

ws**TOOLS**



BY IMPLEMENTATION SPECIALISTS

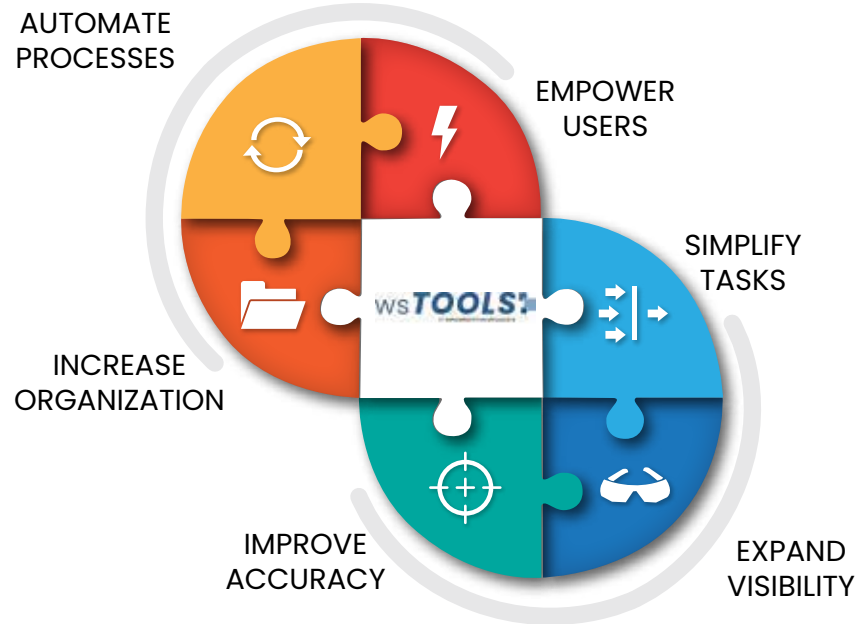
Your Industry Leader in Dynamics & Key2Act

Features | Enhancements | Development | Support

About wsTOOLS

**Established in 2005,
Implementation
Specialists is a Microsoft
Gold Certified Partner
with Advanced ERP
Competency.**

Our wsTOOLS collection of add-on solutions for Microsoft Dynamics GP and Key2Act Signature was designed to help your employees work smarter, not harder. With wsTOOLS, you'll be able to simplify and speed up common processes and allow your employees to do their work in the way that's best for your business.



Our Key2ActSolutions

AutoCharge
JCDivisionChange
QuickMail V2
QuickFind V2
SelectCostTransfer V2
VoidReopen
WebTimeEntry V2
Quick PO
Dispatch Center
CustomerModifier+
VendorModifier+
AutoList
VendorChange

Our GP Solutions

InventoryRound
PostingControl
SimplyUse
SummaryRecalc
GLBankBridge
QuickPO
POVendorChange
PMVendorChange
PMUnapply
SpeedSwitch
NextID
GPIntegrations
PaymentReapply
QuickCollect
PayrollRewind
PayrollHandoff
1095Importer
Drawer
FTERefreshableReport
PTOLiabilityReport
AutoDiscount



Never key standard charges line by line to a Service call Invoice again. Use AutoCharge to calculate a percentage discount for a specific cost category or across them all. No matter the charge or cost you want to add, AutoCharge's user-friendly setup makes it easy to get started. AutoCharge remembers additional charges for your customers so you don't have to!

DISCOUNTS

FIXED FEES

LABOR



**SERVICE
INVOICE**

\$ _____

\$ _____

\$ _____

Auto Charge provides a simple and convenient way to automatically add labor, discounts and other costs to service invoices based on your unique rules.

JC DivisionChange

The screenshot shows a software window titled "Job Cost Division Change -...". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a toolbar with several icons and labels: a gear icon for "Process", a red "X" for "Cancel", a folder icon for "File", a wrench and screwdriver icon for "Tools", a question mark icon for "Help", and a magnifying glass icon for "Debug". Each icon has a corresponding label below it. The main area of the window contains four input fields: "Job Number" with a search icon, "Description", "Current Division", and "Change to Division" with a search icon. The "Job Number" and "Change to Division" fields have a small magnifying glass icon to their right, indicating a search function.

Process	Cancel	File	Tools	Help	Debug
Actions					
File					
Tools					
Help					
Debug					

Job Number

Description

Current Division

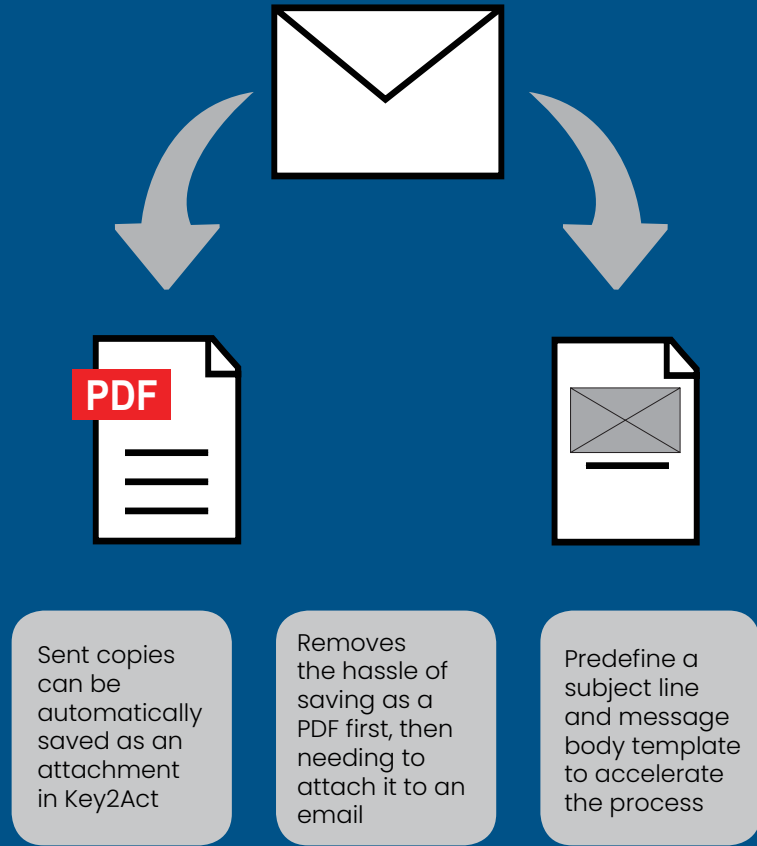
Change to Division

Allows you to change the division on a job, even after you have posted transactions. Eliminates re-keying and adjusting or reversing transactions.

Updates GL Divisional accounts for the change automatically.

QuickMail v2

Send SSRS reports as PDF attachments right from KEY2ACT Signature. In a single step, email attachments of Invoices, Call Summary Reports, Job Status Reports and more without leaving the Signature window.

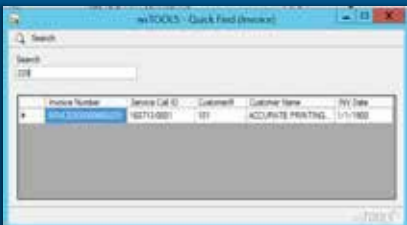




Start typing part of the phone number, a contact's first or last name, or customer name and QuickFind intuitively filters the results



Find service calls based on the date of the call with optional filters for technician, customer and division



No need to type the whole invoice number

QuickFind v2

Powerful searching produces immediate results when trying to find a customer, vendor, service call or invoice. Search by any information you know even with misspellings.

SelectCostTransfer V2

Overcome posting mistakes. SCT helps you move the transactions to the correct service call or job and send appropriate transactions to General Ledger.

Records Selected		Related Trans	
6		0	
Total Cost	\$0.00	Total Cost	\$0.00
Total Billable	\$438.10	Total Billed	\$0.00

Service Call

Overcome the common error of posting costs to the wrong service call

Eliminates re-keying the adjusting/reversing transactions

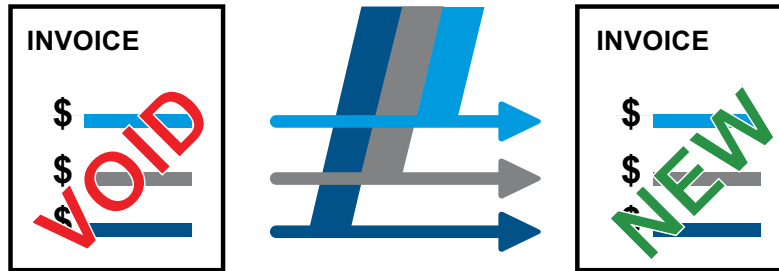
Select only the posted costs you want to transfer

View a history of transferred transactions

Transfer costs to another service call with a different division and/or call type

Select the costs to transfer to a job and which cost element type and cost code should be moved to

VOID/ReOpen



Correcting KEY2ACT Service Invoices just got easier. The days of recreating a service call invoice from scratch are over. VoidReOpen returns the costs back to the service call for re-billing.

Void a service invoice and return costs back to the Service Call

Missing charges can be added or adjusted on the new invoice

Reduces the need to issue credit memos and create additional invoices

A summary of the void is recorded

WEBTimeEntry V2

Enter your labor from anywhere. Use the web browser on your phone, tablet or computer to submit labor, travel or expenses against service calls and jobs. Sold as a product not by user count.

Alan Flint

Select Week: ☒ Current Week ☐ Prior Week

New	TRX Type	Job Number	Day of Week	Pay Code	Hours/Units	Cost Code	Cost Type
---------------------	----------	------------	-------------	----------	-------------	-----------	-----------

Card

Notes

TRX Type

SERVICE

Weekday

MONDAY

Job/Call

140905-0007 (EQUIP. AI

Cost Type

Labor

Cost Code

Labor Category1

Pay Code

Hourly Pay Code

Description

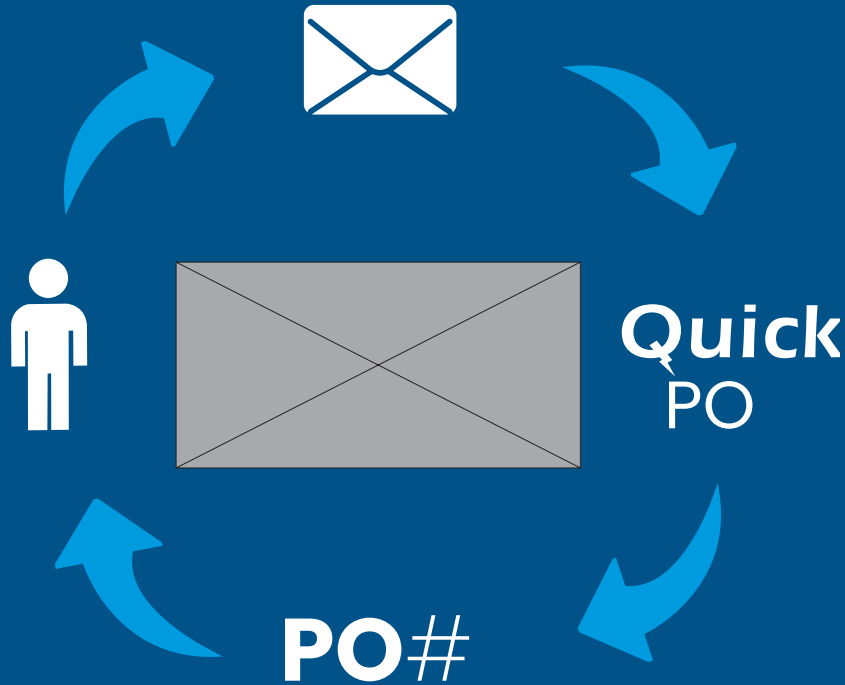
Consulting

Hours/Units

5.00

[Update](#) [Cancel](#)

[Submit Time](#)



Send an email to quickly create a PO in GP

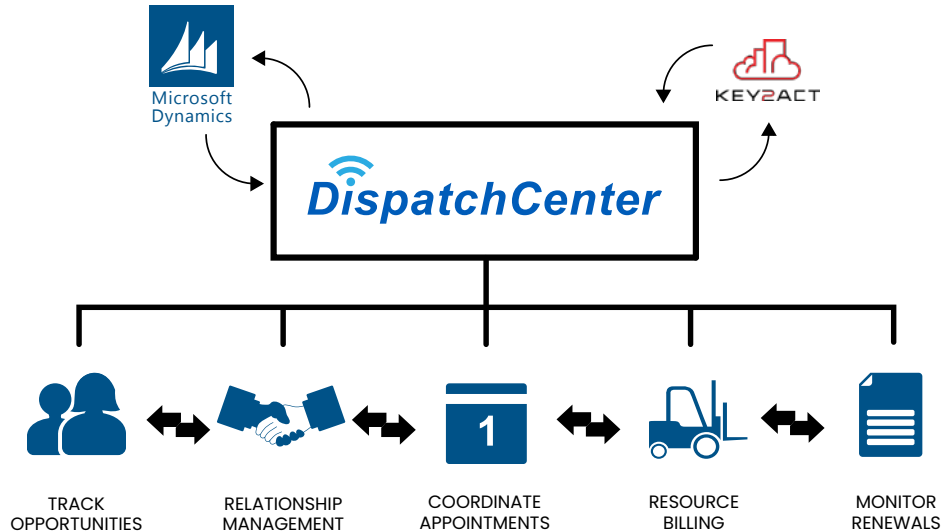
- Reserves the next PO number in GP so further detail can be added upon return
- Streamlines the PO process to save time

QuickPO

With no back-office assistance required, Quick PO allows users to create a Purchase Order in GP by simply sending an email. Requester receives an automated email with the PO number within minutes.

DispatchCenter

Simplify the lives of your sales reps, dispatchers, and service teams by connecting more areas of your business. The ultimate tool for putting prospects, customers, contracts, and schedules at your fingertips.



Bring it all together

Meet our Modules



Prospect

Build a relationship and turn your prospects into customers. Manage your quotes, opportunities, contacts and follow-ups.



CustomerCare

Easily search for a customer and see all of their contacts, locations, equipment, open and closed service calls, and invoices in a centralized view.



TechnicianScheduler

Create, schedule and dispatch technicians to the appointment or make adjustments through a user-friendly calendar interface.



MachineScheduler & Billing

Schedule and bill for resources such as machines, tools and equipment.



Contract

Stay on top of your current and upcoming contract renewals. View all your maintenance contracts in one spot.

Customer**Modifier+**

Lets you amend master customer records in your system. When you use CustomerModifier+, data integrity is ensured; All work, open, and historic GP and Key2Act transactions are updated accordingly.



Combine a customer ID with another existing customer ID



Change an existing customer ID to a new customer ID

Vendor**Modifier+**

When you use VendorModifier+, data integrity is ensured; All work, open, and historic GP and Key2Act transactions are updated accordingly.



Combine a vendor ID with another existing customer ID



Change an existing vendor ID to a new vendor ID

AutoList

Automate a specified
action on a set of
records selected within
a navigation list.



Unlock the power of automation in
GP and Signature. A single action can
perform multiple tasks



Create invoices for replacement parts



Email daily picklists to technicians

VendorChange

Don't start over just because you selected the wrong vendor. Easily switch the vendor on a PO or unposted payables voucher.

POVendorChange

Eliminates the Canceling, Copying or Re-Keying of a Purchase Order

Easily switch the vendor on a standard, blank, drop-ship, or drop-ship blank purchase order in GP



PMVendorChange

Eliminates Deleting and Re-Keying Purchase Details and Distributions





Power BI is a powerful analytics tool that allows you to combine, analyze and share data across your organization. With Power BI, cut down on manual report generation and always have updated data on a real-time basis.



Connect to hundreds of different data sources and display on one report.



Analyze your data using graphs, filters and formulas.



Schedule data refreshes to keep you reports up to date when you need them.



Collaborate with your team by sharing reports and enabling comments.



Interact with your data with the Q&A feature or Quick Insights.

InventoryRound

GP's unit cost only
handles up to five
decimal places...
so what happens
when your unit costs
don't divide evenly
with the total cost?
InventoryRound fixes
this issue!

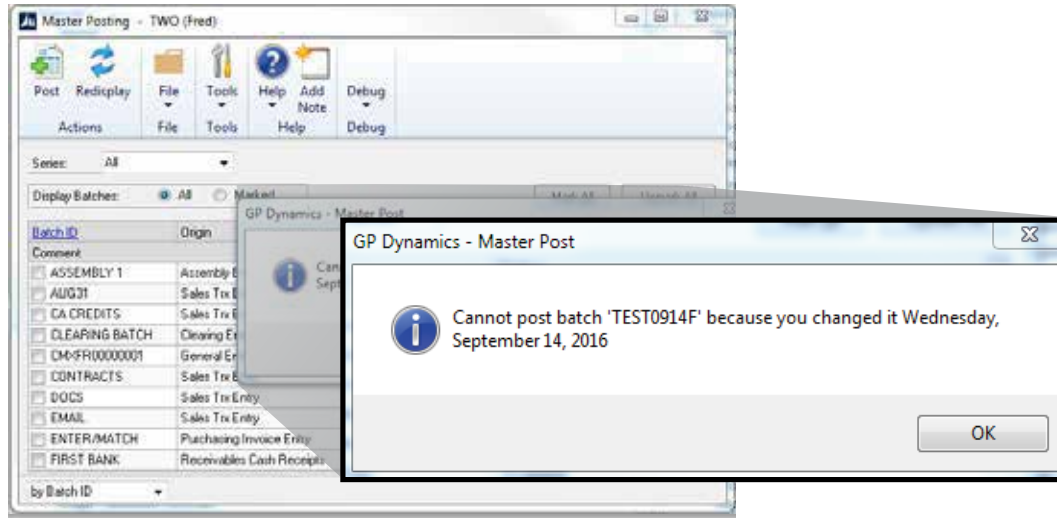


Automatically distributes the same actual cost per item per inventory layer and posts the difference to the GL



Applies costs evenly across all the received items

[PostingControl]



Add additional control and security by not allowing the user who posted an AP or AR batch to post it in GL



Posting can only be done by users who have not previously edited the batch



Supports Master and Series Posting

Get out of Excel and
record Use Tax in GP



Record Use Tax in payables and purchase order or in
KEY2ACT's Job Cost and Service Management



Leverages GP Tax Schedules

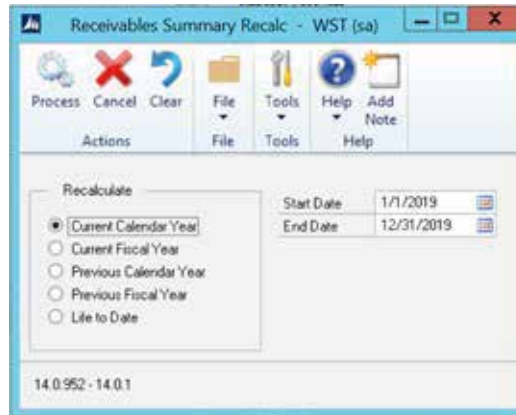
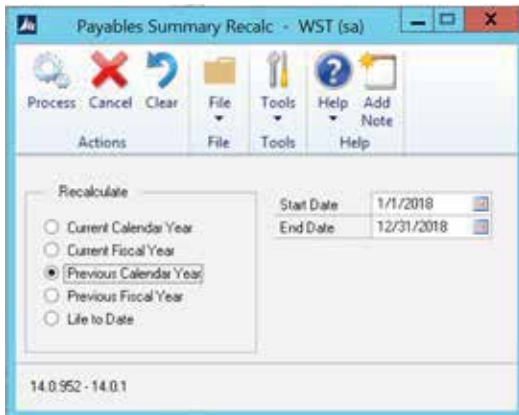


Ensures Accurate Reporting with updated Tax Reports



General Ledger entries are recorded for Liability/Expense/Costing

SummaryRecalc

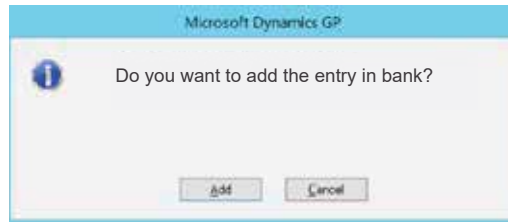
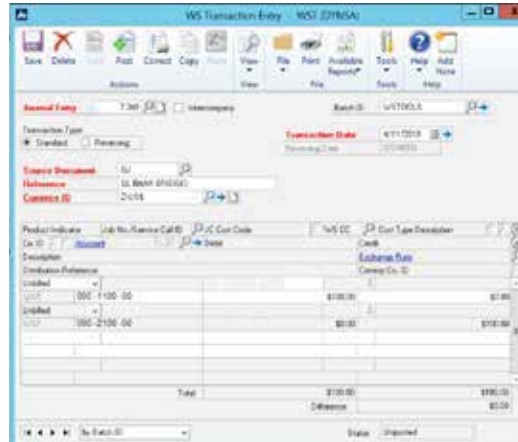


Correcting your Yearly Summary Information.

Regardless of when and how many times you close AP and AR, SummaryRecalc will recalculate and reset the "Year-to-date" and "Last Year" amounts on the Vendor Yearly Summary and the Customer Yearly Summary Windows so that your reports and SmartLists are correct.



Add Bank Transactions automatically while making your GL entries. GLBankBridge is used during the entry of a transaction to an account that is attached to a checkbook, to provide the user with an option to automatically create the corresponding transaction in the bank reconciliation module.



Eliminates having to also manually enter the entry in bank reconciliation



Uses automation to create efficiencies



Ensures accuracy and consistency



Saves time and effort



Allows users to create a Purchase Order in GP by simply sending an email



Requester receives an automated email with the PO number within minutes



Reserves the next PO number in GP so further detail can be added upon return



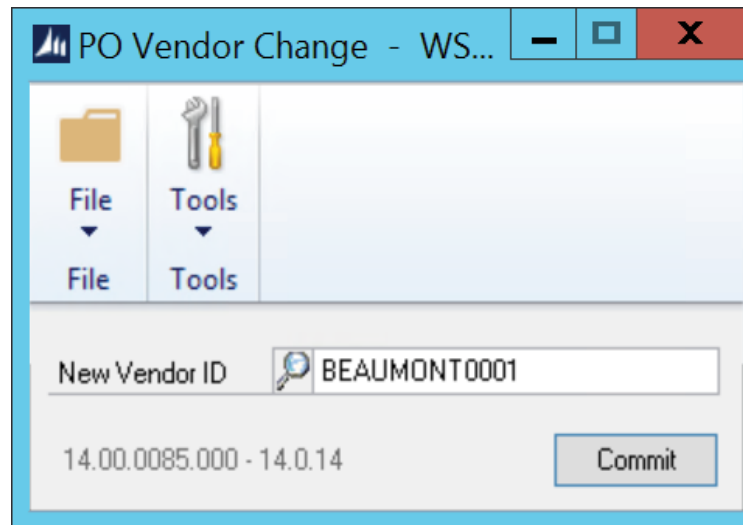
Streamlines the PO process to save time

Send an email to quickly create a PO in GP Send an email to quickly create a PO in GP without back-office assistance. Don't make your field technician wait at a supplier's counter when the only thing stopping him from going with the parts to next the customer appointment is a purchase order number. Use QuickPO instead.

Don't start over just
because you selected
the wrong vendor.
Easily switch the vendor
on a PO or unposted
payables voucher.
Easily switch the vendor
on a standard, blank,
drop-ship, or drop-ship
blank purchase order
in GP.

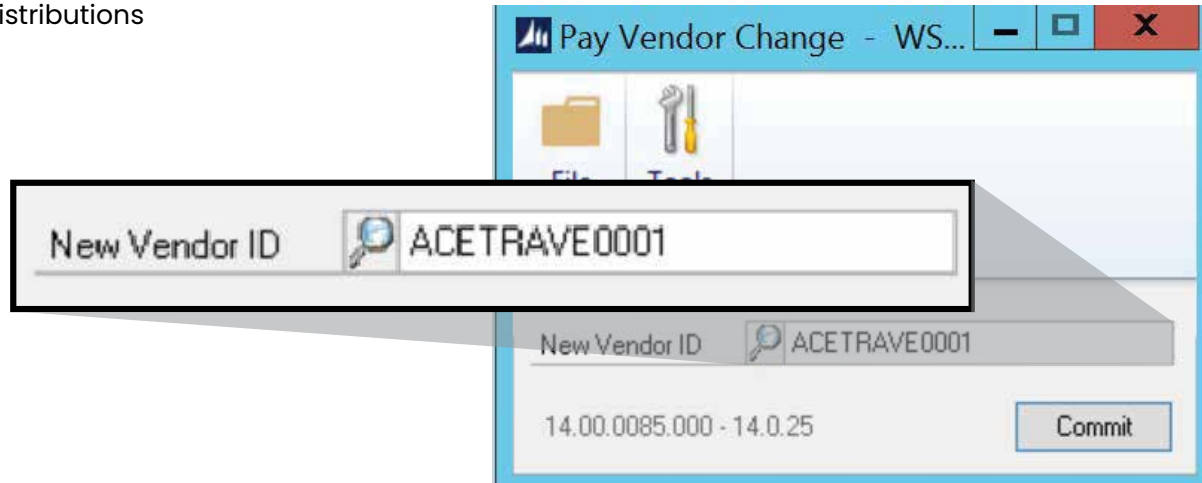
POVendorChange

Eliminates the Canceling, Copying or Re-Keying of a Purchase Order



PMVendorChange

Eliminates Deleting and Re-Keying Purchase
Details and Distributions



PMUnapply

Origin	IC	Document Number	Type	Doc. Date	Disc. Date	Original Amount	Transaction Description	Unapplied Amount	Currency ID	Unapply
HIST		10901	PMT	01/21/14		\$1,567.00		\$0.00		<input type="checkbox"/>
HIST		3000	INV	13/08/13		\$2,067.00		\$0.00		<input type="checkbox"/>
HIST		3000.5	PMT	13/08/13		\$500.00		\$0.00		<input checked="" type="checkbox"/>



Conveniently move historical payables transactions back to open



Eliminates the need to VOID the payment record



Eliminates the need to re-enter the transaction

How much time COULD you save in a year?

01 : 04 : 54 : 39

DAYS

HOURS

MINUTES

SECONDS

**Save 10-15 seconds every time you switch
between companies in Dynamics GP.**



Assign new Customer and Vendor numbers consistently. Set up your numbering preference to automatically assign the Customer ID number and Vendor ID number when creating a new record. Set up your numbering preference to automatically assign the Customer ID number and Vendor ID number when creating a new record.

A screenshot of a software dialog box titled "GP Next Number Se...". The dialog has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a menu bar with "File", "Edit", "Tools", and "Help". The main area contains two input fields: "Next Customer ID" with the value "00001" and "Next Vendor ID" with the value "00007". At the bottom, there is a text label "14.00.0085.000 - 14.0.22" and a "Save" button.

Next Customer ID	00001
Next Vendor ID	00007

14.00.0085.000 - 14.0.22

Save

TIMEImport

Brings outside payroll and timeclock data into GP for payroll processing and general ledger distributions without using integration manager.

MICROSConnect

Eliminates manual entries in GP for daily activity from Micros POS including cash/daily receipts reconciliation.

EPICConnect

Provides seamless processing of information between Epic (EHRP) and Dynamics GP.

SUBWAYImport

Integrates the SUBWAY DAILY SALES reports into GP to generate daily reporting and deposit reconciliation.

We have the expertise and knowledge to develop solutions that work with your outside applications. Check out our current line of Integrations and Imports for GP

QuickCollect

Automatically email reminders to past due accounts based on your payment terms and settings. Helps to limit invoices from running past due by notifying your customers with automated email reminders.

Dear John Doe,

We have previously contacted you about the outstanding invoice(s) on your account and we have not received a response from you. Your account has an outstanding balance of \$14601.91. The following invoice(s) are overdue:

Date	Doc #	Terms	Due Date	Amount Due
7/15/2016	SLS5004	Net 30	8/15/2016	\$4,510.39
8/23/2016	SLS15014	Net 30	9/23/2016	\$8,444.25
8/27/2016	SVC15005	Net 30	9/27/2016	\$1,647.27

Please call us immediately at 218-555-1234 to discuss your account or to let us know that you have sent your payment. Thank you for your prompt response to this matter.

Sincerely,

A Travel Company



Reduce uncomfortable collection calls



Customize the message, schedule, timing and frequency of the communication that you want to send to your customers

Backout Payment Document

File Edit Tools Help sa wsTOOLS 4/6/2017

FROM Customer ID
101 ACCURATE PRINTING

From Receipt Amount
PYMNT0000000304 \$70.00

Payment info: Uptown Trust

TO Customer ID
102 CEDAR FAMILY COUNSELING

Batch ID PMTREAPPLY PYMNT0000000304A

Document Date 4/11/2017 GL Posting Date 4/11/2017

Return Status 0 Return Code 0

Unapply

Create

Conveniently
Unapply,
Void and
Post a New
Payment all
in the same
process

Streamline corrections
of payments applied
to the wrong customer.
Simultaneously
unapply, void & create
a new payment receipt.
Automated process
eliminates the need
for manual entry of
additional documents for
the correct customer.



Segregate the payroll processing duties with additional security



Forces a different user to take over the check printing process once the checks have been built and calculated



Adds another layer of security by segregating the payroll processing duties



Take the headache out of payroll check voids



Eliminates the need to VOID an entire payroll batch



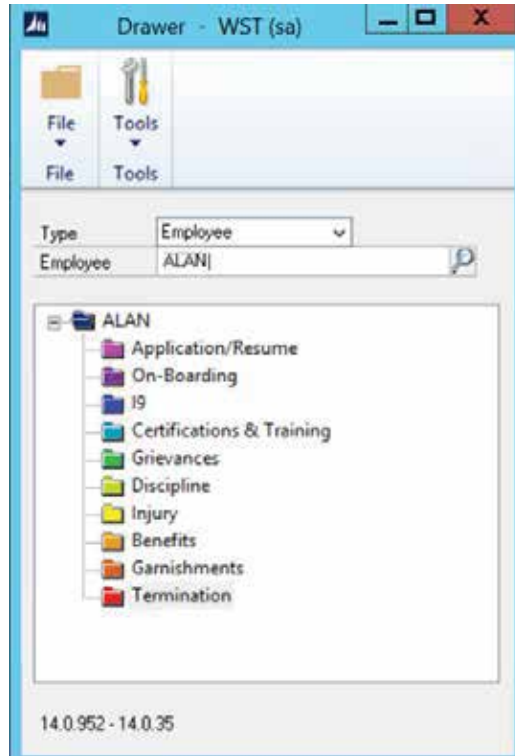
Returns the transactions back to the payroll batch for rebuild and recalculation without rekeying



Removes the voided deposit from the ACH file prior to sending



Organize and Secure your Documents in Dynamics GP.



Centralize your Employee, Customer, Vendor and Inventory Attachments



Easily Categorize your Documents into Folders



Secure Each Folder for your Most Sensitive Documents



Improved Organization



Reduce your Paper Pile

Get these reports for FREE.

FTE Refreshable Report

The Full-Time Report provides a view of an employee's and a department's total hours and wages paid for a period of time. This can be used in reporting to government agencies and for internal uses, such as actual wages vs. budget and forecasting budgets.

PTO Liability Report

An easier way to sum up employee sick time and vacation time accruals by department that's been formatted to copy/paste into GL.

Discounts**PLUS**



Setup discounts on an item/item class or customer/
customer class basis



Discounts can be automatically applied to a SOP invoice
or users can pick and choose



Discounts show as negative line items on the invoice

Our Services

Consulting | Support | Development | Training

We are a Microsoft Gold ERP Partner, Cloud Solution Provider, Source Code Provider, with Dynamics GP, SQL, Azure, and Dynamics 365 expertise.

Our talented team of consultants and developers possess more than 250 years of combined experience serving customer's complex process and technology needs.

We are focused on building trust as a reliable advisor and business partner.



We offer a full range of services to streamline processes and increase efficiency across your entire organization

- Ongoing Support Specializing in GP
- Upgrades to New Versions
- Data Migration & Integrations
- Project Management & Consulting
- SQL Server Report Services
- Power BI
- Business Process Review
- Installation & Configuration
- In-depth Training
- Weekly Webinars
- Development & Customizations
- Support, Implement and Customize CRM