



Category Change Utility

For Project and Job Costing

By Musick International, Inc.

Overview

The Category Change Utility for Project and Job Costing allows you to change one or more Sage Project and Job Costing categories throughout the Sage 300 database. Other modules updated by this utility include Accounts Payable, Accounts Receivable, Inventory Control, Order Entry, Purchase Orders, Canadian Payroll and US Payroll.

Pjc Category Change v6.9.0 2022-01-20

Company: [SAMLTD] Sage 2022 Sample Company Limited

Use Categories.txt file to Change Multiple Categories

Change Single Category

Category: BLDBKSHLF

New Category:

Replace Multiple Categories

Compatibility

Musick International products are compatible with current and recent versions of Sage 300. To verify compatibility to Sage 300 and third party products, please check our website (www.Musick-Int.com) or email Sales@Musick-Int.com.

Requirements:

Category Change Utility requires DataCHECK or FixIT Professional. If you do not own FixIT, contact Musick International for your complimentary activation code for DataCHECK.

Installation

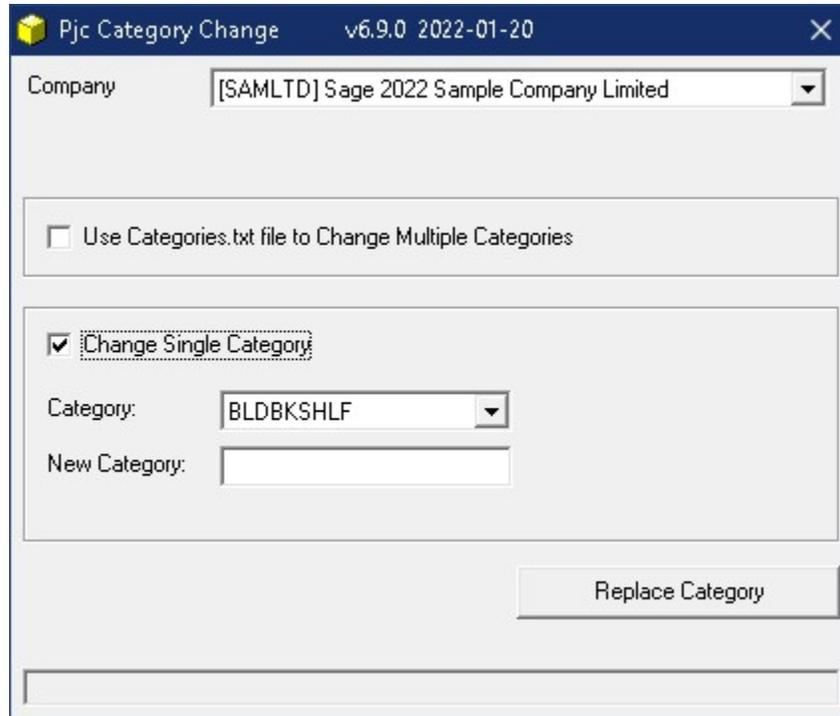
Download and install the latest release of either FixIT Professional or DataCHECK. In the folder where FixIT is installed (default is C:\FixITcc), run the install program "CategoryChangeInstall.exe". We recommend running the install using "Run as Administrator".

Connect FixIT Pro or DataCHECK

The Category Change Utility uses FixIT Professional or DataCHECK for connection to the company database. If the database has not yet been defined, start FixIT/DataCHECK and verify the connection to the company. If the company is not listed on the “Validate” screen, select the “Locate” icon on the left toolbar, change to “Locate Data using FixIT Path” as the default, and click “New” to add a new connection to the company database. “Apply” the changes and verify the database is available.

Starting Category Change Utility for PJC

Launch the CategoryChange.exe from “Start” – “Programs” – “Musick International” – “Category Change”. The utility’s main window looks like this:



Select the company. If the company is not in the list, refer to “Connect FixIT Pro or DataCHECK” above.

The Category Change Utility allows renaming of PJC category number(s). Select the appropriate option on the screen. Selecting “Change” will allow you to rename a category number.

Change Multiple Categories

This option allows several category numbers to be changed at one time. Create/modify the “Categories.txt” file with the original category number, the structure and new (unformatted) category number. Here is the sample layout from the “ContractsExample.txt” file:

```
"OldContract1","NewStructure1","NewContract1"  
"OldContract2","NewStructure1","NewContract2"  
"OldContract3","NewStructure2","NewContract3"  
"OldContract4","NewStructure2","NewContract4"
```

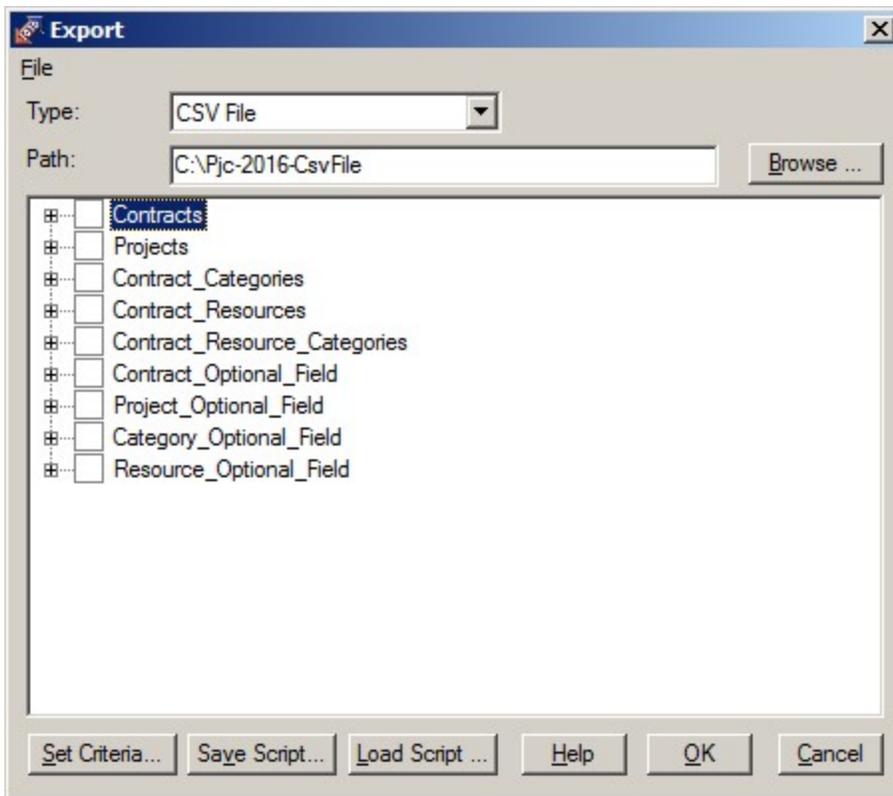
The OldContract1 maybe formatted or unformatted.
The NewStructure1 must exist in PJC Category Structures.
The NewContract1 must be unformatted.

Here is a sample file for Sage Sample Company:

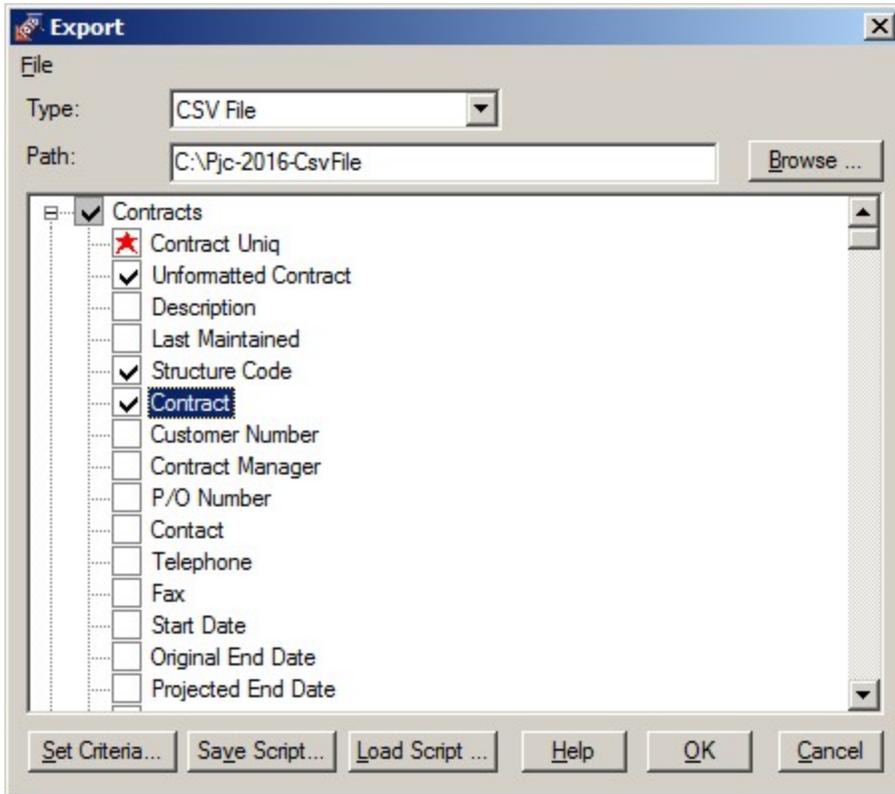
```
"120120010","SECPRJ","120120020"  
"120140010","SECPRJ","120140020"  
"120152010","SECPRJ","120152020"
```

This sample file can be run against the Sage Sample Company.

The easiest way to create this file is to export the “Category Maintenance” form. To do this, open the PJC Category Maintenance screen. Select “File,” and then “Export”. On the Export screen, select the Type “CSV File” and enter the path for the file. Next clear all of the check boxes.



Now expand “Categories” and select only “Unformatted Category”, “Structure Code” and “Category”.
 NOTE: To create a blank column for the New Category Number, select another string field that is blank in the database. Possible selections are “Position”, “Phone”, “Fax”, “Other Phone”, “E-mail” or “Segment5”



Click OK to create the file. Here is the file created by Sage Sample Company.

```
"CONTRACT","CONTBRKID","FMTCONTNO" <- Remove this title line.
"120120010","SECPRJ","120-1200-10" <- NOTE: New Category Number should not be formatted.
"120140010","SECPRJ","120-1400-10"
"120152010","SECPRJ","120-1520-10"
```

or if using “FAX” instead of “FMTCONTNO”

```
"CONTRACT","CONTBRKID","FAX" <- Remove this title line.
"120120010","SECPRJ",""
"120152010","SECPRJ",""
"120140010","SECPRJ",""
```

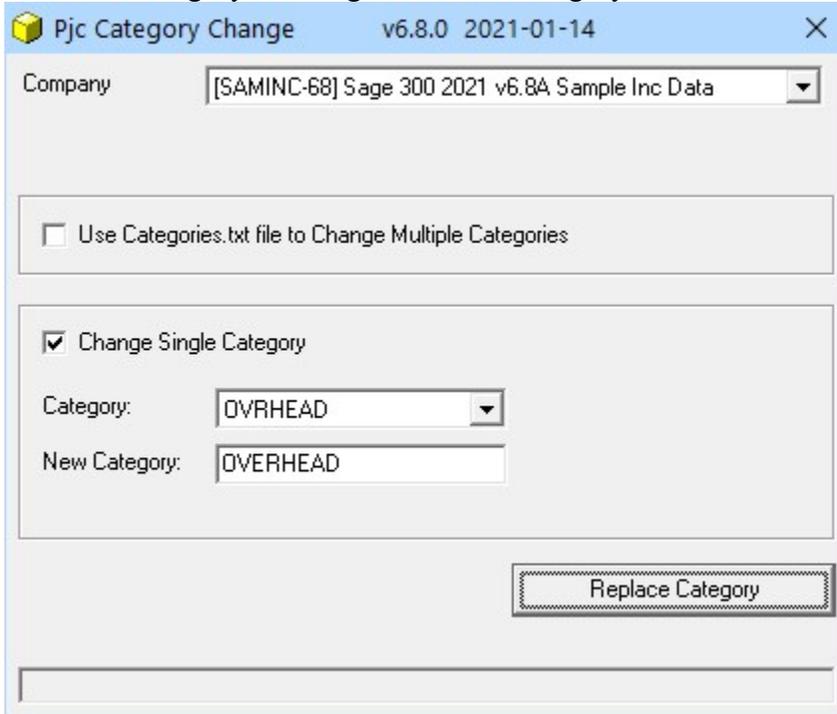
Remove the title line (the first line). Rename the file to “Categories.txt” and place it in the folder where Category Change is installed.

The last step is to change the last column to reflect the new category number. Remember to remove the formatting as the Category Change Utility requires this to be unformatted. Save the file.

Once edited and saved, click “Replace Category”. You will be prompted for a backup before proceeding. It is recommended to run a test on a copy of the data before run this on production data.

Change Single Category

Select the category to change with the “Category” field.



Pjc Category Change v6.8.0 2021-01-14

Company [SAMINC-68] Sage 300 2021 v6.8A Sample Inc Data

Use Categories.txt file to Change Multiple Categories

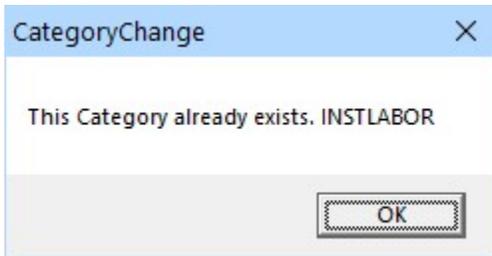
Change Single Category

Category: OVRHEAD

New Category: OVERHEAD

Replace Category

Now enter the “New Category” number. The “New Category” number is required and must match the length of the structure selected. If not, one of the following errors are displayed:



CategoryChange

This Category already exists. INSTLABOR

OK

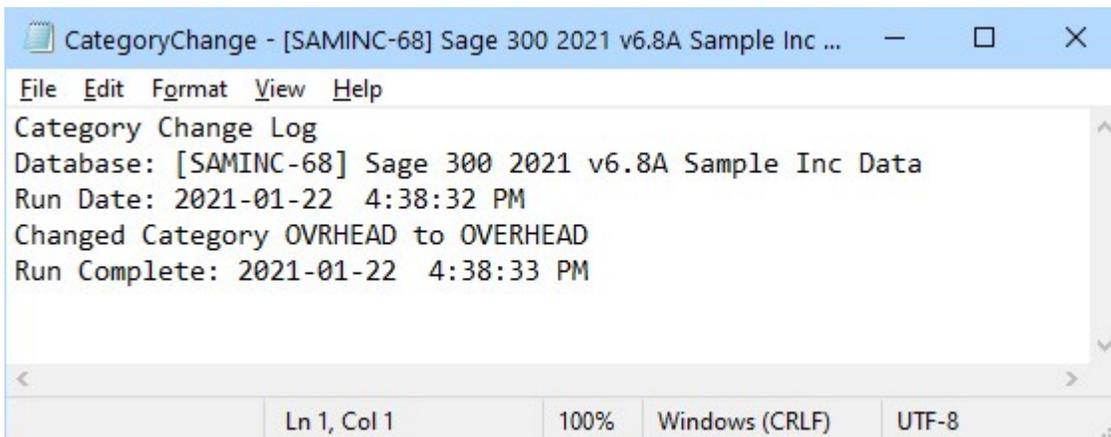
Note: Characters that are used as delimiters for the structure are not allowed in the category number. These characters will automatically be removed: - * . \ / () #

Once the screen is populated, click on the “Replace Category” button. This screen is displayed:



It is recommended to have a backup of the data before changing category numbers. If you have a backup and want to change the category number, click “OK”.

The results of the replace are saved in the Category Change log file located where the Category Change Utility program is installed. The Log file name will be similar to “CategoryChange - [SAMINC-68] Sage 300 2021 v6.8A Sample Inc Data 2021122 - 163832.LOG.”



Examine the log file to view the details of the error(s), or a confirmation that the categories were changed successfully.



Thank you for selecting Musick International, Inc.

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