

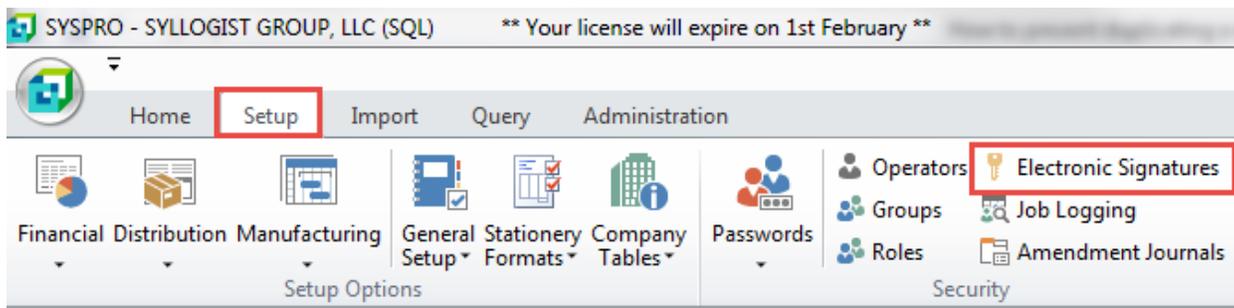
## How to Prevent Performing a Double Month End in SYSPRO

*The instructions below show steps for the Accounts Receivable module, but the same steps can be applied to other modules as well. It is recommended that users be out of the system while you're performing these changes.*

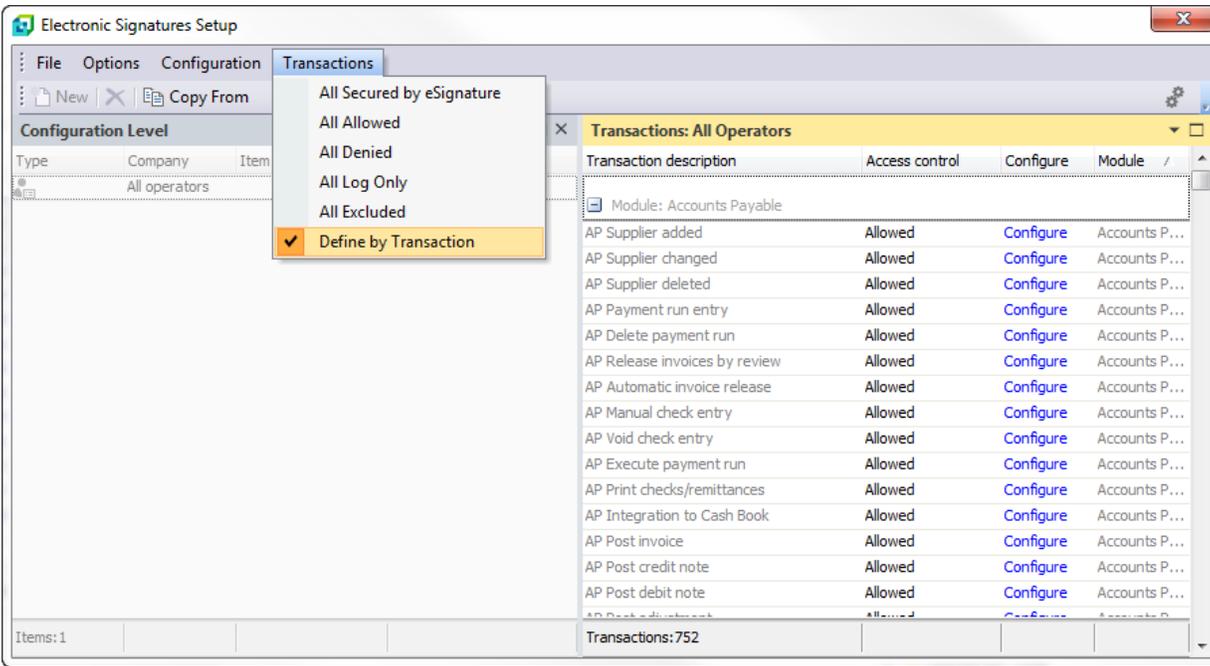
With the busy and stressful lives that we lead, we can be faced with situations where we execute a double month-end by accident in the same day, the same week or even two weeks apart. SYSPRO has preventative measures where the system will warn you if you try to perform a month end on the same date as the last month end, or if the date is different than the expected execution date, but there are also other setup options to further prevent this.

Before you can make use of this process you need to decide on your business rule and answer the following question: How many days apart should month-ends be from one another? You will also need to determine whether you already have Electronic Signatures (eSignatures) enabled. If not, there are other steps that will need to be taken before you can perform the following steps. For a brief training/overview of eSignatures, contact the Sylogist Group at [support@sylogistgroup.com](mailto:support@sylogistgroup.com).

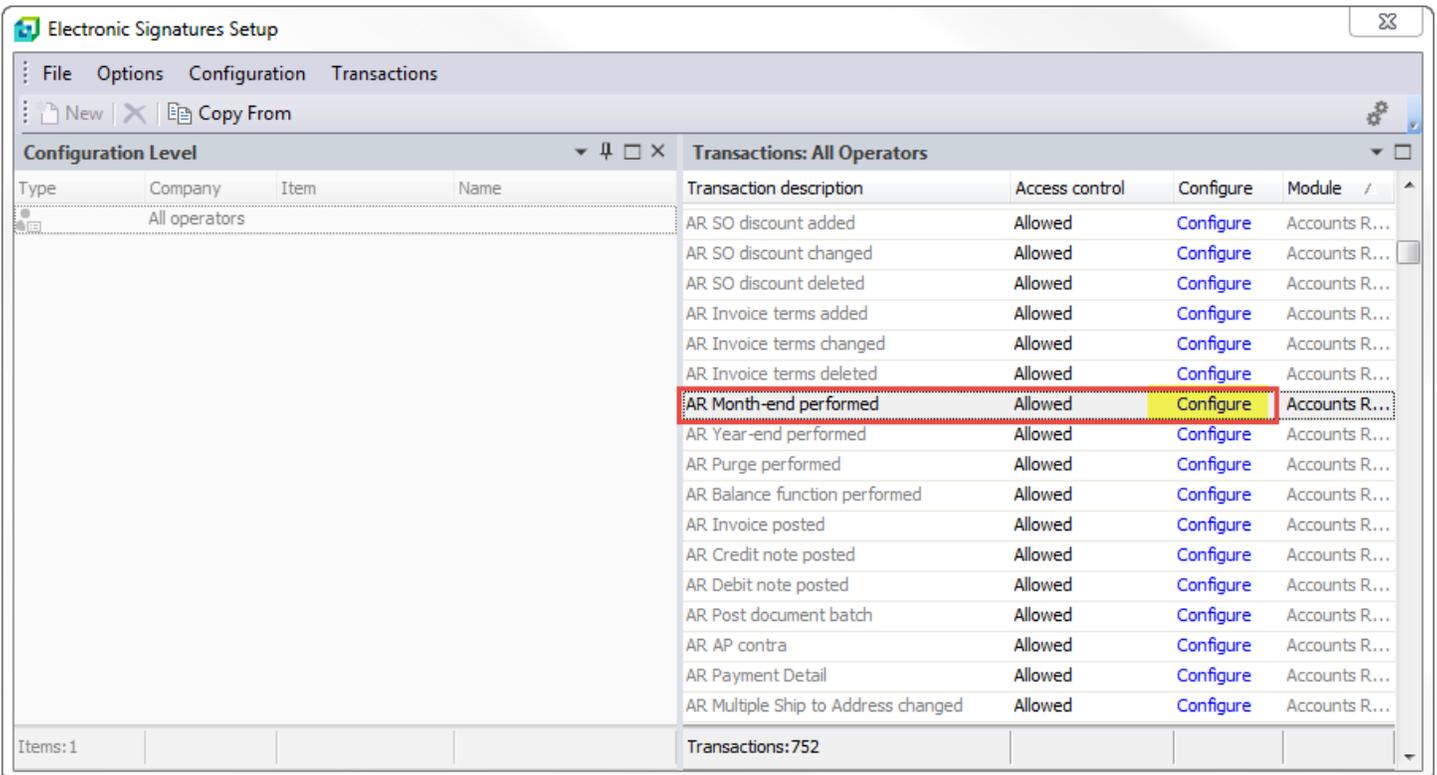
1. First, open the Electronic Signatures Setup Screen (Setup > Electronic Signatures):



2. Verify your settings are set to "Define by Transaction":



- In the following steps, we will be using Accounts Receivable as the example. You will now find the AR Month End Transaction (or month end transaction for another module) in the list, and click Configure:



- To set SYSPRO to where you're not allowed to do a month end if the previous month end was done less than 20 days ago, the description should be modified to "Month end cannot be performed due to business rule", and amend the access control level to "Denied":

Transaction: 210013 - AR Month-end performed

Name	Access control	Description	Transaction condition
Trn1	Allowed	AR Month-end performed	Whenever AR Month-end perf...

Transaction condition: **Whenever AR Month-end performed**

Transaction Details | Logging and Trigger Options

Description: nth End Cannot Be Performed Due to Business Rule

Access control level

- eSignature
  - Confirm with password
  - Request confirmation - default Ok
  - Request confirmation - default Cancel
- Allowed
- Denied
- Log only
- Excluded from definition

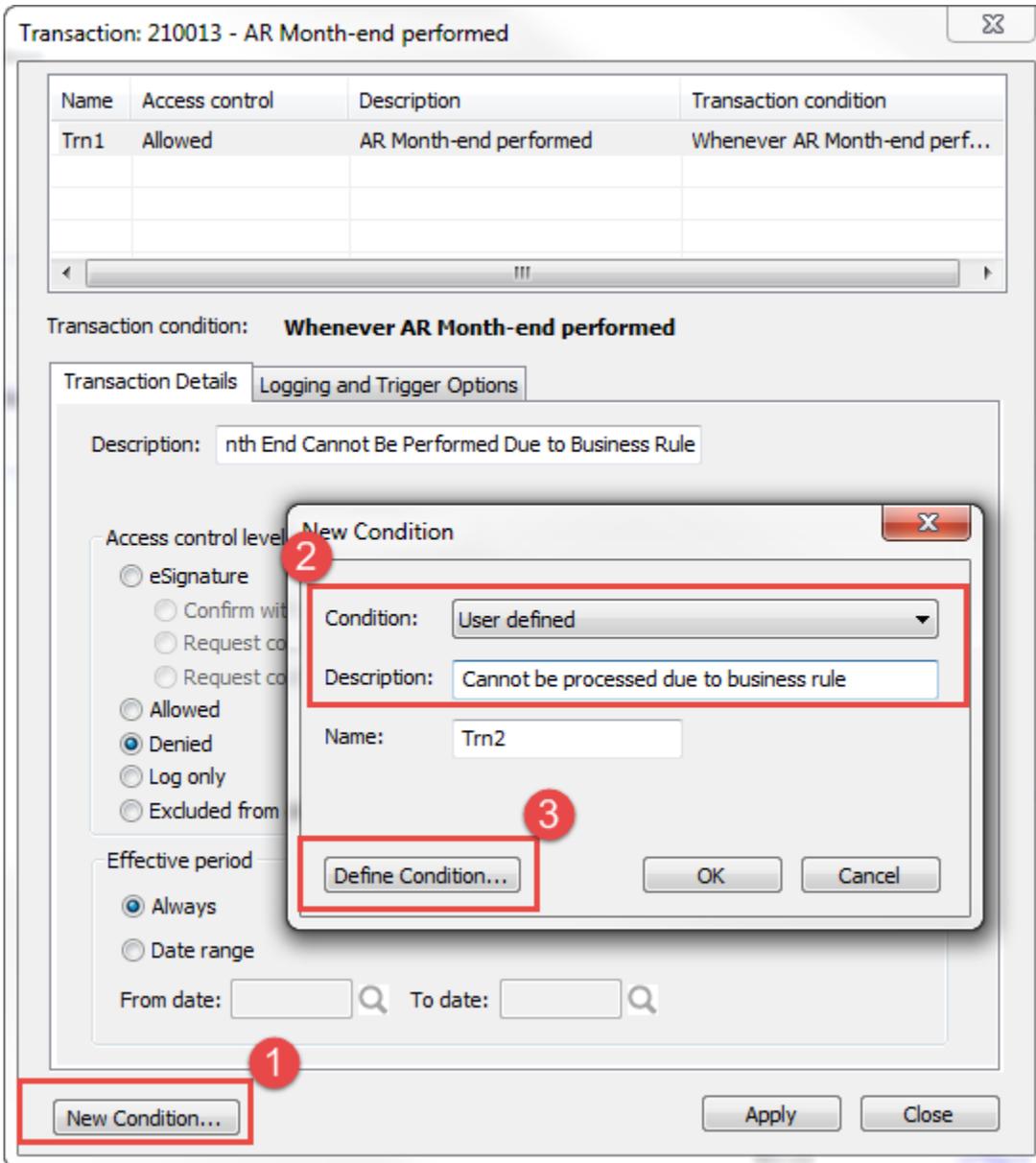
Effective period

- Always
- Date range

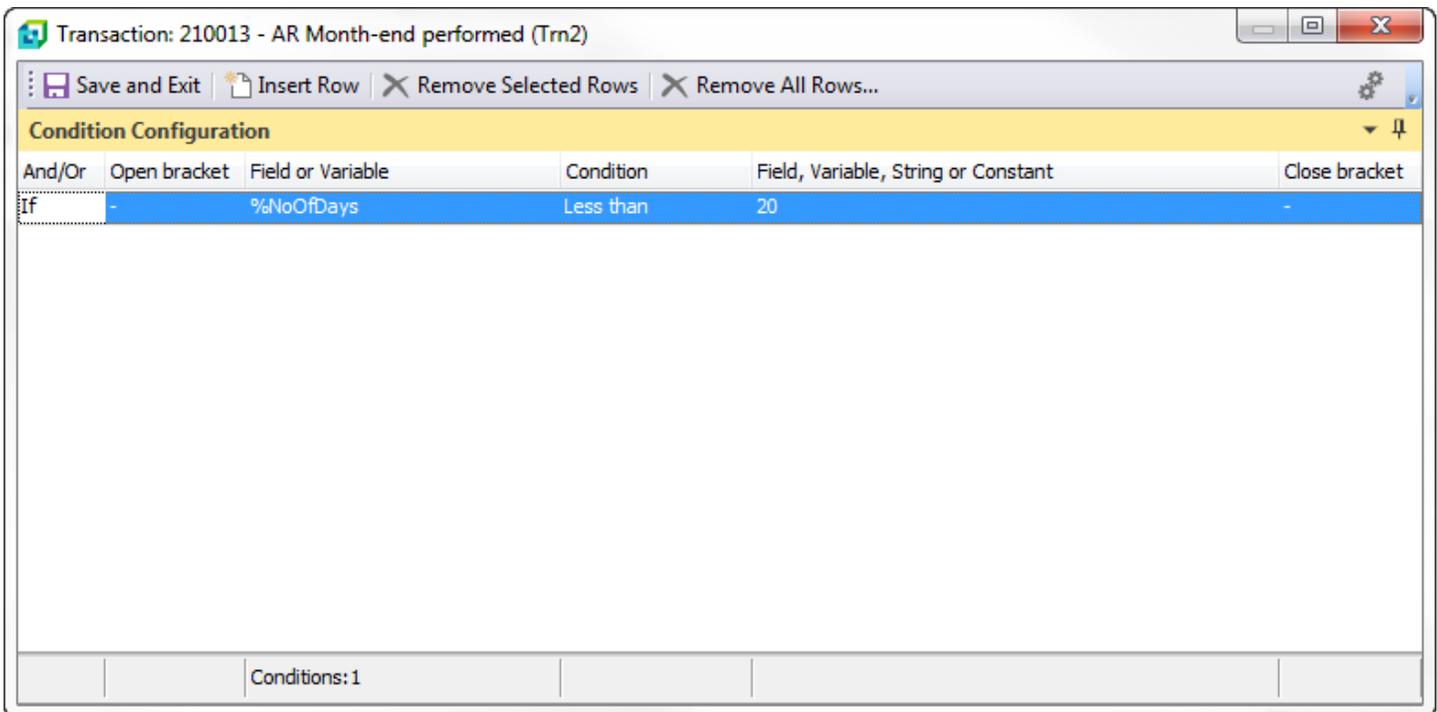
From date:  To date:

New Condition... Apply Close

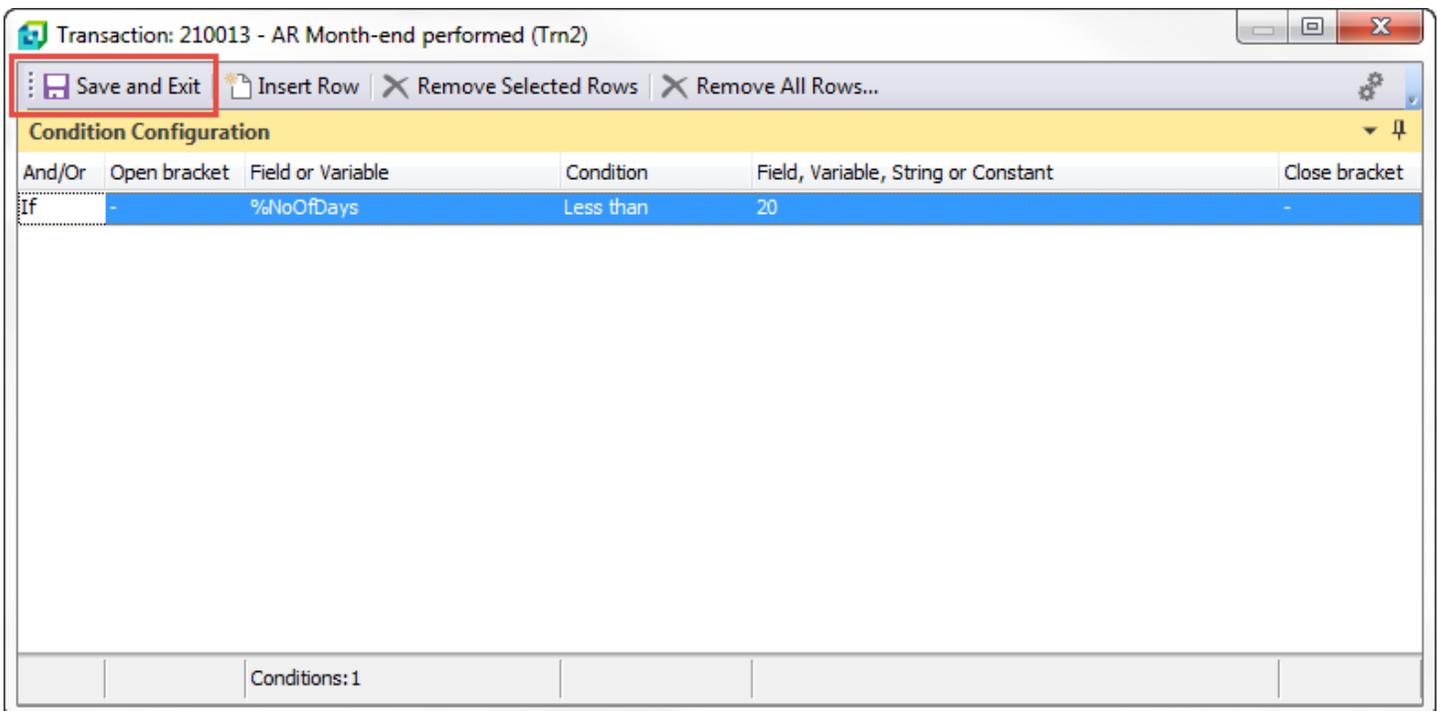
- Next, set a new condition – For this example, we are using 20 days. Click “New Condition” and set the condition to “User Defined” and description as “Cannot be processed due to business rule” and click “Define Condition”:



6. In the condition form, set the Field or Variable to “%NoOfDays” (case sensitive), the Condition to “Less than” and the Field, Variable, String or Constant to “20” (or the number of days you would like to use).



7. Click "Save and Exit" and "Apply" & "Close"



Transaction: 210013 - AR Month-end performed

Name	Access control	Description	Transaction condition
Trn1	Allowed	AR Month-end performed	Whenever AR Month-end perf...
Trn2	Denied	Cannot be processed due to b...	User defined

Transaction condition: **User defined**

Transaction Details | Logging and Trigger Options

Description:

Access control level

- eSignature
  - Confirm with password
  - Request confirmation - default Ok
  - Request confirmation - default Cancel
- Allowed
- Denied
- Log only
- Excluded from definition

Effective period

- Always
- Date range

From date:   To date:

8. Finally, you can either exit Electronic Signatures and it will give you a message that you must exit SYSPRO for it to take effect, or you can continue with the same steps for other modules.