

How to Copy a Live Company to a Test Company

- 1. Open the Test company in Sage that needs to be updated
- 2. Go to Library Master > Main > Company Maintenance
- 3. Enter Company Code
 - a. If unsure, use the magnifying glass to determine the company code.

S Company Ma	intenance (TST) 5/2/2024	- (- X
Company Code		Activate	Convert
Company Name		Remove	Сору
Company Type	•		

4. After Selecting the Company Code, update the date in the company name

S Company	Maintenance (TST) 5/2/2024	-	D X
Company Cod	TST Q 14 4 P PI	Activate	Convert
Company Nan	TEST Company updated 10/4/2023	Remove	Сору
Company Type	e lest 🔻		
<u>1</u> . Main	2. Additional 3. Preferences 4. Dates 5. Payment 6. E-mail	<u>7</u> . Fax	8. Theme

5. After making the name change, select Accept.

mpany Name mpany Type	Remove	Сору.		
1. Main 2. Ctivated Modul	Additional <u>3</u> . Preferences <u>4</u> . Dates	<u>5</u> . Payment <u>6</u> . E-mail	<u>7</u> . Fax	8. Them
Module		Data Level		^
Accounts Pay	vable	7.10		
Accounts Re	ceivable	7.10		
Bill of Materia	ls	7.10		
Bank Reconc	iliation	7.10		
Common Infor	rmation	7.10		
Business Insi	ghts	7.10		
General Ledg	er	310		
Inventory Mar	nagement	7.10		~



- 6. Go back into the same company code for Test company.
- 7. Select Copy

company Code	Activate	Convert					
Company Name TEST Company updated 05/01/2024						Copy	
ompany Type	Test 💌						
<u>1</u> . Main <u>2</u> .	Additional 3. Preference	es <u>4</u> . Dates	5. Payment	6. E-mail	<u>7</u> . Fax	8. Theme	
Company Inform	nation						
Country							
Address		3					

8. Sage 100 Warning box will come up, select OK

S Sag	je 100	×
į	Warning: Copying individual modules that are integrated with other modules may cause unexpected results. $\prod_{i=1}^{n}$ Integration with any copied module should be reviewed.	
	<u>о</u> к	

- 9. Select your Source Company
 - a. This MUST be the live company
 - b. Destination Company will be the test company selected above.

Сору	Data	5			f	
Source (Company	400 🔍 Steve Jack	son Games	Inc.		
Destinati	on Compan	y TST TEST Comp	any update	d 05/01/	2024	
Options						
	Modules		Data	Forms	Reports	
1	C/I	Common Information	V	N/A	N/A	
2	E/S	Business Insights	V	N/A	N/A	
3	G/L	General Ledger	V	N/A	V	100
4	A/R	Accounts Receivable	V		N/A	
5	A/P	Accounts Payable	V	V	N/A	
6	P/R	Payroll	V	V	N/A	
7	VM	Inventory Management	V	V	V	
8	S/0	Sales Order	V	V	N/A	
9	P/O	Purchase Order	V	V	N/A	
10	J/C	Job Cost	V	N/A	N/A	
11	B/M	Bill of Materials	V	N/A	N/A	
12	B/R	Bank Reconciliation	V	N/A	N/A	



10. Select Proceed

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	Modules		Data	Forms	Reports	
1	C/I	Common Information	V	N/A	N/A	
2	E/S	Business Insights	V	N/A	N/A	
3	G/L	General Ledger		N/A	V	
4	A/R	Accounts Receivable	V	Ø	N/A	
5	A/P	Accounts Payable	V		N/A	
6	P/R	Payroll	1	V	N/A	
7	VM	Inventory Management	V	V	V	
8	S/0	Sales Order	V	V	N/A	
9	P/O	Purchase Order	V	V	N/A	
10	J/C	Job Cost		N/A	N/A	
11	B/M	Bill of Materials	V	N/A	N/A	
12	B/R	Bank Reconciliation		N/A	N/A	

11. Click Yes, at the prompt "Do you want to copy all data files to selected company?"



12. Click Accept once all data has been copied over.

Company Name TEST Company updated 05/01/2024				Remove	Copy		
<u>1</u> . Main <u>2</u> .	Additional	. Preferences	4. Dates	5. Payment	6. E-mail	<u>7</u> . Fax	8. Them
Company Infor Bill of Materials	mation				7.10		
Bank Reconcilia	tion				7.10		
Common Informa	ation				7.10	_	
Business Insigh	ts				7.10		
General Ledger					7.10		
Inventory Manag	gement				7.10		~