Deltek Vantagepoint Utilities Series: Key Conversions

Key Conversions Overview

The **Key Conversions** utility allows you to change certain numbers or codes in your database to new numbers or codes.

The changes made by this utility apply to all of the data in your database.

Key Conversions in Deltek Vantagepoint will create an entry on the **Posting Log Review** report.

Comment field displays the type of conversation performed with a transaction type of **KC**.

How to access: **Utilities > Key Conversions**

⚠ **Warning**: Deltek strongly recommends that you create a backup copy of your database before running the utility. There is **no way** to undo this process.

Codes That Can Be Converted

KEY CONVERSIONS	
Accounts	Tasks
Banks	Enable Phases/Tasks
Contacts	Disable Phases/Tasks
Discount Codes	Projects' Organization
Employees	Labor Codes
Firms	Organization sub-codes
Organizations	Liability Codes
Projects	Withholding Codes
Phases	Contribution Codes
Tasks	Absence Accrual Codes
Enable Phases/Tasks	Tax Codes
	Units

Project Key Conversions

Change a project number to a new project number throughout Deltek Vantagepoint. (Example: 1.00 to 1.10)

To Change a Project Number

1 Back up your Deltek Vantagepoint database.

2 In the Browser, go to **Utilities > Key Conversions > Projects**.

3 On the **CHANGE NUMBER** tab, click **+ Add Project**.

4 In the **Existing Project** field, select the project that needs to be changed.

5 In the **New Project** field, enter the new project number.

6 Click **Run** to process immediately or click **Schedule** to process at a later time.

Combine Projects

When you combine project numbers, Deltek Vantagepoint does the following:

- Combines budgets and data in the project financials tables.
- Deletes billing terms and invoice detail so you cannot reprint old invoices.
- Updates the accounts receivable paid period to the most recent period.
- Combines plan data for the projects.
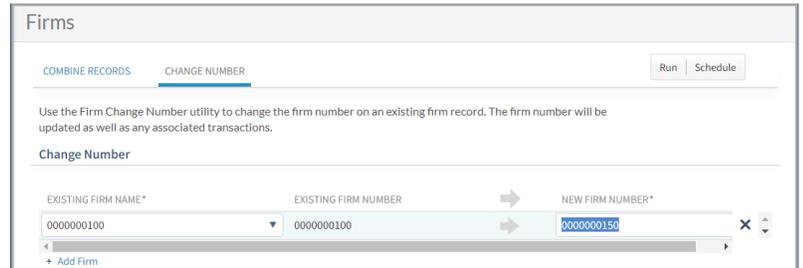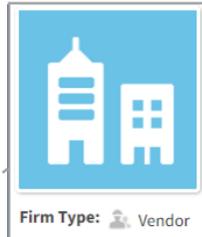- Removes the link to a promotional project, if a link exists for the existing project.

💡 **Note :** Consider if the projects have any associated plans.

Deltek Vantagepoint Utilities Series: Key Conversions

Deltek

To Combine Projects

1 Back up your Deltek Vantagepoint database.

2 In the Browser, go to **Utilities > Key Conversions > Projects**.

3 On the **COMBINE RECORDS** tab, click **+ Add Project**.

4 In the **Existing Project** field, select the project(s) to be combined.

5 In the **New Project** field, select the project to merge the existing project into.

6 Click **Run** to process immediately or click **Schedule** to process at a later time.

Firms Vendor Number Key Conversion

This utility changes the Vendor Number, not the Firm ID, and applies only if the firm's type on the Summary pane of the Firms hub is "Vendor".
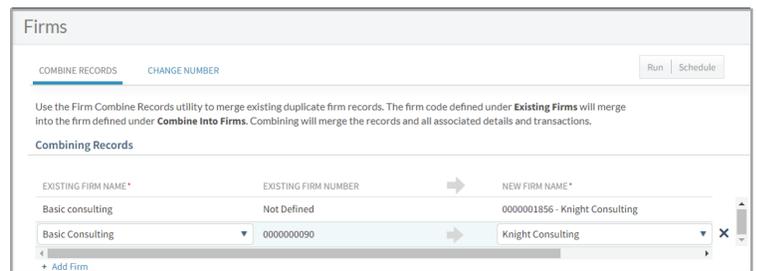
Firm Type: Vendor

Firms

COMBINE RECORDS   CHANGE NUMBER   Run | Schedule

Use the Firm Change Number utility to change the firm number on an existing firm record. The firm number will be updated as well as any associated transactions.

Change Number

EXISTING FIRM NAME*	EXISTING FIRM NUMBER		NEW FIRM NUMBER*
0000000100	0000000100	➡	0000000150

+ Add Firm

To Change a Vendor Number

1 Back up your Deltek Vantagepoint database.

2 In the Browser, go to **Utilities > Key Conversions > Firms**.

3 On the **CHANGE NUMBER** tab, click **+ Add Firm**.

4 In the **Existing Firm Name** field, select the vendor that needs to be changed.

5 In the **New Firm Number** field, enter the new vendor number.

6 Click **Run** to process immediately or click **Schedule** to process at a later time.

Combine Firms

This utility combines existing duplicate firms from the Firms hub.

> 💡 **Note:** When combining existing vendors, Budgets and 1099 amounts are also consolidated.

Firms

COMBINE RECORDS   CHANGE NUMBER   Run | Schedule

Use the Firm Combine Records utility to merge existing duplicate firm records. The firm code defined under **Existing Firms** will merge into the firm defined under **Combine Into Firms**. Combining will merge the records and all associated details and transactions.

Combining Records

EXISTING FIRM NAME*	EXISTING FIRM NUMBER		NEW FIRM NAME*
Basic consulting	Not Defined		0000001856 - Knight Consulting
Basic Consulting	0000000090	➡	Knight Consulting

+ Add Firm

To Combine Firms

1 Back up your Deltek Vantagepoint database.

2 In the Browser, go to **Utilities > Key Conversions > Firms**.

3 On the **COMBINE RECORDS** tab, click **+ Add Firm**.

4 In the **Existing Firm Name** field, select the vendor(s) to be combined.

5 In the **New Firm Number** field, select the vendor to merge the existing vendor into.

6 Click **Run** to process immediately or click **Schedule** to process at a later time.