

# Creating reporting entities without organizational levels

## (ajeraComplete or Departments add-on)

**Goal:** Your corporate structure is simple, and you want to create groups of departments to report on in your financial statements.

### In this quick lesson

Step 1: Review department names	2
Step 2: Set up reporting entities	3

If you are using departments, you can create *reporting entities*, which are groups of departments that represent various divisions in your firm.

For example, reporting entities for an architectural firm in Oregon with offices in Portland, Salem, Eugene, and Bend might look like this:

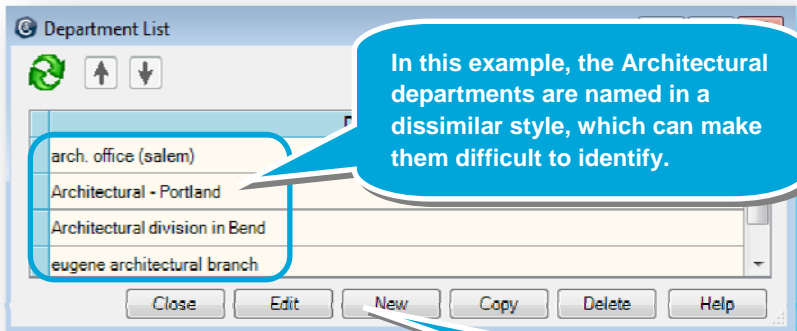


A reporting entity can consist of as many or as few departments as you want, and you can create as many as you need.

You must then add the reporting entities to statement designs in the Financial Statement Designer to view financial information for each entity (for example, year-to-date revenue for the Portland office).

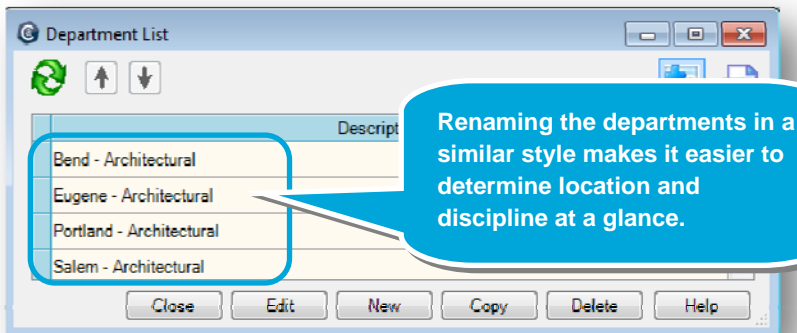
## Step 1: Review department names

1. Click **Company > Financials > Departments.**
2. Review your department names to ensure they are detailed enough for easy identification when creating reporting entities. Your departments must be set up before you can create reporting entities.



In this example, the Architectural departments are named in a dissimilar style, which can make them difficult to identify.

To change a name, select a department, and click Edit.

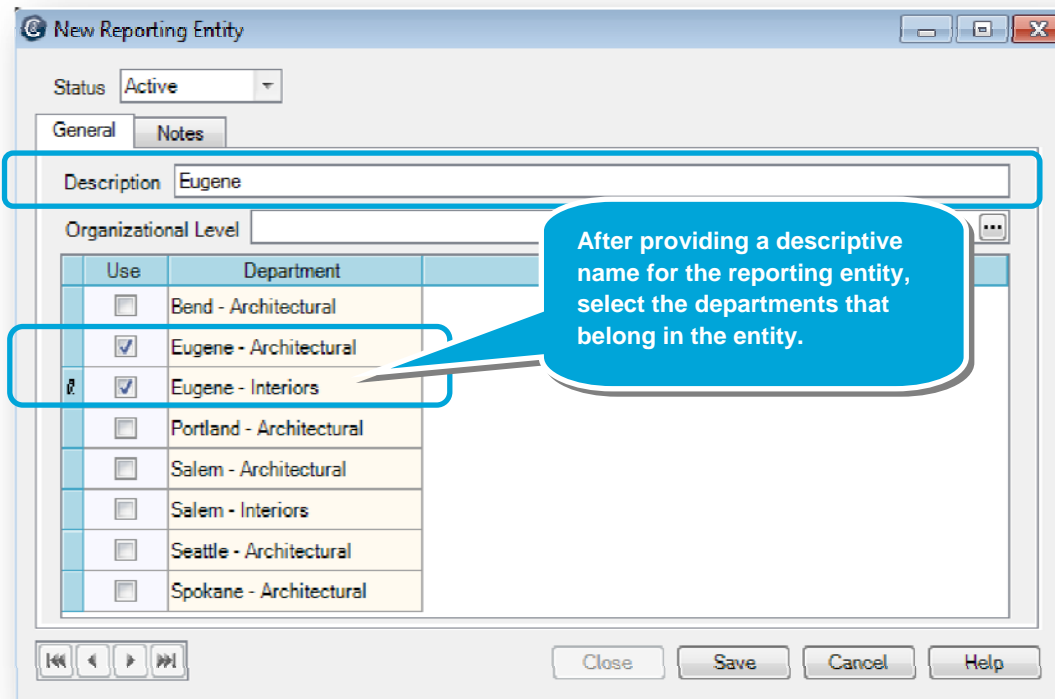


Renaming the departments in a similar style makes it easier to determine location and discipline at a glance.

The image shows two screenshots of a 'Department List' window. The top screenshot shows a list of departments with inconsistent naming: 'arch. office (salem)', 'Architectural - Portland', 'Architectural division in Bend', and 'eugene architectural branch'. A blue callout bubble points to the 'Architectural - Portland' entry, stating that such dissimilar styles make departments difficult to identify. Below this, a large grey arrow points down to the second screenshot. The second screenshot shows the same list after renaming: 'Bend - Architectural', 'Eugene - Architectural', 'Portland - Architectural', and 'Salem - Architectural'. A blue callout bubble points to the 'Eugene - Architectural' entry, stating that this standardized style makes it easier to determine location and discipline at a glance. Both screenshots include a toolbar with buttons for 'Close', 'Edit', 'New', 'Copy', 'Delete', and 'Help'.

## Step 2: Set up reporting entities

1. Click **Company > Financials > Reporting Entities**.
2. Set up reporting entities by selecting the departments that belong in them. In this example, you set up reporting entities for each city by selecting the departments that belong in each city entity.



### Summary

Now that you know how to create reporting entities in Ajera, finish setting up the other entities for your firm.

If your firm structure is complex, see the quick lesson entitled *Creating reporting entities with organizational levels*.

To learn how to add reporting entities to financial statements, see the quick lesson entitled *Using the Financial Statement Designer*.