Creating a Data Sync Profile

The **Data Sync Profile** defines what data will be synchronized, from which company it originates, and how the synchronization will be processed.
Follow the steps below to create and configure a new Data Sync Profile.

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1. Create the Data Sync Profile Header

1. Navigate to **Data Sync Profiles**.
2. Select **New** to create a new profile.
3. Complete the following fields:
    - **Code –** Enter a unique identifier for the Data Sync Profile.
    - **Description –** Provide a clear description of the purpose of the profile.
    - **Data Sync Source** – Specify the company from which data will be synchronized.

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2. Create the Data Sync Profile Lines

Each profile can have multiple **Data Sync Profile Lines**, each defining a specific table or dataset to be synchronized.

1. From the **Data Sync Profile Card**, select the **Data Sync Lines**.
2. For each line, specify:
    - **Table No. –** The table to be synchronized.
    - **Sync Counter Field No. –** Optional (supported tables will auto populate). Used if the table does not have a default counter field supported by the system.
    - **Sync Action** – Define the synchronization behaviour (e.g., Insert / Update or Update).
    - **Allow Table Triggers –** Specify whether Business Central table triggers should be executed during synchronization - Recommended.

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3. Set Line Priority

1. Use the **Move Up** and **Move Down** actions to adjust line order.
2. Priority determines the processing order:
   - **Lower priority value = processed first.**
   - Example: Dependent tables (such as Customer Posting Group or Customers Price Group) should be processed **before** primary tables (like Customer).

Tip: Always set dependency tables to higher priority to avoid synchronization failures due to missing references.

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4. Define Line Fields

1. Select **Line Fields** to manually specify which fields should be synchronized.
2. Alternatively, use **Insert Default Fields** to automatically include commonly synchronized fields for the selected table.
3. Review and adjust the fields as needed.

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5. Set Optional Filters

1. Select **Line Filters** to apply synchronization filters.
2. Use filters to limit data (e.g., only specific records, dates, or conditions).
3. After adding or modifying filters, select the **Validate Filters** action to ensure they are correct.
   - This validation is only required **once** after completing all filter changes.

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6. Configure Optional Counters

1. Counters define from which point synchronization should start.
2. If you wish to synchronize **all existing data**, this step can be skipped.
3. If you only want to synchronize **new data going forward**, use **Preset Counters**:
   - This sets the initial counter values to the latest existing records.
   - Only new or changed records after this point will be synchronized.

7. Review Dependencies

When synchronizing tables with dependencies:

- Ensure dependency tables (e.g., * Posting Groups) are given **higher priority** than the tables that reference them (e.g., Customer, Vendor).
- This ensures related data exists in the target company before dependent records are processed.

Summary

Step	Description	Key Action
1	Create Profile Header	Set Code, Description, Source
2	Add Profile Lines	Define Table, Sync Action, Triggers
3	Set Priority	Arrange order of processing
4	Define Fields	Manual or Default
5	Set Filters	Add and validate
6	Configure Counters	Optional preset for incremental sync
7	Review Dependencies	Prioritize accordingly