Merge Utility Addon for Microsoft Dynamics 365 Business Central

Languages: English Countries: US, CA, UK, EI, ZA, NZ, AU Clients: On Prem and Web Clients Price: Contact Us for Pricing Information

Instantly merge Customers, Vendors, G/L Accounts, and Items (limited)

Do you have duplicate Customer Cards? Do you have obsolete G/L Accounts? Did someone enter the same vendor twice?

Now you can merge them with the click of a button. All documents, history, and ledger entries will move from a Source Account to a Destination Account. All "Contacts" and "Ship-to Addresses" will also be moved. You can even optionally create the Source Account as a Ship-to Address in the Destination Account.

CUSTOMER CARD		✓ + ±		
61000 · Kelly	Со			
Process New Document	Request Approval Customer	Show Attached Actions Navigate Report	Less options	0 🖈
New Document 🗸 🛛 👪 Po	st Cash Receipts 🖪 Sales Journal	$\label{eq:Register Customer Payments} \qquad \underbrace{VL} \lor \qquad \text{Workflow} \lor$	${\rm I\!\!\!\!I} \; {\rm Functions} \smallsetminus $	4
Name	KelyCo	Total Sales ···	109.80	\frown
Balance (\$)	109.80	Costs (\$)	85.60	(\bigcirc)
Balance Due (\$)	0.00	CFDI Purpose		(\simeq)
Credit Limit (\$)	0.00	CFDI Relation		
Blocked				
				Attachments
Address & Contact			Show more	Documents 0
ADDRESS		CONTACT		Sell-to Customer Sales History
Address	Belle Ave.	Primary Contact Code CT000261		Sel-to customer Sales History
Address 2		Contact Name · · · · · Bob		0 0 4
City	Winter Springs	Phone No. 407-620-3665		Orgoing Sales Orgoing Sales Orgoing Sales Quotes Blanket Orders Orders
State	FL.	Email		
ZIP Code	20755	Home Page		
21 VVVE	32133			Ongoing Sales Invoices Return Orders Credit Memos

To merge one Customer into another open the Source account (account to be merged). Click on Actions \rightarrow VL \rightarrow Merge Customer. Enter the Destination account (the account into which the Source Account should be merged).

Manage	Process	Show Attached	Actions	Less options			
MERGE CU	STOMER						\square
Merge							
Merge Fror	n Customer	61000		\sim			
Destination	Customer · ·			\sim			
						ОК	ancel

Click **OK** and all ledger entries, sales history, Ship-to-Addresses, and Contacts will be merged into the Destination Account.







Did you mistakenly merge accounts and wish to undo the merge? Either open the Destination Account and click Actions \rightarrow VL \rightarrow Undo Merge History or go to the Merge Utility History List in Merge Utility Setup. Click Process \rightarrow Undo Utility and everything is restored.

🛲 Undo Utility					
General					
Entry No		1	Merged By	BC\BCOLE	
Entry Type	Merged		Merged Date	1/23/2020	
Source Type	Customer		Merged Time	11:25:55 AM	
Source No	61000		Comment	User Merged the Customer	
Destination No	10000				
Merge history Subform	Manage	•			
5 5					
5 5	Manage TABLE NO	TABLE NAME			*
5 5	TABLE NO				^
5 5	TABLE NO	TABLE NAME	Entry		-
5 5	TABLE NO 17 21 32 36	TABLE NAME G/L Entry Cust. Ledger E Item Ledger E Sales Header	Entry		A
5 5	TABLE NO 17 21 32 36 37	TABLE NAME Cust. Ledger I Item Ledger E Sales Header Sales Line	Entry intry		A
5 5	TABLE NO 17 21 32 36 37 110	TABLE NAME G/L Entry Cust. Ledger E Sales Header Sales Line Sales Shipmen	Entry intry nt Header		Î
5 5	TABLE NO 17 21 32 36 37	TABLE NAME Cust. Ledger I Item Ledger E Sales Header Sales Line	Entry Intry nt Header nt Line		
5 5	TABLE NO 17 21 32 36 37 110 111	TABLE NAME G/L Entry Cust. Ledger I Sales Header Sales Line Sales Shipmen Sales Shipmen	Entry Intry Int Header Int Line Header		

Do you have a lot to merge? You can now "Batch Merge" multiple accounts and get them all done at once. Search for "Batch Merge". Then enter as many source and destination accounts as desired and click on "Process".

	w 💀 Edit List	t 🗙 Delete	Process	Show Attached	📲 Open in Excel		\mathbb{Y}
ACCOUNT TYP	ΡE	SOURCE	ACCOUNT	DESTINA	TION ACCOUNT	DELE SOUR ACCO	CE
Customer		C00010		10000			•
G/L Account		11200		11100			•