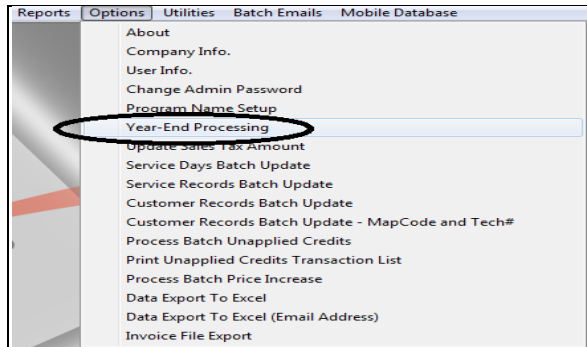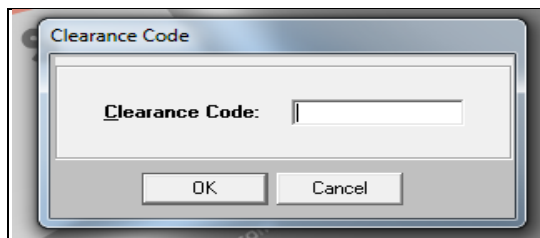# New Year Scheduling Procedures for PCO Cloud / VM

Step 1: Year End Processing

Select **Options**, and **Year End Processing**. This will require a clearance code before proceeding. If you do not have your personal clearance code or do not remember your code, please contact A&K Systems at info@akcomp.com.
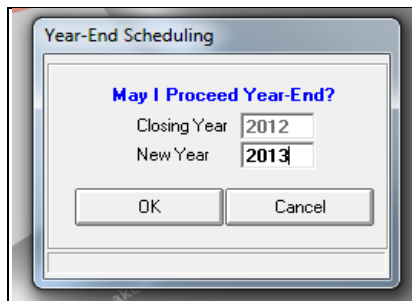

Step 2: Enter your clearance code.

After entering your clearance code, the system will prompt you to confirm that you have performed a backup first. Disregard this message **(backups are not required on the cloud),** and click **Yes** to proceed.
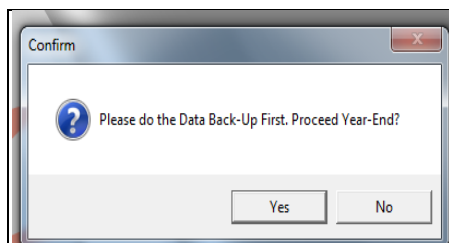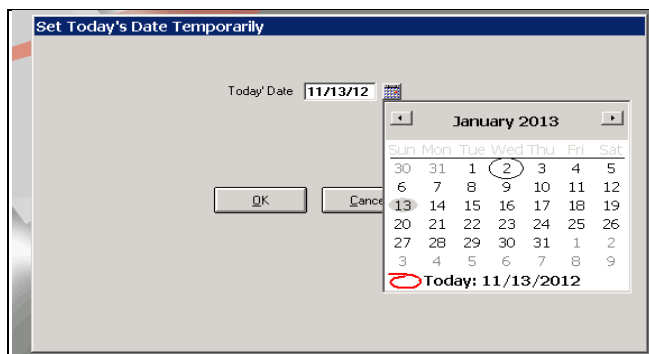

Step 3: The next screen will allow you to enter the new year. This process will take a few minutes to complete.

Step 4: Creating January Batch Invoices

To create invoices for next year, click on **Invoice**, then **Create Invoices**. Change "Today's Date" to a random date in January 2015, and click ok. This will generate invoices using January 2015 as the base date.

Step 5: IMPORTANT – Scheduling new customers for the remainder of the closing year

Once you have completed the Year End Process and created the New Year January invoices, any new customers or one-shots should be scheduled for service in January of the following year (2015). You can still create the invoices in December, but you should change the invoice date to match the scheduled date in January of 2015. Alternatively, for bimonthly schedules, you can change the invoice dates to match the month of whatever date the schedule falls on (Example: 01/2015 for monthly, 02/2015 for bimonthly, etc.)

Step 6: Ensuring proper scheduling for new recurring customers

For new customers with regular (recurring) services, make sure to change the number in the Scheduled row under December (12) from 1 to 2, to ensure that

the recurring service is properly processed by the system in December 2015 – omitting this step will cause the system to omit December schedule.

Step 7: Steps to take in January 2015

Make sure to run **Create Invoices** again when it is actually January 2015 to ensure that no invoices are missed.

Be sure to run Start Report for December to see if all of the new regular customers acquired during the period between New Year Scheduling and the end of the closing year are showing up properly as recurring service.

If you have questions regarding the process, please contact A&K Systems at info@akcomp.com with your company name and contact information so a technician can reach out and assist you with the process. Support is provided free of charge to cloud users.