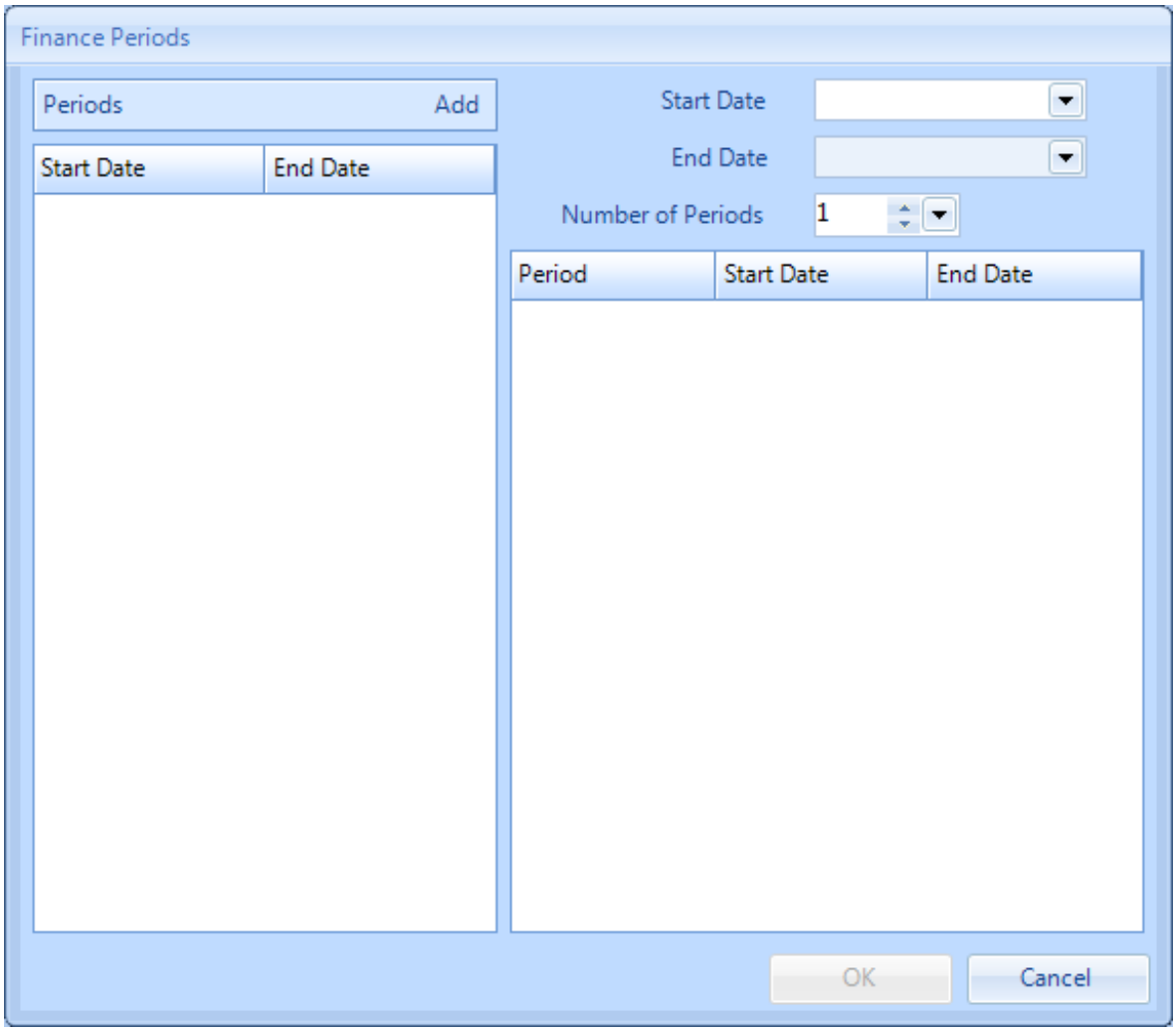
Finance Periods

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.



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.

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