Closing Sales Period

Module Guide: Closing Sales Period

Module Location

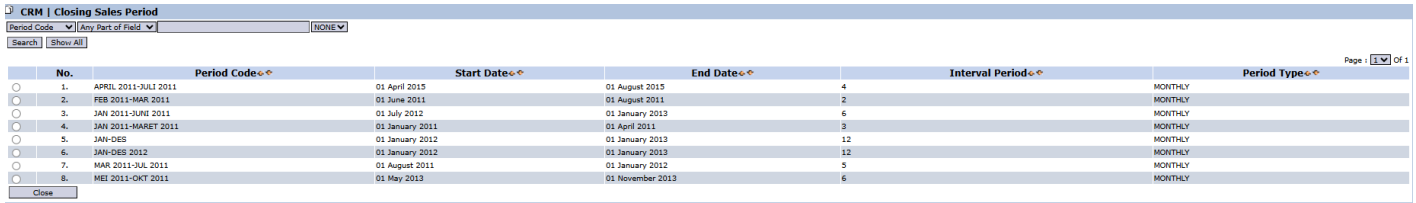
CRM > Closing Sales Period

Module Objective

The **Closing Sales Period** module is an administrative tool used to officially close a sales period within the system. After a period is closed, sales transactions (such as Opportunities or Activities) within that period generally can no longer be created or modified. This process is important for finalizing data for performance reporting and accurate commission calculations

1. Main View (Sales Period List)

The main page of this module displays a list of all sales periods that have been defined in the system.



View Explanation

This page is the center for performing the period-closing action.

- **Filter**: You can search for a specific period by **Period Code**.

- **Period List**: The table below displays all existing sales periods, with the following details:
  - **Period Code**: The unique code for each sales period (e.g., APRIL 2011-JULI 2011, JAN-DES 2012).
  - **Start Date**: The start date of the period.
  - **End Date**: The end date of the period.
  - **Interval Period**: The duration of the period in a specific unit.
  - **Period Type**: The type of period, for example, MONTHLY.

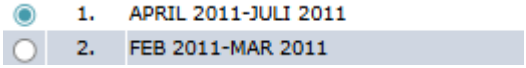
Button Functions

- **Close**: The main action button to run the closing process on the selected period.

2. Steps to Close a Sales Period

Step 1: Access the Module and Select a Period

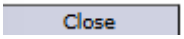
Open the **Closing Sales Period** module. Find the period you want to close from the list, then select that period by clicking the radio button in the leftmost column of the corresponding row.



Step 2: Run the Closing Process

After the period is selected, click the **Close** button in the bottom-left section of the page to run the closing process. The system will

process and lock that period.



Tips & Important Notes

- The period closing process is **final**. After a period is closed, you will most likely no longer be able to create or modify sales transactions within that period.
- Before closing a period, ensure all sales transaction data (such as the status of Opportunities and Activities) is **complete and correct**.
- This module is generally only accessed by the **CRM Administrator or Sales Manager** who has the authority to perform period closings.

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