

Close Accounting Period

23/10/2024 4:27 pm BST

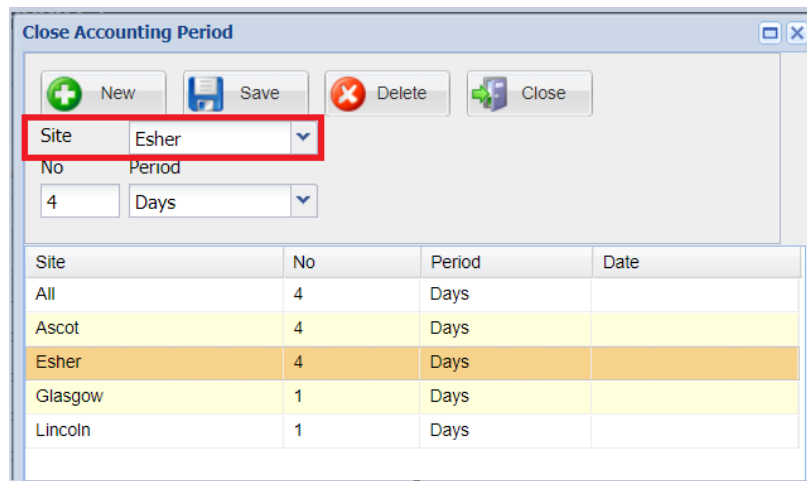
Summary

The Close Accounting Period Date is an accounting and security feature which prevents any editing of client accounts before the date set.

Details

Set the Close Accounting Period

1. From the '**Finance**' toolbar menu select '**Close Accounting Period**'.
2. This will open the Close Accounting Period window.
3. Select the **site** you are setting the account period for from the 'Site' drop-down list.

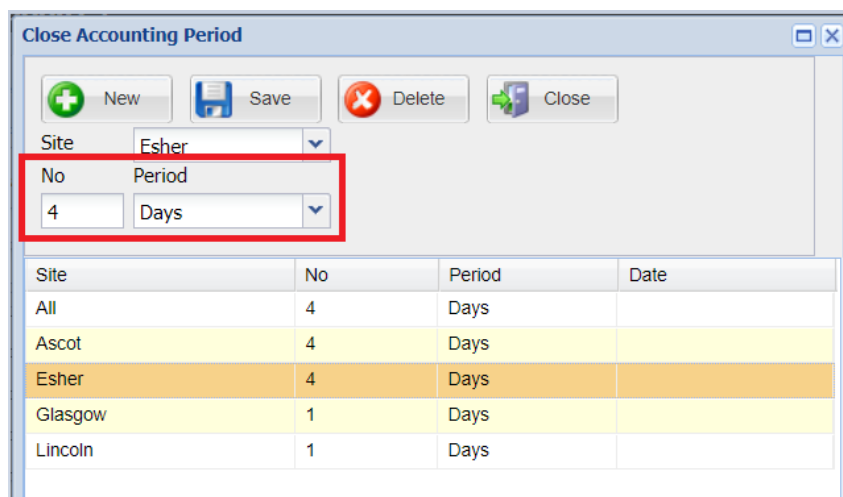


The screenshot shows the 'Close Accounting Period' window. At the top, there are four buttons: 'New' (green plus icon), 'Save' (blue floppy disk icon), 'Delete' (red X icon), and 'Close' (green arrow icon). Below these buttons, there is a 'Site' dropdown menu with 'Esher' selected. Below the 'Site' dropdown, there is a 'No' field with the value '4' and a 'Period' dropdown menu with 'Days' selected. Below these fields, there is a table with four columns: 'Site', 'No', 'Period', and 'Date'. The table contains five rows: 'All', 'Ascot', 'Esher', 'Glasgow', and 'Lincoln'. The 'Esher' row is highlighted in orange.

Site	No	Period	Date
All	4	Days	
Ascot	4	Days	
Esher	4	Days	
Glasgow	1	Days	
Lincoln	1	Days	

Note: If setting for all sites (or if you are a single practice) select 'All'

4. **Specify the close period.** This can be set as 1 day/week/month or set to a user specified date.



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Site	No	Period	Date
All	4	Days	
Ascot	4	Days	
Esher	4	Days	
Glasgow	1	Days	
Lincoln	1	Days	

5. Select '**Save**' to add. (To add multiple Close Accounting Periods, select the 'New' button and repeat the above steps.

The system can be configured to prompt users if the close account period exceeds a set amount of days. For more information see: [Account Settings](#).
