

Professional Services

# Tools Library



Microsoft Dynamics™

## Change Critical Data Faster and Easier with Microsoft Dynamics Professional Toolkit Library

This powerful suite of service tools can help you consolidate and change your critical data quickly and accurately! The Professional Services Tools Library provides greater flexibility with your solution. These tools ensure data integrity, increase productivity and efficiency.

### Why add Tools from the Professional Services Tools Library to your system?

The answer is simple! These tools are quick, affordable solutions for consolidating, and changing data within your system. Each Tool provides an efficient, productive solution specific to your needs. Users can click one button to change data throughout the system without manually keying in the data at every location.



### Does my business need a single tool, a 3-Pack or the entire Professional Services Tools Library?

We expect most customers will need all these tools, but some customers may require only three, while others may call for a single tool to effectively resolve one critical change of data. To keep Microsoft Dynamics™ GP and Microsoft Dynamics™ SL affordable and manageable for every small to mid-size business, the Library of Professional Services Tools is made available separately. You can choose to purchase every tool in the library at one low cost, the three that provide solutions for your businesses' most common needs or a single tool.

The Professional Services Tools Library is easily distributed and affordably priced. We continually evaluate every tool. This helps us determine if it should be included with a new release of Microsoft Dynamics GP and Microsoft Dynamics SL. Before a tool becomes a part of the core product, we consider three things: (1) customer demand (2) level of service required for deployment (3) cost impact of the code.

## Professional Services Tools Library for Microsoft Dynamics™ GP

### FINANCE SERIES TOOLS

#### Account Modifier/Combiner

Change an old account number to a new account number, or combine like accounts into a single account without manually keying in the data. This tool includes both the account modifier and combiner.

#### Fiscal Period Modifier

Change fiscal year definitions effortlessly. It allows you to change the fiscal year by changing the year stamp on transactions.

#### Checkbook Modifier

Change existing checkbook IDs to new checkbook IDs. All work, open and history records are updated with no loss of data.

#### Fixed Asset Modifier

Reclassify an asset code within the fixed assets module and reflect that change in all tables throughout the system.

#### General Ledger Master Record Triggers

Avoid data entry by adding a general ledger account when you replicate records to another database.

### PURCHASE SERIES TOOLS

#### Vendor Modifier

Change an existing vendor ID to a new vendor ID with the click of a button. Instead of having to key in a new vendor ID and re-key open invoices, you are able to update all work, open and history records seamlessly.

#### Vendor Combiner

Combine a vendor ID into another existing vendor ID. All the work, open and history records combine into the new vendor. No data is lost and the summary balances are recalculated. The original vendor ID is removed from the system after it is combined into the other vendor ID.

#### Vendor Name Modifier

Change an existing vendor name to a new vendor name with a click of the button. All work, open and history records are updated seamlessly.

#### Payables Select Checks Combiner (FREE)

Use this tool to consolidate checks to the same vendor when users are appending to an existing checks batch. This can be of great value if users frequently build batches of payables checks and select different document number ranges or different date ranges.

#### Payables Minimum Check Utility (FREE)

Pick a minimum amount for your payables checks created through the select checks process. It will prevent any checks being created under the minimum amount specified.

#### Payables Management Master Record Triggers

Avoid data entry by adding a vendor record and vendor address when you replicate records to another database.

#### Minimum PO/Receipt Number (FREE)

Prevent purchase order processing from defaulting the next PO number or receipt number to a number that is previous to the current PO number – when an existing

PO number is deleted. Option to set a minimum PO number default, so the system won't default to anything below the minimum.

#### 1099 Modifier

Change documents to 1099 documents if you have incorrectly set up your vendors, or if you forgot to mark the 1099 vendor option on your vendor card for a year or a portion of the year. After marking the option, you can run this tool, which will mark all documents for that vendor as 1099 documents. It will then reconcile these amounts into your summary records so they print on your 1099 reports.

### SALES SERIES TOOLS

#### Territory Modifier (FREE)

Change territory IDs in the system. The result is a new territory ID with no loss of data.

#### Territory Combiner (FREE)

Combine a territory ID into another territory ID without losing any work, open or history records. After the completion of the tool, the old territory is removed from the system.

#### Customer Modifier

Change customer numbers in the system. You can change from an existing customer number to a new customer number. Instead of having to key in a new customer number and re-keying all your open invoices, you can update all work, open, and history records with the click of a button.

#### Customer Combiner

Combine a customer number into another customer number without losing any work, open or history records. The old customer number is removed from the system after the completion of the tool and the summary records are recalculated to include both customers' summary information.

#### Customer Name Modifier

This tool enables you to change an existing customer name to a new customer name with a click of the button. All work, open and history records are updated seamlessly.

#### Salesperson Modifier

Change salesperson IDs. The result is a new salesperson ID and no data is lost or has to be re-keyed into system.

#### Receivables Management Master

##### Record Triggers

Avoid data entry by adding a customer record and customer address record when you replicate records to another database.

##### Receivables Management Transaction Unapply

Unapply documents in the history table and automatically move the records back to the open table, allowing you to reapply the records as needed. This is a good alternative to removing history and re-keying data if the records are applied incorrectly.

#### PAYROLL SERIES TOOLS

##### Employee Modifier

Change an employee ID without losing any work, open or history records. A new employee ID is introduced to the system, while the existing one is removed.

#### Certified Payroll Report

Add a project number to employees' hourly transactions and track these hours on a per/project basis. The transactions are then printed on a weekly report and are separated by project number with a breakdown for each employee by department, job title and pay code.

#### INVENTORY TOOLS

##### Item Reconciler (FREE)

Reconcile inventory or field service. This tool can increase performance if all items don't need to be reconciled. Only those items that need reconciling will be reconciled using Professional Services Tools.

##### Item Number Modifier

Change an item number without losing any work, open or history records.

##### Item Number Combiner

Combine an item number into another item number without losing any work, open or history records. After the completion of the tool, the old item number is removed from the system.

##### Item Description Modifier

Create a new description for item numbers without a lot of manual data entry. All work, open and history records are updated.

##### Inventory Site Modifier

Change the site/location code without losing any data.

##### Inventory Site Combiner

Combine site/location code. It does not post adjustments to the general ledger.

#### Sales Order Processing Customer Item Lookup

Store customer-specific ordering history along with last invoice date and last price used. A lookup is available from within sales order processing entry and the sales item detail window.

#### SYSTEM TOOLS

##### Toolkit (FREE)

Rebuild the GL00105 without going into SQL query analyzer, turn on/off dexsql.log, rebuild indexes and recreate Dex Procs and tables.

##### Database Disabler

Allows the 'sa' user to disable any company database. Once the database is disabled, the company option is removed from the login window you see when logging into Dynamics or eEnterprise. The company database can easily be 're-activated.'

##### Login/User Generator (FREE)

Recreate all logins and users based on the users that are set up in your system. The tool is useful for recreating logins and users to a restored database on a new server or a test server.

##### Shortcuts Copy

Copy the shortcuts options from one user to another user. This is especially useful when multiple users have to set up specific, frequently used shortcuts for third-party windows or data entry windows.

##### Menu Inquiry Utility (FREE)

The Menu Inquiry Utility allows you to see all of the commands on the menus, hidden or not, and helps identify where those commands come from (which product) and other properties of the commands.