### **Rename Material Codes**

### **Overview:**

This document describes how to rename material codes in OPTO. Material codes may need to be renamed due to Management requests, changes to a supplier, codes entered incorrectly, etc. To be able to utilise this function the USER will need to have permission and an internal employee password.

### **To Set-Up the Permissions**

From the OPTO ribbon, select the 'Resources' tab and **click** on the 'New/Edit Employee' icon to pen the 'Employee Details' window. **Click** in the *Emp No* field type in the required employee number or **press** <**F2**> and select the employee from the pop-up list and **click** <u>OK</u>. **Press** <**TAB**> to display the details for the employee, **click** on the 'Security' tab to open and **click** in the required boxes (circled below) to tick.

Employee		
Emp No: Employee Name or Surnan	ne: Given Name: Mi	iddle Name: Initial: Current Shift: 🖉
2 v Moreton	Larry T	Shift 1 🚽 1
Details More Info Security Emp Sche	d Pictures Notes QMS	
Signature Purchase	Check - Clock Time	Send Production Order -> History
🗹 Change Client Code	🗹 Check - Jobs	Back from History <- Production Order
🗹 Change Supplier Code	🗹 Despatch Awaitin 🗹 Add Transpor	t 🗹 Cancel - Production Order
Show Financial History (Clients)	Change Revision Tick in Parts	Send Client Order -> History
Show Financial History (Suppliers)	🗹 Change Material Code	Back from History <- Client Order
🗹 [3] Hide Despatch Amount	Delete Material	[3] Credit Orders and Purchase , Orders Only
🗹 Change Part Code	🗹 Change Material Stock	Cancel - Client Order 🛛 Return Goods
🗹 Delete Parts	Lock/Unlock Parts for Editing	🗹 Create Invoice 🗹 Change Credit, Desp Stop
🗹 Change Parts Stock	Save Changes to Locked Parts	Show Job Cost Screen ON-Hold (Clt)
🗹 Create New Part Code	Substitute Items	🗹 Edit History Order Book 🛛 ON-Hold (Prd)
Create New Material Code	Update Parts Cost Price	Change Part Production Stop
Password Despatch (Production)	Allow Part Sell Price change (setup Pa	aram Client) 🗹 Show All Doc's (Incl No Public Access)

**Click** on the 'Details' tab and create an internal employee password by typing in the **Password** field (circled below). This password is different from the password used to log-on to iTMS and must be unique to that employee.

Employee					
Emp No: Employee Name or	r Surname:	Given Name:	Middle Name:	Initial: Current Sh	ift: 🖉
2 👻 Moreton		Larry	Т	Shift 1	- 1
Details More Info Security En	mp Sched Pictures Not	tes QMS			
Group Pos: 30 - SU	JPERVISOR			✓ Is Active	
Emp Start Date: 05	5/04/10 10023	Sales Team:	▼ No	Lunch - Auto	
Position: 3510 Superv	visor Fabrication		No	Multi On Only (	M. H. O. P. Off
Acting Position:				Rounding	Multi On & Off
Password: ••••	Div: 0001 👻			Round 15 Min	> <
	•			Web Despatch	

**Press <F9>** to save and continue.

# **To Rename Material Codes**

From the OPTO ribbon, select the 'Inventory' tab and **click** on the 'Utilities' drop menu then select the 'Rename Codes' option from the list to open the 'Rename Codes' window.



There are 2 methods to rename the material codes -

In the 'Rename Codes' window, enter your employee password and **click** on the *Material* radio button.

To Rename a Single Material Code – Ensure the *Materials* radio button (circled below) is selected. Click in the *From Existing Code* column, type in an existing code, press <TAB> and select the materials to be renamed from the pop-up list and then click <u>OK</u>. Press <TAB> to move to the *To New Code* field, type in the new code, press <TAB> to move to the *New Description* field and enter a new description if required. Click on the <u>OK</u> button to run the renaming.

💷 Ren	name Codes			- • •
Pas	Update:	laterials Replace Partial Code Pos 1 Len 3	With ACB G Update	💀 Query 🔎 Search
- 1. lr	nport List		😰 😔 Refresh	🖶 Print 🕞 OK
	From Existing Code	To New Code	New Desc	ription
1	MAT200	MAT200	Material 200 NSTK SS5mm	
2	MAT2000	MAT2000	Material 200 NSTK SS5mm	
3	MAT250	MAT250	MAT250 NSTK 8mm	

 To Rename Multiple (Partial) Material Codes - Click on the 'Query' button and select the required saved query and click <u>OK</u>.

swoi		odate: Parts 💿 M	laterials	Replace Partial Code Pos 1 Len 3	With ACB	🕞 Upda	te	🔀 Query 🔎 Sear
npor	t List				i	😰 😁 Refre	sh	🖶 Print 🛛 🕞 OK
м/ Ф (	From Existin AT200 Saved Query	g Code	MAT200	To New Code	Material 200	N NSTK SS5mm	lew Descript	ion X
		Data		Query Name		Num Keys	Stocktake	OK
	Table Name	Date					•••••••••••••••••••••••••••••••••••••••	
1 2 3	Table Name MATERIAL MATERIAL MATERIAL	18/10/2017 18/03/2016 03/07/2015	ACTIVE SUB-50 INV MAT			100 1 73	No No No	Cancel

# Enter the required data in to the 'Replace Partial Code' fields: -

**Pos** – Defines the starting position in the string to change.

Len – Defines the length of the string to change.

With – Defines the new characters.

🔳 Ren	ame Codes					[	- • •
Pass •	sword Update: Parts  Mat	erials	– Replace Partial Code Pos 1 Len 3 V	Vith ACB	🕒 Update	💽 Query	🔎 Search
				<b>2</b>	😌 Refresh	🖶 Print	🕞 ок
1 2	From Existing Code MAT2000 MAT250	ACB2000 ACB250	To New Code	Material 200 NST MAT250 NSTK 8m	New Descri K SS5mm m	iption	

**Click** on the 'Update' button, if the new codes are not suitable, you can edit by repeating the process or close the window to cancel. **Click** the 'OK' button to run the renaming of material codes when satisfied (see below),

Ren	ame Codes			
Pass •	sword Update: O Parts   M	Replace Partial Code laterials Pos 1 Len 3	With ACB G Update	🐻 Query 🔎 Search
l. In	1port List		📽 🕞 Refresh	🖶 Print 🕞 OK
1 2	From Existing Code MAT2000 MAT250	To New Code ACB2000 ACB250	New Desc Material 200 NSTK SS5mm MAT250 NSTK 8mm	ription

The Re-naming process is now complete, close the window when finished.