Contents

CRAWFORD SOFTWARE

Month End

Objective:

The Object of this User guide is to familiarize the users with how to lock/unlock SYSPRO users while running Month End.

Process:

Log out All the users from SYSPRO:

When the company is ready for performing Month End, all the users must be logged off from SYSPRO. During processing the month end, SYSPRO accesses a lot of files and updates various table. If any user is logged into SYSPRO and trying to query or post transaction, it creates internal conflicts and impacts the month end closing process. Therefore, all the users must be logged out of SYSPRO before the month end process is started.

Note: You will need Admin Rights in SYSPRO to Log out the Users.

To log out the users, please follow the below steps.

Navigate to Administration → Logout Users.
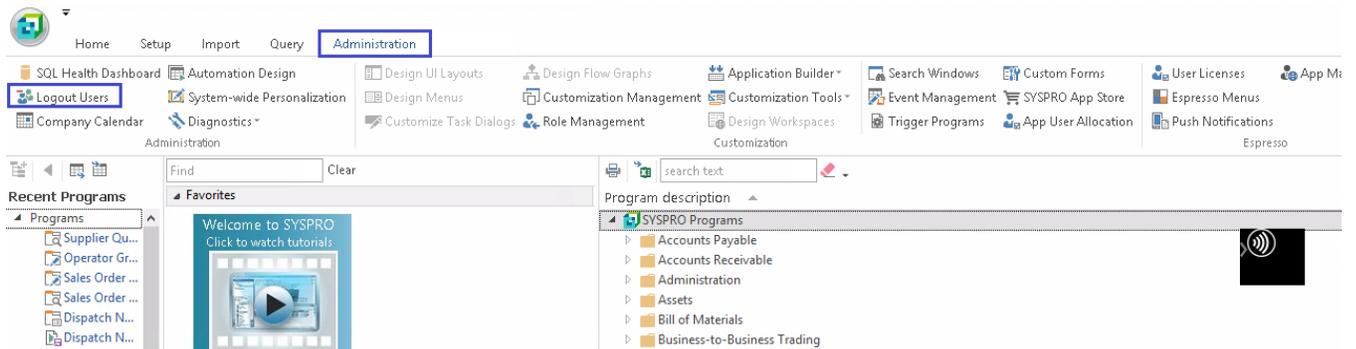
Once you click on Logout Users, a separate window as shown below will appear.
Select the User and click on logout.
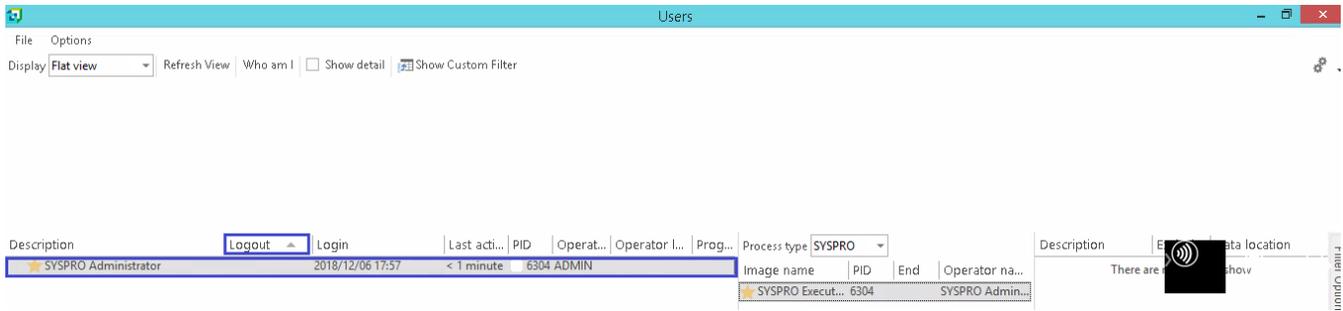
Prevent Login

Once all the users are logged out of the Company, you have to lock the company in order to disable other users to log into SYSPRO until the month end process is completed.

To prevent users from logging into the Company, please follow the below steps.

Click on the SYSPRO Icon and Switch Company as show below.
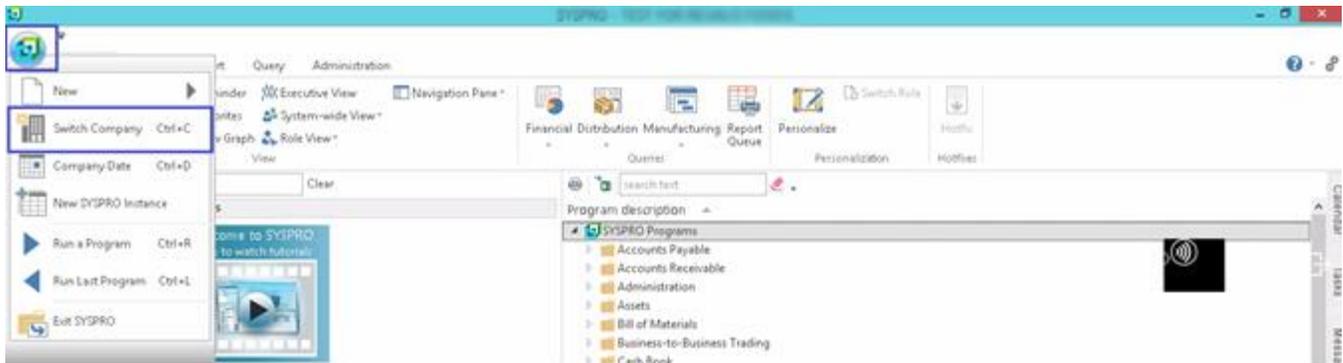
Once user clicks on Switch Company, the below screen will appear.

Click on the Magnifying Glass as shown above. Once user clicks on the Magnifying Glass the below screen will appear. Click on Change.

Once the Changing Company screen appears, click on Options, Prevent Further logins, update a Reason for the same and click on Save.

Once this is done no user can log into the system unless they have overriding previliges assigned against their User Profile.

Admin Users can log in by ignoring the errors.

Change the Company Date

It is very important that the company date is changed to the last day of the month for which the month end is being processed. For Example if the month end is being processed for November, then set the Company Date to 03/31/2019. The Change in date is valid for the current login session only. Once you log out from the SYSPRO the date again defaults to Current System Date.

Note: If the month end date is not changed it will impact every aging report.

Please follow the below steps to change the company data temporarily.