disclaimer

This documentation is always under active development and as such, there may be mistakes and omissions - watch out for these and please report any you find to EBT Middle East LLC. Contributions of material, suggestions and corrections are welcome.

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MASTER DATA DISTRIBUTION USER MANUAL

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This manual explains how to configure and operate the EBT Enterprise Data Management extension in Microsoft Dynamics 365 Business Central. The extension replicates master data - such as customers, vendors, items, and their related tables - from a single Master Company to one or more Child Companies within the same Business Central database, so that shared master data is entered once and distributed consistently.

1. Overview

The extension distributes master data between companies in the same Business Central database:

- You designate one company as the Master Company and the others as Child Companies.
- You choose which tables and which fields participate in replication, and optionally define linked (related) tables that must travel together.
- As records are created, changed, or deleted in the Master Company, the extension automatically records each change in a replication log.
- You then push the pending changes to the selected Child Companies - manually from the Replication by Company Matrix, or automatically using a recurring Job Queue.
- Every applied record is written to a history log, so you can confirm what was distributed and review any errors.

> **NOTE:** Replication moves data between companies inside the same Business Central database. It does not send data to any external service, so no outbound HTTP configuration is required.

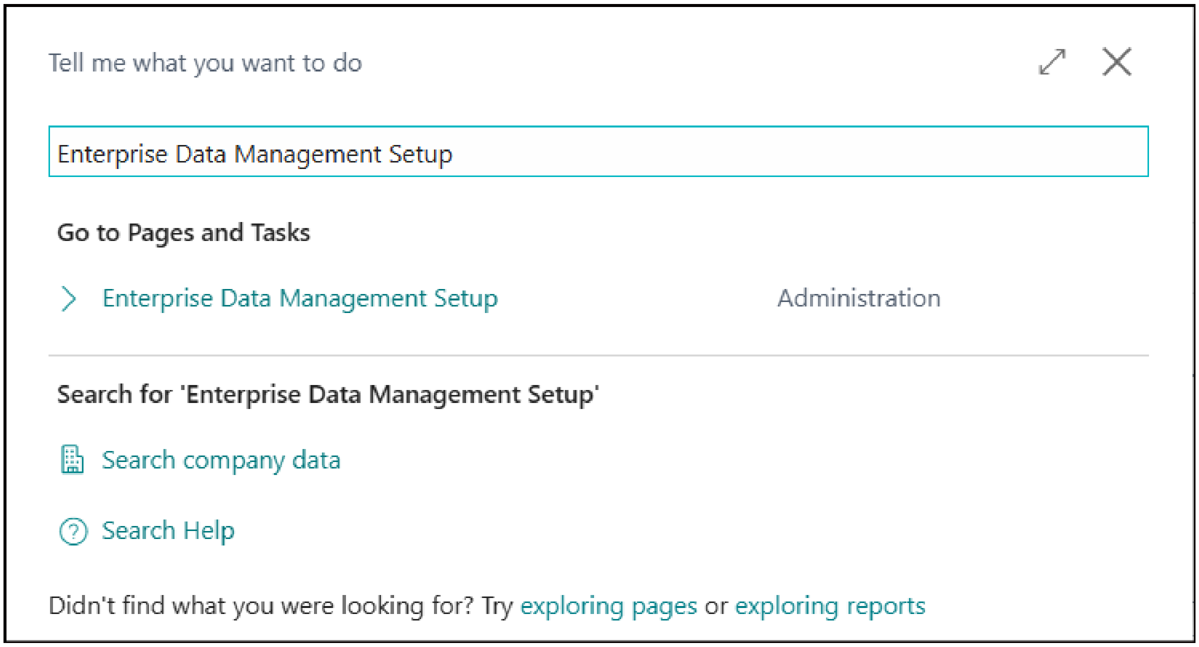
2. Prerequisites

Before you begin, make sure you have:

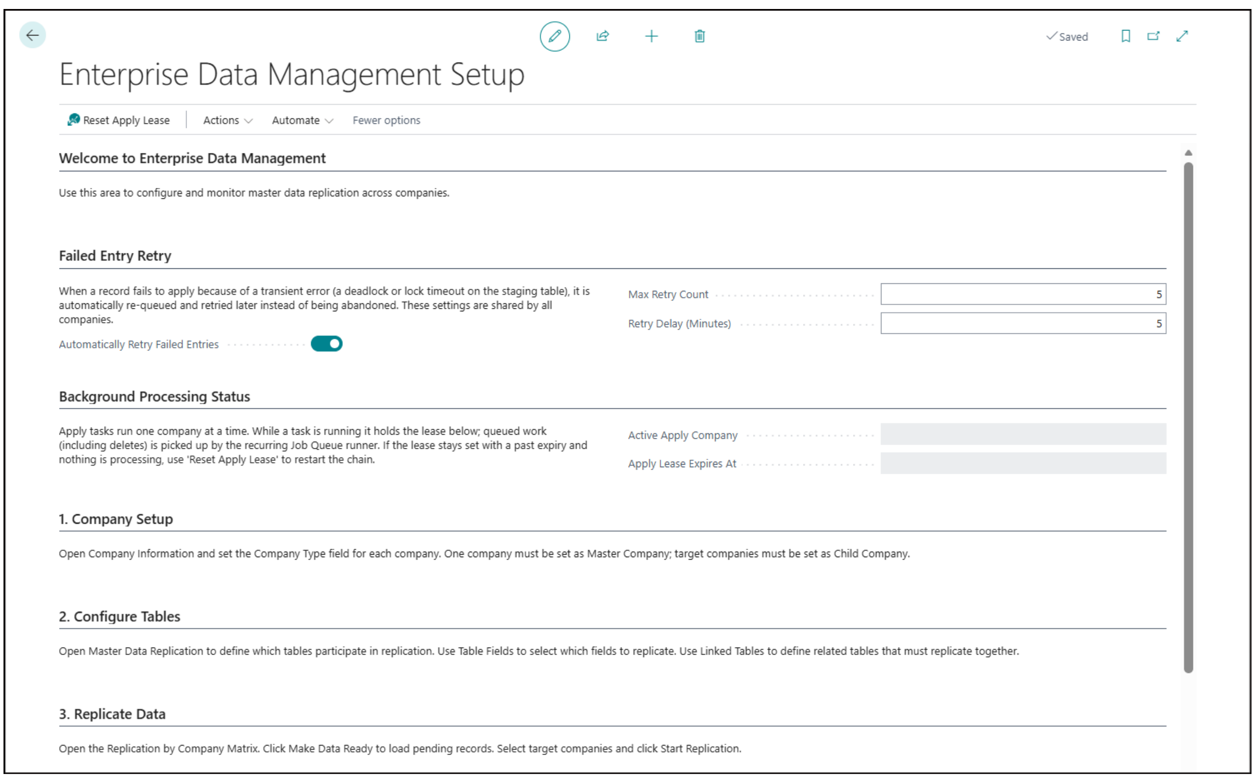
- The EBT Enterprise Data Management extension is installed and up to date in the environment.
- At least two companies in the same Business Central database.
- The EBT MDD Admin permission set is assigned to the users who configure and run replication, and to the Job Queue account used for automatic processing.
- Rights to edit Company Information in each participating company.

3. Opening the Enterprise Data Management Setup Page

Choose the Search (Tell Me) icon, type Enterprise Data Management Setup, and open the page.



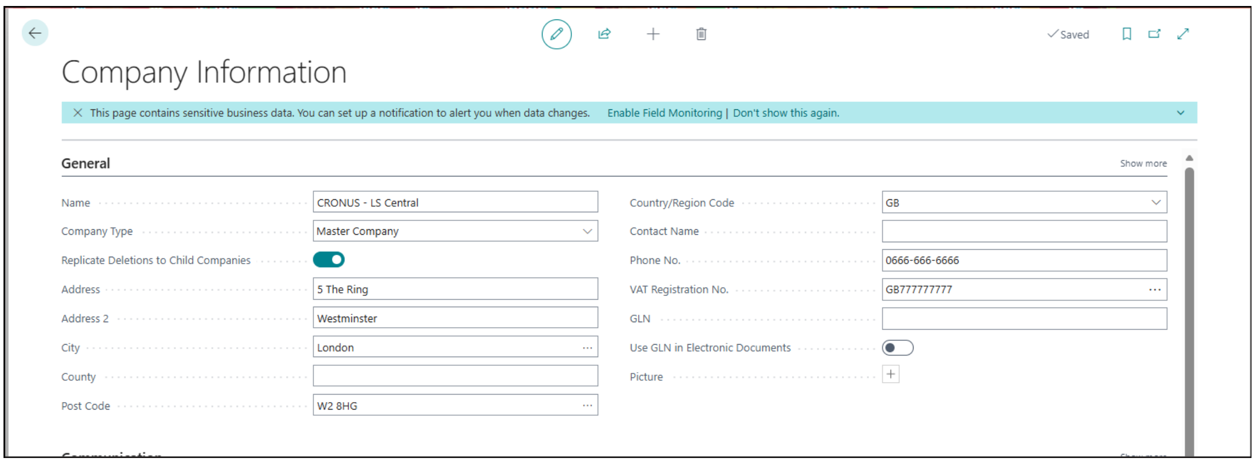
The Enterprise Data Management Setup card opens. This is the central screen for the integration: it lists the guided setup steps, the failed-entry retry settings, the background-processing status, and actions to open the table configuration, the replication matrix, and the log.



4. Step 1 - Setting the Company Type

Each company must be told what role it plays in replication.

1. In each participating company, choose Search (Tell Me), type Company Information, and open the page.
2. In the Company Type field (added just below Name), choose the role: Master Company for the single source company; Child Company for a target company that receives replicated data; leave it blank for a normal company that takes no part in replication.
3. On the Master Company only, optionally turn on Replicate Deletions to Child Companies if deleting a tracked record in the Master should also delete the matching record in every Child Company.



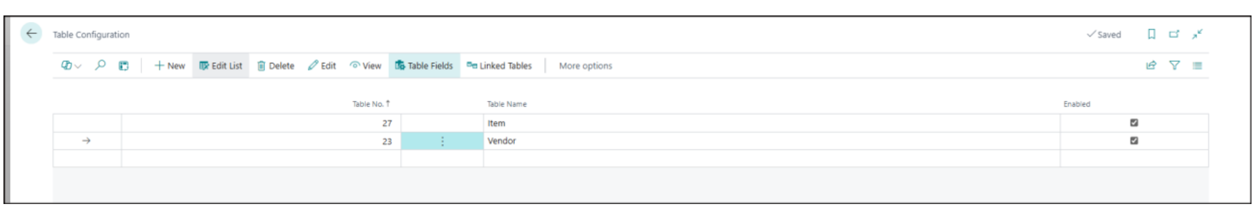
NOTE: Set exactly one company as the Master Company, and set each target as a Child Company. A company left with a blank type is ignored by replication.

5. Step 2 - Configuring Tables to Replicate

5.1 Adding the Tables

From the Setup page choose Open Table Configuration (or search for Master Data Replication).

1. On a new line, set Table No. and pick the table to replicate (for example, 18 - Customer). The Table Name fills in automatically.
2. Turn on Enabled to activate change capture for that table.
3. Repeat for every table you want to distribute.

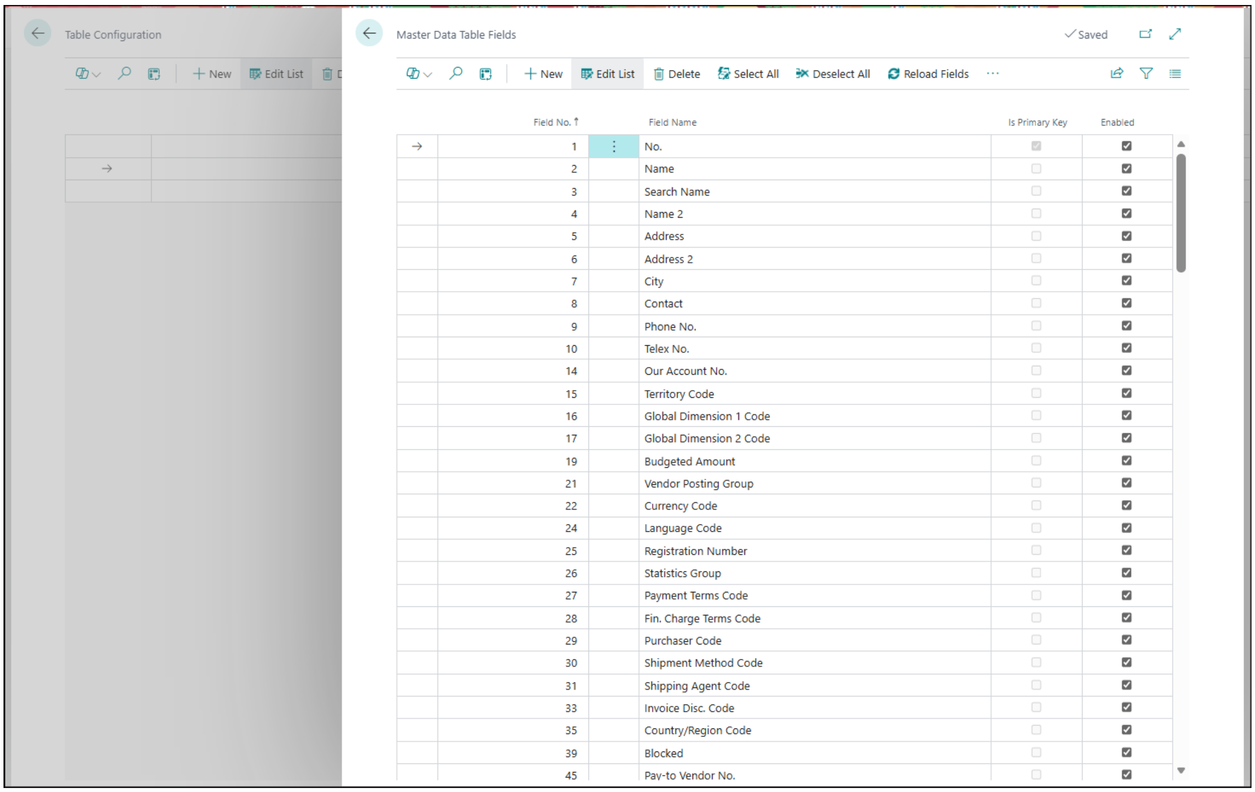


> **NOTE:** Only enabled tables are tracked. Changes made in the Master Company to a table that is not added and enabled here are not captured.

5.2 Choosing the Fields

Select a table line and choose Table Fields.

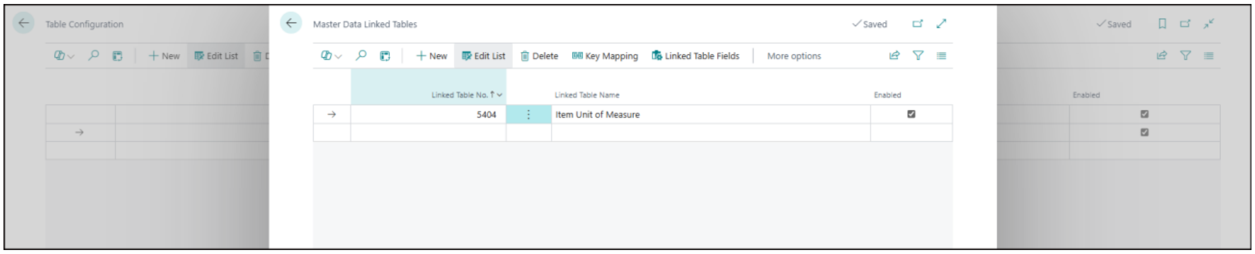
- The list shows every field in the table. Choose Reload Fields to load or refresh the field list from the current table definition.
- Turn Enabled on for each field you want to replicate. Use Select All or Deselect All to set them in bulk.
- Primary key fields are always enabled and cannot be turned off.

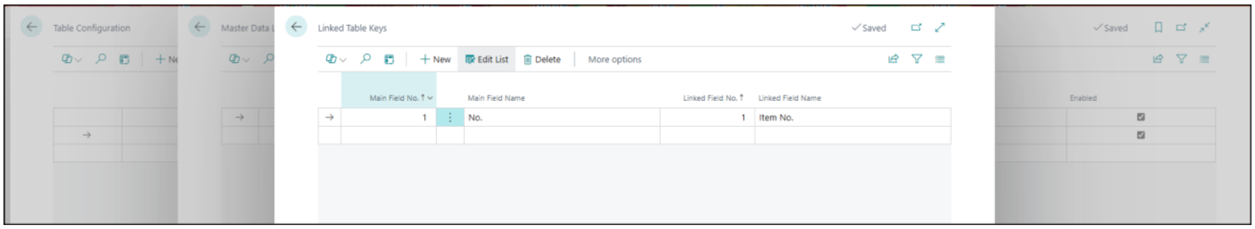


5.3 Linked Tables (Optional)

Some records only make sense together with related rows - for example a header and its lines, or an item and its variants and units of measure. Choose Linked Tables from a table line to define these.

1. Add the Linked Table No. and turn on Enabled.
2. Choose Key Mapping to define how the main table's key fields map to the linked table's key fields.
3. Choose Linked Table Fields to choose which fields of the linked table are replicated.

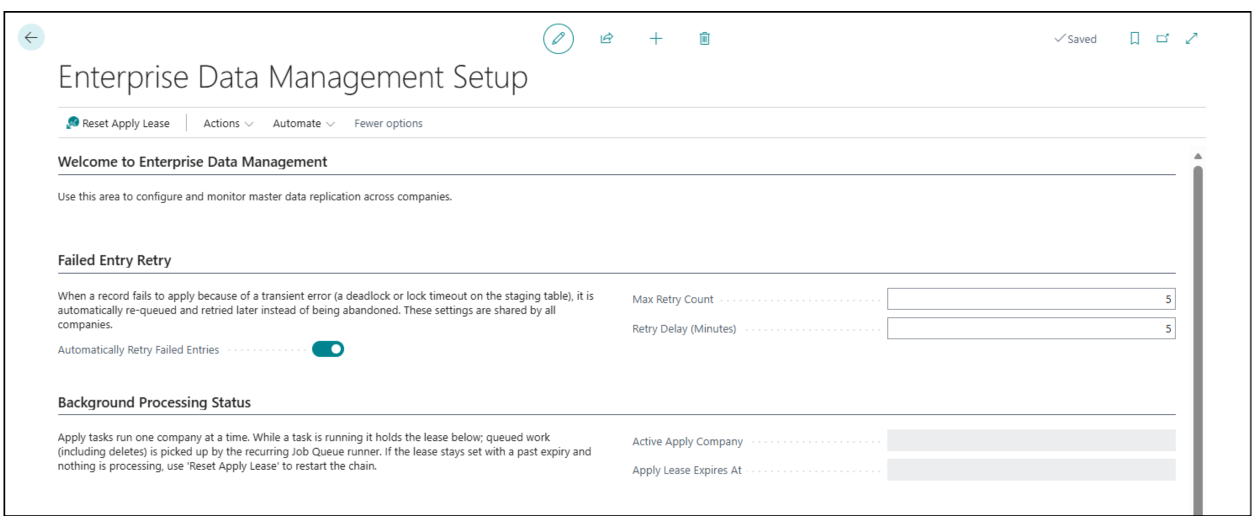




6. Step 3 - Retry and Background Settings (Optional)

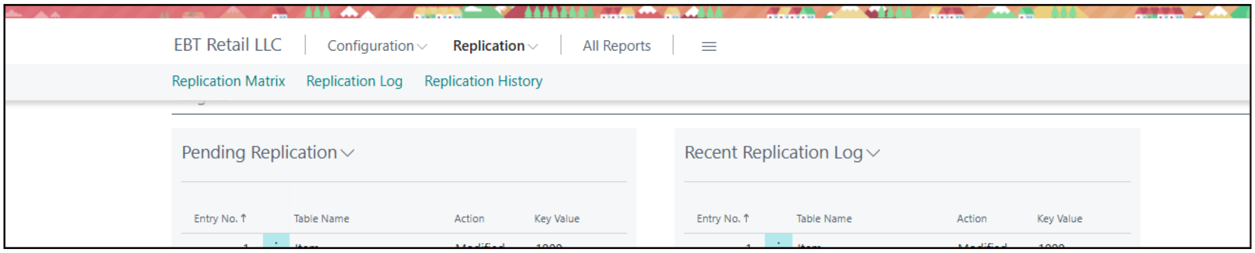
On the Setup page, the Failed Entry Retry section controls what happens when a record cannot be applied because of a transient error (a deadlock or lock timeout on the shared queue). These settings are shared by all companies.

- Enable Auto Retry - when on, a transient failure is re-queued and retried automatically instead of being marked Failed immediately.
- Max Retry Count - how many times a row is retried before it is marked Failed permanently.
- Retry Delay (Minutes) - how long to wait before a re-queued row becomes eligible for processing again.

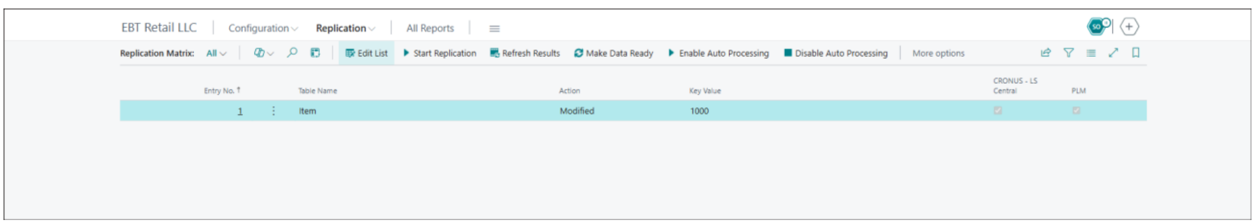


7. Step 4 - Replicating Data (Replication by Company Matrix)

This is where you push the captured changes to the child companies. From the Setup page choose Open Replication Matrix (or search for Replication by Company Matrix).



1. Choose Make Data Ready. All pending (not-yet-replicated) log entries load into the matrix - one row per change, showing Entry No., Table Name, Action (Inserted or Modified), and Key Value.
2. Each Child Company appears as its own checkbox column. Tick the companies each row should be sent to. Use Select All or Deselect All to tick every company on every row at once.
3. Choose Start Replication. The selected rows are queued and applied in the background, one company at a time. A summary shows how many records were queued.
4. After a moment, choose Refresh Results to pull the outcomes: successful rows leave the matrix and are written to Replication History, and anything still processing appears on the next refresh.

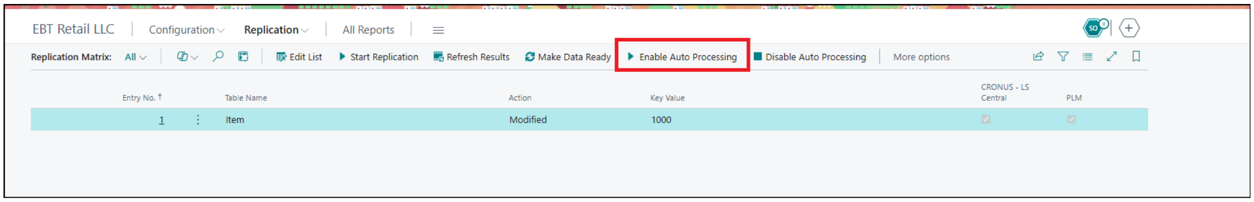


NOTE: Validation runs inside each child company as the record is applied. If a record fails validation there (for example, a missing setup or a posting restriction), it is recorded as Failed in Replication History with the error message - the rest of the batch is unaffected.

8. Automatic Processing (Job Queue)

Instead of clicking Start Replication and Refresh Results by hand, you can have Business Central apply the queued work and load the results on a schedule.

On the Setup page (or on the matrix) choose Enable Automatic Processing. This creates and starts a recurring Job Queue entry, in the current company, that runs every 5 minutes to apply queued rows - including deletes - and reconcile the results. Run this from the Master Company. To stop it, choose Disable Automatic Processing.



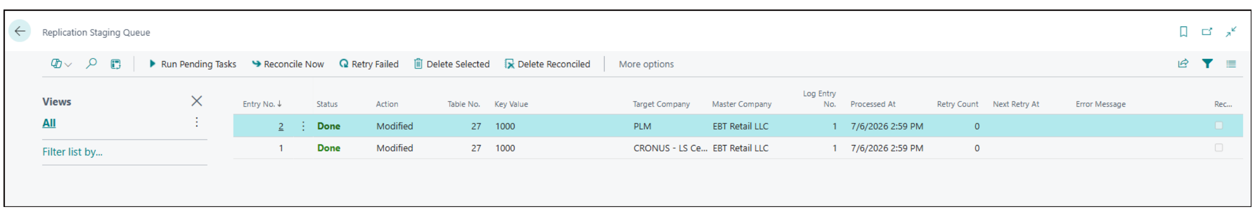
> **NOTE:** The Job Queue account must have the EBT MDD Admin permission set, otherwise the automatic run cannot read the configuration or apply records.

9. Monitoring the Staging Queue

Choose Replication Staging Queue (search for it) to watch background work in detail. Each row shows its Status - Pending, Done, or Failed (colour-coded) - together with the Action, Table, Key Value, Target Company, retry count, and any error message.

The actions let you drive and clean up the queue:

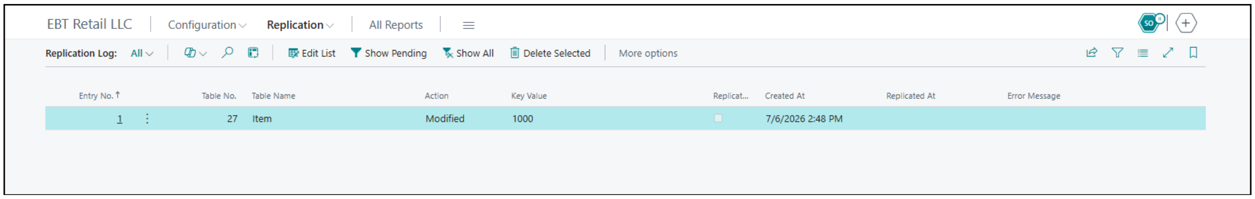
- Run Pending Tasks - start the background apply chain now (companies are processed one at a time).
- Reconcile Now - pull completed results into Replication History and clear finished rows.
- Retry Failed - re-queue the selected Failed rows for immediate processing.
- Delete Selected / Delete Reconciled - remove staging rows once you no longer need them as a log.



10. Reviewing the Replication Log

Choose Open Replication Log from the Setup page. This is the record of every change captured in the Master Company: Entry No., Table, Action, Key Value, and Created At.

- Replicated - shows whether the change has been distributed. You can manually clear this checkbox to re-queue a record; its timestamps and error message are cleared, so it reappears on the next Make Data Ready.
- Use Show Pending to see only records that have not been distributed yet, and Show All to remove the filter.



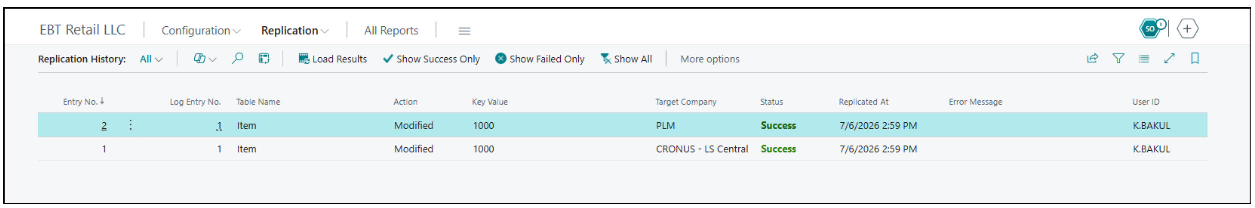
11. Reviewing Replication History

Choose Replication History (from the Replication Log page, or search for it). This shows the outcome per child company.

The Status column shows:

- Success - the record was applied in the target company (see Replicated At).
- Failed - the record could not be applied; the Error Message column explains why.

Use Show Success Only, Show Failed Only, and Show All to filter, and Load Results to pull the latest outcomes of finished background tasks.



12. Replicating Deletions

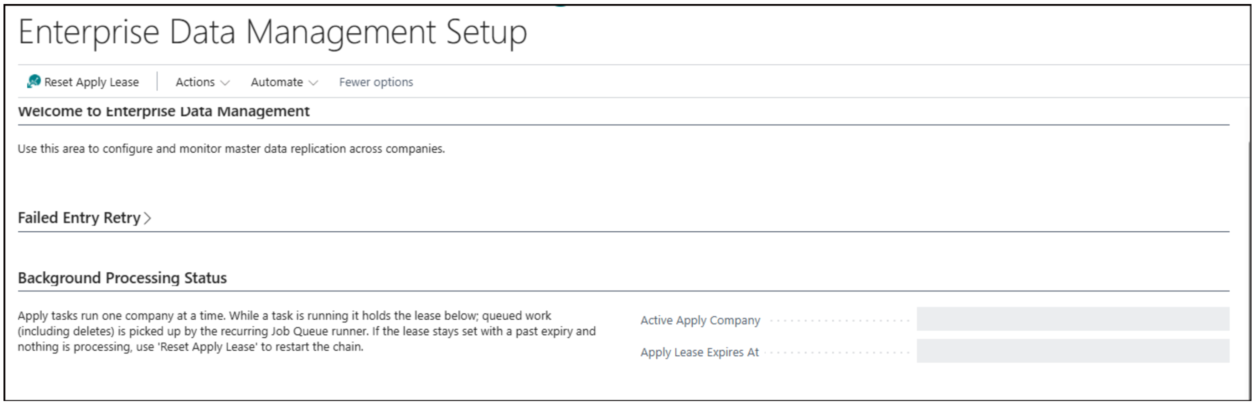
When Replicate Deletions to Child Companies is turned on for the Master Company, deleting a tracked record in the Master queues a matching delete for every child company. The delete is applied by the next processing pass - Run Pending Tasks, or the automatic Job Queue - because a delete cannot be applied instantly from inside the change trigger. If the option is off, the child copies are kept and only the Master's pending queue is cleaned up.

> **NOTE:** The Replicate Deletions to Child Companies toggle is on Company Information for the Master Company (see Step 1).

13. Recovering a Stuck Queue (Reset Apply Lease)

Apply tasks run one company at a time and hold a short processing lease, shown in the Background Processing Status section of the Setup page as Active Apply Company and Apply Lease Expires At. If a task is interrupted - for example a hard crash, or the extension is re-published mid-run - the lease can remain set even though nothing is actually processing.

When that happens (the lease has a past expiry and no work is moving), choose Reset Apply Lease. It clears the lease, re-queues any rows stranded mid-process, and restarts the apply chain immediately. Then use Refresh Results or Reconcile Now to load the outcomes.



> **NOTE:** Only use Reset Apply Lease when you are sure no apply task is actually running - resetting the lease while a task is live can cause the same rows to be processed twice.

14. Troubleshooting

Nothing is captured in the log

Check that the source company is the Master Company (Company Information > Company Type), that the table is added and Enabled in Master Data Replication, and that its fields are configured. Only enabled tables are tracked. If you have just changed the configuration, sign out and back in so the change is picked up.

Child companies do not appear as columns in the matrix

Each target company must have Company Type = Child Company. Up to ten child companies are shown as checkbox columns.

The matrix is empty

Choose Make Data Ready first to load the pending records into the matrix.

Records were queued but the results do not show

Background tasks run one company at a time. Choose Refresh Results (matrix) or Reconcile Now (Staging Queue) after a moment, or enable Automatic Processing.

A record shows Failed in history

Read the Error Message. It usually reflects validation in the child company (a missing setup, dimensions, or a posting restriction). Fix the cause, then re-queue the record - clear Replicated on the log entry, or use Retry Failed on the staging row - and run again.

Automatic processing does nothing

Confirm the Job Queue is running and that the Job Queue account has the EBT MDD Admin permission set. Enable automatic processing from the Master Company.

Processing seems stuck

See section 13 and use Reset Apply Lease.

Deletions are not propagating

Turn on Replicate Deletions to Child Companies on the Master Company. Deletes are applied on the next processing pass, not instantly.