



Salesperson Code Change Utility

Version 6.9.0

By Musick International, Inc.

Overview

The Salesperson Code Change Utility changes one or more Salesperson Codes throughout the Sage 300 database.

Compatibility

Compatible with Sage 300 2022, 2021, 2020, 2019, 2018, 2017, 2016, 2014, 2012, v6.0.

Installation

The Salesperson Code Change requires FixIT or DataCHECK. Download and install the latest release of either FixIT or DataCHECK. In the folder where FixIT or DataCHECK is installed (default is C:\FixITcc), run the install program “SalespersonCodeChangeInstall.exe”. We recommend running the install using “Run as Administrator”.

Connect FixIT or DataCHECK

Salesperson Code Change uses FixIT or DataCHECK to establish a connection to the company database. If the database has not yet been defined, start FixIT or 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 Salesperson Code Change

Launch the SalespersonCodeChange.exe from “Start” – “Programs” – “Musick International, Inc” – “Salesperson Code Change”.

The utility's main screen looks like this:

Select a Company

[SAMLTD] Sage 2022 Sample Company Limited - Accounts Receivable - 69A

Salesperson Name	Original Code	New Code
Bill Bhaissou	BB	
Don A. Tio	DA	
David Emerald	DE	DEMERALD
Dan Nishiga	DN	DNISHIGA
David Sanjos	DS	DSANJOS
Kathryn Winer	KW	
Peter Louder	PL	
Rhonda Barnes	RB	
Ronald Walters	RW	
Susan Prommer	SP	
WEB sales	WEB	

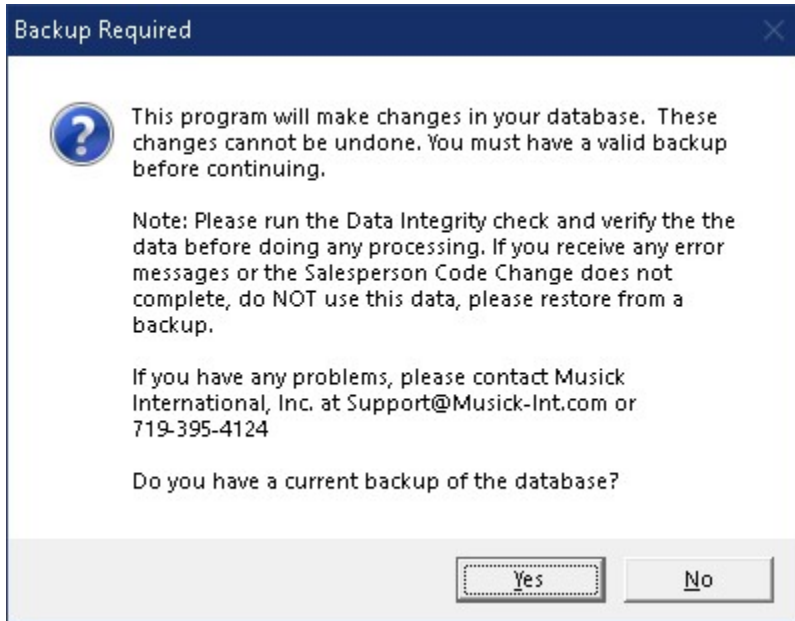
Change Salesperson Codes

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Sage 300

Enter the “New Code” for each salesperson. Salesperson Codes may contain uppercase letters and numbers. Symbols and spaces are not allowed. Once the New Codes are entered, click the “Change Salesperson Codes” button to process the changes.

At this point a prompt is displayed to verify a backup has been made:



The “Salesperson Code Change” will spin through the database and make all the required changes. Once the process has completed, the following message will display:

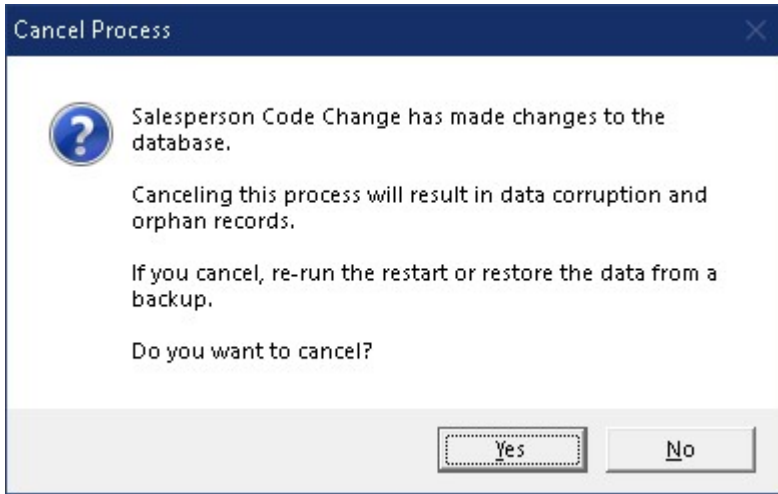


Verify the Database Before Starting Data Entry

There are factors beyond the control of the Salesperson Code Change. We do our best to anticipate and trap various issues, but a quick validation of Accounts Receivable and Order Entry data will ensure the process completed properly. Run the Sage 300 AR & OE Data Integrity as well as various reports to verify the accuracy of the changes made.

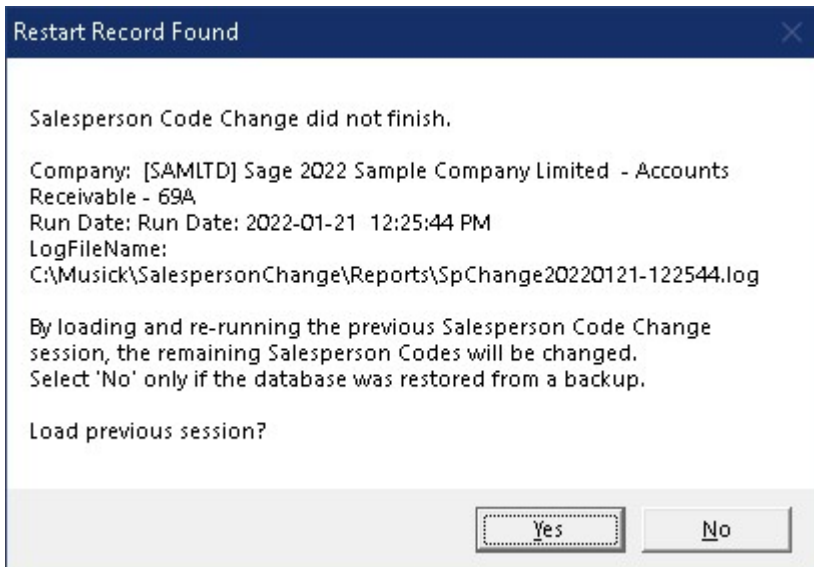
Canceling the Process

If you need to cancel the run for any reason, the utility will display this message:



Restart Found

When the Salesperson Code Change is canceled or interrupted, the following message will display:



It is recommended that you select “Yes” to reload the previous session and complete the process. As long as no changes have been made to the database, re-running the restart information will complete the Salesperson Codes previously in progress. Selecting “No” should only be considered if the database was restored from a backup, otherwise, some tables will have the new Salesperson Code and other tables will have the original code.



Thank you for selecting Musick International, Inc.

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