

Salesperson Code Change Utility

By Musick International, Inc.

Overview

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

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 <u>Sales@Musick-Int.com</u>.

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:



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.

If any errors were encountered during the process, the following message will display:



Examine the log file to view the details of the error(s).

Log File

The Salesperson Code Change generates a complete document of each run. The audit files are located in the directory where Salesperson Code Change is installed. The file is identified by "SalespersonCodeChange" followed by the date and time of the run (ex: SalespersonCodeChange2021-02-18 15-38-25.Log). Here is a sample log file:

Salesperson Code Change Log Database: [SAMLTD] Sage 2022 Sample Company Limited - Accounts Receivable - 69A Run date: 2022-01-21 10:56:22 AM

David Emerald - Original #: DE - Changed to: DEMERALD Dan Nishiga - Original #: DN - Changed to: DNISHIGA David Sanjos - Original #: DS - Changed to: DSANJOS

Run finished: 2022-01-21 10:56:23 AM Salesperson Code Change complete. Please run Data Integrity and verify the data before doing any processing.

Canceling the Process

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

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?	Salesperson Code Change has made changes to the database.	
	Canceling this process will result in data corruption and orphan records.	
	If you cancel, re-run the restart or restore the data from a backup.	
	Do you want to cancel?	
	<u>Yes</u> <u>N</u> o	
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Re-run the restart or restore this data from a backup. Do NOT do any processing in this database.

<u>Restart Found</u> When the Salesperson Code Change is canceled or interrupted, the following message will display:

OK

Restart Record Found	×
Salesperson Code Change did not finish. Company: [SAMLTD] Sage 2022 Sample Company Limited - Accounts Receivable - 69A Run Date: Run Date: 2022-01-21 12:25:44 PM LogFileName: C:\Musick\SalespersonChange\Reports\SpChange20220121-122544.log By loading and re-running the previous Salesperson Code Change session, the remaining Salesperson Codes will be changed. Select 'No' only if the database was restored from a backup. Load previous session?	
<u>[Yes</u>] <u>N</u> o	

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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