

Re-Opening a Period in a Closed Fiscal Year in SedonaOffice

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Re-Opening a Period in a Closed Fiscal Year

Customers cannot open, re-open, or otherwise work in a period from a closed fiscal year. Sometimes they contact us to request we give them this access. We can do this by running a script to set the period to Re-Open status, but there are two caveats.

1. They must send us a statement in writing (email is fine) that they understand opening the period could lead to changes in financial statements they may have already used for external reporting.

Suggested verbiage: In order to temporarily re-open a period in a closed fiscal year we need an email stating you understand opening the period will allow changes to be made to GL totals which you may have already used for your financial reporting.

2. This process does not allow the user access to the period through GL – Accounting Periods, it only forces the period to show as re-opened on the backend. The customer therefore cannot close the period when they are done making changes, we must close the period for them. Their support case must remain open until the period has been re-closed. For this reason, a timeframe should be established before the period is re-opened, so that we have an expected date of when we can re-close it. It is recommended to allow the period to remain open for 1-3 days.

Scripts

Note – replace the date with a 4 digit year, and 2 digit month. Example for re-opening December of 2022: '2022-12-1'

--Set the period to Re-Open

```
//Update gl_accounting_period Set Status = 'R' where start_date = 'Year-month-1'
```

--Set the period back to Closed

```
//Update gl_accounting_period Set Status = 'C' where start_date = 'Year-month-1'
```