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expanding the world of sage

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.

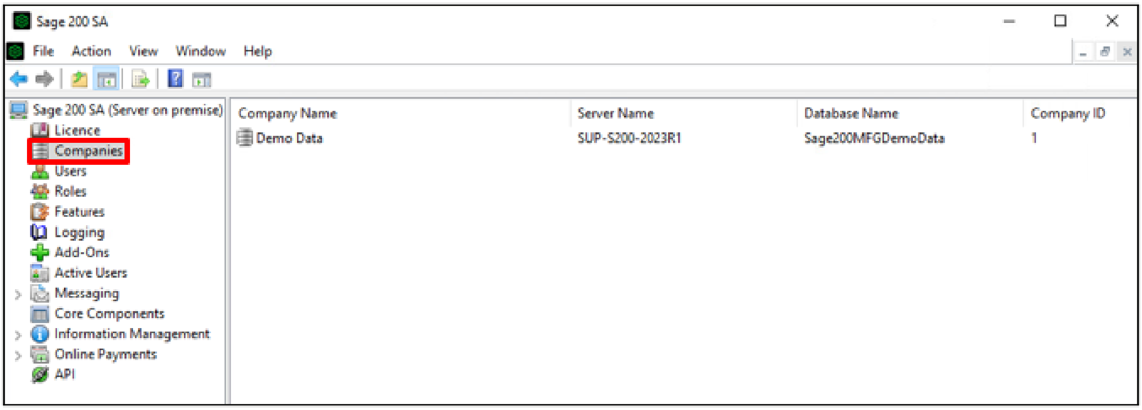
Before beginning, you must ensure that you are set up with administrator rights to your Sage 200 system. Only users with Sage 200 administrative rights can access the Sage 200 Administration Tool.

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.

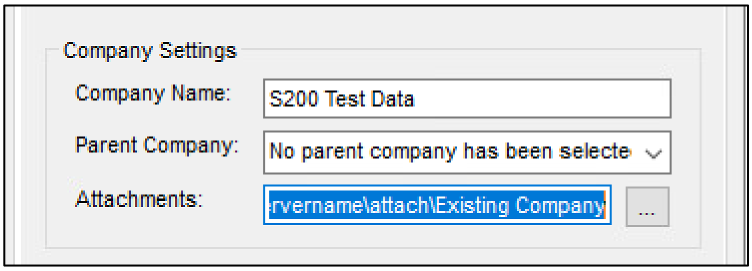
Setting up a new company

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.



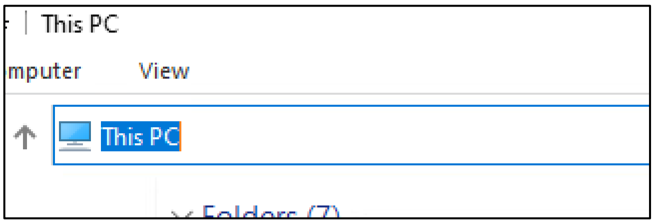
- If you already have existing companies, you can create an attachment folder in the same location ready for when adding the new company.
- Double click on any of the existing companies and highlight the contents of the attachment folder.



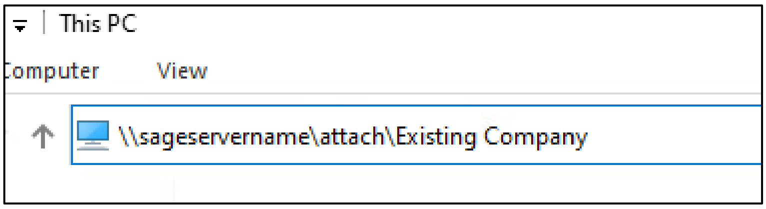
- Press Ctrl & C to copy, or right click over the highlighted text and select Copy.

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

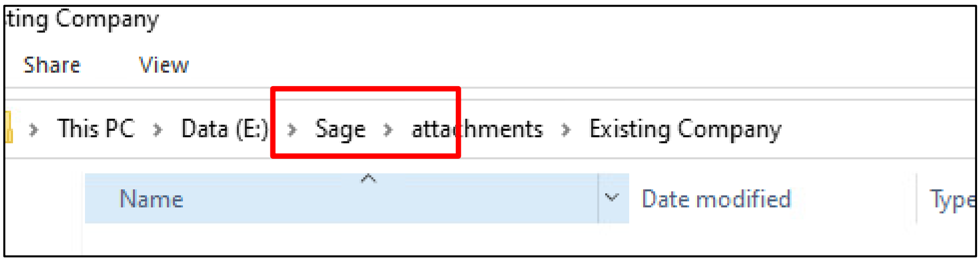
- Click at the end of the address bar to highlight the contents.



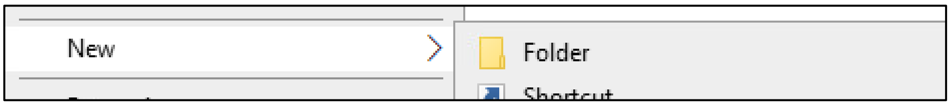
- Delete this and then press Ctrl and V to paste in the attachments path copied previously and press enter.



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

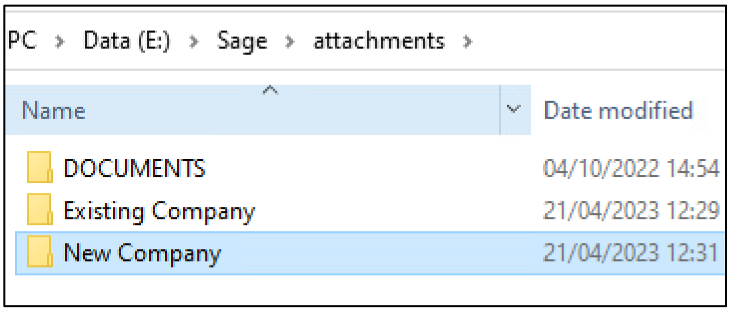


- Right click in the white space at the bottom of this window and select New, then Folder.



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

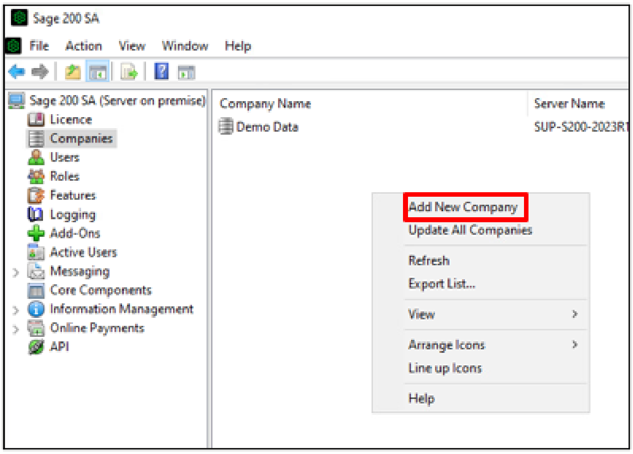
- Once the new folder has been created double click on it.



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

- 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.

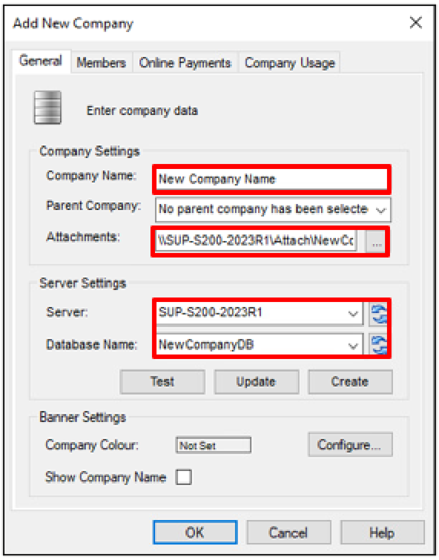
Attachments: It is recommend that a separate attachments folder is created for each company set up in Sage 200. On the server, locate the folder where Sage is installed and create a new attachment folder.

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.

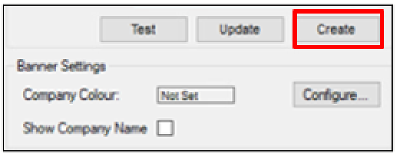
Once the attachments folder is created, you can click on the ellipsis beside the Attachments folder and browse to it.

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.

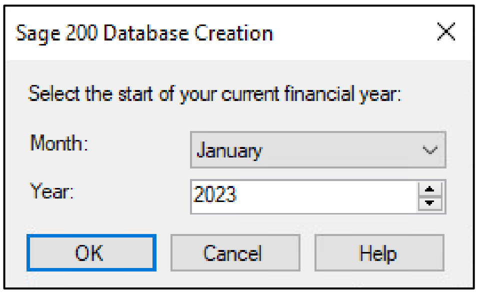
Database Name: Type in the name of the database as it will be displayed in SQL.



- Click on the Create button.

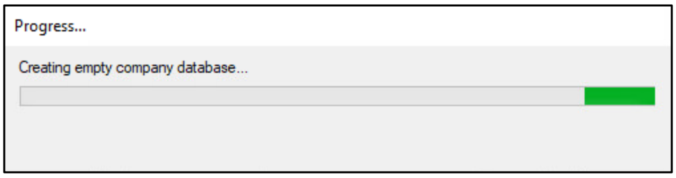


- Set the Financial Year start month and year and click on OK.

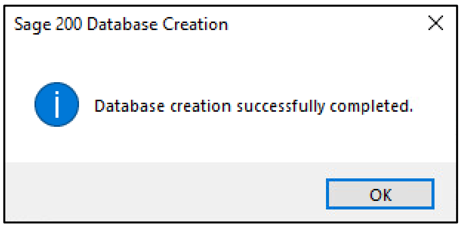


NOTE: If a prompt for a user name and password appears you will need to speak to your IT department for the SQL sa password.

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

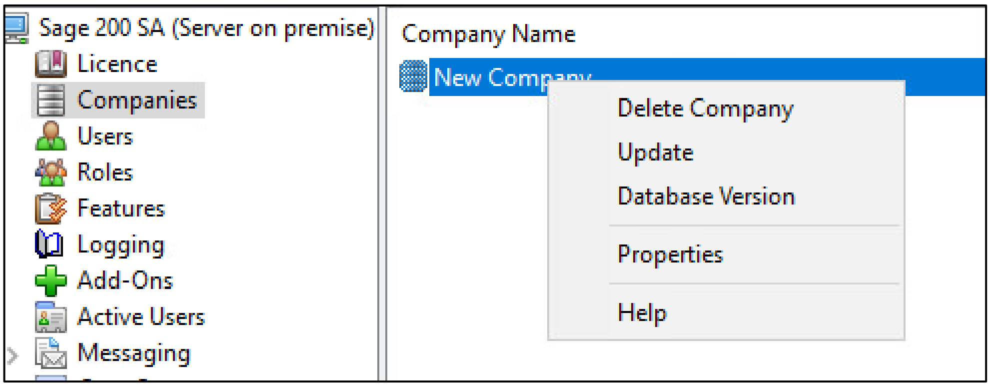


- Followed by a prompt that it has been created successfully.



- 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.



- 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.