

Set Up Your New Entity: Accounting & Inventory

When your company opens a new restaurant or accounting entity, you must complete the necessary setup. Some aspects of setup can be copied from an existing entity to your new entity.

If you are setting up an **accounting entity**, follow steps #1-6, and 9. For a **restaurant entity**, follow all steps outlined below.

To automate the creation of a new entity as much as possible, we recommend you follow these steps in the order presented:

1. **Entity Definitions.** Enter as much information as possible for your new entity, such as address, phone number, and days open on the **Setup > Entities > Restaurants or Accounting Entities** screen.
2. **Security.** Grant new or existing users access to this entity by adding it to their security privileges under **Setup > Security > Users > Entity Access** tab.
3. **Inter-Company.** Use the wizard to create inter-company relationships for your new entity. Go to **Setup > Inter-Company** and click **OK** to view all existing inter-company relationships. Click **Auto-Create** in the upper-left corner and choose **Relationships Between All Entities**. Verify that your account prefix is correct, and click **OK**. To add these new accounts to your Chart of Accounts, click **Auto-Create > Associated Chart of Accounts Entries**.
4. **Bank Accounts.** Create a bank account for your new entity to establish a base banking relationship. Go to **Setup > Banking > Bank Accounts** and define a GL Account, Bank Code, and Bank Name.
5. **Other Definitions.** Create a definitions record for your new entity from scratch, or copy from an existing entity. Go to **Setup > Other Definitions**. For a new record, click the green plus sign at the top of the screen. To copy, select the record of an existing entity and click **Copy** in the upper-left corner. From the drop-down, select your new entity. Update bank codes and GL account information on the **Accounts Payable** and **Accounts Receivable** tabs.
6. **Periods.** Go to **Setup > Periods** and select your new entity from the **Entity** drop-down. Click **New Period** to create the periods from scratch, or choose **Copy Periods** to copy periods from an existing entity. To view a training video on how to set up or copy periods, visit our support site [here](#). *Note: For consolidated financial reporting, entity periods must match. You will need to copy previous year period files for your new entity to ensure it matches other entities.*
7. **DSR Setup.** Enter any entity-specific POS codes for existing comps, paid outs, and additional deposits. These fields are found under **Setup > DSR > Comps, Paid Outs, or Additional Deposits**.

8. **DSR Definitions.** Create a DSR definitions record for your new entity from scratch, or copy from an existing entity. Go to **Setup > DSR > DSR Definitions**. For a new record, click the green plus sign at the top of the screen. To copy, select the record of an existing entity and click **Copy** in the upper-left corner of the record. From the drop-down, select your new entity. Update credit card, banking, tax rate, and other information as needed.
9. **Copy Vendors.** Copy vendors from an existing entity to your new entity using the **Copy Vendors** wizard. Go to **Setup > Accounts Payable > Copy Vendors**. If your new entity will perform inter-store transfers with another entity, it must be set up as a new vendor record. Go to **Setup > Accounts Payable > Vendors (All Entities)** and create a **New Record**. This vendor must also represent the entity on the **Miscellaneous** tab of the record. Select the entity from the drop-down for **Entity This Vendor Will Represent**.
10. **Account Receivable Customers.** If using the Accounts Receivable module, add your new entity to customer records on the **Setup > Accounts Receivable > Customers (All Entities) > Entity Access** screen.
11. **Install Polling.** Compeat Support provides instructions for the installation of the polling client. Contact support@compeat.com for installation instructions. Once installed, notify our support team so a technician can complete the configuration and necessary mapping.
12. **Copy Inventory.** Use the **Copy Inventory Items** wizard to copy inventory items to your new entity. Go to **Inventory > Restaurant Inventory Items > Copy Inventory**. Choose which entity you wish to copy from, and the destination entity (your new entity). You can copy all items, a range of items, or by inventory level. To view a training video on how to copy inventory items, visit our support site [here](#).
13. **Copy Prep Items.** Use the **Copy Prep Items** wizard to copy prep items to your new entity. Go to **Inventory > Prep Items > Copy Prep Items**. Choose which entity you wish to copy from, and the destination entity (your new entity). To view a training video on how to copy prep items, visit our support site [here](#).
14. **Copy Menu Items.** Use the **Copy Menu Item Info** wizard to copy menu prices and POS codes to your new entity. Only copy POS codes if the configuration is uniform across entities. If your new entity has different POS codes, manually enter them. Go to **Inventory > Menu Items > Copy Menu Items Info** to access the wizard. Choose which entity you wish to copy from, and the destination entity (your new entity). To view a training video on how to copy menu items, visit our support site [here](#).
15. **Vendor Interfaces.** If you have Vendor Interfaces set up, you must submit a request to have your new entity included in the existing interface. To submit your request via the **Vendor Interface Request Form**, visit our support site [here](#). Ensure that your new entity has been added to the vendor's record (**Setup > Accounts Payable > Vendors (All Entities) > Entity Access**) and that account numbers are included.