Card ID Change Utility

Version 7.1.0

By Musick International, Inc.

Overview
The Card ID Change utility changes one or more Card IDs throughout the Sage 300 database. The Card ID may be renumbered, deleted and/or renamed on the preview screen before actually changing the Card ID.

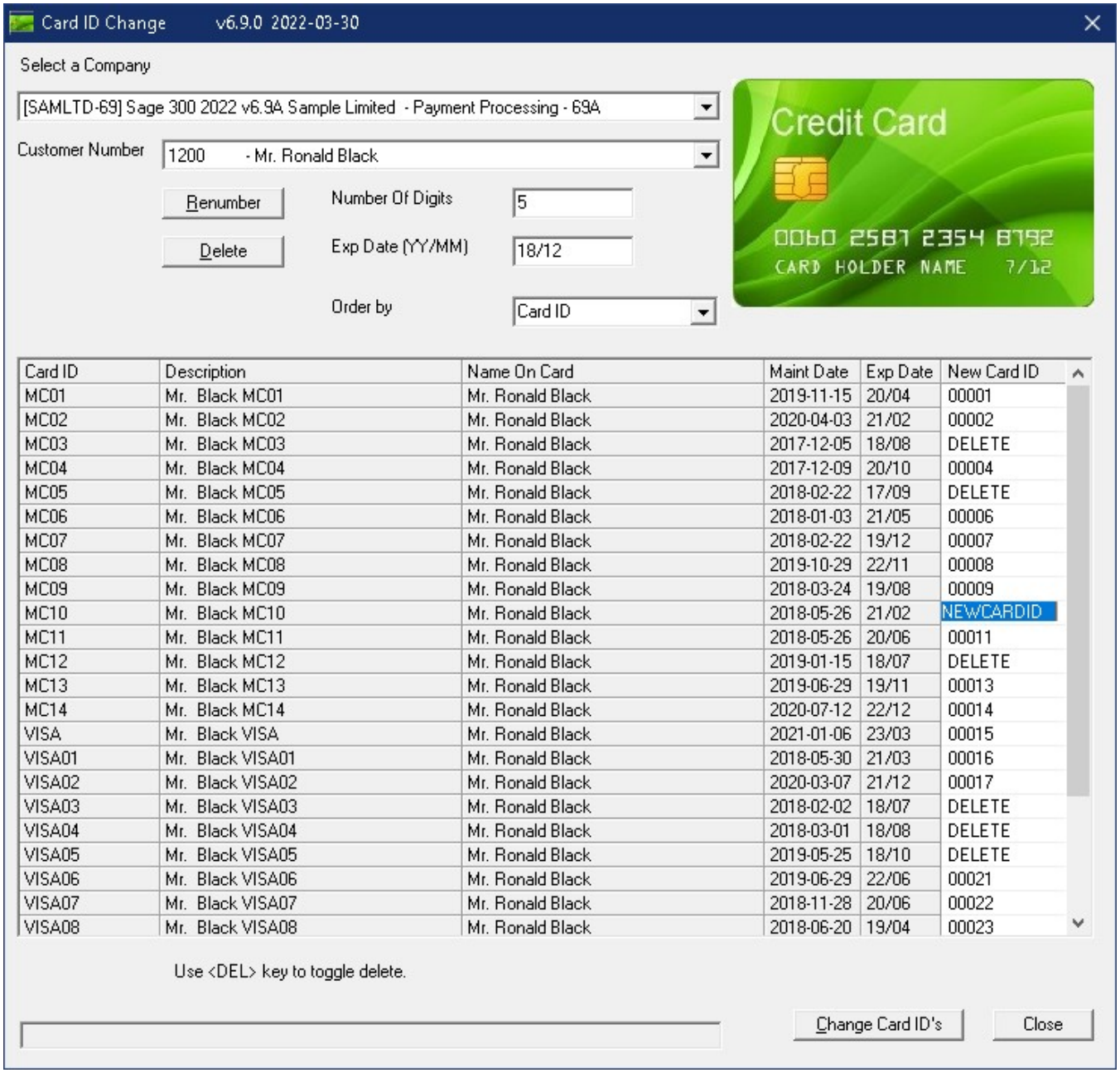
Compatibility
Musick International products are compatible with current and recent versions of Sage 300. To verify compatibility to Sage 300 and third party products, please check our website (www.Musick-Int.com) or email Sales@Musick-Int.com. It includes both Sage Payment Processing and Order Entry.

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 "CardIDChangeInstall.exe". We recommend running the install using "Run as administrator".

Connect FixIT Professional or DataCHECK
The Card ID Change requires a FixIT or DataCHECK connection to the company database. If the database has not yet been defined, start FixIT 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 Card ID Change
Launch the CardIDChange.exe from "Start" – "Programs" – "Musick International" – "Card ID Change".

The utility's main window looks like this:



Select the company from the drop down list.

Select the Customer Number from the drop down list.

The Card ID grid is displayed showing all of the credit cards for this customer. Each credit card is displayed with the Card ID, Description, Name on Card, Maintenance Date and Expiration Date. The order of the credit cards maybe changed by changing the "Order by" drop down list. The "Order by" is available for any of the columns in the Card ID grid.

To renumber the credit cards, click on the “Renumber” button. This will update the “New Card ID” column with numeric sequence. The width of the sequence number is determined by the “Number of Digits” field. The maximum number of characters in the Card ID field is 12.

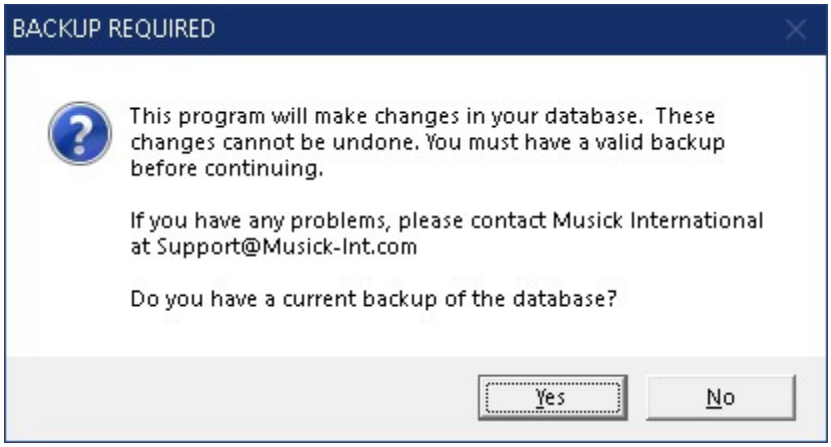
To rename a specific Card ID, simply type the new Card ID into the column. The Card ID field allows a maximum of 12 alpha/numeric characters.

Card ID Change allows two methods for deleting credit cards. To manually mark a credit card to be deleted, simply highlight the credit card line and press the “Delete” key on the keyboard. To deselect the credit card, press the “Delete” key again. To automatically mark expired credit cards for deletion, change the “Exp Date (YY/MM)” and click the “Delete” button. All of the credit cards with an expiration date less than or equal to the “Exp Date (YY/MM)” field will be marked for deletion.

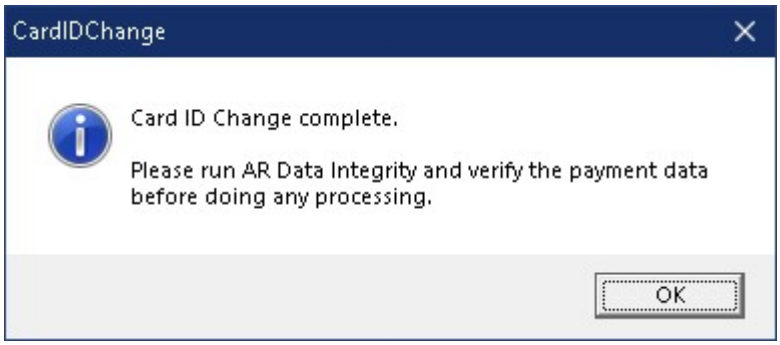
Credit cards that have a blank “New Card ID” will not be changed or deleted.

Once all of the credit cards have been updated in the Card ID grid, click the “Change Card ID’s” to update the Sage database with the changes.

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



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



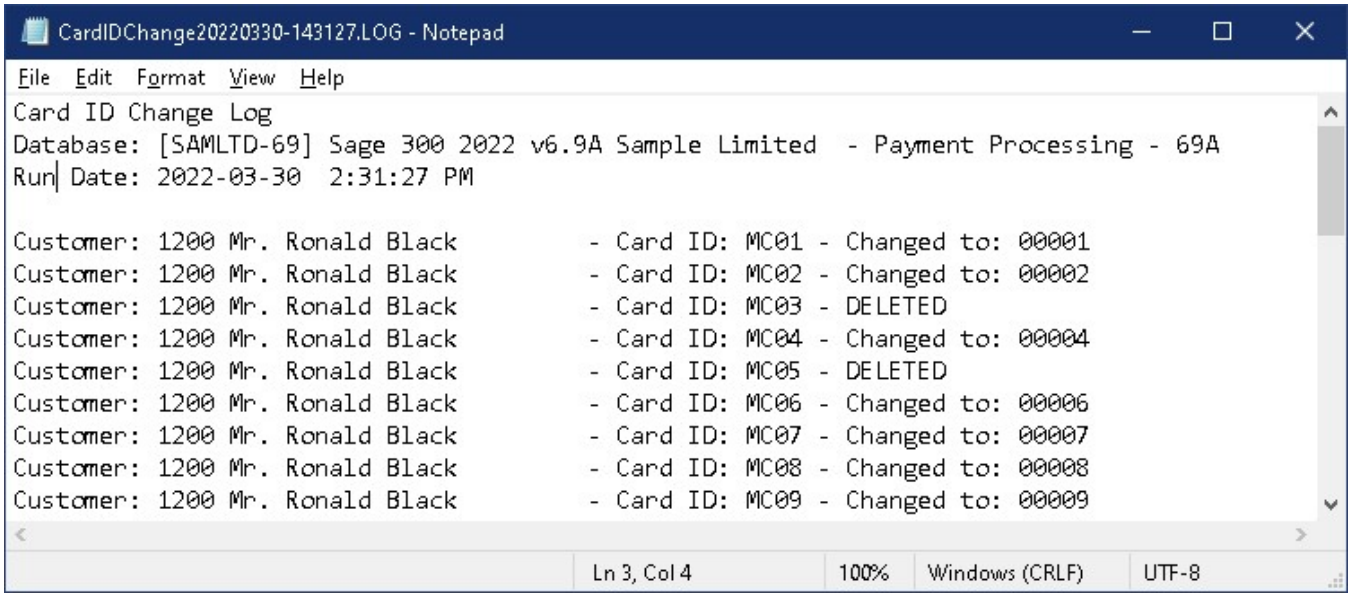
Verify Accounts Receivable Before Starting Data Entry

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

Clicking "OK" will display the log file of changes.

Log File

The Card ID Change generates a complete document of each run. The audit files are located in the directory where Card ID Change is installed. The file is identified by "CardIDChange" followed by the date and time of the run (ex: CardIDChange20220330-143127.LOG). Here is a sample log file:



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Card ID Change Log
Database: [SAMLTD-69] Sage 300 2022 v6.9A Sample Limited  - Payment Processing - 69A
Run Date: 2022-03-30  2:31:27 PM

Customer: 1200 Mr. Ronald Black         - Card ID: MC01 - Changed to: 00001
Customer: 1200 Mr. Ronald Black         - Card ID: MC02 - Changed to: 00002
Customer: 1200 Mr. Ronald Black         - Card ID: MC03 - DELETED
Customer: 1200 Mr. Ronald Black         - Card ID: MC04 - Changed to: 00004
Customer: 1200 Mr. Ronald Black         - Card ID: MC05 - DELETED
Customer: 1200 Mr. Ronald Black         - Card ID: MC06 - Changed to: 00006
Customer: 1200 Mr. Ronald Black         - Card ID: MC07 - Changed to: 00007
Customer: 1200 Mr. Ronald Black         - Card ID: MC08 - Changed to: 00008
Customer: 1200 Mr. Ronald Black         - Card ID: MC09 - Changed to: 00009
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Thank you for selecting Musick International, Inc.

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