

# Setting up multi-company (ajeraComplete only)

**Multi-company** allows you to set up multiple companies so they can share clients, contacts, and vendors, but keep their financial, project, and payroll transactions separate.

You can add companies to an existing Ajera database or set up a new Ajera database with multiple companies. This quick reference shows you what to set up at the organization level and at the company level.

## 1 Set up company preferences

### Company > Preferences

General, Balance Sheet Accounts, Billing tabs

- Use **multi-company** check box
- Department for cash accounting
- Invoice numbering option

## 2 Set up security

### Company > Security

General, Company, Projects, Reports tabs

- Journal entries to intercompany accounts
- Access to company setup
- Company in Project Command Center
- Multi-company Reconciliation report

## 3 Set up each new company

### Company > Companies\*

\* overrides Company > Preferences

- Fiscal dates
- Beginning balance date
- Payroll type
- Payroll start date
- Client invoicing options
- Average labor budget rates
- Report and invoice logos

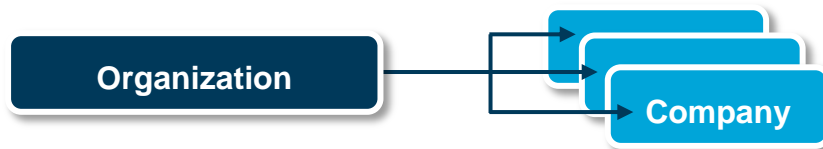
**Important!** Set the Don't Allow Entries Prior To date in Company > Preferences to **one day past the latest beginning balance date** of all the companies.

## 4 Set up or review setups

### Company and Setup menus

- Account groups
- Bank accounts
- Budgets
- Chart of accounts
- Clients
- Contacts
- Departments
- Employees
- Organizational levels
- Overhead groups
- Projects and templates
- Recurring journal entries
- Recurring vendor invoices
- Reporting entities
- Vendors

**Note:** If using account IDs, add IDs to new Intercompany Due To and Due From accounts.



After setting up multiple companies, you follow a company-specific workflow in Ajera.

## 5 Set up or review existing reports, statements, and inquiries

### Reports and Inquiry menus

Don't forget the financial statement designs and statement groups.

## 6 Enter and reconcile beginning balances for each company

### Company > Beginning Balances

**Note:** Beginning balances for client prepayments (Setup > Clients) are unavailable in multi-company.

### Setups

- Bank accounts
- Beginning balances
- Budgets
- Credit cards
- Employees
- Projects

### Tasks that don't cross companies

- Client invoices (non-WIP changes)
- Journal entries
- Payroll
- Vendor payments

### Tasks that can cross companies

- Bank register entries
- Client invoices (WIP changes)
- Client receipts
- Expense reports
- In-house expenses
- Timesheets
- Vendor invoices

### Reporting

- Client statements
- Financial statements
- Inquiries
- Reports, including Multi-company Reconciliation report

Next quick reference:

- [Understanding the Ajera workflow with multi-company](#)