

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™ SL

## FINANCE SERIES TOOLS

### 1099 Rebuild Utility (\$750)

Build vendor 1099 box totals from existing accounts payable documents. This tool is useful to update accounts payable vendor box totals when 1099 box numbers are not entered on accounts payable documents. Use all existing accounts payable documents to update a specified 1099 box total, or only use the accounts payable documents that are missing a 1099 box number to update a 1099 box total.

### Account Modifier (\$750)

Transform an existing account to a new account. Instead of having to key in a new account and re-keying all your initial balances or journal transaction records, update transactions with the click of a button.

### Account Combiner (\$750)

Combine two general ledger account numbers into a single account number. All previous history transactions, summary and detail, will reflect the new account number.

### Account Class ID Modifier (\$750)

Change an account class to a new account class. Instead of keying in a new account, assigning the new account class and re-keying all your initial balances or journal transaction records, you are able to update transactions with the click of a button.

### Subaccount Modifier (\$750)

Change an old subaccount number to a new subaccount number. Instead of having to key in a new subaccount and re-keying all your initial balances or journal transaction records, you are able to update transactions with the click of a button.

### Subaccount Combiner (\$750)

Combine two subaccounts into a single subaccount number. The system will check for the situation that the combined subaccounts will create a duplicate check number scenario in either accounts payable or payroll.

### Currency Modifier (\$750)

Change a currency ID to a different currency ID. Only the ID is changed. No revaluation or translation occurs.

### Ledger ID Modifier (\$750)

Transform a ledger ID to a new ledger ID. This tool allows changes to any ledger ID including budget, statistical and actual, instead of creating new ledgers.

### Terms Modifier (\$750)

Change a terms ID to a new terms ID. Instead of having to key in new terms and keying in changes to all documents, all customers and all vendors are updated with the click of a button.

### Company ID Modifier (\$750)

Change a company ID to a new company ID. Instead of having to create a new company or DB and copying all tables, you are able to change company IDs for all transactions and reports with the click of a button.

### Company ID Combiner (\$750)

Combine two company IDs into a single company. All balances and transactions will be combined into the single entity.

### Vendor ID Modifier (\$750)

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

### Vendor ID Combiner (\$750)

Combine two vendors into a single vendor. The vendors' balances and open documents are combined into a single vendor. The master information, such as address information, comes from the vendor entered as the primary vendor.

### Vendor Class Modifier (\$750)

Change an existing vendor class ID to a new vendor class ID with the click of a button. Instead of having to key in a new vendor class ID and reassign all vendors to the new class ID, you are able to update all vendors seamlessly.

### Customer ID Modifier (\$750)

Transform an existing customer ID to a new customer ID. Instead of having to key in a new customer and re-keying all your open invoices, you can update all work, open, and history records with the click of a button.

### **Customer Class Modifier (\$750)**

Change an existing customer class ID to a new customer class ID with the click of a button. Instead of having to key in a new customer class ID and reassign all customers to the new class ID, you are able to update all customers seamlessly.

### **Customer Class Combiner (\$750)**

Combine two customer class IDs into a single customer class. Combine customers and pricing all under a single class ID with a click of a button.

### **Salesperson ID Modifier (\$750)**

Alter an existing salesperson ID to a new salesperson ID. Instead of having to key in a new salesperson and re-keying all your open invoices, you can update all work, open, and history records with the click of a button.

### **Salesperson ID Combiner (\$750)**

Combine two salesperson IDs into a single salesperson. Transfers all customers, commission and order information to a single salesperson. The master information, such as name, address, etc., comes from the primary salesperson.

### **Employee ID Modifier (\$750)**

Transform an existing employee ID to a new employee ID. Instead of having to key in a new employee and initializing all current amounts, you can update all employee records with a click of a button. Project-specific employee modifier and service-specific employee modifier tools are also provided in case the payroll module is not used.

## **DISTRIBUTION SERIES TOOLS**

### **Inventory ID Modifier (\$750)**

Change an existing inventory ID to a new inventory ID. Instead of having to key in a new inventory item and re-keying all your quantities on hand, you can update all transaction and history records with the click of a button.

### **Inventory ID Combiner (\$750)**

Combine two inventory items into a single inventory ID. All master information will come from the primary inventory item. With a click of a button, combine costing, on hand quantities, history, and lot/serial information into a single inventory ID.

### **Product Class ID Modifier (\$750)**

Alter a product class without losing any transaction or history information or any re-keying with the click of a button.

### **Warehouse/Bin Location Modifier (\$750)**

Change a warehouse or bin location without losing any transaction or history information. Combine your inventory quantities at the two locations into a single location with a click of the mouse.

### **Warehouse/Bin Location Combiner (\$750)**

Combine two warehouse/bin locations into a single warehouse/bin location without losing any transaction or history information. Combine your inventory quantities at the two locations into a single location with a click of the mouse.

### **Inventory Site ID Modifier (\$750)**

Transform inventory site IDs without losing any transaction or history information or any re-keying with the click of a button.

### **Inventory Site ID Combiner (\$750)**

Combine two inventory sites into a single site. With a click of the button, combine costing, history and on-hand quantities into a single inventory site ID.

## **PROJECT SERIES TOOLS**

### **Project ID Modifier (\$750)**

Change a project ID to a new project ID. All setup and data tables containing the old project ID will be updated with the new project ID. This tool is useful when project ID coding schemes or flex keys are changed. Instead of entering new projects and initializing or entering beginning data, the new project ID can retain all the transactions already entered with the old project ID.

### **Task ID Modifier (\$750)**

Change a task ID to a new task ID. All setup and data tables containing the old task ID will be updated with the new task ID. This tool is useful when task ID coding schemes or flex keys are changed. Instead of entering new tasks and initializing or entering beginning data, the new task ID can retain all the transactions already entered with the old task ID.

### **Account Category Modifier (\$750)**

Change an account category ID to a new account category ID. All setup and data tables containing the old account category ID will be updated with the new account category ID. This tool is useful if account category ID coding schemes are changed. Instead of entering new account categories and initializing or entering beginning data, the new account categories can retain all the transactions already.

# Professional Services Tools Library for Microsoft Dynamics™ GP

## FINANCE SERIES TOOLS

### Account Modifier/Combiner (\$1,000)

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 (\$750)

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

### Checkbook Modifier (\$750)

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

### Fixed Asset Modifier (\$750)

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

### General Ledger Master Record Triggers (\$1,500)

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

## PURCHASE SERIES TOOLS

### Vendor Modifier (\$750)

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 (\$750)

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 (\$750)

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 (\$1500)

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 (\$750)

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 (\$750)

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 (\$750)**

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 (\$750)**

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 (\$750)**

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 (\$1,500)**

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

### **Receivables Management Transaction Unapply (\$750)**

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 (\$750)**

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 (\$750)**

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 (\$750)**

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

### **Item Number Combiner (\$750)**

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 (\$750)**

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 (\$750)**

Change the site/location code without losing any data.

### **Inventory Site Combiner (\$750)**

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

### **Sales Order Processing Customer Item Lookup (\$750)**

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 (\$750)**

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 (\$750)**

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.

# Buy a 3-Pack and Save!

The entire library of Professional Services Tools offers you a complete assortment of data customization and control utilities. You can save money by purchasing a 3-pack or the entire tool library!

**Entire Professional Services Tools Library**

**3-Pack of your choice**

**Individual Tools** (unless otherwise noted)

Account Modifier/Combiner

Master Record Trigger Tools

**Microsoft Dynamics GP**  
(in USD)

**\$5,000**

**\$2,000**

**\$750**

**\$1,000**

**\$1,500**

**Microsoft Dynamics SL**  
(in USD)

**\$4,000**

**\$2,000**

**\$750**

n/a

n/a

## Three Ways to Order:

1

Contact your local  
**Microsoft Dynamics  
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2

Send Email to **MBSProfessional  
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3

Call **888-875-9071**

\* Microsoft Dynamics Partners receive the PSTL tools at no cost for their own use. If the customer purchases the tools directly from Microsoft, partner still receives standard product discount.

These tools are available to customers in U.S. and Canada who use Microsoft Dynamics™ GP or Microsoft Dynamics™ SL. To order, you must be enrolled in a current Partner Service Plan for Microsoft Dynamics. However, purchasing any or all of the Professional Services Tools Library will not increase your system list price, or count toward your Enhancement Program or support plan renewal calculation. You will not receive the Professional Services Tools Library with your Enhancement Program updates and upgrades. If you acquire Professional Services Tools Library 60 days prior to a new release, you will receive the latest version at no additional charge. Owners of previous versions of Professional Services Tools Library can purchase the latest version for 16% of list price. If you have a tool and need it upgraded, contact Microsoft Dynamics Professional Services. Professional Services Tools are non-refundable and non-returnable.

## Questions?

If you have questions about Microsoft Dynamics Professional Services, please send an e-mail to [MBSProfessionalServices@microsoft.com](mailto:MBSProfessionalServices@microsoft.com)



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