How to Setup Multi-Company Replication

Multi-Company is the ability to create subsidiary companies within a parent company or the original company.

- 1. Login as an Administrator
- 2. On the user's menu panel, open System Manager menu then Company Configuration
- Multi-company can be setup in the Company panel

 a. Note:The Create Parent Company button creates a copy of the original company database or a fresh company. To view the steps on

 how to create a parent company database see How to Create a Parent Company
- 4. To create a Subsidiary company click on the Create Subsidiary Company button

Iompany	Company	Audit Log			
n Manager	Parent Com	ipany			
al Ledger	🗊 Create Pa	rent Company Replica	tion Configuration	ြို့ Agent Setup	
Card Recon	Company Id	Company Name	Database Name	Server	Туре
ory	1	iRely LLC Demo Envi	1830RC	BETHNUC\SQL201	4 Production
asing	•				
	Subsidiary (Company			
	Company Id	bsidiary Company Rep	Database Nar	X Drop Replication	n vr
Receivable	1624		Database Har	ine Serve	
Management	Cr	eate Subsidiary Com	pany		×
ect Management	c	reate Cancel			
anagement		Details			
cs	D	atabase Prefix			
acturing	c	ompany Code			
lanagement	D	atabase Name			
Ŭ					

5. Enter the Database Prefix and Company Code on the Create Subsidiary Company screen:

Create Subsidiary	Company X
Create Cancel	
Details	
Database Prefix	irely
Company Code	03
Database Name	irely03
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Field	Description
Database Prefix	Database Prefix
Company Code	Must be unique. Ex. 01, 02, 03 etc. Note that this field only accepts numeric characters.
Database Name	A read-only field that displays the combined Database Prefix and Company Code that will be the complete database name

6. Click the **Create** button to start creating the subsidiary company

-	
/ersion 18.31.1011.84	Ó
Action	Status
Prepare requirements	Completed
Create Database	🔅 In Progress

7. Once the process has completed, subsidiary companies will be listed in the Subsidiary Company panel

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0	iRely i21
20	New database created successfully.
3	ОК

8. The new subsidiary company database will be automatically added to the web.config of i21

Configure Replication:

1. Setup the windows agent and save

Agent Setup		×
Save		
Details		
- Windows Acco	ount	
User Name	BETHNUC\repl_agent	
Password		
? 🛈 Ç 1.2	22s Saved	C Refresh

2. Click the **Replication Configuration** button for the Parent Company

Company Configuration					^	< T
Done Save Close						
Multi-Company	Company Audit Log					
System Manager	Parent Company					
General Ledger	Create Parent Company Replicati	on Configuration 🏼 🎲 Ag	ent Setup			
Credit Card Recon	Company Id Company Name	Database Name S	erver	Туре		
Inventory	1 iRely LLC De to Envi	1830RC B	ETHNUC\SQL2014	Product	ion	
Purchasing	n Configuration					×
Sales Save Und	lo Commit Close					
Payroll Details	J					
Notes Receivable Replicatio	on for Parent to Subsidiary					
Ticket Management	All 🗌 Clear All Export 🕶 🔠 View 🕶	Filter (F3)				K 7 K 3
Contract Management Module Na	ame*	Screen Name*			Enabled	
Risk Management Manufactu	uring	Recipe, Machine, Manuf	acturing Process,Man	ufac	\checkmark	-
Logistics Scale		Scale Station, Ticket Poo	l, Truck/Driver/Refere	nce,	\checkmark	1
Manufacturing Quality		Quality Parameters			\checkmark	1
Tank Management Logistics		Warehouse Rate Matrix			\checkmark	
Card Fueling Logistics		Terminals			\checkmark	
Logistics		Shipping Mode			\checkmark	
? D V 0.82s F Logistics		Shipping Lines			\checkmark	
Logistics		Reason Code			\checkmark	
Logistics		Insurers			\checkmark	
Logistics		Forwarding Agents			\checkmark	
Logistics		Equipment Types			\checkmark	
Logistics		Container Types			~	
Risk Mana	igement	Basis Entry			\checkmark	
						-
? 🔘	0.42s Ready				₿ Re	fresh

Details		
Action	Status	
Setting replication option	Completed	
Configure Log Reader	Completed	
Setting Publication	Completed	
Setting Article	🛟 In Progress	
Add Publication snapshot		
Configure Initial snapshot		
Add Initial snapshot subscription		
Add subscription	N	
Add Push subscription	Ъď	
Setting Company Id		
Starting snapshot		



3. Click the Replication Configuration button for the Subsidiary Company

Company Configuration									
Done Save Close									
Multi-Company	-	Company	Audit Log						
System Manager		Parent Con	npany						
General Ledger		Create Pa	arent Company Replica	ation Configuration	승규 Agent Setup	X Dro	p Replication		
Credit Card Recon		Company Id	Company Name	Database Name	Server		Туре		L
Inventory	11	1	iRely LLC Demo Envi	1830RC	BETHNUC	SQL2014	Production		L
Purchasing	-11	•						•	
Sales	-11	Subsidiary	Company						L
Payroll	-11	🗊 Create Su	ubsidiary Company Rep	plication Configuration	on				L
Notes Receivable	-11	Company Id	Company Name	Database N	ame	Server			L
Ticket Management		3	Rely LLC Demo Enviro	nme irely03		BETHNU	C\SQL2014		
Contract Management	Replica	ation Configu	ration						
Risk Management	Save		it Close						
	Detail	ls)						
Manufacturing	Repli	cation for Sub:	sidiary to Parent						
Tank Management	√ Se	elect All 🗌 Cl	ear All Export - 🔠 V	iew - Filter (F3)					
	Modu	ule Name*	1	Screen Nan	ne*			Enabled	d
Card Fueling	Manu	ufacturing		Blend prod	uction, Process p	roduction, I	FG Product	~	
? 🔘 🖓 0.82s Read	Scale			Scale Trans	action			\checkmark	
	Gene	ral Ledger		Transaction	1			~	
	Risk N	Vanagement		Sample Ent	ry			\checkmark	
	Risk N	Vanagement		RM Derivat	ive Entry, RM Assi	ign Derivati	ve, RM Ma	~	
	Sales			Invoices				\checkmark	
	Purch	nasing		Vouchers				\checkmark	
	Inven	itory		Inventory V	aluation			\checkmark	
	Inven	itory		Inventory C	ount			\checkmark	
	Inven	itory		Inventory A	djustment			\checkmark	
	Inven	itory		Inventory T	ransfers			\checkmark	
Replication Progres	s								×
Details									
Action				Status					
Setting replication of	ption			Completed					
Configure Log Reade	2r			Completed					
Setting Publication				Completed					
Setting Article				In Progres	s				
Add Publication snap	pshot								
Add subscription									
Add Push subscriptio	on								
Setting Company Id									
Configure Initial sna	pshot								
Add Initial snapshot	subsc	ription							
Starting snapshot									
2 🕅 🔾 Para	-h./								
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- 1. Login as an Administrator

- Login as an Administrator
 On the user's menu panel, open System Manager menu then Company Configuration
 Multi-company can be setup in the Company panel

 Note: The Create Parent Company button creates a copy of the original company database or a fresh company. To view the steps on how to create a parent company database see How to Create a Parent Company

 To create a Subsidiary company click on the Create Subsidiary Company button

	Compa	ny Audit Log (2)			
System Manager	Parer	t Company			
General Ledger	🗊 Cre	ate Parent Company R	eport 🔠 View	Filter (F3)	К.Я. И Ч
Credit Card Recon	Comp	any Id Company Name	Database Nam	ne Server	Туре
Inventory	1	iRely LLC	i1730DEV	BETHNUC\SQL201	4 Produ
Purchasing	4				×
Sales	Subsi	diary Company			5.7
Payroll	Comp	ate Subsidiary Company	Report BB View	Filter (F3)	23
Notes Receivable	219	iRely I G	Database Int	BETHNUCISO	2014
Ticket Management		Create Subsidiary C	ompany		×
Contract Management		Create Cancel			
Risk Management		Details			
-		Database Prefix			
Logistics					
Logistics Tank Management		Company Code			
ank Management		Company Code Database Name			

5. Enter the Database Prefix and Company Code on the Create Subsidiary Company screen:

Create Subsidiary Company X			
Create Cancel			
Details			
Database Prefix	i1730		
Company Code	03		
Database Name	i173003		
? 🗘 🖓 Ed	lited		

Field	Description
Database Prefix	Database Prefix
Company Code	Must be unique. Ex. 01, 02, 03 etc. Note that this field only accepts numeric characters.
Database Name	A read-only field that displays the combined Database Prefix and Company Code that will be the complete database name

- 6. Click the Create button to start creating the subsidiary company
 7. The Patch Update screen will open, showing the process:

 a. Creating the Database
 b. Syncing SM tables from Parent to Subsidiary
 c. Syncing EM tables from Parent to Subsidiary
 d. Syncing GL tables from Parent to Subsidiary
 e. Syncing Vendors from Parent to Subsidiary
 f. Syncing Other files from Parent to Subsidiary
 g. Syncing Multi-company from Parent to Subsidiary
 h. Syncing Multi-company from Parent to Subsidiary

i21 Updates		×
	L. :04 TH	
Patch Update with iRe	IY IZ1 ™	
Version 17.32.1106.171		0
Action	Status	
Prepare requirements	Completed	
Create Database	C in Progress	
Your system is up to date	Check Database	
Download Lo	g File	
2 0 0		
i21 Hødates		٦ x
i21 Updates		⊐ ×
i21 Updates	ty i21™	⊐ ×
Patch Update with iRe	t ly i21™	∍ × ∘
Patch Update with iRe	t ty i21™ Status	•
i21 Updates Patch Update with iRe Version 17.32.1106.171 Action Prepare Database	ty i21™ Status Completed	•
i21 Updates Patch Update with iRe Version 17.32.1106.171 Action Prepare Database System Manager	t ly i21™ Status Completed Completed	•
i21 Updates Patch Update with iRe Version 17.32.1106.171 Action Prepare Database System Manager Entity	t ly i21™ Status Completed Completed Completed	¢
i21 Updates Patch Update with iRe Version 17.32.1106.171 Action Prepare Database System Manager Entity GeneralLedger	ty i21™ Status Completed Completed Completed © In Progress	¢
i21 Updates Patch Update with iRe Version 17.32.1106.171 Action Prepare Database System Manager Entity GeneralLedger Customer	It i21 ™ Status Completed Completed Completed © In Progress	°
i21 Updates Patch Update with iRe Version 17.32.1106.171 Action Prepare Database System Manager Entity GeneralLedger Customer Your system is up to date	ty i21 ™ Status Completed Completed Completed © In Progress Check Database	0
i21 Updates Patch Update with iRe Version 17.32.1106.171 Action Prepare Database System Manager Entity GeneralLedger Customer Your system is up to date Download Le	Ity i21 ™ Status Completed Completed Completed © In Progress Check Database	•

8. Once the process has completed, subsidiary companies will be listed in the Subsidiary Company panel



- 9. The new subsidiary company database will be automatically added to the web.config of i21
- 10. Login on subsidiary company. Note that we will need a new License for the subsidiary company.
- 11. When a user adds/edits/deletes a record from the subsidiary company and saves it, it will be saved in the parent company first, then the parent company will then sync the changes to all of its subsidiary companies.
 - a. Here are the list of items that can be synced:
 - i. User Profile
 - ii. Favorites
 - iii. User Roles
 - iv. Security Policies
 - v. User Entity
 - vi. Ship Via Entity
 - vii. Customer Entity
 - viii. Vendor Entity
 - ix. Employee Entity