

Practice Companies Help and Information Sheet

‘Practice Companies’ allows you to create and remove practice companies using either the data from one of your existing companies or the data contained in a saved backup. This functionality allows you to practice using Chreos without affecting or risking valuable data. This must be setup in Chreos Server under Properties | File | Practice companies by selecting either “Create practice company from existing company” (Fig 1.) or “Create practice company from a backup” (Fig 2.).

Note: You must be logged out of Chreos Client before you do this because the Server will need to restart.

Create a Practice Company with Existing Data

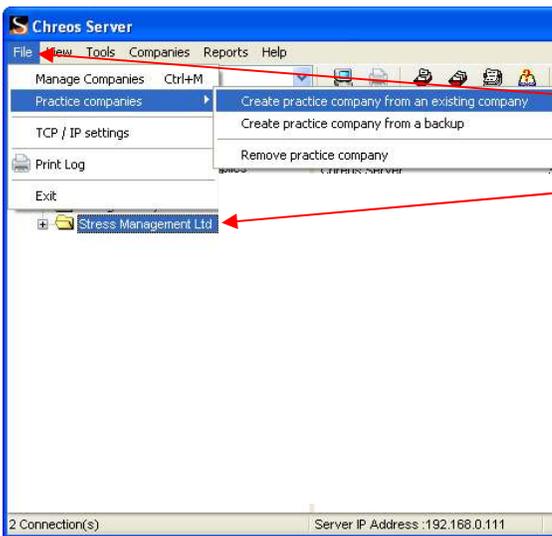


Fig 1. Chreos Server Screen

To create a practice company start Chreos Server and right click on the Server icon  in your icon tray and select **Properties**.

Click File | Practice companies.

To “Create practice company from an existing company” you must first select the company. A Login screen will appear (Fig2.).



Fig 2. Login Screen

If Chreos is licensed, enter your User Name and Password. Enter the company name (Fig.3).

A confirmation message will tell you to restart Chreos Server before the changes can take place (Fig 4.).



Fig 3. Enter Company Name Screen

Create a Practice Company with Existing Data cont.

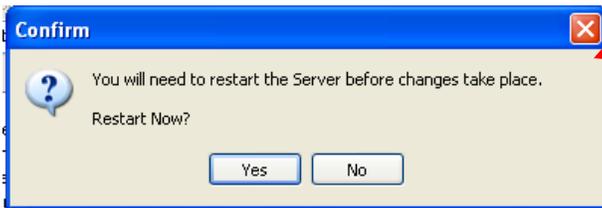


Fig 4. Confirmation Screen

If you click [Yes] Chreos Server will restart and the practice company will be available.
If you click [No] you will go back to the original screen and the practice company will be created next time the server is started.

Create a Practice Company from a Backup

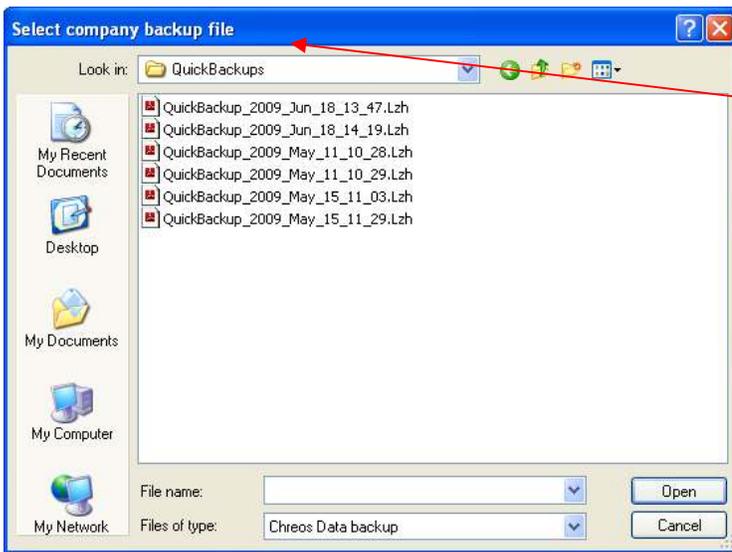


Fig 2. Select Company Backup File Screen

To "Create practice company from a backup company" click on "Create practice company from a backup" and select the Chreos generated backup file from your company backups. The size of your data will determine how long it takes to build.

Log in as in (Fig 2.).
Enter the company name as in (Fig 3.).
Click [Yes] or [No] in the confirmation screen as in (Fig 4.).

To Access a Practice Company

The practice company will be set up ready to use on the Server machine. On other machines a connection will have to be made by going to File | Manage companies | Add and selecting the created practice company. The practice company screen will open with the words "Practice company" across it.

To Remove a Practice Company

On the Server machine select the menu option File | Practice companies | Remove practice company (Fig 1.). A confirmation message will tell you to restart the server as in (Fig 4.).

Any instance of Chreos Client other than those running on the Server machine will need to have the company individually removed.

Note:

Any changes that you make to the data in the practice company will not affect the data in the company that it is based on. For example any Debtor Invoices created in the practice company will not appear in the real one, although if you process an Invoice in the practice company and you have an Email Invoice setting in place for that Debtor, an email will be sent.

Please be aware that the company you have set up as a practice company is an exact replica of the original and has all the same functionality. To avoid any information accidentally being sent to Clients, Debtors or Creditors you will have to manually change the practice company setup and disable the email. This is easily done by removing the 'Smtip Server address" in Maintenance | Setup | System | Internet.