

## Changing Agency Name

File these instructions in the MACS Software User's Manual

### Requirements

Operating System: Any  
MACS Version: 3.40 or higher  
MACS Modules: all

### Situation

User needs to change agency name in MACS.

### Solution

- Contact MACS Client Services to order a license for the new agency name (free for MACS/care+ members.)  
Old Agency Name: \_\_\_\_\_  
New Agency Name: \_\_\_\_\_
- Obtain a new Permanent Authorization Code:  
New Permanent Authorization Code: \_\_\_\_\_
- Go to AGENCY INFORMATION RECORD [3.1]. The Installation Information Record screen will appear with your specific agency information:

SF\3.1	**INSTALLATION INFORMATION RECORD**	MM/DD/YY
	CHANGE	
1	INSTALLATION NAME	Any Sales Agency, Inc.
2	SERIAL NUMBER	1234M67
3	INSTALLATION DATE	031486
4	NUMBER OF TERMINALS	2
5	NUMBER OF PRINTERS	5
6	MATRIX PRINTER? (Y/N)	Y Y Y Y Y _ 1 2 3 4 5 6
7	MULTI-COMPANY? (Y/N)	Y
Enter Field No. to Change, <F4>End		

- Select field 1 to change. Type in your new agency name and press <Enter>.

- Press <F4> to end. The Update Installed Module Table Screen will appear with your settings:

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                Any Sales Agency, Inc.
                SERIAL NUMBER: 1234M67

                UPDATE INSTALLED MODULE TABLE
    _  1) BASE SYSTEM                                0 15)
    _  2) MULTIUSER SYSTEM                          _ 16) WAREHOUSE PROCESSING      [WH]
    _  3)                                             _ 17) BILLING/ACCTS RECEIVABLE [BA]
    _  4)                                             0 18)
    _  5) QUOTES [QU]                               _ 19) MAILING LABEL SOFTWARE    [ML]
    _  6) SALES ORDER TRACKING [OT]                 _ 20) DATA EXCHANGE SYSTEM    [DES]
    _  7) SALES INVOICE TRACKING [IN]               _ 21) SPREADSHEET EXPORT      [SE]
    _  8) SALES COMMISSION TRACKING [CO]            _ 22) SALES IMPORT             [SI]
    _  9) SALES CALL TRACKING [CA]                  _ 23) ACCOUNT INFORMATION MGR. [AIM]
    0 10)                                           _ 24) PRODUCT IMPORT/EXPORT   [PI]
    _ 11) SALES ANALYSIS REPORTS [SA]               0 25)
    _ 12) SALES FORECASTING [FO]                    0 26)
    _ 13) MANAGEMENT INQUIRY [MI]                   0 27)
    _ 14) MANAGEMENT REPORTS [MR]                   0 28)

    ARE THE CURRENT SETTINGS CORRECT? (Y/N)
    
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- Answer **Y** to the ARE THE CURRENT SETTINGS CORRECT? (Y/N) prompt.
- Type in your new Permanent Authorization Code when prompted. All MACS reports will now reflect the new agency name.
- Refer to the following memos for additional areas to be reviewed for changes:

Memo	Description	Module Required
183	Changing Agency Name/Address on Orders	Order Tracking
184	Changing Agency Name/Address on Quotes	Quotes
185	Changing Agency Name/Address on Releases	Warehousing
186	Changing Agency Name/Address on Invoices/Memos	Billing/AR