Canadian General Ledger
Year-end Checklist

**Note: Perform all tasks, in the given order, in your current company data, unless directed otherwise.**

* Review the [Recommended Timeline of Year-End Tasks](https://support.na.sage.com/selfservice/viewdocument.do?noCount=true&externalId=79966&sliceId=1&noCount=true&isLoadPublishedVer=&docType=kc&docTypeID=DT_Article&stateId=903&cmd=displayKC&dialogID=32062&ViewedDocsListHelper=com.kanisa.apps.common.BaseViewedDocsListHelperImpl&openedFromSearchResults=true).
* Read Knowledgebase article, [What do I need to know about the fiscal year-end process in Sage 100 Contractor SQL](https://support.na.sage.com/selfservice/viewdocument.do?externalId=50381&sliceId=1).
* Back up and verify your Sage 100 Contractor data.
See [How to back up your company data or Restore in Sage 100 Contractor (SQL)](https://support.na.sage.com/selfservice/viewdocument.do?externalId=68385&sliceId=1).
* Log in to your Sage 100 Contractor company as Company Administrator, and then select the **Open company exclusively** checkbox.
* When you are ready, change the default posting period from 12 to 1 of the new fiscal year.
See [How do I advance to period 1 of the next fiscal year](https://support.na.sage.com/selfservice/viewdocument.do?externalId=26726&sliceId=1)?

Note: All periods from both the old and new fiscal year are available until you archive the old data.

* Use Manage Period Availability in the 1-6 Period/Fiscal Year Management window to lock the periods you do not want anyone to post transactions to.
See [How do I lock or unlock a posting period?](https://us-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=225924350084371&page=1&position=1&q=I%20am%20attempting%20to%20lock%20the%20posting%20period%20in%20menu%201-6%20but%20the%20Lock%20Access%20button%20is%20greyed%20out)

Example: Lock periods 1 - 11 of last fiscal year. Leave period 12 open to make year-end adjustments as needed.

* Log out so that you no longer have exclusive access.

Important! Wait to archive your fiscal year until after you enter and post all adjustments and corrections for the old year, as recommended by your tax advisor