

## 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.



Company Maintenance (TST) 5/2/2024

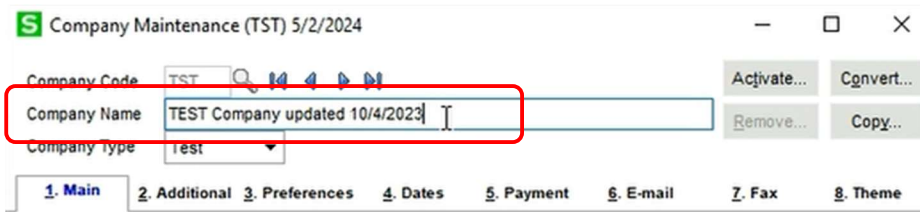
Company Code: TST

Company Name: [Empty]

Company Type: [Empty]

Buttons: Activate..., Convert..., Remove..., Copy...

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



Company Maintenance (TST) 5/2/2024

Company Code: TST

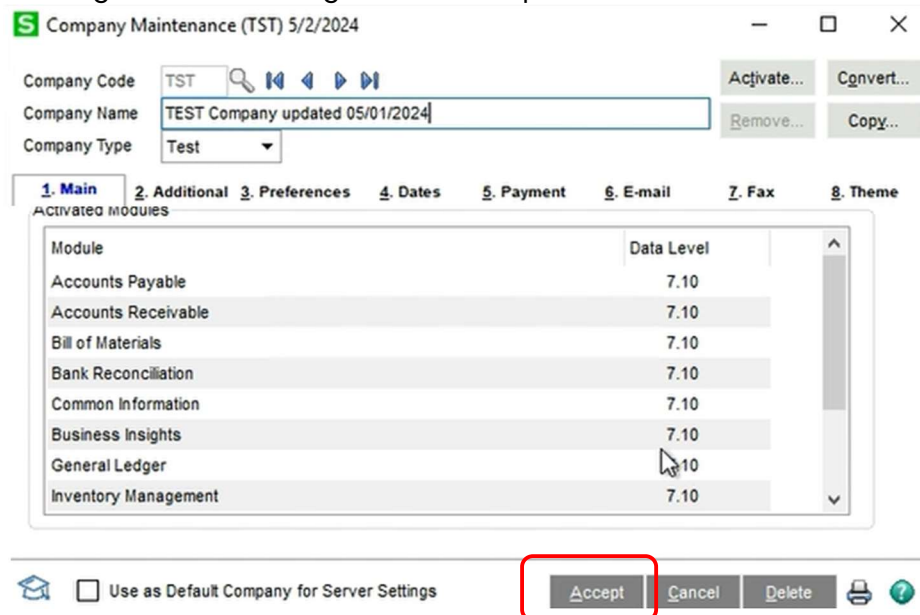
Company Name: TEST Company updated 10/4/2023

Company Type: Test

Buttons: Activate..., Convert..., Remove..., Copy...

1. Main | 2. Additional | 3. Preferences | 4. Dates | 5. Payment | 6. E-mail | 7. Fax | 8. Theme

5. After making the name change, select Accept.



Company Maintenance (TST) 5/2/2024

Company Code: TST

Company Name: TEST Company updated 05/01/2024

Company Type: Test

Buttons: Activate..., Convert..., Remove..., Copy...

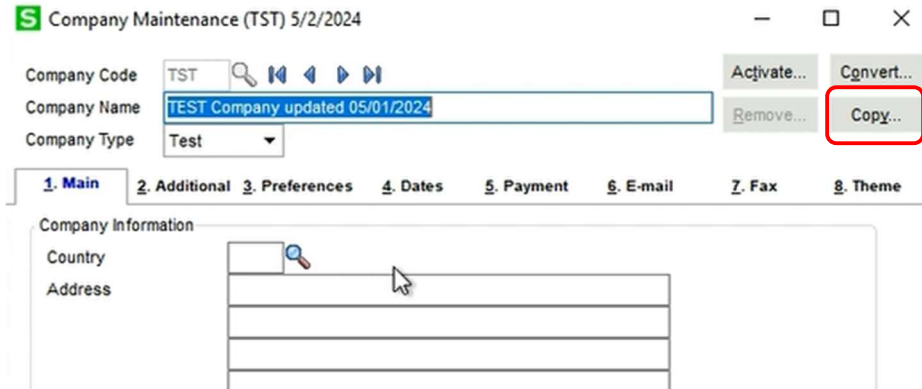
1. Main | 2. Additional | 3. Preferences | 4. Dates | 5. Payment | 6. E-mail | 7. Fax | 8. Theme

Module	Data Level
Accounts Payable	7.10
Accounts Receivable	7.10
Bill of Materials	7.10
Bank Reconciliation	7.10
Common Information	7.10
Business Insights	7.10
General Ledger	7.10
Inventory Management	7.10

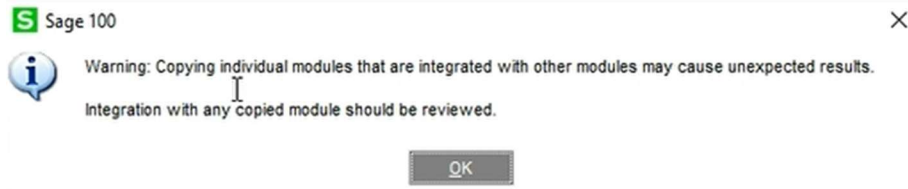
Use as Default Company for Server Settings

Buttons: Accept, Cancel, Delete

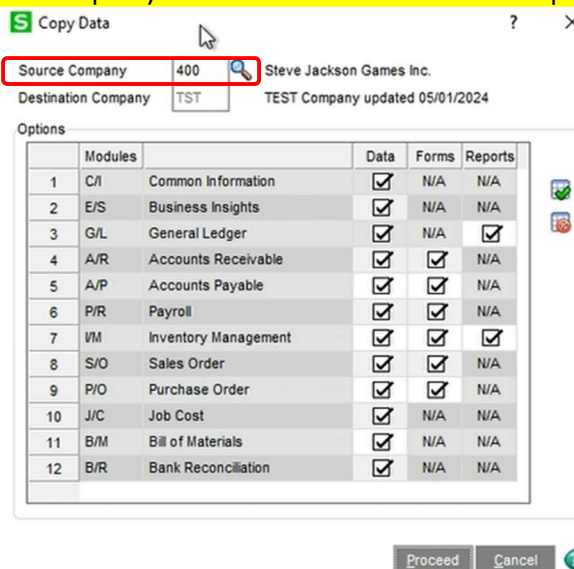
6. Go back into the same company code for Test company.
7. Select Copy



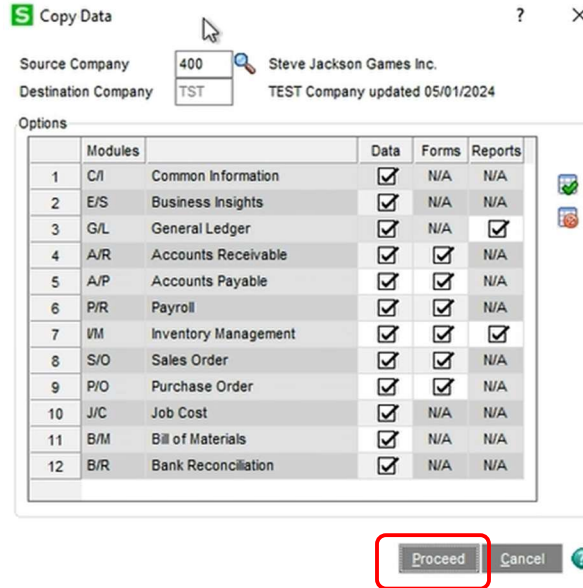
8. Sage 100 Warning box will come up, select OK



9. Select your Source Company
  - a. This MUST be the live company
  - b. Destination Company will be the test company selected above.
  - c. Destination Company should never be the live company.



10. Select Proceed



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.

