



NEW ENTITY ADD CHECKLIST



Reach out to your CSM to let them know you're adding an entity



Entity Name

- Company > Setup > Entities to create a new Entity
- Follow the configuration of existing entities
- Entity ID (Cannot be changed)
- Entity EIN



Add any GL accounts for Bank Accounts or IE Accounts

- General Ledger > All > General ledger accounts
- Recommend duplicating a similar account and adding the name and account number



Add any Checking Accounts

- Cash Management > Checking
- ID (Cannot be changed)
- GL Account (Will need to be created)



Add any Savings Accounts

- Cash Management > Savings
- ID (Cannot be changed)
- GL Account (Will need to be created)



Inter-Entity Mapping

- Company > Setup > Inter-entity account mapping
- Edit
 - Scroll to the bottom and any new combinations or export template
 - Add the accounts to new combinations and import
 - Delete existing combinations and just add the account numbers to the new mappings
- Add Due To and Due From accounts (Will need to be created)