



Create Company

User Guide

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Important Notice

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Create Company Overview

Create Company provides an easy way to create a new Sage 300 company database 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.

When used with Copy Company, Create Company lets a finance department set up small test databases without involving IT staff or contractors. Copy Company lets you copy the structure of an existing company, while eliminating any transactional data.

In tightly controlled environments, IT staff can block Create Company's operation by restricting database creation rights. For these environments, Create Company becomes a tool for IT staff, rather than for financial users.

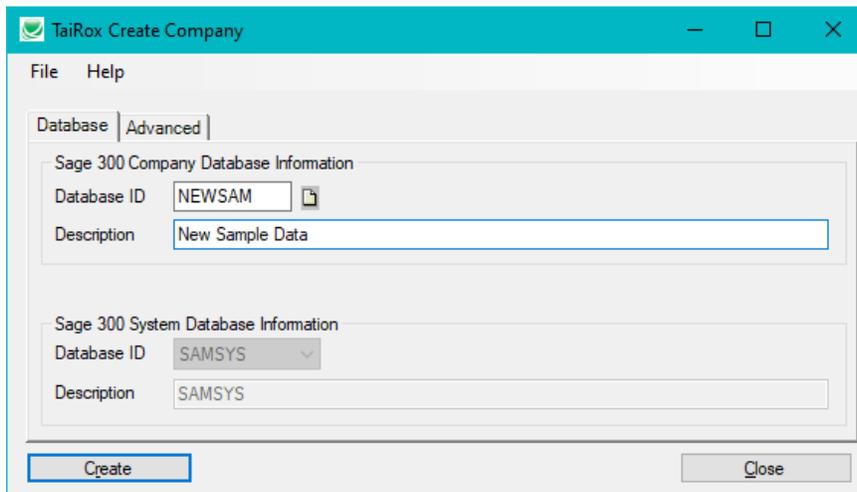
If you wish to copy an existing company, using Create Company is the first step in the process.

Important Note: Some coordination with IT staff or contractors may be required, initially, to provide access passwords and rights. It may also be necessary to adjust backup processes when new production databases are created.

Creates Company Databases Only

Sage 300 provides a general set of tools for creating system and company databases that requires a more technical understanding of Sage 300 databases.

Create Company does something much simpler – it just creates a new company database. For most users, the process is as simple as filling in two fields (Database ID and Description) and clicking the Create button.



Even if advanced settings are required, Create Company will still save a lot of time. A few limitations are identified here.

- Firstly, Create Company only creates company databases. It will not create a System database (or a Sage300Store or Sage300Vault database if you are using Sage 300 2023 PU2 or higher).
If you are already running Sage 300, this is not an issue – the system, store and vault databases 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.
- You can change the name of the database on the Advanced tab. Create Company will use the Database ID entered on the Database tab unless you change it.
- The final limitation has to do with “authentication”.

You need to enter a SQL Server database user name and password when you start Create Company.

Installing Create Company

Create Company is installed and run like any other Windows program. The installation program adds it to the Windows Start List, and you can create an icon to launch the program from the Sage 300 desktop.

Create Company can be uninstalled from **Windows Control Panel > Programs and Features** or from **Settings > Apps and Features**, depending on your version of Windows.

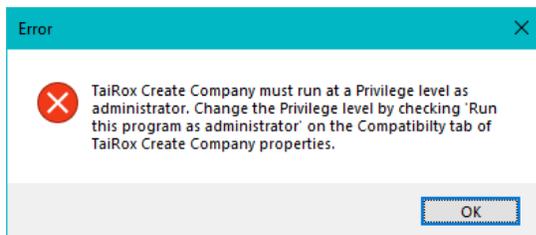
Create Company is distributed as 1 file, Setup.msi.

- The program is installed by default in “C:\Program Files (x86)\TaiRox\CreateCompany\”

Running Create Company

Once you install Create Company, you can run it from the Windows Start list, from the Windows desktop or from the Sage 300 desktop (if you add the icon there).

If you get the following message:



Right-click the entry in the Start list, and select **More > Run as Administrator**

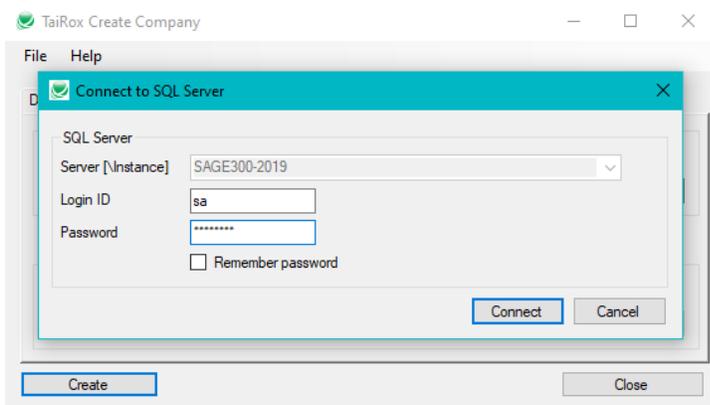


Alternatively, you can log in as an administrator to run the program or to change the program properties to always run it as an administrator.

Note: The default SQL Server 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.

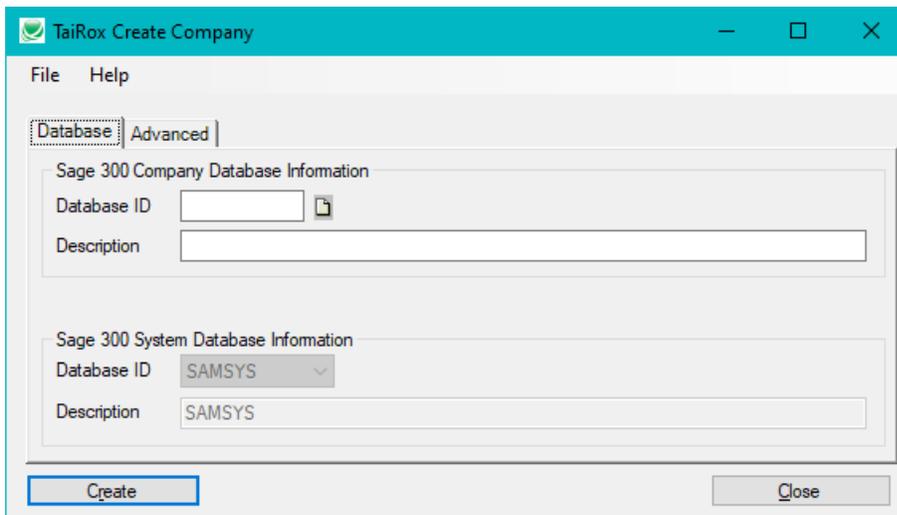
Log in to the SQL Server Instance for Sage 300

When you launch the program, it will ask you to connect to the SQL Server instance where Sage 300 is installed.



Note: The default SQL Server 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.

Create Company will inspect the installation to see which databases are installed and how many system databases are in use. It will then display the following screen.



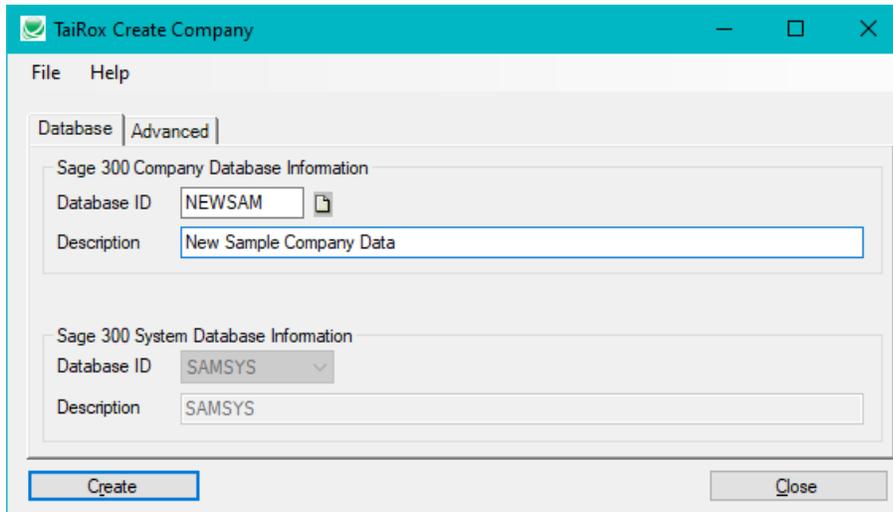
Enter a Database ID and Database Description

You need to enter a Database ID (a 6-character code that Sage 300 will use to identify the company) and a descriptive name for the company.

If your server includes more than 1 system database in use, the program will enable a drop-down list so you can choose the correct system database.

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 recovery model should be Simple.

Fill in the screen with values such as those below and press the Create button to create a new company using Windows authentication (or using the most recent settings).

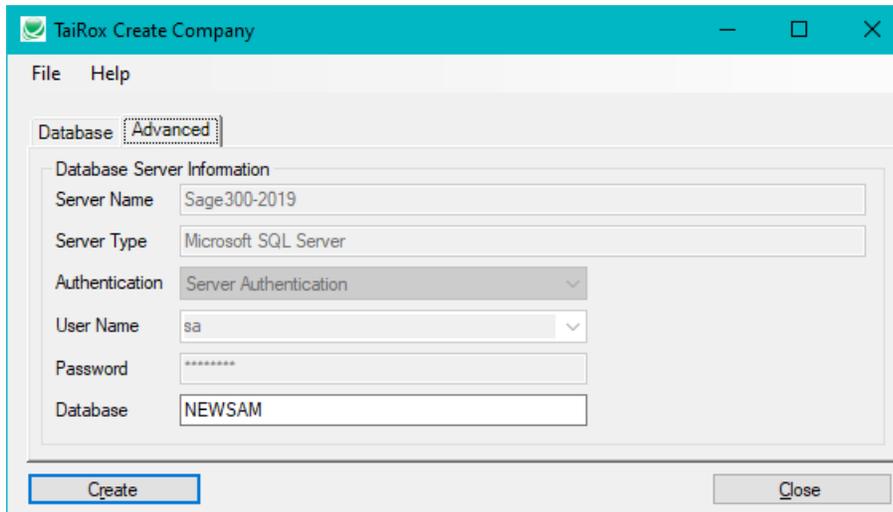


The screenshot shows the 'TaiRox Create Company' dialog box with the 'Database' tab selected. It contains two sections: 'Sage 300 Company Database Information' and 'Sage 300 System Database Information'. In the first section, the 'Database ID' is 'NEWSAM' and the 'Description' is 'New Sample Company Data'. In the second section, the 'Database ID' is 'SAMSYS' and the 'Description' is 'SAMSYS'. There are 'Create' and 'Close' buttons at the bottom.

If you want the database name to be different from the Database ID, you will need to click the Advanced tab.

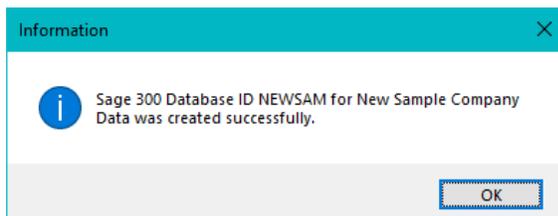
Changing the Database Name

The Advanced tab looks like this. It shows you the current server, login ID, and database name.



The screenshot shows the 'TaiRox Create Company' dialog box with the 'Advanced' tab selected. It contains 'Database Server Information' with the following fields: 'Server Name' (Sage300-2019), 'Server Type' (Microsoft SQL Server), 'Authentication' (Server Authentication), 'User Name' (sa), 'Password' (masked with asterisks), and 'Database' (NEWSAM). There are 'Create' and 'Close' buttons at the bottom.

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



The screenshot shows an 'Information' dialog box with a teal header and a close button. It contains an information icon and the text: 'Sage 300 Database ID NEWSAM for New Sample Company Data was created successfully.' There is an 'OK' button at the bottom right.

Activate Sage 300 After Create Company

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

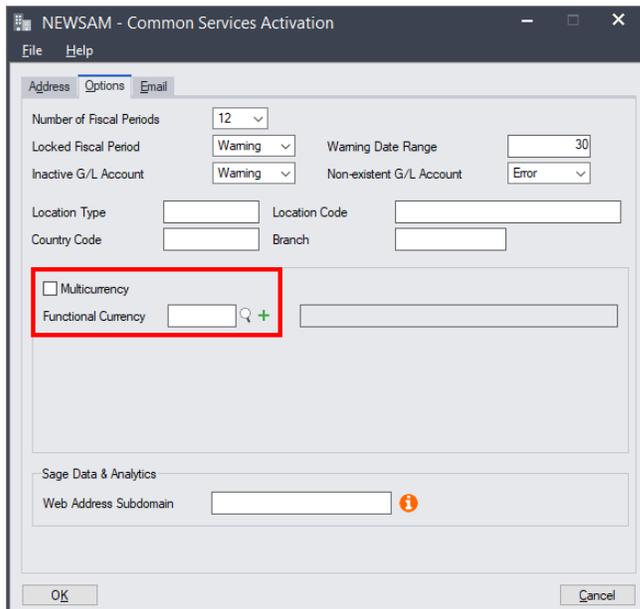
When you click OK to open the company for the first time, it will create some common services tables,

and then you will be asked for a fiscal year start date.

Enter the date, and click the Proceed button to activate Common Services. This is the normal way that Sage 300 creates initial data for the Company.

After activation, a new form will appear, where you can enter company information on the first tab.

- You can enter or skip the address information, but you **MUST** click on the Options tab to specify whether this is a multicurrency company and to select a currency.

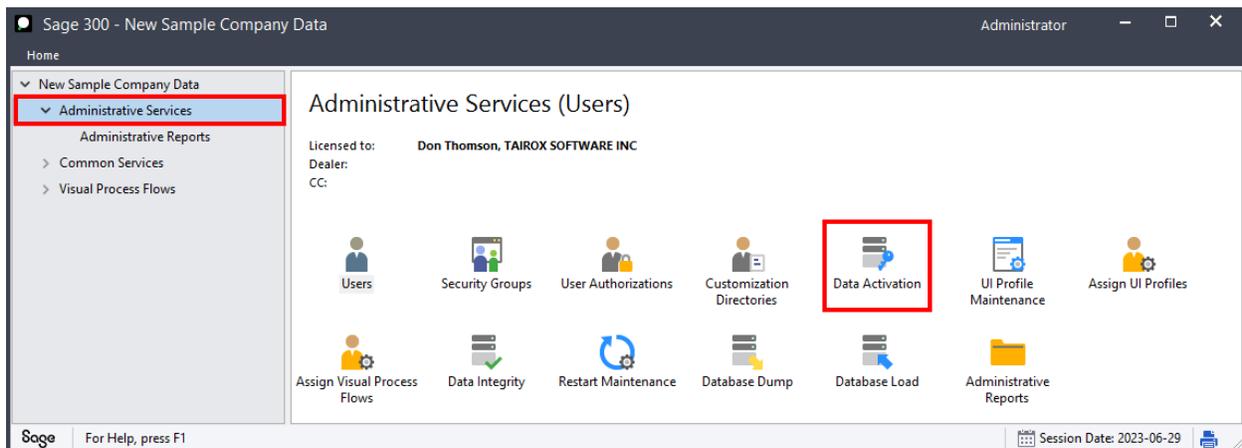


- Click the Multicurrency checkbox if this is a multicurrency ledger.
- Choose which currency is the functional (home) currency of the company.

Note: You cannot change the Multicurrency setting or the functional currency after activating the company. All other information – on all three tabs – can be edited on the Company Profile in Common Services.

Activate Each of the Accounting Applications

After activating Common Services, you will see the Sage company desktop for the new company. You must now use the Data Activation function in Administrative Services to activate the accounting modules you need for the new company (G/L, A/R, A/P, etc.).



Run TaiRox Copy Company

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