

TaiRox™ Memo

Creating a New Sage 300 Company (Should you use Copy Company or Export/Import?)

Summary

Copy Company will copy one Sage 300 company's structure to a newly created Sage 300 company without copying transactions. Copy general ledger accounts, customers, vendors, inventory items, employees, recurring entries and financial and operational setup options.

This memo explains the advantages of using Copy Company instead of a time-consuming and error-prone export and import process. The term entity used here corresponds to a table entry (for example, a G/L account or an A/R customer) in the database.

Order Dependencies – Comparison Chart

This chart outlines some of the problems you may encounter when using Export/Import.

Import / Export	Copy Company
You must import modules in the correct order. For example, G/L setup must be imported before you can import A/R setup.	Copy Company creates the entities and setup in the correct module order.
You must import entities in the correct order. For example, you must import G/L account groups before you can import G/L accounts.	Copy Company creates the entities in the correct entity order.
You may have to reorder the lines in an exported file. For example, if GL allocations are turned on and account 100 allocates to account 200, account 200 must exist before account 100 can be added. You may need to sort the exported file.	Copy Company uses a multi-pass strategy to create entities that self-reference. For example, when adding G/L accounts, in pass one, all accounts are added without any allocation. A second pass adds the allocation details.

Data Integrity

Copy Company and Sage's import programs both use Sage 300 "Views" (business objects) to write data to the new company. This guarantees that the resulting entity from every operation will pass a data integrity test.

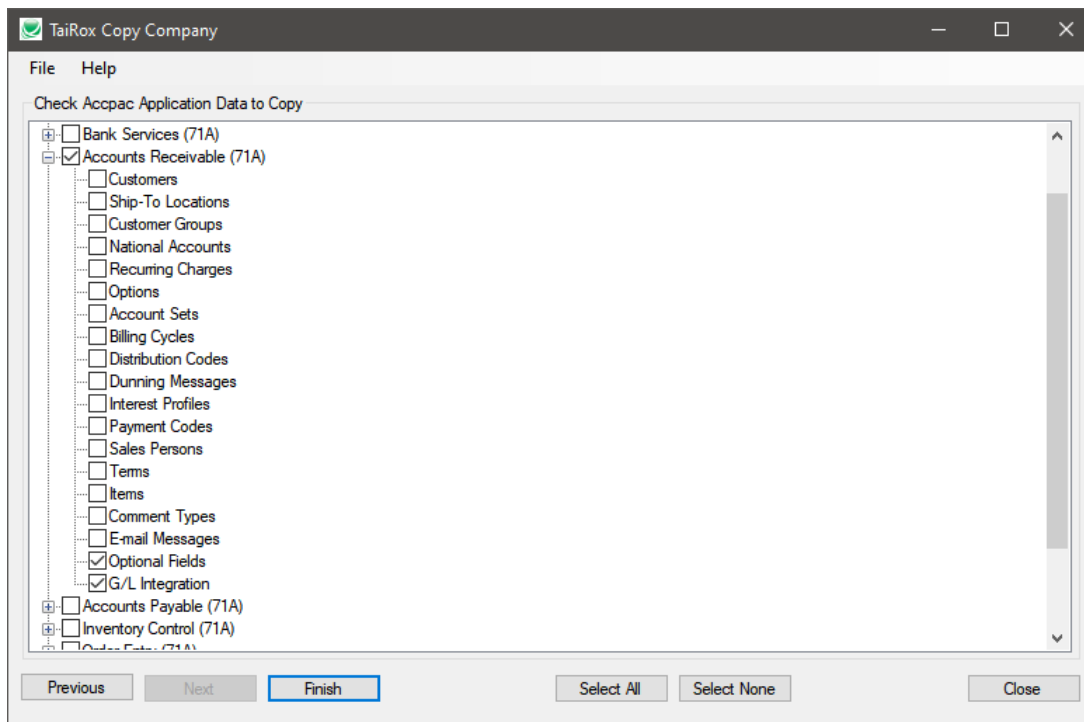
When an entity in the source company has integrity errors, Copy Company can be run again once the source data is corrected. When an import operation fails in the middle of an import file, it may not be clear what to do other than starting over at the first import operation.

Changing The Functional Currency

Do you need to change the functional currency of a Sage 300 company? An appendix in the Copy Company User Guide describes the process involved and how Copy Company can be used.

Special Use of Copy Company – Copying Integration Settings

Occasionally Sage 300 users with multiple active companies (companies with transactions) want to update G/L Integration Settings in the same way across multiple companies without the laborious process of logging into each company to perform the same edits. An appendix to the Copy Company User Guide describes how to do this safely by selecting specific entities in a module, as shown below.



What About Updating Accounts, Customers, etc.?

Copy Company is used to create new companies in a few steps, without a lot of options. The TaiRox Productivity Tools program has several programs that can be used to add or update selected entities in multiple companies. Many options and features are supported and described in the Productivity Tools user guides.

