

**FOCUS
ON DESIGN,
AUTOMATE
THE REST**

CUSTOMTOOLS 2024 SP0
Data sheet



CUSTOMTOOLS

BATCH PROCESSING

Batch printing

	BASIC	PRO
Manage print order	X	X
Insert BOM quantities	X	X
Define print settings per sheet format or paper size	X	X
Overwrite Custom Properties for prints	X	X
Print sheets referenced by model configuration	X	X
Manage layer visibility	X	X
Include/Exclude specific sheets	X	X
Filter based on property value	X	X
Launch print from search results	X	X
Print closed assembly	X	X
Add files, assembly or folder to the print list	X	X
Define print profiles	X	X
Batch print drawings	X	X
Customer specific properties (print/convert)	X	X
Set print scaling	X	X
Print to a specific printer tray	X	X
Export file print list	X	X
Simplified profile creation wizard	X	X
Set print coloring	X	X
Filter Drawings based on property values	X	X
Respects SOLIDWORKS BOM settings for component exclusion	X	X
Reload and change sheet formats		X
Quick launch pre-configured print profiles		X
Create templated operations		X
Translate properties and title blocks		X
Insert Cutting Profile sheet		X
Insert Bending sheet		X

Batch conversion

	BASIC	PRO
Convert to multiple formats at the same time	X	X
Merge assembly drawings into one PDF	X	X
Merge DXF based on sheet metal thickness and material	X	X
Define file naming and storing rules	X	X
24 file formats available	X	X
Insert BOM quantities	X	X
Convert sheets referenced by model configuration	X	X
Filter based on property values	X	X

Manage layer visibility	X	X
Overwrite Custom Properties for converted documents	X	X
Include/Exclude specific sheets	X	X
Include/Exclude specific configurations	X	X
Supports multi-body parts	X	X
Run conversion rules on BOM export	X	X
Run conversion rule automatically on save operations	X	X
Define conversion profiles	X	X
Single-page PDF of multiple drawings	X	X
Convert drawings, parts & assemblies	X	X
Launch conversion from search results	X	X
Convert closed assembly	X	X
Customer specific properties (print/convert)	X	X
Associate configuration name to output file name	X	X
Rename child components in STEP file format	X	X
Export file conversion list	X	X
Auto detect sheet metal part	X	X
Define orientation of non-sheet metal parts in DXF/DWG export	X	X
Simplified profile creation wizard	X	X
Filter conversion based on Property values	X	X
Save converted files to Top assembly path	X	X
Respects SOLIDWORKS BOM settings for component exclusion	X	X
Reload and change sheet formats		X
Quick launch pre-configured conversion profiles		X
Create templated operations		X
Translate properties and title blocks		X
Insert Cutting Profile sheet		X
Insert Bending sheet		

Drawing automation / Tasks

	BASIC	PRO
Batch create missing drawings for parts & assemblies		X
Define unique drawing creation rules for different model types		X
Use specific Drawing template per drawing creation rule		X
Use specific Sheet format per drawing creation rule		X
Use specific BOM Table per drawing creation rule		X
Import specific dimensions per drawing creation rule		X
Customize drawing creation rules with scripting		X
Insert the cutting profile sheet		X
Insert the bending sheet		X
Reload and change sheet formats		X

Quick launch drawing creation rules	X
Rebuild drawings and models in batches	X

Solid Edge migration

	BASIC	PRO
Import Solid Edge model to SOLIDWORKS files		X
Convert Solid Edge drawings to PDF/DXF/DWG		X
Import Solid Edge file properties		X
Fixed components in SOLIDWORKS		X
Map material		X
Filter properties to import		X
Keep original file structure		X

SHEET METAL TOOLS

DXF Automation

	BASIC	PRO
Auto-create DXF drawing sheet		X
Auto-create DXF from parts		X
Auto-create DXF for multi-body parts		X
Merge DXF based on material & thickness		X
Insert customized property notes in DXF/DWG		X
Use cut list item in output file name		X
Use instance number and total quantity in output file name		X
Associate configuration name to output file name		X
Insert customized note in flatten view		X
Show bend lines in flatten view		X
Insert customized bend notes		X
Show only silhouette edges		X
Create cutting profile sheet during batch operation		X
Create bending sheet during batch operation		X
Define the sheet format/size to be used by the bending sheet		X
Save temporary created drawing during DXF creation from parts		X

Cut-list property management

	BASIC	PRO
Write additional cut list properties	X	X
Property pane for cut list items	X	X
Auto number cut list item	X	X
Write additional properties based on geometry	X	X
Copy cut list item as drawing/model properties		X

REPORTING

Excel Report

	BASIC	PRO
Export where used list		X
Generate custom Excel reports		X
Generate custom BOM listing		X
Insert preview image (3D model & cut list item)		X
Insert SOLIDWORKS attributes		X
Insert custom property values		X
Accumulate quantities		X
Insert link to converted files (req. CT Apps)		X
Bi-Directional Excel report (req. CT Apps)		X
Keep BOM Structure		X
Translate custom properties		X
Manage configurations		X
Run file conversion rules during report creation		X
Launch reporting from search results		X
Support user defined sub-structure for parts		X
Support for hide, promote & show		X
Support for cut list item (Weldment, Sheet metal & Solid Bodies)		X
Quick launch export profile		X
Excel profile creation wizard		X
Export configurations to separate Excel sheets		X

PROPERTY MANAGEMENT

Property Pane

	BASIC	PRO
Property wizard		
Create the property pane from the SOLIDWORKS Tab builder templates	X	X
Create the property pane from SOLIDWORKS files	X	X
Create the property pane from the SOLIDWORKS PDM Pro Data Cards	X	X
Manage properties based on configuration		
Write property values to pre-defined target	X	X
Write property values to all configurations	X	X
Write property values to specific configuration	X	X
Write property values to document properties	X	X
Write property values to active configuration	X	X
Write property values to document properties and active configuration	X	X
Write property values to document properties and all configurations	X	X
Custom properties functions		
Manage property group visibility	X	X
Manage property visibility	X	X
RAL Colors/Colors	X	X
Link mass and material	X	X
Manage revisions data	X	X
Link to dimensions	X	X
Auto-numbering	X	X
Auto-numbering based on property value	X	X
Track property change history	X	X
Clear property value on Save As	X	X
Define customer specific properties	X	X
Insert property tooltips	X	X
Used a custom property as BOM quantity	X	X
Insert property translation		X
Link to external data source		X
Copy cut list item property as model/drawing property		X
Copy model property as drawing property		X
Custom dictionaries		X
Look up list		
Multi-level look up list	X	X
Control secondary properties with list selection (Key values)	X	X
Hierarchical dropdown list	X	X

Fetch dropdown list content	X	X
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Default values

Define default custom property	X	X
Insert user's initial	X	X
Insert SOLDIWORKS functions as default values	X	X
Insert current date	X	X
User/User group based default property value	X	X
Auto complete	X	X
Retrieve parent property value	X	X

Formatting

Combine custom properties	X	X
Define maximum length	X	X
Force CAPS	X	X
Define values to be written for check box	X	X
Configure date format	X	X
Compulsory values	X	X
Multiline properties	X	X

Propagate property value

	BASIC	PRO
Propagate property values to models, parts and assemblies		X
Propagate property values to drawings		X
Update combinations of properties		X

Insert Notes

	BASIC	PRO
Pre-defined note templates with custom properties	X	X
Save note for later use	X	X
Share notes between users	X	X
Insert BOM quantity during file conversion	X	X
Insert notes during file conversion		X

Drawing Template

	BASIC	PRO
Customize sheet formats with custom properties	X	X
Access to pre-defined list of available properties	X	X
Insert properties defined for models and drawings	X	X
Insert revision table	X	X

Bounding box

Support parts and assemblies	X
Define a bounding box offset	X
Update automatically	X
Write additional bounding box dimension properties	X

Coord Note

Insert coordinates points in drawing	X
Create groups of coordinates	X
Support linear and polar coordinates	X
Support arc centre point	X
Update automatically	X

FILE MANAGEMENT

File naming

	BASIC	PRO
Define file naming rules	X	X
Number sequencing	X	X
Shared sequences between users	X	X
Part and assembly specific naming	X	X
Combine custom properties	X	X
Auto-save to folder	X	X
Configuration specific drawings	X	X
Generate sequence based on property value	X	X
Detect property value changes	X	X
Define sequence format	X	X
Increment sequence number	X	X
Auto-generate drawing filename	X	X
Supports naming of virtual components	X	X
Save configuration as new file	X	X
Replace component in assembly	X	X
Save as and break external references	X	X
Copy as new component in assembly	X	X
Rename existing file	X	X
Property pane popups on save operation	X	X
Retain all references when file is renamed	X	X
Use SOLIDWORKS PDM Professional Serials	X	X
Run conversion rule on save operation		X

Project

	BASIC	PRO
Define projects and sub-projects		X
Auto-save to project folder		X
Define model & drawing save folders		X
Define specific file naming rules per projects		X
Project specific sequencing		X
Load default custom property values		X
Search files based on project/sub-project		X
Auto-Number & Name by Project		X
Link project information to custom properties		X
Link parent project information to custom properties		X
List active projects (vs Archive project)		X

Project sorting (by Number, name, or creation date)	X
Show recently used project	X
Retrieve projects from ERP (req. customization)	X

ERP CONNECTION

Import

	BASIC	PRO
Live ERP search in property pane		X
Link ERP data to properties		X
Fetch dropdown list content		X
Connect to different tables		X

Export

	BASIC	PRO
Export BOM to ERP (req. customization)		X
Automate the creation of new items in ERP (req. customization)		X
Export BOM to XML		X
Export BOM to HTML		X
Export BOM to CSV		X
Export BOM to TXT		X
Export preview image		X
Launch Export from search results		X
Split structure export output to several files		X
Support cut list item		X
Export configurations during the same export		X
Quick launch Export profile		X
Support user defined sub-structure for parts		X

DYNAMICS 365 Business Central (BC 365) integration module

	BASIC	PRO
Support on-premises or cloud version		X
Support also Dynamics NAV (From version 2012 onwards)		X
Link BC 365 items with SOLIDWORKS models/configurations		X
Use BC number series		X
Generate BC item number during an export		X
Integration with Item Card, Production BOM, Assembly BOM; including customized.		X
Bi-directional low-code integration solution with any exposed BC services		X
Fetch dropdown list content from BC 365		X
Automate item creation for model/cut list item		X
Prevent item creation for model/cut list item completely or rule-based		X
Automate Production BOM creation in BC 365 (using SOLIDWORKS BOM)		X
Automate Assembly BOM creation in BC 365 (using SOLIDWORKS BOM)		X

Update existing Item/BOM	X
Add BC items in Design BOMs without modeling them (i.e. Virtual Items)	X
Export preview image of the 3D Model to the Item Card	X
Link custom properties with fields of the Item Card/BOM	X
Insert links to converted 3D Model/drawing into the Item Card	X
Compulsory values	X
Default values, e.g., Default Unit	X
Define custom property maximum length	X
Field specific add/update rules	X
Ignore item or BOM creation/update based on custom property value	X
Ignore item or BOM creation/update based on BC field value	X
Exclude components that are excluded from SOLIDWORKS BOM	X
Support hide, show or promote options in the SOLIDWORKS BOM	X
Retrieve item/BOM status before an export	X
Prevent export of blocked Items / Certified BOMs / any other rule	X
Supports OAuth2, Basic authentication and Windows authentication	X
Batch import values from BC to models/configurations/cut-list items	X
See and control also BC BOM lines not belonging to the current design structure	X
Consistency checks after itemization, e.g. for cyclic references	X
Define target BC 365 Company	X

Odoo integration module

	BASIC	PRO
Support on-premises or cloud version		X
Automate Product creation		X
Automate BOM creation (using SOLIDWORKS BOM)		X
Update existing Item/BOM		X
Export preview image of the 3D Model to the product card		X
Link custom properties with field of the product card/BOM		X
Define custom property maximum length		X
Insert links to converted 3D Model/drawing into the Product Card		X
Compulsory values		X
Exclude components that are excluded from BOM		X
Support hide, show or promote options in the SOLIDWORKS BOM		X
Retrieve product/BOM status before an export		X

Oscar ERP integration module

Import

	BASIC	PRO
Automate item creation		X
Automate BOM creation		X
Update existing Item/BOM		X
Export preview image of the 3D Model to the product card		X
Link custom properties with field of the Item Card/BOM		X
Define maximum length		X
Insert links to converted 3D Model into the Item Card		X
Compulsory values		X
Retrieve product/BOM status before an export		X

ADVANCED SEARCHING

Search

	BASIC	PRO
Search files based on custom property values	X	X
Search files based on document types	X	X
Drag & drop from search results	X	X
Free search	X	X
Configurable search pane	X	X
Supports file configuration	X	X
Search based on BOM part number	X	X
Remembers last search criteria	X	X
Export file search results list		X
Project search		X

Open Drawings

	BASIC	PRO
Identify all drawings made for a model	X	X
Open associated drawings	X	X
Finds referenced drawings regardless of name and folder	X	X
Support configuration specific drawings	X	X

Explore

	BASIC	PRO
Locate a file in Windows Explorer	X	X

DESIGN REUSE

Copy

	BASIC	PRO
Copy and rename assemblies		X
Move and rename assemblies		X
Copy referenced drawings		X
Batch modify properties		X
Create a zip		X
Exclude non-referenced configurations		X
Exclude Design Library files		X
Exclude Toolbox parts		X
Keep folder structure under the main assembly		X
Update drawings with property changes		X
Define destination folder for Models/Drawings		X
Find and replace in file name		X
Filter files to copy based on property value		X
Retain all references when file is copied		X
Retain all references when file is renamed		X

Where used

	BASIC	PRO
Locate where a model is being used		X
Export where used list		X

SOLIDWORKS PDM PROFESSIONAL INTEGRATION

SOLIDWORKS Add-in

	BASIC	PRO
CUSTOMTOOLS Search – Disabled	X	X
File references read directly from the SW PDM database	X	X
Supports printing & file conversion	X	X
Ensures correct local file versions	X	X
Add custom reference from converted document	X	X
Map model properties to the data card of converted documents	X	X
Define check in method for the converted documents	X	X
Use SOLIDWORKS PDM Professional Serials	X	X
Link custom properties with attributes of the File Card	X	X
Create templated operations		X
Supports drawing automation & Tasks		X

CT Task Add-in for SOLIDWORKS PDM

	BASIC	PRO
Use file conversion profiles	X	X
Use print profiles	X	X
Print in BOM order	X	X
Support As-Built and Latest referenced version	X	X
Launch CUSTOMTOOLS Task from the Vault View	X	X
Launch CUSTOMTOOLS Task from Workflow State Transition	X	X
Automatically set Task success or failure variable	X	X
Reload/change sheet formats		X
Rebuild task		X
Drawing creation rules		X
Create templated operations		X
Generate Export reports		X
Generate customized text files (E.g. csv, txt, xml,...)		X
Export to ERP		X
Export to Odoo, Business Central 365, Dynamics NAV & Oscar Pro		X

COLLABORATION

Collaborative design environment in SOLIDWORKS

	BASIC	PRO
Shared serial sequences	X	X
Unified file naming and storing rules	X	X
Shared projects	X	X
Common search	X	X
Unified property management	X	X
Shared rules for creation of manufacturing documentation	X	X
Administrative tools	X	X

CUSTOMTOOLS Viewer for Non-SOLIDWORKS users

	VIEWER
View drawings & 3D Models without SOLIDWORKS	X
Limited eDrawings tools for interaction	X
Search tool	X
View properties	X
Supports printing	X
Locate where a model is being used	X
Identify all drawings made for a model	X
Generate Excel reports	X
Export to ERP	X
Export to Odoo, Business Central 365, Dynamics NAV & Oscar Pro	X
Open associated drawings	X