



## FAQ

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### How do I map comps in Compeat?

It's easy to map new comps in Compeat. Below are step-by-step instructions to guide you and your team through this process.

#### DSR Out of Balance?

While there are times you may know of a comp that needs to be mapped, there are other times when a comp might be pushed to Compeat from your POS and cause your DSRs to be out of balance.

We call these **polling exceptions**, and we have a fantastic report that lists any exceptions that have come over from the POS.

Note: We also strongly recommend you review the POS Sales report against your DSR to determine the discrepancy. This helps you determine what type of exception to search on the below report. If you are unsure of the discrepancy, run the below report for each exception type.

To run the *Polling Exceptions* report, go to **Reports > Miscellaneous > Polling Exceptions**:

1. Choose the **date range**.
2. Select your **entity** (or leave blank if you wish to run the report for all).
3. Pick the **type of exception** you wish to view.
4. **Preview** your exceptions.

The *Polling Exceptions* report shows exceptions not currently mapped in Compeat. You can compare the amounts listed to see whether they match the amounts out of balance on the DSRs.

### Polling Exceptions - Comps

Irving

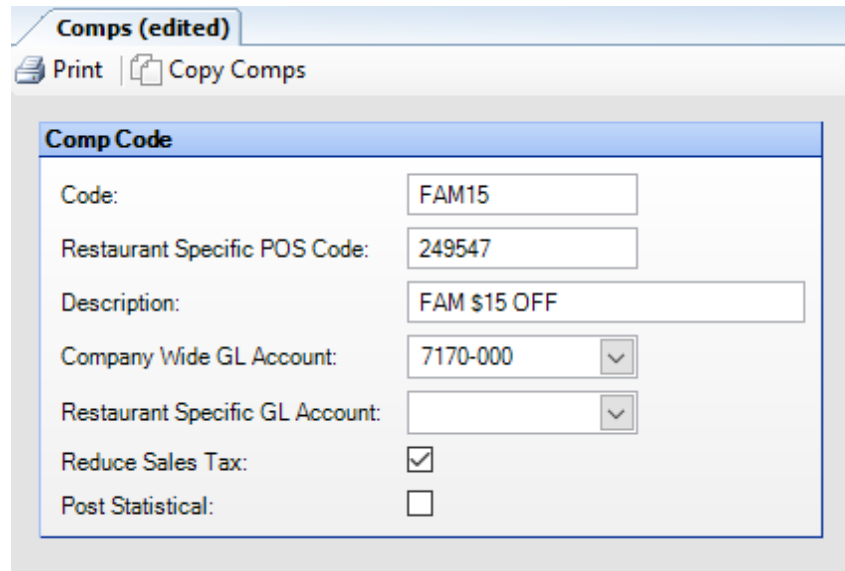
DSR Date	DSR Status	POS Code	Total	Polling Client	Polling Job	Polling Step
03/08/2017	Valid	249547	\$15.00	Polling Clients	010 - Irving	Comps

In the above example, the *Polling Exceptions* report shows a single comp with one instance of use on the POS for the business date of 3/08. As a result, the DSR is out of balance by \$15.00. To map this comp, you need the POS code associated with this item. In this example, the POS code is 249547.

If you are unsure what the comp is for, or what it should be called in Compeat, consult your POS Sales report. Check the comps and discounts section for an item that matches the amount of your exception.

## Mapping Comps

Now that you know which exception needs to be mapped, or if you wish to set up a new comp, go to **Setup > DSR > Comps**.



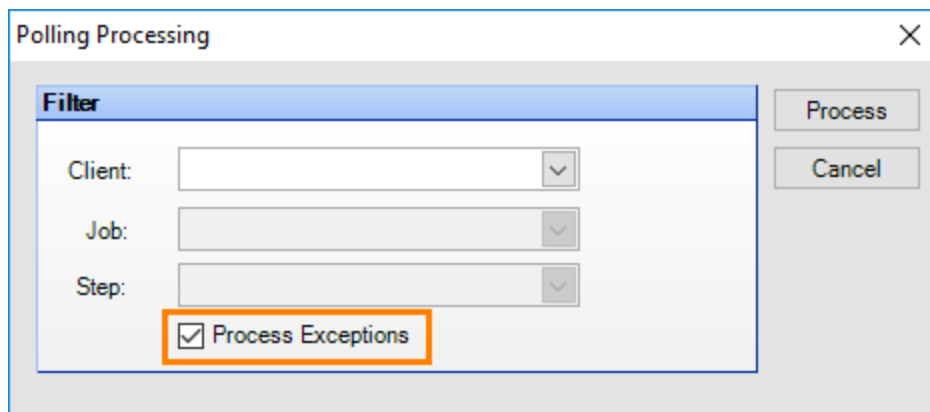
The screenshot shows a software window titled "Comps (edited)". At the top left, there are two buttons: "Print" and "Copy Comps". Below these is a section titled "Comp Code" with a blue header. The form contains the following fields:

Code:	<input type="text" value="FAM15"/>
Restaurant Specific POS Code:	<input type="text" value="249547"/>
Description:	<input type="text" value="FAM \$15 OFF"/>
Company Wide GL Account:	<input type="text" value="7170-000"/> <input type="button" value="v"/>
Restaurant Specific GL Account:	<input type="text"/> <input type="button" value="v"/>
Reduce Sales Tax:	<input checked="" type="checkbox"/>
Post Statistical:	<input type="checkbox"/>

1. For a new comp, choose **New Record**.
2. Complete the **Comp Code**
  - o **Code:** Choose an identifying name for the comp.
  - o **Restaurant Specific POS Code:** Assign the code used by the POS at that entity (this is the POS code shown on the exceptions report).
  - o **Description:** Provide a full name for the comp.
  - o **GL Account:** Select which GL Account you wish to use.
    - **Company Wide:** The same account used by other entities.
    - **Restaurant Specific:** If selected, this account takes priority over the company-wide GL account.
  - o **Reduce Sales Tax:** Ensure this box is checked.
  - o **Post Statistical:** If you poll net sales, your comps must post statistically. Ensure this box is checked. Important: The GL Account assigned to this comp (above) must also be statistical.
3. **Save** your new comp.

## Balance Your DSR

Once you map a comp from your *Polling Exceptions* report, it's important to clear that exception off the report so your DSR balances.



1. Go to **Setup > Polling > Polling Processing**.
2. Choose the **Client** (the entity).
3. Choose the **Job** (optional).
4. Choose the **Step** (if mapping comps, choose **Comps**).
5. Ensure **Process Exceptions** box is checked.
6. Click **Process**.

Compeat notifies you once processing completes. Re-fresh the DSR in question, and it should balance and reflect the new comp on the **Comps** tab.

**Please note:** If the DSR was completed or posted, processing your exceptions will not update the DSR. You must un-complete or un-post the DSR to update the DSR.

Was this Helpful ?  yes  no

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## Learn More



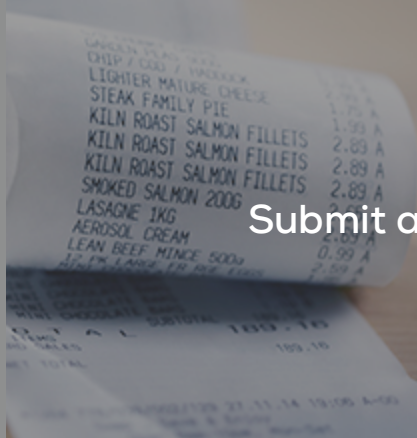
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