

Setting up a new company in Sage 200 Sage 200 Help Sheet





Overview & Pre-requisites

The set up of a new Sage 200 company is performed within the Sage 200 Administration tool.

Before beginning, you must ensure that you are set up with administrator rights to your Sage 200 system. Only users with Sage 200 administrative rights can access the Sage 200 Administration Tool.

You will then need to make sure that the Sage 200 Administration client has been installed. Please see your on-site Administrator if this needs to be installed for you.

Setting up a new company

Within your Windows session, go to Start > Sage UK Limited > Sage 200 Administration or double click the Sage 200 Administration icon if it is saved to your Desktop session.

• Click on Companies in the top hand left of the Sage 200 SA form.



- If you already have existing companies, you can create an attachment folder in the same location ready for when adding the new company.
- > Double click on any of the existing companies and highlight the contents of the attachment folder.

Company Settings	
Company Name:	S200 Test Data
Parent Company:	No parent company has been selecte \checkmark
Attachments:	rvername\attach\Existing Company

> Press Ctrl & C to copy, or right click over the highlighted text and select Copy.





Open Windows File Explorer either from your toolbar or via your Windows button at the bottom left and typing This PC.



• Click at the end of the address bar to highlight the contents.

This PC	
mputer View	
1 This PC	
Coldors (7)	

 Delete this and then press Ctrl and V to paste in the attachments path copied previously and press enter.

Computer View	
↑ 💻 \\sageservername\attach\Existing Company	

• Click on the attach or attachments part of the address to go back to this level.



• Right click in the white space at the bottom of this window and select New, then Folder.

New	
	Shortcut

• Enter the new folder name for the company you are creating, this can be abbreviated if required.





Once the new folder has been created double click on it.

PC > Data (E:) > Sage > attachments >				
Name	~	Date modified		
		04/10/2022 14:54		
📙 Existing Company		21/04/2023 12:29		
		21/04/2023 12:31		

• Right click at the end of the address bar and copy the contents.

Ne	ew Compar	лу	
e	Share	View	
	\\serve	name\sage\attachments\New Company	
			1.0

- You can then open Notepad and paste this in to copy from when creating the new company, or just move on to adding this new company and pressing Ctrl & V in the attachments field.
- Right click anywhere in the white space in the right-hand pane of the form and select Add New Company.



• Enter the details of the new company in the following fields:

Company Name: Name of the new Sage 200 company as displayed when logging in to Sage 200.

Parent Company: Only applicable if using Consolidation in the Nominal Ledger.

Attachments: It is recommend that a separate attachments folder is created for each company set up in Sage 200. On the server, locate the folder where Sage is installed and create a new attachment folder.





There is no naming convention for the attachments folder that must be adhered to but you may have your own that you wish to follow.

Once the attachments folder is created, you can click on the ellipsis beside the Attachments folder and browse to it.

Server: Enter the name of the SQL Server or click on the browse button to select it from a list of available servers. Please contact your IT department if you are not sure which SQL server name to provide.

Database Name: Type in the name of the database as it will be displayed in SQL.

	~
Add New Company	~
General Members Online Payments Company Usage	
Enter company data	
Company Settings	
Company Name: New Company Name	
Parent Company: No parent company has been selecte \checkmark	
Attachments: \\\SUP-S200-2023R1\Attach\NewCc	
Server Settings	
Server: SUP-S200-2023R1 V	
Database Name: NewCompanyDB 🗸 😋	
Test Update Create	
Banner Settings	
Company Colour: Not Set Configure	
Show Company Name	
OK Cancel Help	

Click on the Create button.

	Test	Update	Create	
Banner Setting				
Company Col	our: Not Se	e	Configure	
Show Company Name				





• Set the Financial Year start month and year and click on OK.

Sage 200 Database Creation		
Select the start of your current financial year:		
Month:	January	\sim
Year:	2023	•
ОК	Cancel Help	

NOTE: If a prompt for a user name and password appears you will need to speak to your IT department for the SQL sa password.

• A progress bar will appear for a short period of time while it creates the new blank company.

Progress	
Creating empty company database	

• Followed by a prompt that it has been created successfully.



• Click on OK and answer any prompts.





Right click on the company in the list and select Update. This will ensure any bespoke tables that do not get created initially, are added to the new database.

💂 Sage 200 SA (Server on premise)	Company Name	
Licence	New Company	
Companies		Delete Company
🐣 Users		Undate
🙀 Roles		opuate
📴 Features		Database Version
Dogging Logging		Properties
🖶 Add-Ons		· · · · · · · · · · · · · · · · · · ·
Active Users		Help
> 🚵 Messaging		

Final step is to click on the Members tab and assign users to the new company. Highlight the user requiring access from the left hand list and click on the single arrow to transfer them to the right hand list. Click OK to save. You have finished creating a blank new company in Sage 200 and assigning users access to it.

Add New Company			×
General Members Online P	ayments C	ompany Usage	
Users:		Selected User:	
S200SecuredServices S200Services SageBI		Administrator	
	>		
	>>		
	<<		
	<		
	ОК	Cancel	Help

