Close Accounting Period

23/10/2024 4:27 pm BST
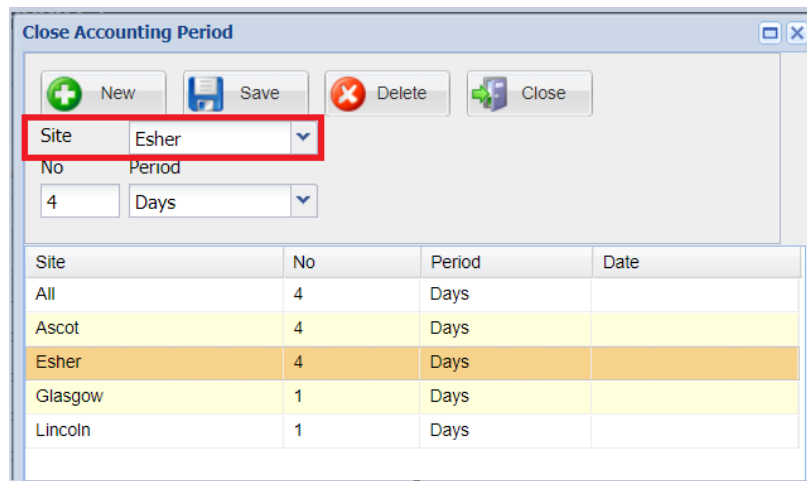
Summary

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.

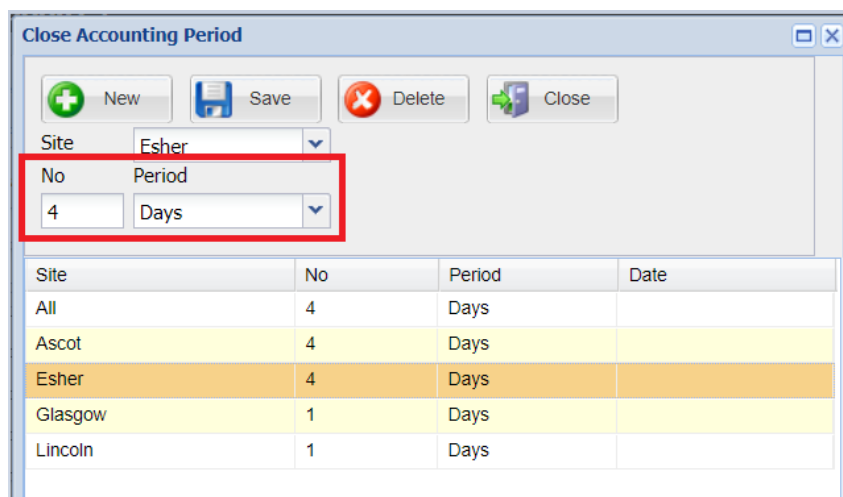3. Select the **site** you are setting the account period for from the 'Site' drop-down list.

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.

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.