How to Create a Fresh Company Database

Before creating a new database, the following pre-requisites must be met:

- Production Database must be updated through Patch Update
- System should be the latest Patch Update build

Here are the steps on How to Create a Fresh Company Database:

- 1. Log in as Admin user
- 2. On user's menu panel, go to System Manager folder then click Company Configuration

Cancel							
em Manager	System Manager	Keyb	oard Shortcut	s Audit l	Log (36)	Attachment (1	1)
eral Ledger	Origin Integrati	on:	 Source 	System:		Summit	\sim
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es	Reporting Curr	rency:	USD		~	🔿 Cash	
ayroll	Country:		United State	5	~		
otes Receivable	Environment T	ype:	Production		~		
ain							
ntract Management	SMTP Email Set	ttings					
k Management	From Email:	i: i21testcompany@gmail.com					
gistics	From Name:	m Name: iRely Demo					
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rd Fueling	SMTP Port:	58	7 E	ncrypted	Connec	tion: TLS	~
M	✓ Requires Au	thentic	ation				
elp Desk	Username:	i21	testcompany	@gmail.co	Passv	vord:	
ansports	Test Recipient:					Ser	nd Test Mail
tor Fuel Tax Forms	Company Setu						

Note that the Environment Type must be Production, otherwise Create New Company Database will not be available. 3. Scroll down to see the Create New Company panel

Create New Company			
Database Prefix:			
Company Code:			
Environment Type:			~
Copy From Current Company:			
		Create	

a. Enter the Database Prefix, Company Code and select an Environment Type

Create New Compar	пу		
Database Prefix:		irely	
Company Code:		TE	
Environment Type:		Test	~
Copy From Current	Company:		
			Create
Field	Descrip	tion	

Field

Database Prefix	Database Prefix
Company Code	Must be unique. Ex. 01, 02, TE, EOM
Environment Type	Selections are: Test, Month End, Other
Copy From Current Company	Checked = will create a copy of existing company database Unchecked = will create a fresh database

4. Click the Create button. Patch Update screen will open to show the progress of the creation of the database

Patch Update with i	iRely i21™
Version 16.21.0627.45	<
Action	Status
Prepare requirements	Completed
Download updates	Completed
Create Database	🏷 In Progress

5. After successful creation of database, this message will show

i
iRely i21
New database created successfully.
ок

6. Fresh new database will be created and added to the company's list of database

Here are the steps on How to Create a Fresh Company Database:

1. Log in as Admin user

2. On user's menu panel, go to System Manager folder then click Company Configuration

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OK Cancel							
System Manager	System Manager	Keyboard Shortcuts	Audit Log (3) Attach	ment (0)		
Tank Management	Origin Integration	Source	System:	Summi	t	~	
Sales	Default Fields			De	fault Acc	ounting Metho	d
Purchasing	Functional Currer	ncv: PHP		~ 0			
Help Desk		· · · · ·			Accrual		
Notes Receivable	Reporting Curren	-			Cash		
Contract Management	Country:	United State	S	~			
Payroll	Environment Typ	e: Production		~			
Risk Management	SMTP Email Settir						
rain		igs					
ogistics	From Email:	mail: i21testcompany@gmail.com					
ard Fueling	From Name:	ame: Test Company					
Transports	SMTP Server:	smtp.gmail.com					
Notor Fuel Tax Forms	SMTP Port:	587	Encrypted Co	onnection:	TLS		\sim
Patronage	Requires Auth	entication					
CRM	Username:	i21testcompany	@gmail.com	Password		•	
	Test Recipient:					Send Test Mail	
	Company Setup						
	Company Logo:	Upload Logo				Browse CI	ear
	EIN:						
	Company ID:	4					

Note that the Environment Type must be Production, otherwise Create New Company Database will not be available. **3.** Scroll down to see the Create New Company panel

Create New Company	
Database Prefix:	
Company Code:	
Environment Type:	~
	Create

a. Enter the Database Prefix, Company Code and select an Environment Type

Create New Company		
Database Prefix:	irely	
Company Code:	TE	
Environment Type:	Test	~
		Create

Field	Description
Database Prefix	Database Prefix
Company Code	Must be unique. Ex. 01, 02, TE, EOM
Environment Type	Selections are: Test, Month End, Other

4. Click the Create button. Patch Update screen will open to show the progress of the creation of the database

i21 Updates	×
Patch Update with iRely i21 [™]	м
Action	Status
Prepare requirements	Completed
Download updates	🐝 In Progress
Create Database	
Your system is up to date Che	ck Database
Download Log File	
Download Log File	

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iRely i21
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