

SOP OPENING COMPANIES

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# SOP OPENING COMPANIES

**TABLE OF CONTENTS**

Aims ..... 2

Procedure ..... 2

    Stage One: Opening a New Company ..... 2

        Method One: Open a new company without data ..... 2

        Method Two: Open a new company with all data from an existing company ..... 2

        Method Three: Open a new company with basic data from an existing company ..... 3

    Stage Two: Deleting Company Data ..... 3

    Stage Three: Deleting a Company ..... 3

## AIMS

- To open a new company
- To copy an existing company
- To delete a company

## PROCEDURE

Note: All programs referred to below must be run from the server by the super user.

### STAGE ONE: OPENING A NEW COMPANY

There are three ways to open a new company in Priority: opening a company without data, copying basic data (e.g., user profiles, personnel files, parts, warehouses, branches, customer, vendors) from an existing company, or copying all data from an existing company.

#### METHOD ONE: OPEN A NEW COMPANY WITHOUT DATA

1. Run the Add Company program.
2. In the Company input column, specify the desired company code (use lowercase letters and or numbers). If you leave this column empty, the system will assign a code automatically. The company code is used to name the Priority sub-folder in which the company data is stored.
3. Record the Full Company Name. This name will appear in the Choose list.  
Note: This program takes a long time to run. Never close the program window before the program finishes running and displays a notification to that effect, as that is likely to corrupt the database of the new company.

#### METHOD TWO: OPEN A NEW COMPANY WITH ALL DATA FROM AN EXISTING COMPANY

Note: You do not need to open the new company before copying the data.

1. Make sure that there is sufficient disc space to duplicate the existing company.
2. Make sure there are no users working in the system.
3. Run the Copy Company program.
4. In the input screen, record the Full Company Name of the company from which you are copying the data.
5. In the New Company column, specify the code of the new company (use lowercase letters and or numbers). If you leave this column empty, the system will assign a code automatically. The company code is used to name the Priority sub-folder in which the company data is stored.

6. Record the name of the new company in the New Co. – Full Name column. This name will appear in the choose list.

Note: This program takes a long time to run. Never close the program window before the program finishes running and displays a notification to that effect, as that is likely to corrupt the database of the new company.

### METHOD THREE: OPEN A NEW COMPANY WITH BASIC DATA FROM AN EXISTING COMPANY

Note: You do not need to open a new company before copying the data.

1. Make sure that there is sufficient disc space to copy the basic data from the existing company.
2. Make sure there are no users working in the system.
3. Run the Add Company & Copy Basic Data program.
4. In the input screen, record the Full Company Name of the company from which you are copying the data.
5. In the New Company column, specify the code of the new company (use lowercase letter and or numbers). If you leave this column empty, the system will assign a code automatically. The company code is used to name the Priority sub-level in which the company data is stored.
6. Record the name of the new company in the New Co. – Full Name column. This name will appear in the Choose list.

Note: This program takes a long time to run. You must never close the program window before the program finishes running and displays a notification to that effect, which could corrupt the database of the new company.

### STAGE TWO: DELETING COMPANY DATA

Under certain circumstances, you can clear a company of its data. This process deletes all data recorded in the company, except for the privileges defined for it.

*Warning: The data is completely erased, and will be very difficult to reconstruct.*

1. Run the Delete Company Data program.
2. Specify the Full Company Name of the company whose data you want to delete.

### STAGE THREE: DELETING A COMPANY

*Warning: The Company is completely erased, and it will be very difficult to reconstruct its data.*

1. Make sure that you are working in a company other than the one you want to delete.
2. Make sure there are no users working in the company that you want to delete.
3. Run the Delete Company program. This will delete the company, along with all its data.
4. Specify the Full Company Name of the company that you want to delete.