

# Year End Procedure

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The first day of business at your new fiscal year, CounterPoint must be updated to the current calendar.

The following steps should be performed before starting business on the first day of the new year, however it should not be done in advance.

Be sure all transaction posting (credit card settlement, end of day ticket posting) is complete for the year that is ending.

To change to the next year, select **Setup / System / Company**.

The screenshot shows the 'Company' setup window. At the top, there is a 'Name' field containing 'Camptown Golf' and a 'Set up batches' button. Below this is a navigation bar with tabs: 'Main', 'Address', 'Contacts', 'Distributions', 'Reference', 'Gift certificates', 'Store credits', 'Stored Value Cards', and 'Other'. The 'Main' tab is active. The 'Dates' section contains 'Century offset years' (80) and 'Current calendar' (2009). The 'Passwords' section includes 'Use passwords' (unchecked), 'Require complex passwords' (checked), and a warning: 'Password settings are not PCI DSS compliant - Click here to fix'. The 'Account Format' section has 'Main acct start pos' (1), 'Main acct length' (4), 'Profit center start pos' (5), and 'Profit center length' (3).

1. Select the new year by using the lookup  in the **Current calendar** field

2. If the year is there, select it and click OK. If not, select **Add (F2)**

1. Enter the New Year

2. Enter the begin date (Example: 01/01/2009)

3. Enter the end date (Example: 12/31/2009)

4. Enter Last year calendar (Example: 2008)

5. Enter Next year calendar (Example: 2009)

6. Click **Set Default Dates**  
You will be prompted for the **Ending date for first week**, this would be the first Saturday in January. This will define the months, quarters and weeks for reporting purposes. (Ex for 2009: 1/3/2009)

3. Save the new calendar when done
4. Exit from the calendars window and verify that the new year is in the Current calendar box on the Company window
5. Close the Company window

NOTE: If your fiscal calendar is different from the regular calendar, perform these steps on the first day of your fiscal year.