

Set the Financial Year

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Permissions

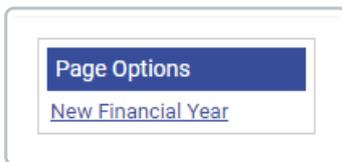
You will require an Access Role with the following permissions:

- Company Details

By default, the system financial year is set to from **April** through to **March**.

It is possible to set your own financial period in the system in which to calculate the vehicle journey thresholds. This means that once the new financial year is defined, the mileage counter will revert to zero when the new year commences. The mileage counter and thresholds are used to calculate the reimbursements as per policy defined.

1. Navigate to from the **Home** page to **Administrative Settings | Tailoring | Company Details**.
2. Click **New Financial Year** from the Page Options menu.



3. Enter the following details:

Financial Year

Description*

Start Date*

End Date*

Active

Primary

Field	Description
Description*	Enter a description for the financial year (limited to 15 characters).

Field	Description
Start Date*	Select the start date using the date picker or enter a date in the format DD/M .
End Date*	The end date is automatically populated based upon the start date .
Active	Select this check box to activate this financial year.
Primary	Select this check box to set this as the primary financial year within your system.

4. Click **Save**.

Note: If the rate is changed partway through the default year, Assure Expenses will reconfigure itself and recognise where distances and thresholds have already been passed. This will not affect any figures that have already been reimbursed.