

# Finance Periods

📅 Wed, Jan 17, 2024   📁 Finance

Multiple Finance Periods can be entered to aid budget and spend tracking. Finance Periods must be set up before any budgets or AOVs can be created. To create a Finance Period, click on the "Finance Periods" button.

1. This is the Finance Periods screen. This is where all the Finance Periods for the Client are stored. To add a new Period, click the "Add" button. The Periods list will be updated with the newly added Finance Period where the dates can be amended to the desired dates. Also, choose the number of Periods that will make up this Finance Period. Once complete, click the "OK" button.

The screenshot shows a software window titled "Finance Periods". On the left, there is a table with two columns: "Start Date" and "End Date". Above this table is a button labeled "Add". To the right of the table, there are three input fields: "Start Date", "End Date", and "Number of Periods" (which is a spinner box currently set to 1). At the bottom right of the window are two buttons: "OK" and "Cancel".

2. When adding more Finance Periods, clicking the "Add" button opens up a drop down menu where it is possible to set the next Period as either first Period or last Period.

The screenshot shows a dropdown menu that appears after clicking the "Add" button. The menu has a title "Add new period..." and two options: "as last period" and "as first period".

