



FAQ

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How do we set up a new entity in Schedule?

When your company opens a new entity, you must complete the necessary setup. Below are step-by-step instructions on how to *Set Up Your New Entity* in Schedule. For a PDF version of this checklist, click [here](#).

1. Jobs. In [Workforce 1.0](#), go to **Labor Admin > Scheduling > Jobs**. Double-click each job the new restaurant needs from the existing list. For each, click the **Entity Assignments** tab and **Add Row**. Choose the new entity number from the drop-down and enter the correct POS code for this job. If you are creating a new job, select the option to **Add** at the bottom of Jobs listing page. Remember that employees see the job code when viewing a schedule, so it should be something identifiable.
2. Wage Rules. *If your new entity resides in the same state as another entity, and is subject to the same labor laws, skip this step.* If not, create a Wage Rule Set for the new state. This may require that you set up

new labor laws first, then apply them to the new Wage Rule Set (OT Rules, Minor Rules, etc.). The setup for labor laws and Wage Rule Set can be found on the **Labor Admin > Wage Rules** menu in [Workforce 1.0](#).

3. Special Days. *If your new entity uses the same Special Days as another entity, skip this step.* If not, create a separate Recurring Special Day Set and Variable Special Day Set for your new entity. These sets are available on the Forecasting menu in **Labor Admin > Forecasting** in [Workforce 1.0](#).
4. Schedule Groups. *If your new entity uses the same Schedule Group as another restaurant, skip this step.* If not, create a Schedule Group Set with a list of schedules your new entity uses. This may require you to create new Schedule Groups, and then apply them to the Schedule Group Set. These features can be found on the Scheduling menu in **Labor Admin > Scheduling** in [Workforce 1.0](#).
5. Restaurant Stations. *If your new entity uses the same Restaurant Stations as another restaurant, skip this step.* If not, create a Restaurant Stations Set using a list of stations your new entity uses. This may require you to create new Restaurant Stations, and then apply them to the Restaurant Station Set. These features can be found on the Scheduling menu in **Labor Admin > Scheduling** in [Workforce 1.0](#).
6. Day Parts. *If your new entity uses the same Day Parts (breakfast/lunch/dinner) as another entity, skip this set.* If not, go to **Labor Admin > Forecasting > Day Part Sets** in [Workforce 1.0](#) and create a new day part by clicking **Add** at the bottom of the screen. If you need to set up forecasting for a new day part, please contact support@compeat.com. The forecasting menu is located under **Labor Admin > Forecasting** in [Workforce 1.0](#).
7. Labor Definitions. If your new entity requires settings different from that of your Default Labor Definitions (including any new sets created in steps 2-6), you must create a new Labor Definitions record for this entity. Go to **Labor Admin > Labor Definitions > Labor Definitions** in [Workforce 1.0](#). Select **Add** at the bottom of the page and choose your new entity from the drop-down. Override existing settings by clicking the checkbox next to the necessary field. If you use the ADP or Paychex export configuration, enter the company code for the new entity at the bottom of this screen.
8. Polling. To install polling, contact support@compeat.com. Be sure to specify which polling features you wish to use for this entity (time

punches, schedule export, employee import, etc.). Availability for these features depends on your POS.

9. Employees. In Labor, go to **Labor > Employees** to set up employees for your new entity. If your POS is compatible with the employee import feature, we may be able to import employee records from your POS. Please contact support@compeat.com for further information, as this feature requires some initial setup.

Was this Helpful ?

yes

no

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