What is the Post button?

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The Post button provides you the control to keep your HaulWare accounting books accurate.

1) The Post button gives you the control on **when** an invoice, AP bill or Banking transaction will appear on the financial statements.

1. Some accounting systems will immediately include the Invoice, or AP Bill, or any Banking transaction in your accounting books (Balance Sheet, Income Statement, etc.) once they are created. Now imagine you are doing your billing, and want to have time to look it over, make sure it's correct, but your bookkeeper wants to run a financial statement. You may need to make corrections, or delete the invoices completely and start over. Use the Post button when you are sure you're ready to commit your transactions to the accounting system.

2) The Post (or Unpost) button will not allow you to commit your accounting (Invoice, AP Bill, or Banking) transaction if the transaction date is in a closed or non-existent accounting period.

1. Financial Periods must be set up to define your accounting periods. Most will use the calendar year, (January 1 through December 31), for their accounting year, but some will use October through September, July through June, etc.. Once you define those periods, you may elect to "close" (or lock) a period to prevent any further transactions. This will keep your financial reports from changing once they have been finalized.