Unit of Measure Change Utility

By Musick International, Inc.

Overview
Units of measure in Sage 300 Inventory Control item maintenance are one of those things that seem to propagate themselves. Over time, users tend to add units of measure accidentally. These units of measure represent the same count, but have different names. Examples of these are: "Each", "Ea", "each", "Ea." etc... The Unit of Measure Change Utility can assist in restoring your inventory to consistent titles. Use the Units of Measure change to upper case all units of measure or rename units of measure. All units of measure are replaced in all tables in Inventory Control, Purchase Orders and Order Entry.

This utility will also resolve the error message "INSERT (error = 127, native code = 2677)" when loading data into Microsoft SQL Server. Simply let the Unit of Measure Change spin through the database and upper case all of the units of measure.

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. All of the core modules are supported: Accounts Payable, Accounts Receivable, Inventory Control, Order Entry, Purchase Orders, plus Service Manager and Sales History.
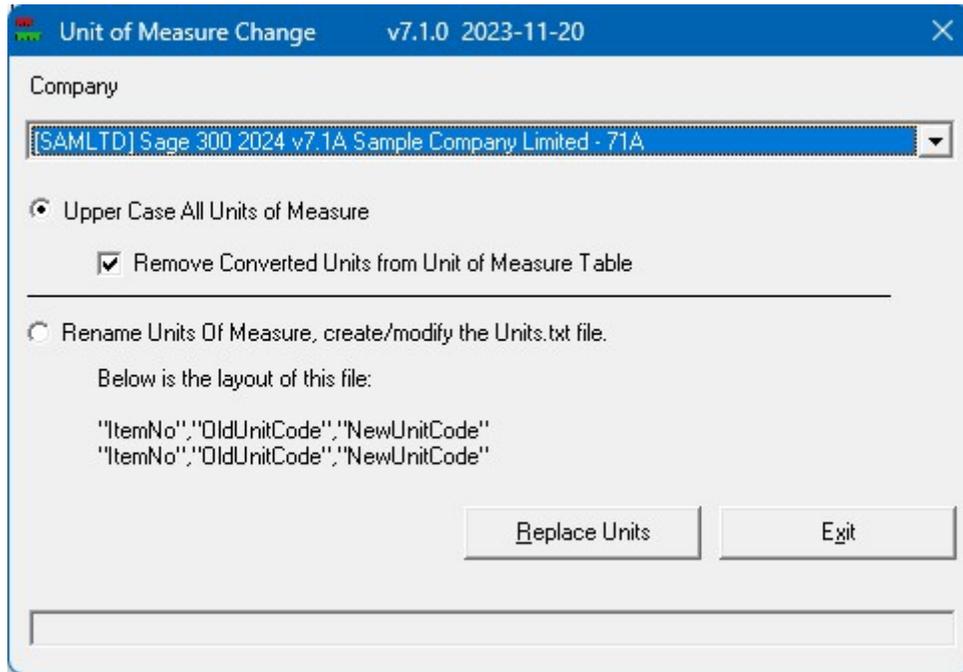
Installation
Download and install the latest release of either FixIT or DataCHECK. In the folder where FixIT is installed (default is C:\FixITcc), run the install program "UnitChangeInstall.exe". We recommend running the install and application using "Run as Administrator".

Connect FixIT or DataCHECK
The Unit of Measure Change requires the database connection to be created in FixIT or DataCHECK. 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.

Running Unit Of Measure Change

Launch the UnitChange.exe from "Start" – "Programs" – "Musick International" – "Unit Of Measure Change".
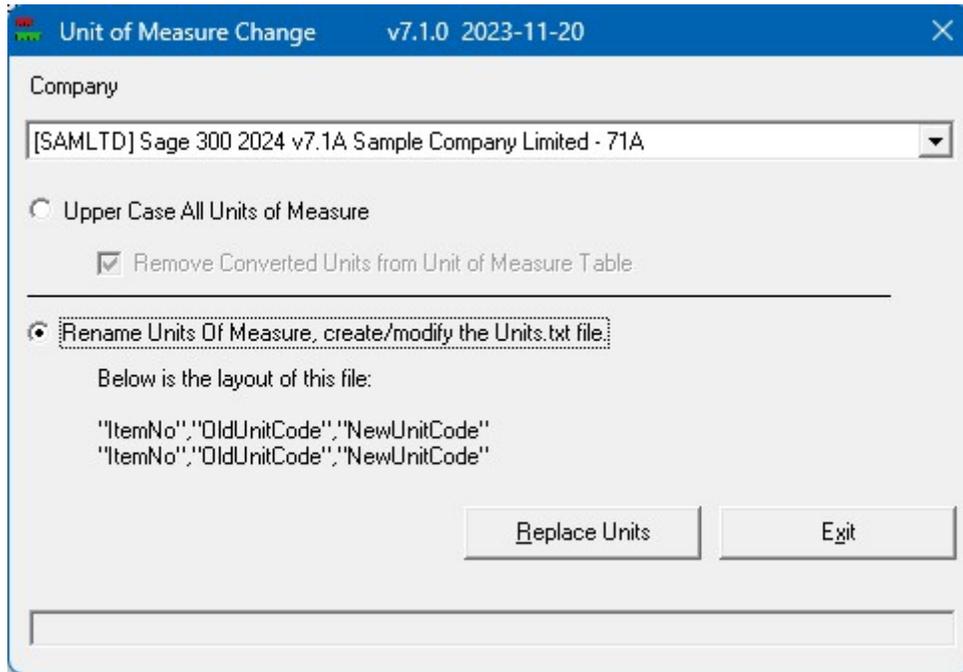

Select the company from the drop down list at the top of the screen. If your company is not in the list, verify the company database is available in FixIT or DataCHECK.

Specify "Upper Case All Units of Measure" or "Rename Units Of Measure".
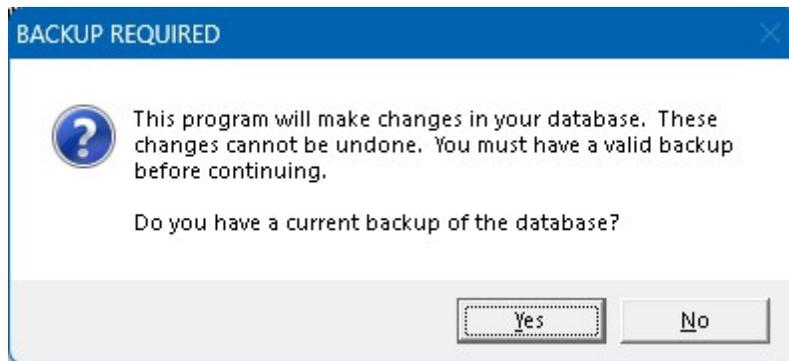
The "Upper Case All Units of Measure" option will go through the entire Sage database and change all units of measure to be upper case. Example: "each", "Each" and "EAch" will all become "EACH".

We recommend checking the box for "Remove Converted Units from the Units of Measure Table". This will remove "each", "Each" and "EAch" from the units table. Otherwise, the units will still be available for future use on an item.

The "Rename Units of Measure" requires the "Units.txt" file to be created in the same folder where the Unit of Measure Change is installed. Use this file to identify the new unit of measure for each item number and unit of measure to change. Please refer to the next section on how to create this file.
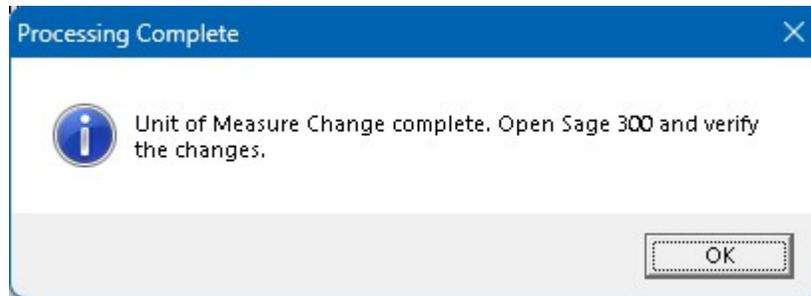

Clicking on "Replace Units" causes the following "Backup Required" prompt to display.

Once a backup of the data has been made, click "Yes" to proceed.

The Unit of Measure Change will spin through the database and change all of the units of measure.

Once the process has completed, the following message will display:

After clearing this message, the Unit of Measure Change Audit Log will display.

How to Create the "Units.txt" File
The "Units.txt" file is a comma separated file. The item number is unformatted. Double quotes are not required. Only 1 item and unit of measure per line.

The format of the "Units.txt" file is:
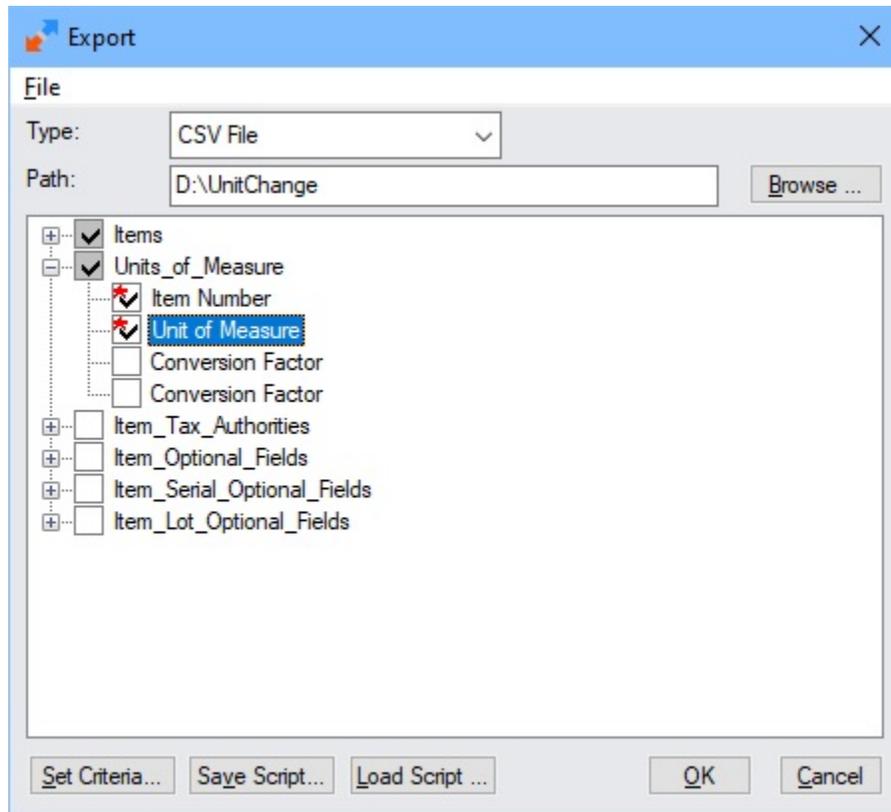"ItemNo","OldUnitCode","NewUnitCode"
"A11030","Ea.","Each"
"A11050","Ea.","Each"
A11030,Case,Box
A11030,Crate,Pallet

To create this file and populate it with your inventory items and unit of measure, start Sage 300 and open the "Items" form from the "I/C Items and Price Lists" menu. On this form, select "File" (at the top of the screen) and "Export…". On the "Export" screen select "CSV File" for the "Type". For the "Path" enter the path to the Unit of Measure Change folder and do not specify a file name. Un-check all of the boxes on this screen (hint: highlight each line and press the space bar). Next, expand the first line ("Items") and only check the box next to "Unformatted Item Number". Minimize "Items" and expand the next line "Units_of_Measure". Check the boxes next to "Item Number" and "Unit of Measure".

This is what the screen should resemble:

Click "OK" to export all of the items in inventory.

Close the screen indicating the number of items exported.

In the folder specified in the "Path", open the "Units_of_Measure.csv" file using Microsoft Excel. Column "A" contains the unformatted item number and column "B" contains the current unit of measure for this specific item. In column "C" add the new unit of measure for each item. To initialize all of the cells in column "C", type the default value in the first row of column "C". Then grab the square on the lower right corner of the cell and drag to the end of the item list.

Any item with the correct unit of measure can simply be deleted from the file. Highlight the row, then right click and select "Delete".

To combine units of measure for an item, simply specify the same new unit of measure for each of the existing units of measure. Here is an example:
"A11030","Ea","Each"
"A11030","Ea.","Each"
"A11030","EA","Each"

Note: the Unit of Measure Change does not validate the conversion factor associated with measure. Care should be taken to combine units of measure that have a common conversion factor.

Once all of the changes have been made, save the workbook as "Units.csv". When prompted "Do you want to keep the workbook in this format?", select "Yes".

Rename the "Units.csv" file to "Units.txt". Make sure this file is in the same folder as the UnitChange.exe. This is how Unit of Measure Change will locate the file.

<u>Unit of Measure Change Log</u>
After completing the Unit of Measure Change, the log will display showing the changes made to the company. Here is an example:

Unit of Measure Change Log
Database: [SAMLTD] Sage 2024 Sample Company Limited - 71A
Run Date: 2024-01-17 4:55:17 PM
   Processing - Rename units of measure from Units.txt file
   Checking: AP71A
   Checking: AR71A
   Checking: IC71A
      Checking Item: A14000 - Unit: Box -> BoxCar
      Checking Item: A14000 - Unit: Carton -> CarToon
      Checking Item: A11030 - Unit: Case -> PK/24
      Checking Item: A11030 - Unit: Dozen -> DOZEN-12
      Checking Item: A14000 - Unit: Dozen -> Doz.
      Checking Item: A11030 - Unit: Ea. -> EACH
      Checking Item: A14000 - Unit: Ea. -> EACH
   Checking: OE71A
   Checking: PO71A
Run finished: 2024-01-17 4:55:20 PM
Unit of Measure Change complete.   7 item/units changed.

<u>Unit of Measure Error Log</u>
If any errors occurred during the update of the units of measure, the UCError.log will contain information regarding the errors. This file is located in the Reports folder where the Unit of Measure Change is installed.

<u>Verify the Database</u>
There are factors (such as data corruption) beyond the control of the Unit of Measure Change. We do our best to anticipate and trap various issues, but a quick examination of the Sage 300 data will ensure the units of measure are correct. Run the Sage 300 Data Integrity Check as well as various reports to verify the accuracy of the changes.

Thank You for selecting Musick International, Inc.

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