Merger Series™

For Microsoft Dynamics GP

Version Oct 2022: 18.5

Use the Merger Series to effortlessly consolidate order

details and invoice details from the Sales Order

Processing module.

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Corporate Renaissance Group, a Quisitive Company

Merger Series^{TM} for Microsoft Dynamics GP

Version Oct 2022: 18.5

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Introducing Merger Series

Introduction

The Merger Series consists of two separate tools: OrderMerger and InvoiceMerger.

OrderMerger

* Now merge multiple orders for multiple customers with the click of the mouse.

OrderMerger effortlessly consolidates order details from the Microsoft Dynamics GP Sales Order Processing modules. By merging multiple orders from the same customer before shipping and invoicing has transpired, OrderMerger streamlines the sales order process. With OrderMerger, Dynamics and eEnterprise customers will reduce costs by combining multiple shipments into one. Administrative expenses will also be reduced, as the consolidation of customer orders will result in the processing of fewer invoices.

With OrderMerger, it is as simple as

- Filtering orders by customer and/or document date;

- selecting a main order;

- selecting a currency or all currencies;

- if required, filtering the orders that will be merged to the main order; and

- pressing the Process button.

Before the orders are merged, the user can print a report detailing the orders that are being merged. This will ensure that the user has selected the correct orders and provide a record of the orders that were merged to the main order.

OrderMerger also provides you with a history of merged orders. Did you forget which orders were merged together? No problem with OrderMerger, just click on the History button, select the customer number, main order or merged order and you will get a report detailing the merged order(s) and the main order number. Additionally, you do not have to worry about using a merged order number more than once, because OrderMerger will not allow the user to create an order using an order number that has already been merged.

InvoiceMerger

InvoiceMerger effortlessly consolidates invoice details from the Microsoft Dynamics GP Sales Order Processing modules. With InvoiceMerger, administrative expenses will be reduced, as the consolidation of customer invoices will result in the processing of fewer invoices.

With InvoiceMerger, it is as simple as

- selecting a main invoice

- selecting the invoices that will be merged to the main invoice

- clicking the Process button.

There is only one simple screen for the user. Before the invoices are merged, the user can print a report detailing the invoices that are being merged. This will ensure that the user has selected the correct invoices and provide a record of the invoices that were merged to the main invoice.

InvoiceMerger also provides you with a history of merged invoices. Did you forget which invoices were merged together? No problem with InvoiceMerger, just click on the History button, select the customer number, main invoice or merged invoice and you will get a report detailing the merged invoice(s) and the main invoice number. Additionally, you do not have to worry about using a merged invoice number more than once, because InvoiceMerger will not allow the user to create an invoice using an invoice number that has already been merged.

Important!
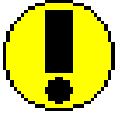
> **The User Defined field information of the orders/invoices being merged will be deleted. Only the User Defined field information of the Main Order/Invoice will remain on the merged orders/invoices.**

> **The Commission amounts may need to be adjusted manually after merging.**

> **Orders/Invoices on hold will not be available to be merged.**

Chapter 1: Installing the Merger Series

Installation Procedures

Installing from Website

1. Double click on the MergerSetup185.EXE file downloaded from the website

2. After you have chosen Yes to accept the License Agreement, the next window requires the destination directory where the Merger Series will be installed on the workstation. Select the same directory where Microsoft Dynamics GP is installed.

3. The Setup program lets you review and if necessary, change the settings.

4. Clicking Next will begin copying the files, ending the Installation process.

Note: When Microsoft Dynamics GP is run the first time after installing the Merger Series, the user will be prompted with a message "New code must be included in the Dynamics.set dictionary. Do you wish to include new code now?" Selecting Yes will create the Merger Series dictionary, synchronize the Merger Series dictionary and update the Merger Series launch file. If No is selected, this message will appear each time Microsoft Dynamics GP is run, until the new code is included in the Dynamics.set file.

Server Installation of the Merger Series

The following process should be run for each company on which you wish to run the Merger Series. User must be logged on as 'sa' to run the Merger Series Server Installation.

To attach the Merger Series Server Installation form to your shortcuts bar:

1. On the shortcuts menu bar, click Add.

2. Choose Other Window.

3. Click the + next to Merger Series.

4. Click the + next to 3rd Party.

5. Click Merger Series Server Install.

6. Click the Add Button. Merger Series Server Install will be added to the shortcut bar. Close the Add shortcut window.

Running Installation Routines

Running Merger Series Server Installation will create tables and stored procedures on SQL Server and set permissions on these objects.

To run Merger Series Server Installation, choose Merger Series Server Install from the shortcut bar. Click the Install Merger Series on Server button. The Merger Series Server Install window will close automatically after the installation is complete.

Accessing Merger Series:

To access the Merger Series, in Microsoft Dynamics GP, select Tools - Utilities – Sales – Merger Series from the main menu.

Chapter 2: Running OrderMerger

The following steps outline the process to merge multiple orders.

Select Tools - Utilities – Sales – Merger Series – OrderMerger from the main menu.

At this point, if you did not register OrderMerger, you will be prompted with the following screen requiring you to either register OrderMerger for use or to use it as a demo on the sample company.

> **Note:** If OrderMerger has been previously registered, then you will not see this message and therefore you can skip to step 3.
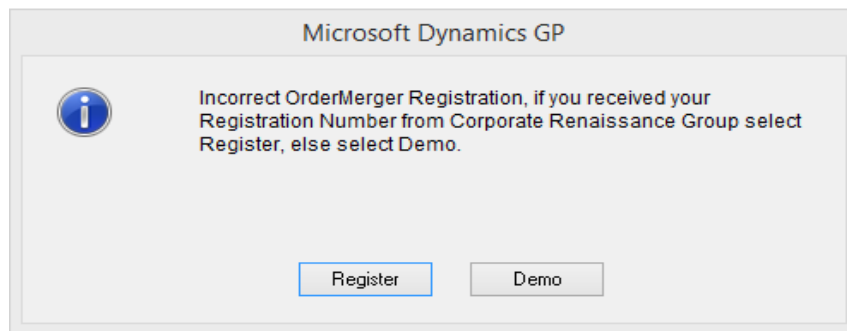
> If you have received your Registration ID from Corporate Renaissance Group and wish to register, select the Register button and the OrderMerger Registration window appears as below.
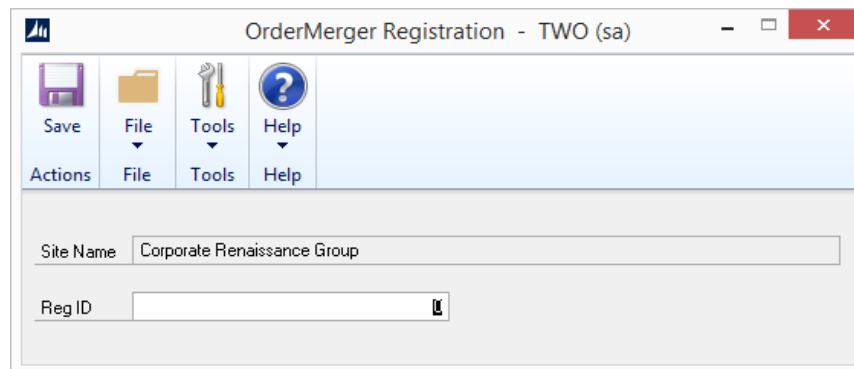
> **Note:** Your Dynamics GP site name on your system must match the site name listed on the bottom of the Corporate Renaissance Group (CRG) Registration ID form you received with your order. If they do not match exactly, please send your site name to CRG to receive a valid ID.

> Key in the Registration ID provided to you in the corresponding field. Select the Save button to validate your license to use OrderMerger.

1. If it is the correct Registration ID, the Merge Multiple Orders window is displayed. The previous registration process needs to be completed only once at initial startup. Once the initial set up is complete, this window will appear directly after choosing OrderMerger from the palette.

2. Select a range of customer numbers or leave the default as all customers.

3. Select a Batch or leave the default as all batches.

4. Select a range of document dates or leave the default as all document dates.
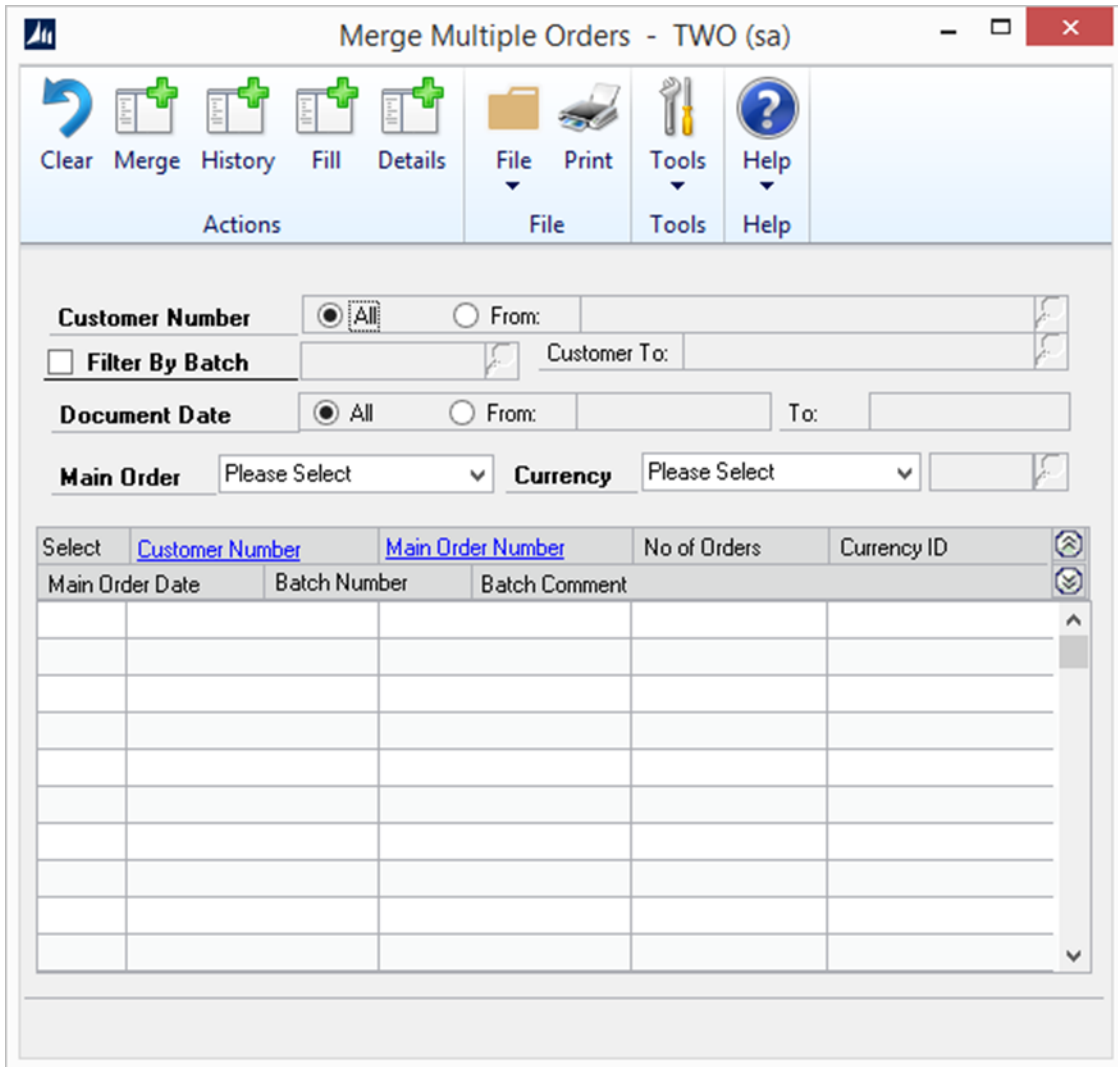
5. Select either the First Order or Last Order as the Main Order. The main order is the order that all other orders will be merged to. The main order can be changed (see step 12).

6. Select a currency or all currencies. **Note that only orders with the same currency can be merged.**

7. Select the Fill button. The list of customers with the number of orders to be merged for the selected filters will be listed in the scroll window. Note that any orders that are on hold will not be available for merging.
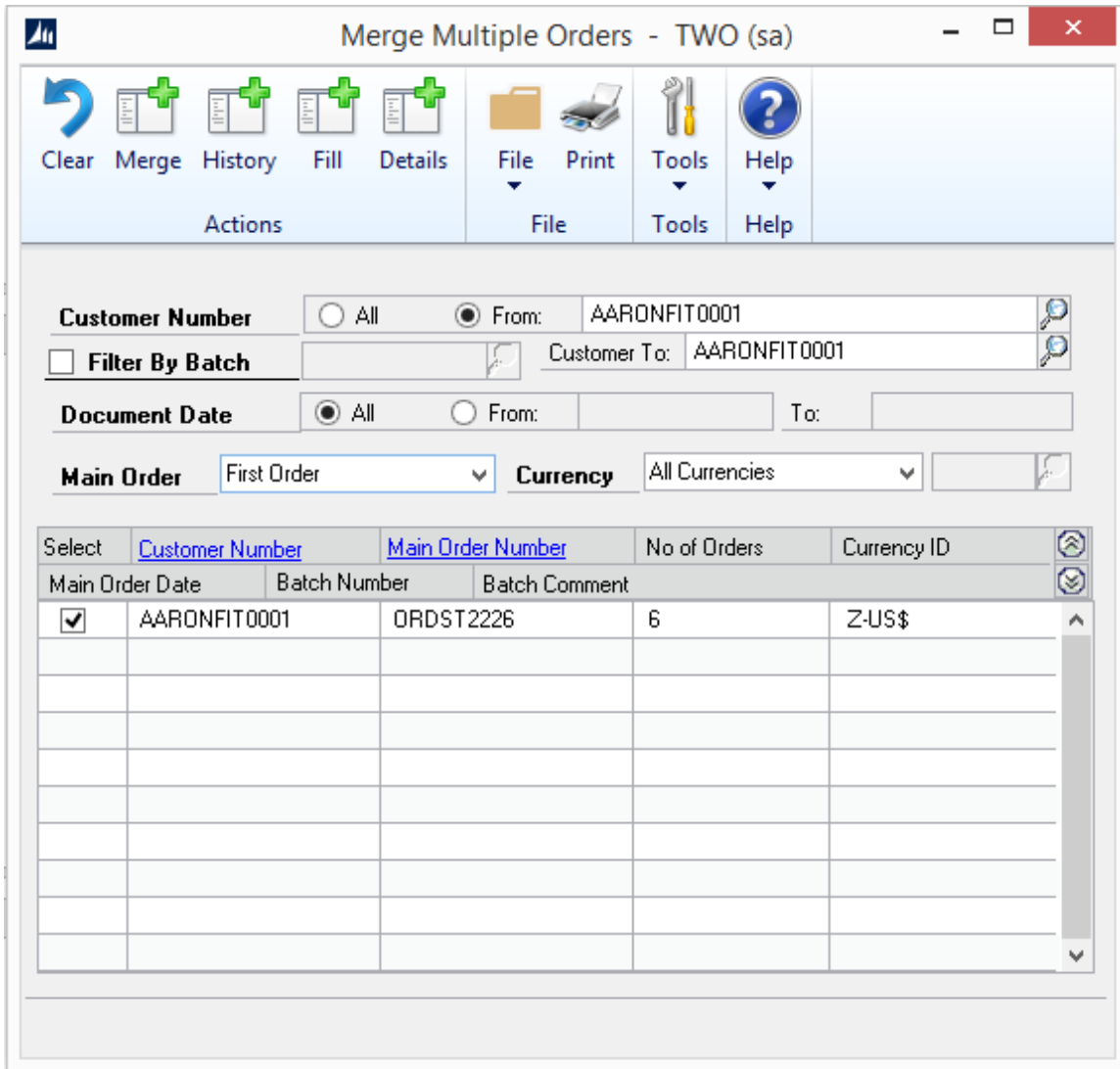
8. All orders for all customers are selected by default. To de-select all orders for a customer, click the Select checkbox.

9. To de-select only certain orders or the change the main order, click on the desired customer row and select the Details button.
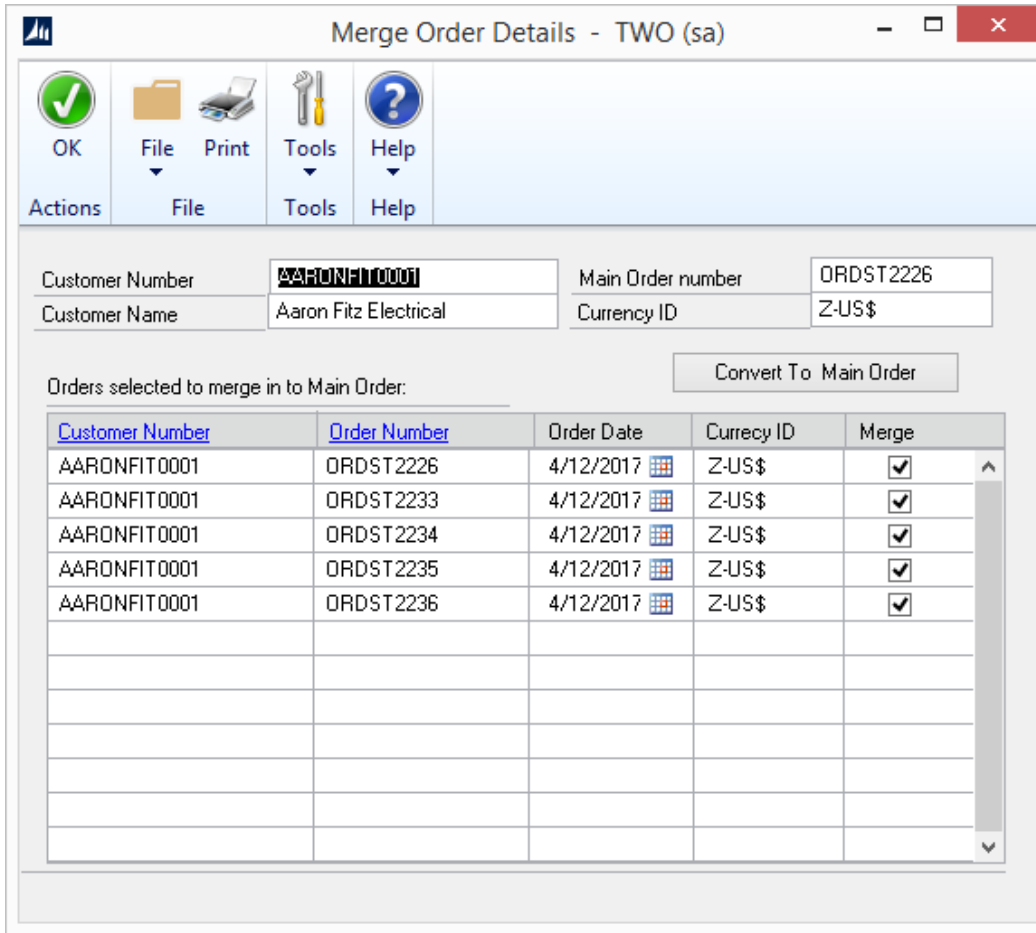
10. To de-select orders to be merged, click on the check box in Merge column of the scrolling window. Note that you can not de-select the main order.

11. To change the main order, click on the order for which you want to be the main order and select the Convert to Main Order button.

12. Click OK to return to the Merge Multiple Orders window.

13. Select the Print icon to print a report detailing which orders are being merged.
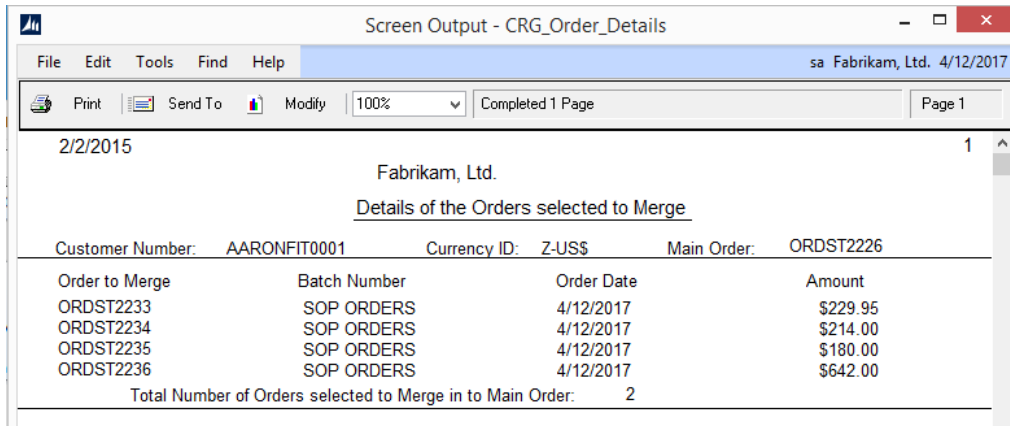
14. Select the Merge button.
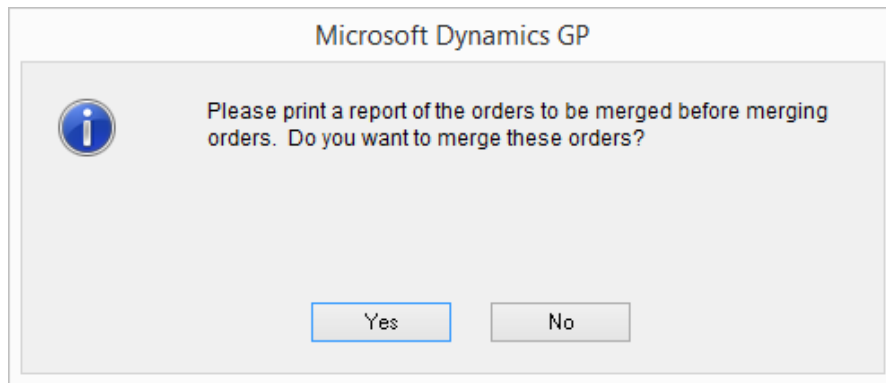
15. Select Yes to merge the orders, No to cancel the merge process
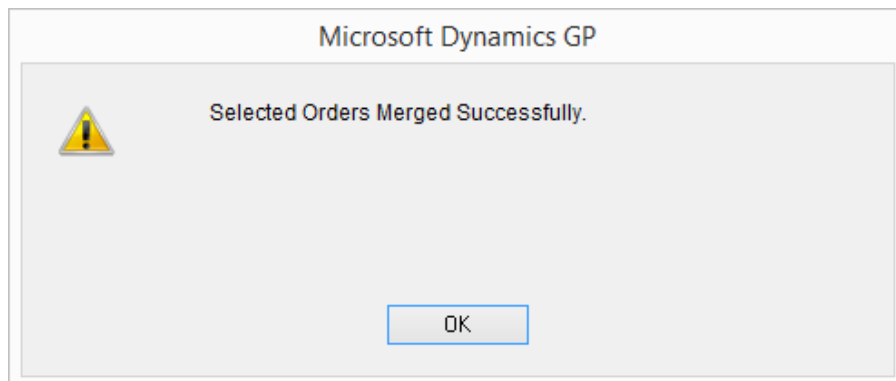
Getting History

In OrderMerger it is simple to get history about an order by customer, main order number, or merged order number.

1. From the main Merge Multiple Orders window, select the History button.
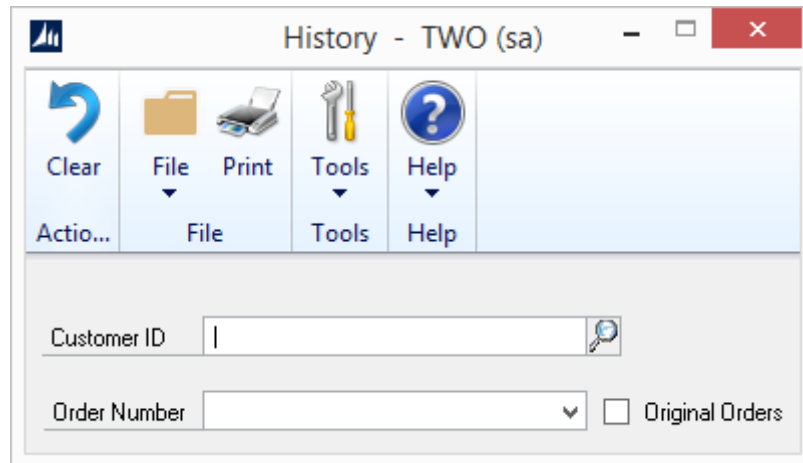
2 To print a report of all orders merged, select the Print icon. To filter by customer, select a Customer ID and then select the print icon or to filter by Customer ID and/or Order Number, select the Customer ID and/or Order Number. By default, the orders displayed in the Order Number list are main order numbers. To select by merged order numbers, select the Original Orders check box.

3 Click the Print icon to get the Report Destination screen. Select Screen to view the report or Print to print a copy of the report.
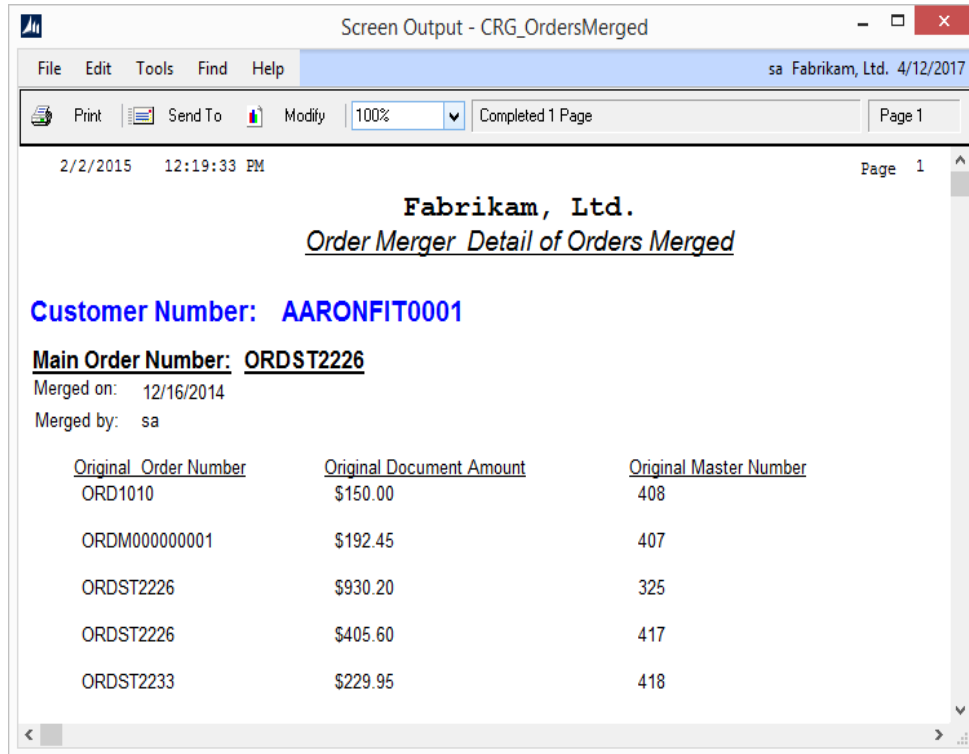
Chapter 3: Running InvoiceMerger

The following steps outline the process to merge multiple invoices.

Select Tools - Utilities – Sales – Merger Series – InvoiceMerger from the main toolbar.

At this point, if you did not register InvoiceMerger, you will be prompted with the following screen requiring you to either register InvoiceMerger for use or to use it as a demo on the sample company i.e. The Fabrikam Inc.

NOTE: If InvoiceMerger has been previously registered, then you will not see this message and therefore you can skip to step 3.
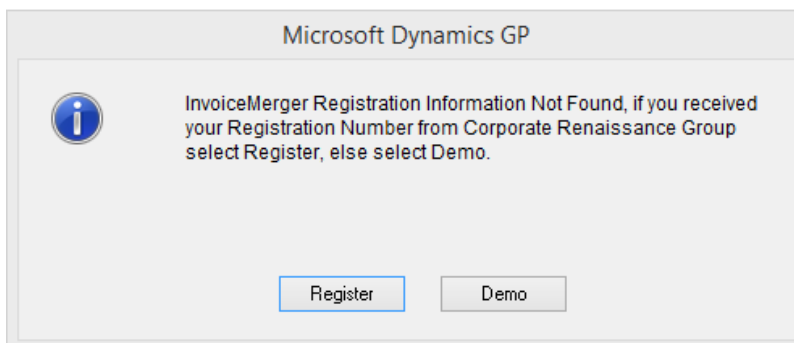
If you have received your Registration ID from Corporate Renaissance Group and wish to register, select the Register button and the InvoiceMerger Registration window appears as below.
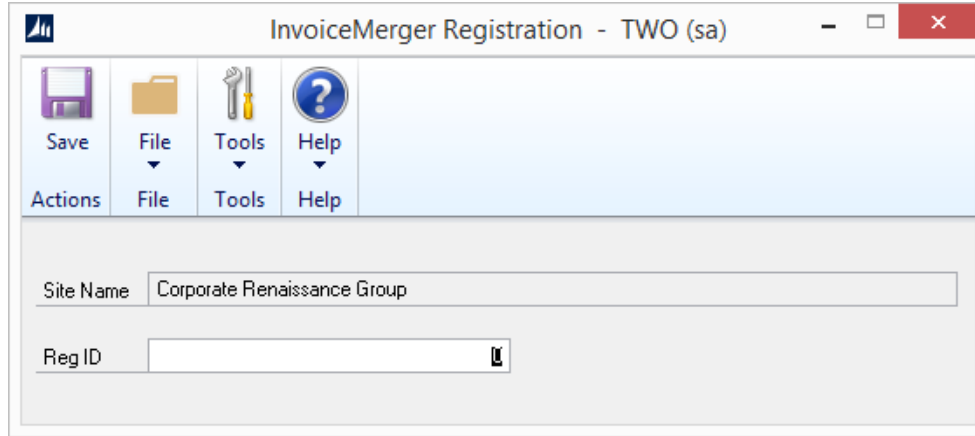
Note: Your Dynamics GP site name on your system must match the site name listed on the bottom of the Corporate Renaissance Group (CRG) Registration ID form you received with your order. If they do not match exactly, please send your site name to CRG to receive a valid ID.

Key in the Registration ID provided to you in the corresponding field. Select the Save button to validate your license to use InvoiceMerger.

1. If it is the correct Registration ID, the InvoiceMerger window is displayed. The previous registration process needs to be completed only once at initial startup. Once the initial set up is complete, this window will appear directly after choosing InvoiceMerger from the palette.
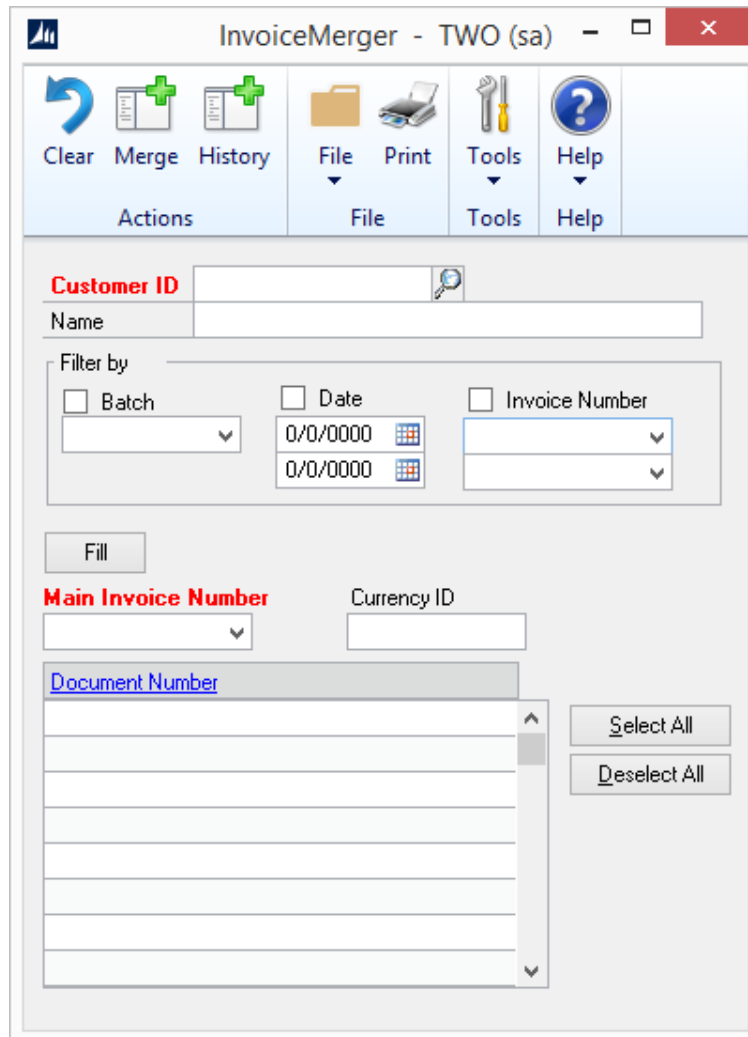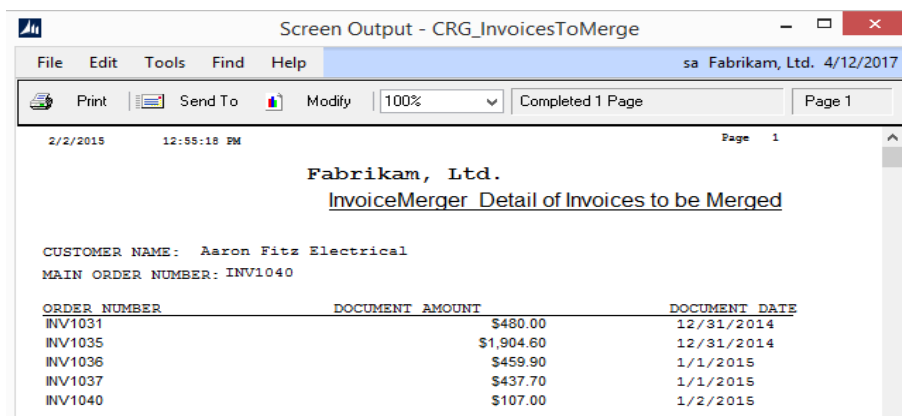
2. Select a Customer ID. Only invoices with the same Customer ID can be merged.

3. You can choose to filter the invoices that appear in the list by Batch, Date and/or Invoice Number. Simply check the box beside the filter type and enter or select the filter values.

4. Select the Fill button.

5. Select a Main Invoice Number. This is the invoice that all other invoices will be merged to. The Currency ID field will be automatically filled in with the Currency ID of the main invoice. The list of invoices for the selected Customer ID and same Currency ID will be listed in the scroll window. Note that any invoices that are on hold will not appear in the list.
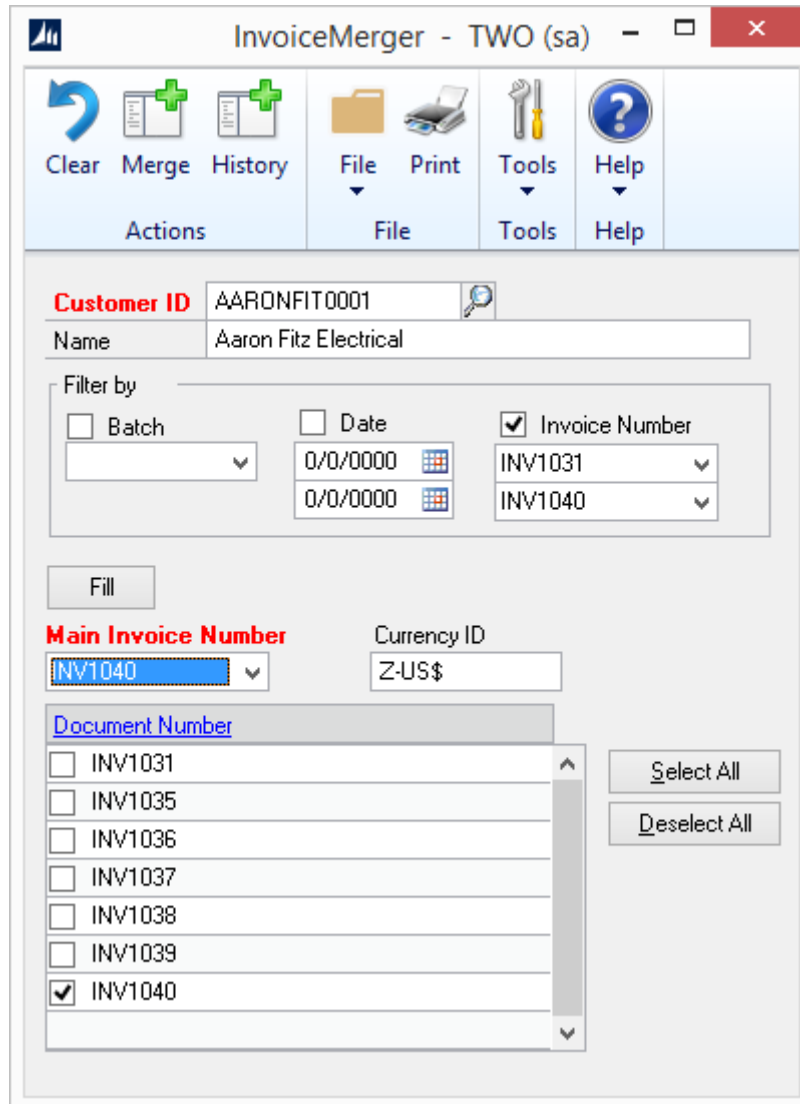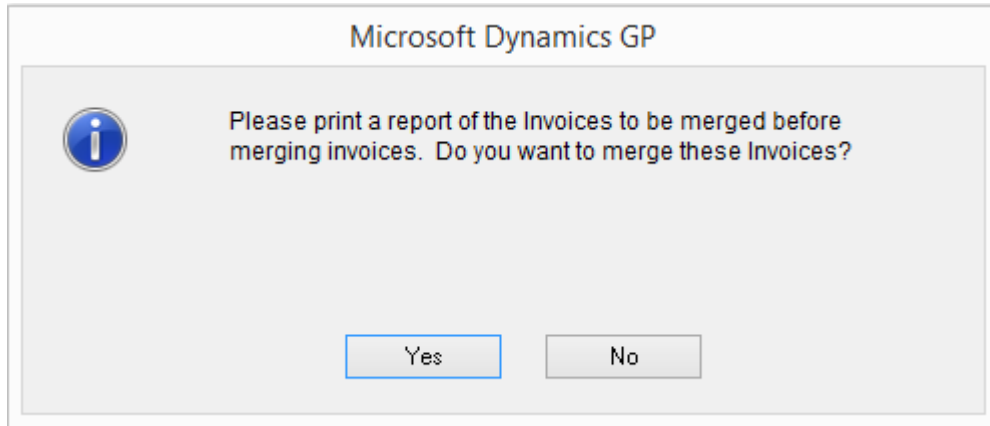
6. Select the invoices to merge by clicking the check box beside the invoice. To select all invoices, click the Select All button. To deselect all invoices except the main invoice, click the Deselect All button. To review an invoice, select the invoice and drill down on the Document Number to view the invoice in the Transaction Inquiry Zoom window.
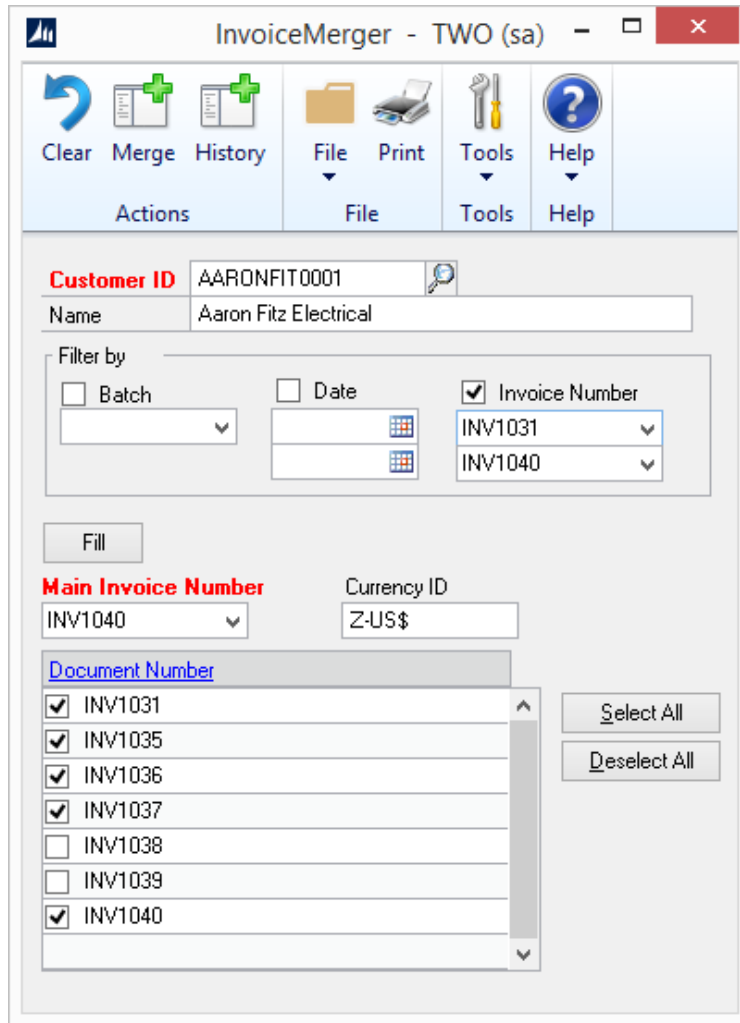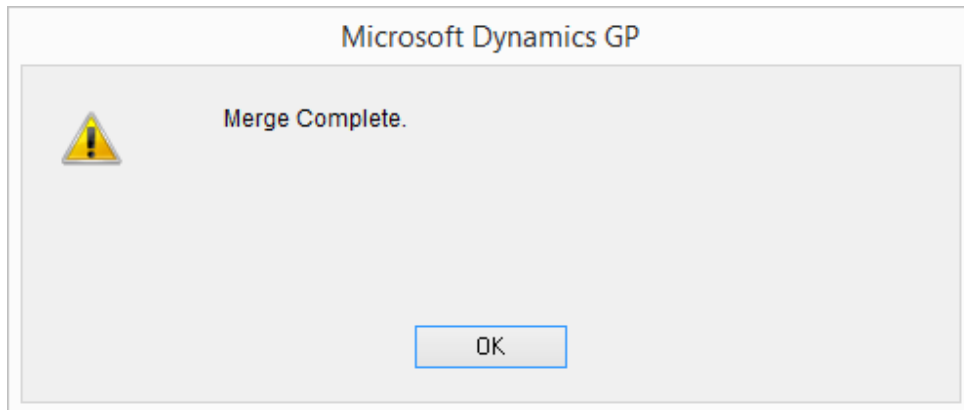
7. Select the Print icon to print a report detailing which invoices are being merged.

8. Select the Merge button.

Microsoft Dynamics GP

Please print a report of the Invoices to be merged before merging invoices. Do you want to merge these Invoices?

Yes   No

9. Select Yes to merge the invoices, No to cancel the merge process.

Microsoft Dynamics GP

Merge Complete.

OK

Getting History

In InvoiceMerger it is simple to get history about an invoice by customer, main invoice number, or merged invoice number.

1. From the main InvoiceMerger window, select the History button.
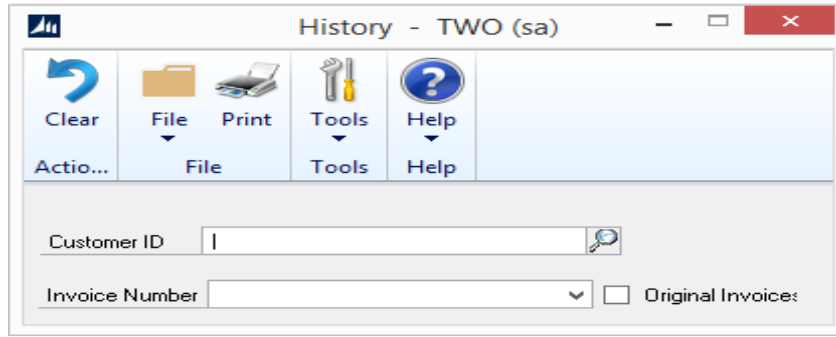
2. To print a report of all invoices merged, select the Print icon. To filter by customer, select a Customer ID and then select the print icon or to filter by Customer ID and/or Invoice Number, select the Customer ID and/or Invoice Number. By default, the invoices displayed in the Invoice Number list are main invoice numbers. To select by merged invoice numbers, select the Original invoices check box.

3. Click the Print icon to get Report Destination. Select Screen to view the report or Print to print a copy of the report.