

51 Microsoft Dynamics GP Tools Now at No Cost



The Professional Services Tools Library (PSTL) for Microsoft Dynamics GP are a set of resources that can be used together or independently to improve the flexibility with your solution while ensuring data integrity and increasing the productivity and efficiency of your solution. These tools provide a means of consolidating and changing data in your Microsoft Dynamics GP solution without rekeying the information, thereby saving you time and reducing the risk of error. The 35 core tools were previously sold for \$750-\$1500, potentially adding thousands to your Microsoft Dynamics GP costs. Now, they are available at no cost and Microsoft has added 16 new tools that can be acquired upon request.

The PSTL includes the following tools:

Finance Series

- **Account Modifier/Combiner** – convert an old account number to a new account number, or combine like accounts into a single account (was \$1000)
- **Fiscal Period Modifier** – change the fiscal year effortlessly by changing the year stamp on transactions (was \$750)
- **Checkbook Modifier** – change existing checkbook IDs to new checkbook IDs, including updates to all work, open and history records with no loss of data (was \$750)
- **Fixed Asset Modifier** – reclassify an asset code within the fixed assets module and reflect that change in all tables throughout the system (was \$750)
- **General Ledger Master Record Triggers** – add a general ledger account when you replicate records to another database to avoid data entry (was \$1,500)

Purchase Series

- **Vendor Modifier** – Instead of keying in a new vendor ID and re-keying open invoices, change an existing vendor ID to a new vendor ID with the click of a button and simultaneously update all work, open and history records seamlessly (was \$750)
- **Vendor Combiner** – combine a vendor ID (with all the work, open and history records) into another existing vendor ID. The summary balances are recalculated and the original vendor ID is removed from the system (was \$750)

- **Vendor Name Modifier** – change an existing vendor name to a new vendor name with a click of the button, updating all work, open and history records seamlessly (was \$750)
- **Payables Select Checks Combiner** – 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 (free)
- **Payables Minimum Check Utility** – Pick a minimum amount for your payables checks created through the select checks process to prevent any checks being created under the minimum amount specified (free)
- **Payables Management Master Record Triggers** – Add a vendor record and vendor address when you replicate records to another database (was \$1500)
- **Minimum PO/Receipt Number** – 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 by setting a minimum PO number default (free)
- **1099 Modifier** – 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, you can mark the option and 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 (was \$750)

Sales Series

- **Territory Modifier** – change territory IDs in the system with no loss of data (free)
- **Territory Combiner** – combine a territory ID (along with any work, open or history records) into another territory ID and remove the old ID from the system (free)
- **Customer Modifier** – change customer numbers in the system without re-keying all your open invoices. You can update all work, open, and history records with the click of a button (was \$750)
- **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 and the summary records are recalculated to include both customers' summary information (was \$750)
- **Customer Name Modifier** – This tool enables you to change an existing customer name to a new customer name with all work, open and history records updated seamlessly (was \$750)
- **Salesperson Modifier** – change salesperson IDs without data loss (was \$750)
- **Receivables Management Master Record Triggers** – add a customer record and customer address record when you replicate records to another database (was \$1,500)
- **Receivables Management Transaction Unapply** – If records are applied incorrectly, unapply documents in the history table and automatically move the records back to the open table, allowing you to reapply the records as needed (was \$750)

Payroll Series

- **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 (was \$750)
- **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 (was \$750)

Inventory Series

- **Item Reconciler** – reconcile only those inventory or field service items that need to be reconciled. (free)
- **Item Number Modifier** – change an item number without losing any work, open or history records (was \$750)
- **Item Number Combiner** – combine an item number into another item number without losing any work, open or history records and remove the old item number (was \$750)
- **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 (was \$750)
- **Inventory Site Modifier** – change the site/location code without losing any data (was \$750)

- **Inventory Site Combiner** – combine site/location code without posting adjustments to the general ledger (was \$750)
- **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 (was \$750)

System Tools

- **Toolkit** – rebuild the gL00105 without going into SQL query analyzer, turn on/off dexsql.log, rebuild indexes and recreate dexProcs and tables (free)
- **Database Disabler** – allows the 'sa' user to disable any company database, then 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.' (was \$750)
- **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 (was \$750)
- **Menu Inquiry Utility** – 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 (free)

*Tools Only Available for Dynamics GP 2010 (version 11) or later

- **SOP PO number Check*** – Verify customer Po numbers for duplicates as data is entered into the field on both the SOP Entry window and the SOP customer detail entry window.
- **POP Cost Defaulter*** – use this tool to default in the Standard cost or the current cost within the Purchase order entry window instead of the vendor specific Last Invoice cost.
- **Default Add Item POP/SOP*** – automatically mark the add Item option to be marked in Sales Transaction Entry, Purchase Order Entry, POP Receiving's Entry and Purchasing Invoice Entry.
- **Doc Date Verify*** – Verify document dates fall in a valid fiscal period when entered in Payables Transaction Entry or Receivables Transaction Entry. If the date does not fall within a valid fiscal period, a message will be issued and the user will not be allowed to continue until the date is in a valid period. This customization will also do a validation if the period is closed.
- **Decimal Place Tool*** – adjust the check amount in Words to two decimals, for both Payables Management and Payroll checks. This tool is useful when the currencies in Microsoft Dynamics GP have been changed to more than two decimals, which can alter the amount when a check prints. NOTE: Report Writer must be used to modify the check report and adjust the currency fields.
- **Update User Date*** – automatically update the user date at midnight. The application will run in the background as long as Microsoft Dynamics GP is open. This tool can be useful when the solution is left open on a machine overnight running integrations or other processes.

*available only on Microsoft Dynamics GP 2010 or later.

New Professional Services Tools Now Available Upon Request:

- **Auto Dim** – Allows you to launch Microsoft Dynamics GP and run one or more integrations or integration groups and have Microsoft Dynamics GP exit upon completion of the integrations. This tool also supports integrating into several different companies.
- **Auto Post** – Allows you to call a COM DLL to post Sales Order Processing, GL Transaction Entry, IV Transaction Entry and RM Cash Receipt Batches.
- **Detail Payroll Activity Tracking** – Allows you to track all employee changes made in Microsoft Dynamics GP.
- **POP Over Receipt Tolerance** – Allows a receipt tolerance percentage for quantities. A setup window allows the user to enter a tolerance percentage, that percentage is then used when a Purchase Order is received. The highest quantity that can be received is the original quantity ordered plus the percentage amount.
- **PO Returns** – When invoicing a receipt in POP, this tool will check the previous quantity invoiced and the quantity returned for the line item. The maximum quantity allowed to be invoiced is based

the following formula: Quantity Shipped minus (Previous Quantity Invoiced plus Quantity Returned). This tool will not allow invoicing of more than this amount.

- **RM Auto Apply** – Allows the user to Mass Apply posted RM Credit Documents to posted RM Debit Documents. The user can select a range of Customer, Debit Document Dates, Credit Document Dates, and a Credit Document Type restriction if desired.
- **Shipment Notification** – Allows drop ship sales orders to be transferred to invoice prior to invoicing the purchase order.
- **SOP Default Per Site Line** – This tool defaults the site from the Cards | Inventory | Quantities | Sites for each line item entered in the SOP transaction.
- **SOP Sort Line Items** – Allows the user to define custom sorting options to display line items in Sales Order Processing.
- **SOP to POP Line Reordering Utility** – This tool will reorder the line items of Purchase Orders generated by the SOP to POP transfer process to be in the same order as they originally were on the Sales Order document(s).

While these tools are now available for free, you may run into some cost to get them implemented and get your people trained to use them. The PSTL is only available through your Microsoft Dynamics GP partner. That is for good reason; the tools in the PSTL are very powerful and can have a profound impact on your Dynamics GP data.