Companies: Create, Copy & Delete

At Soft1, a Default Company is available, which constitutes a configuration template that allows you to start working promptly. Hence, you may use the Default Company by filling the company data or create a new one by using the default company as a template model (usually recommended).

See below how you could make use of Soft1 jobs, such as, **Create Company, Copy Company** and **Delete Company**.

- Create Company
- Copy Company
- Delete Company

Use the **Create Company** job, to generate a new company, whose data/ info is directly filled in and it is suggested for Accounting Offices' installations.

See how the categories of **Accounting Books** kept by the new company (A, B or C Category) differentiate the Soft1 screen:

Regarding **Category B' Books**, (refers to Greek localization) the <**Copy from Company**> and <**Copy Revenue/Expenses Accounts**> fields are activated.

- Select <**Copy from Company**> field if you wish to copy from an existing company **ONLY** the configuration parameters and not the revenues/expenses accounts and Book Columns.
  It means that, upon posting/ creating records/ documents at the New Company, you may select accounts already exist in the Default company.
- Activate the <**Copy Revenue/Expenses Accounts >** parameter if you wish to copy from a specific company **BOTH** accounts and Book Columns.

Regarding **Category C' Books**, (refers to Greek and other countries localization processes) the <Chart of Accounts> and **Copy Chart of Accounts**> fields are activated.

- At <**Chart of Accounts**> field, select one of the available Chart of Accounts, for instance, the Soft1 Standard Chart of Accounts provided that it meets the accounting requirements of your new company. The selected Chart of Accounts will be automatically connected/ matched with the fiscal year of the new company.
- If you wish to create a new schema of Chart of Accounts along with its accounts, then select one of the available Chart of Accounts, for example, the Soft1 Standard Chart of Accounts and activate the <**Copy Chart of Acounts**> parameter. The new chart of accounts shall be applied and bear the code of the new company.

- Then, select the **Fiscal year** period, by defining the Fiscal year From/ To. The specific Fiscal year will be the only available at company data.
- Fill in:
  - the **Code** (the first available number is suggested/ generated according to the posted/ registered companies),
  - the **Name** of the company
  - **T.R.No.** (in case no valid T.R.No. has been set, a warning message will be displayed) and
  - any additional **information**.

- Click <Run>.
- Re-login to Soft1 and work on the preferable company (from here on, the New Company will be also included) and
- proceed to Company data to fill in the rest of the company and tax information/ data.

The **Copy Company** job is used to **create a copy of a company,** without, however, transferring documents and the resulting transactions.

Upon Copy Company process, fill in the following fields:

- **Company, From**: Select an existing company (template model), based on which the new company will be created.
- **Company, To:** Fill in the code of the new company. *Attention: The code cannot be altered once the company is created.*
- **Company name**: Type the name of the new company.
- Define the **Copy setup,** by mainly selecting the data that should be copied from the template company to the new one:
    - If you select **Basic** copy setup:
        - the **absolutely necessary data** for the company's smooth operation are copied (e.g. Branches, Warehouses etc.).
    - If you select **Parameters** copy setup, the following are copied:
        - the **Basic** copy setup data,
        - **table info** along with configuration (e.g. Doc. Series, Printout Forms, Memory Tables etc)
        - **entries/ records found in selected/ additional tables,** (multiple-selection filter, e.g. Agreements, Rules, Shipping purposes).
    - If you select **Full copy** setup the following are activated:
        - the **Basic** copy set up
        - the **Parameters** copy setup
        - and the **records** included in Entities, such as Trading Parties List, Stock Items List, Services List etc.
- Click <Run> and see which Soft1 tables are copied along with the number of entries included.
- Re-login to Soft1 and work on the preferable company (from here on, the New Company will be also included in the Companies list) and
- proceed to Company data to fill in the rest of the company and tax information/ data.

☀ Run   ⊞ Multi-company   ⭐ Save new Template ▾

Copy Company

Company, From:	2000 Default Company ▾	Company, To:	5000
Company name:	NEW COMPANY - COPY	Copy Setup:	Full copy ▾
Select tables:			

Basic
Parameters
Full copy

Note that...

Attention!
This job will result in critical technical changes in your installation.

- Do not use this job if you are not fully informed of the mechanisms activated upon running it.
- Do not use this job if you are not fully aware of the way it is used in your company's operations.
- Click here to read more.

Execution stage

A/A	Stage	Starts on	End Date	Duration
1	Initialization	4:59:41 PM	4:59:43 PM	1 seconds,691 ms
2	Table (USERSERIES) records (0)	4:59:43 PM	4:59:43 PM	26 ms
3	Table (USERSERIESBRN) records (0)	4:59:43 PM	4:59:43 PM	24 ms
4	Table (COMPANY) records (1)	4:59:43 PM	4:59:43 PM	16 ms
5	Table (COMPANYBNK) records (0)	4:59:43 PM	4:59:43 PM	18 ms
6	Table (COMPANYEXT) records (1)	4:59:43 PM	4:59:43 PM	17 ms
7	Table (COMPANYKAD) records (0)	4:59:43 PM	4:59:43 PM	17 ms
8	Table (COMPANYTKAD) records (0)	4:59:43 PM	4:59:43 PM	45 ms
9	Table (WHOUSE) records (1)	4:59:43 PM	4:59:43 PM	16 ms
10	Table (WHOUSEG) records (2)	4:59:43 PM	4:59:43 PM	33 ms
11	Table (BUSUNITS) records (17)	4:59:43 PM	4:59:43 PM	16 ms
12	Table (DEPART) records (0)	4:59:43 PM	4:59:43 PM	17 ms
13	Table (DEPARTG) records (0)	4:59:43 PM	4:59:43 PM	26 ms
14	Table (WHOUSEBIN) records (0)	4:59:43 PM	4:59:43 PM	16 ms
15	Table (CREDITCARDS) records (0)	4:59:43 PM	4:59:43 PM	21 ms
16	Table (CRDMACHINE) records (0)	4:59:43 PM	4:59:43 PM	20 ms
17	Table (CASHDEVICE) records (0)	4:59:43 PM	4:59:43 PM	33 ms

In case you wish to **Delete** a **Company** you should:

- Log in to the specific company.
- Delete all transactions posted/ included in this company.
- Log in to a different company.
- Delete the specific company by clicking "Run" (Delete Company job).

The Company will be permanently and irrevocably deleted, once you click <Run> button.
If the following message is displayed: "Company (e.g. 5000) cannot be deleted. Document(s) still included and not deleted yet", which means that there are some Documents that have not been deleted yet. Soft1 informs you about the location and number of Document(s) in order to delete them.

Menu search 🔍 ▾ | ✉ 🔔 💻 ☁ ▾ | ⊞ Default Company HQR 19/02/2020 | Payroll period | S1 Administrator ▾ | ❓

🏠 | Delete Company ✕

☀ Run   ⊞ Multi-company   ⭐ Save new Template ▾

Delete Company

Company:	5000 NEW COMPANY- CREATE 01 ▾

Note that...

Attention!
This job will result in critical technical changes in your installation (file deletion).

- Do not use this job if you are not fully informed of the mechanisms activated upon running it.
- Do not use this job if you are not fully aware of the way it is used in your company's operations.
- Click here to read more.