

Creating a Company File

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Before creating a company file it is suggested that you read the section on preparing your information. You must have already installed the server and at least one client computer.

In order to manage your products, customers and vendors as well as transactional history All Orders will create a database file. Each company that you manage with All Orders will have its own database file. Therefore the purpose of this section is to create the company database file and prepare it for use.

If you are going to connect All Orders to QuickBooks, please open QuickBooks as the administrative user, switch to single user mode and then minimize QuickBooks. Launch All Orders and select New Company... from the File menu, a Welcome screen will appear. Click Next to continue.

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In the next screen you will choose the region. You can select:

- US – United States
- CA – Canada
- UK – United Kingdom
- AU – Australia and New Zealand

If you are connecting All Orders to QuickBooks, the above should correspond with your regional version of QuickBooks.

Next you will link the soon-to-be created All Orders file with your QuickBooks company file. Check the box if you do not want to link All Orders with QuickBooks. Click Next and after a few moments you should see QuickBooks blinking in your windows taskbar. Click the windows taskbar (QuickBooks icon) and you will see the following dialog box.



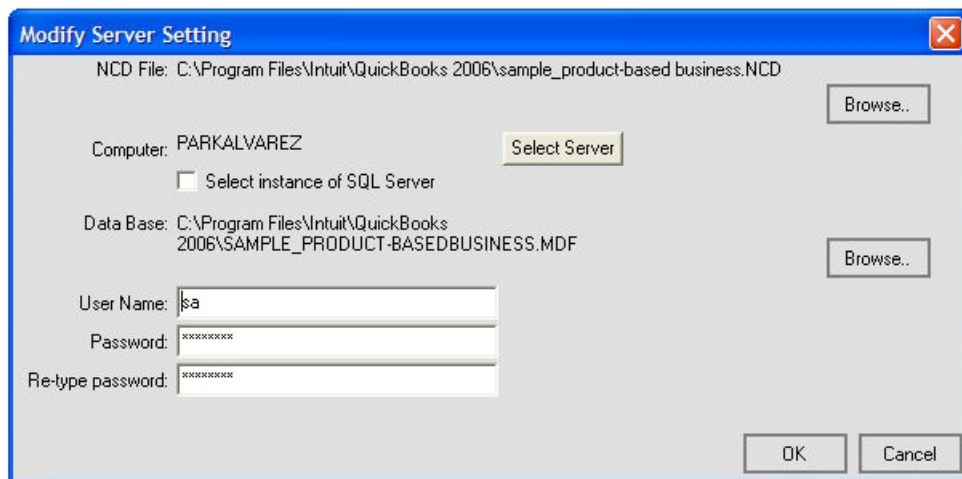
This is the way QuickBooks allows integrated applications such as All Orders to exchange data with QuickBooks. Select Yes, whenever this QuickBooks company file is open, then click Continue, then click Done to confirm.

Note: You can edit these settings at any time within QuickBooks by navigating to **Edit - Company Preferences - Integrated Applications**. See Synchronizing with QuickBooks on different strategies for QuickBooks exchanging information with QuickBooks.

On the next screen you will select the SQL server instance. This should default to SERVERNAME\ALLORDERS. (Note: If you have multiple instances they will be listed). Select a SQL Instance and click Next.

On the next screen you will select a location for the NCD file. Your company's data is not actually stored in the NCD rather it is stored in your SQL Server database. The NCD file contains information which tells All Orders how to connect to the SQL Server and your database file. By default the All Orders database will be created in the same location as the QuickBooks file. You can change the location by clicking Select Folder button to select a new folder. Note: the folder MUST be on the same computer that you installed the server software. Click Next to continue.

The last screen before the company file is created is a summary. Click the Advanced Settings button if you need to alter the NCD location or filename, change servers, or alter the database log in information.



If everything looks good, click Next to continue.

At this point, All Orders will begin to import all pertinent data from your QuickBooks file (if applicable). Depending on how much information is in your QuickBooks database, this can take anywhere from a few seconds to several minutes.

After the first synchronization is complete, you're provided with a special dialog that allows you to set critical preferences. You can alter these preferences at any time navigating through the Main Menu to Company -> Preferences (see the section on Setting Preferences).