

WinOPS End Of Year Procedures

1. Prior to the last commission run for the year decide if you want to set your minimum check and eft amounts to zero to clear all positive commissions. If so change those settings in the Utilities, Setup, System Defaults, Checks before starting your last commission run of the year. If you do change the settings make sure you change them back to the normal values after the last commission run of the year is completed.
2. After your last commission run of the year but before the first commission run of the new year make a good backup of your database. Select Utilities, End Of Year, E.O.Y. Procedures to pull up the following screen.

<<< CAUTION >>>

The following procedures should be run immediately AFTER running the last commission run of the year, AND performing a database BACKUP.

If you have not already run your last commission run of the year you must do so BEFORE continuing. (Remember you may want to set your minimum check and eft amounts to zero prior to running the last commission run of the year to clear all commissions.)

Epoch Date:
 Set New Epoch Date: 1920

Product Totals:
 Zero Product Totals.

CNC/Sales Totals:
 Zero Sales Totals.

E.O.Y. Batch:
 Add Last Commission Batch to the E.O.Y. Batch Table.

Customer Alt. Address:
 Increment all Customer Alt. Address Dates by one year.

Setup options then press "Run E.O.Y. Procedures" button to begin.

Run E.O.Y. Procedures Exit

Make sure all check boxes are selected and the Epoch Date is 99 years before the new year, 1920 in this example (the new year being 2019). Click on the Run E.O.Y Procedures button. When the process is finished you'll see a message that the EOY process is complete.