Move or copy company across clients

Setup paiyroll® · https://paiyroll.com/kb/move-or-copy-company-across-clients/

A company in another client

Follow this guide if you need to duplicate a company across clients. You cannot copy a company of another client, so you download its data, create a new company in the new client, and upload the data into it.

Before you start

If this is the same client, use Copy company within the same client instead.

Important: Do not delete the old company until you have confirmed that the new company has all the necessary data - you may need to repeat some of the steps below.

Copy the company to the new client

Download

Download all the necessary data from the company:

1. **Setup > Pay Definitions > Download…** to download all Pay Definitions
2. **Setup > Report Definitions > Download…** to download all Report Definitions
3. If you have created departments, download these from **Setup > Departments > Download…**
4. Optionally, if you have set up pay schedules, you may want to download these from **Setup > Pay Schedules > Download…**
5. **Employees > Download…** to download all employees
6. Optionally, if you need Pay Items, go to **Pay Item editor > Tools > Create Pay Item workbook**, click **Review**, then **Download** to download all existing pay items.

Create a new company

Create a new company:

1. In the new client, click **Setup > All Tools > Company create or copy**, and for **Company**, select **GB Import Donor Company**. You cannot copy a company of another client, so you upload its data in "Upload".
2. If you need an additional test worker, you can create one now.
3. Rename the company

Upload

If the new company has a different name from the old company, you will have to edit the files. You will find it easier to open the CSV files and save them in Excel XLSX format.

- If you’re unsure of the exact form of the new company name, a quick and easy method is to download the same file from the new company.
- If you have a Data-feed report definition that references a test worker, you will need to change that reference in the file before upload.
- You may also wish to delete all of the system Pay and Report definitions, as these will not be required and already exist in the new company, e.g. PAYE, NIC, etc.

Finally, upload the data into the new company:

1. **Setup > Pay Definitions** > **Upload…** to upload all Pay Definitions.
2. **Setup > Report Definitions > Upload…** to upload all Report Definitions.
3. If you have required departments, upload these from **Setup > Departments > Upload…** all Departments.
4. Ditto for Pay Schedules
5. **Employees > Upload…** to upload all employees. A username can be in one company only, so first change the usernames in the old company, for example to john.smith@acme.com_old, with bulk employee edit. Otherwise the upload stops with "already exists - please choose a different one".
6. If you downloaded the Pay Items, **Pay Item editor > Tools > Upload Pay Item workbook** to upload them.

Your new company should now be ready. After you have verified that everything has moved over correctly, you may wish to delete the old company.

Next steps

- Copy company within the same client
- Move employees between companies