



Create Company

User Guide

Important Notice

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Create Company User Guide

Summary

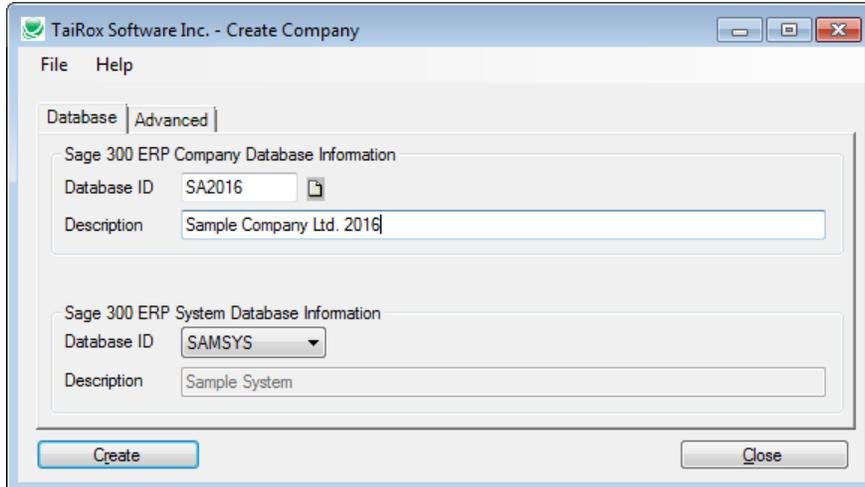
As a Sage 300 user you may have the occasional need to create a new company. Create Company provides a way for you to do this even if you are not highly technical – you simply type in a code and a name for the company and Create Company does the rest. IT staff can block Create Company's operation by restricting database creation rights. For these tightly controlled environments, Create Company becomes a tool for IT staff, rather than for financial users. Create Company only supports creating Sage 300 SQL-Server databases.

Create Company creates a brand new “blank” company. It can be used in conjunction with TaiRox Copy Company, which allows users to copy the structure of an existing company, while eliminating any transactional data. If you wish to copy an existing company, Create Company, documented here, is the first step in the process.

Overview

Sage 300 provides a general set of tools to create companies. The tools will create an initial “system database” (containing currency codes and other information) and an initial “company database” (containing accounts, customers, vendors, etc.). Multiple company databases may be linked to the same system database. Multiple system databases can be created. Each and every database may have different passwords and authentication methods.

Create Company does something much simpler – it creates a new company database. For most customers, this will be as simple as filling in two fields (Database ID and Description) and clicking a Create button.



Is it really that simple? For most customers, the answer is, “yes.” Even if advanced settings are required, Create Company will still save lots of time. A few limitations are identified here.

Firstly, Create Company will create a new company database. It will not set up an initial system database. If you are already running Sage 300, then this is not an issue – the initial system database must already exist.

Secondly, for those customers with more than one system database – a questionable setup for all but the larger, more complex environments – you must select a system database from the drop-down list. If there is only one system database – by far the most common situation – the drop-down list will be disabled.

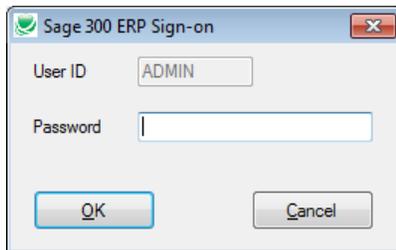
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The final limitation has to do with “authentication”. If you access data using “Windows Authentication”, nothing is required. If you access data using “Server Authentication”, you will need to enter the database user name and password on the Advanced tab. That user must have sufficient rights to create data and modify data. If you do not know what this means, just try creating a company with the default settings.

Running Create Company

After initial setup, Create Company can be run like any other Windows application – from the Programs menu, from the Windows desktop or from the Sage 300 desktop.

Once launched, Create Company will ask you to Sign-on as the Sage 300 administrator. You **MUST** know the password. It may be blank or “admin”. Create Company will then inspect the installation to see which database is installed and how many system databases are in use.



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Running Create Company (continued)

You are now presented with a blank screen and need to enter a Database ID (a 6 character code Sage 300 uses to identify the company) and a descriptive name. If there is more than 1 system database in use, a drop-down is enabled so that you can make a choice. Note: The new database will be created using the same collation sequence and recovery model as the system database. Only in very unusual circumstances should the collation sequence be anything other than **Latin1_General_BIN** and in all cases the system and company databases should have matching collation sequences. For most Sage 300 installations, the recover model should be **Simple**.

TaiRox Software Inc. - Create Company

File Help

Database | Advanced |

Sage 300 ERP Company Database Information

Database ID

Description

Sage 300 ERP System Database Information

Database ID SAMSYS

Description Sample System

Create Close

Filling in the screen with values such as those below and pressing the Create button will create a new company, using Windows authentication (or using the most recent settings). If you know that Windows authentication will not work, or have tried it and it does not, you will need to click on the Advanced tab.

TaiRox Software Inc. - Create Company

File Help

Database | Advanced |

Sage 300 ERP Company Database Information

Database ID SA2016

Description Sample Company Ltd. 2016

Sage 300 ERP System Database Information

Database ID SAMSYS

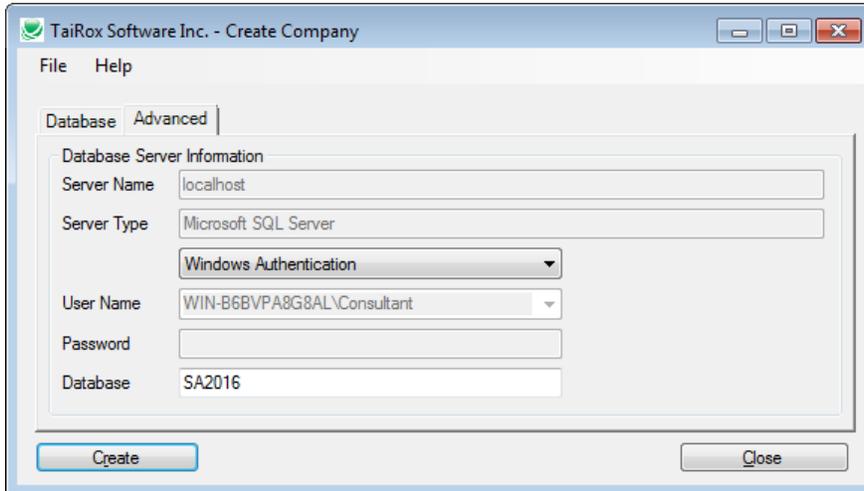
Description Sample System

Create Close

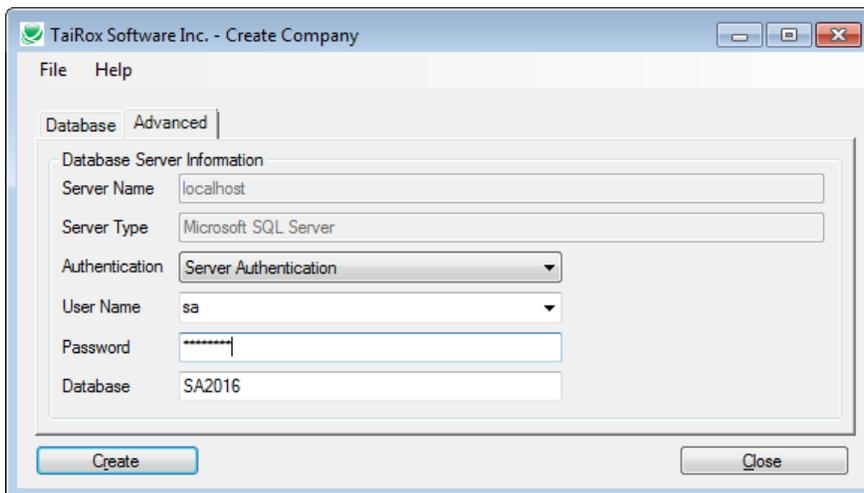
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Running Create Company (continued)

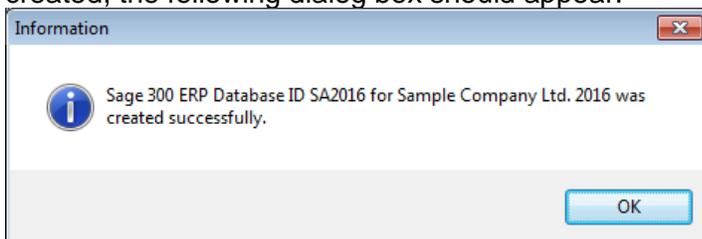
The Advanced tab looks like this with default settings. To change from Windows to Server authentication, use the drop-down control.



When using Server authentication, you will need to enter a user name and password with sufficient rights. The default administrator name is "sa". If another user name is used, it must have sufficient rights to create a database and it will become the owner of the new database.



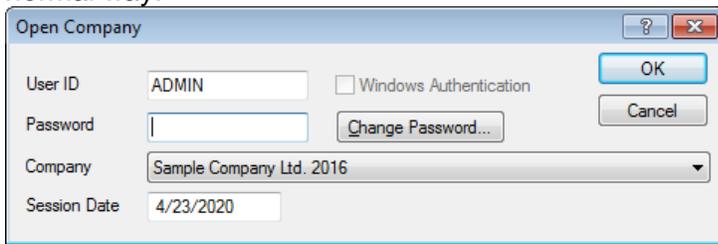
When you press the Create button, it will take a few seconds to create the new database. Once created, the following dialog box should appear:



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Running Sage 300 After Create Company

The new company created will appear in the drop-down list when you log onto Sage 300 in the normal way:



Open Company

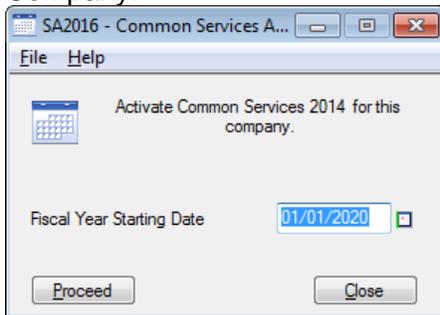
User ID: ADMIN Windows Authentication

Password:

Company: Sample Company Ltd. 2016

Session Date: 4/23/2020

The first time you open the new company, you will be asked for a fiscal year start date and Sage 300 will “Activate Common Services”. This is the normal way initial data is created for the new Company.



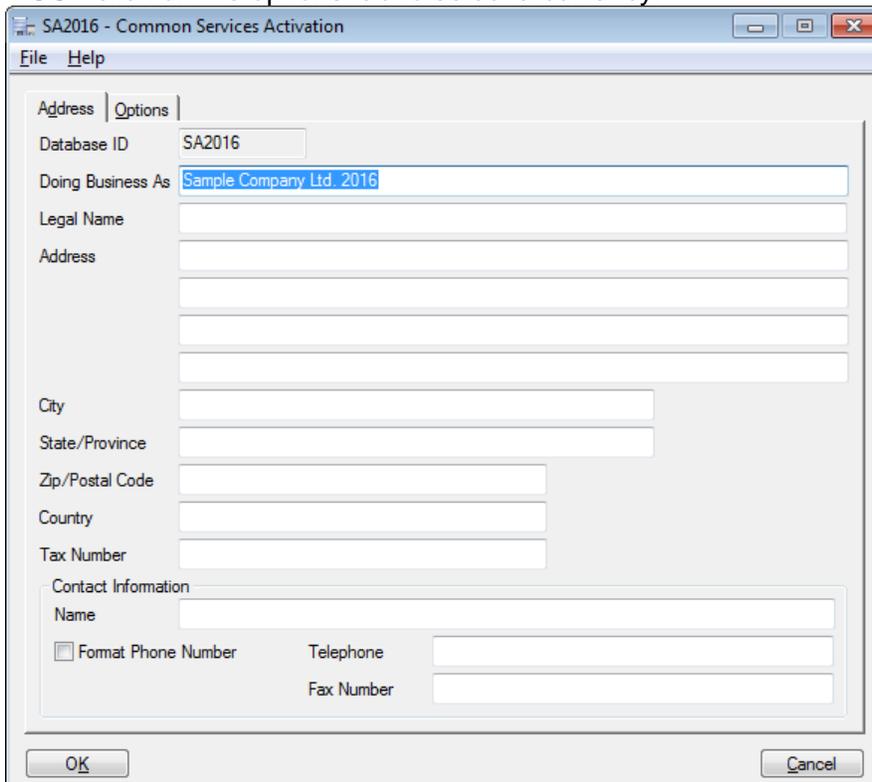
SA2016 - Common Services A...

File Help

Activate Common Services 2014 for this company.

Fiscal Year Starting Date: 01/01/2020

After activation, a dialog will appear. You can enter address information (or not). However, you MUST click on the options tab to select a currency.



SA2016 - Common Services Activation

File Help

Address Options

Database ID: SA2016

Doing Business As: Sample Company Ltd. 2016

Legal Name:

Address:

City:

State/Province:

Zip/Postal Code:

Country:

Tax Number:

Contact Information

Name:

Format Phone Number Telephone:

Fax Number:

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Running Sage 300 After Create Company (continued)

You must select Single or Multi-Currency and which Currency is the functional currency of the company.

SA2016 - Common Services Activation

File Help

Address Options

Number of Fiscal Periods: 12

Locked Fiscal Period: Warning Warning Date Range: 30

Inactive G/L Account: Warning Non-existent G/L Account: Error

Location Type: Location Code:

Country Code: Branch:

Multicurrency

Functional Currency: CAD Canadian Dollars

Default Rate Type: SP Daily spot rate

Gain/Loss Accounting Method: Realized and Unrealized Gain/Loss

Euro

OK Cancel

Now you are at the Sage 300 desktop – with a brand new “blank” company. Sage 300 modules (G/L, A/R, A/P, etc.) must now be activated and set up in the normal way.

Sage 300 ERP - Sample Company Ltd. 2016

File Object View Macro Help

Open Company Page Setup Cut Copy Paste Delete Properties Up One Level View Record Macro Stop Recording Run Macro Edit Macro Website About

Sample Company Ltd. 2016

- Administrative Services
- Common Services
- Visual Process Flows

Sample Company Ltd. 2016 (Administrative Services)

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Dealer: TAIROX SOFTWARE INC
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Administrat... Common Services Visual Proce...

For Help, press F1 NUM 4/23/2020

Running TaiRox Copy Company

Once the Sage 300 modules have been activated for the new company, TaiRox Copy Company can be used to copy the structure of an existing company into the new company.