Property Management year-end checklist

Before you start year-end processing, review the *Year-End Procedures and Government Forms Guide*. You can download the latest version from Sage 300 Construction and Real Estate Product Documents website.

When it is time to close the calendar year or fiscal year, perform the tasks in this checklist. To learn more about a task, click the link to the Sage Knowledgebase article. In some cases, you will need to log into the Knowledgebase to access the article.

	Tasks	Article #
☐	Reconcile Property Management receivables to General Ledger.	47383
☐	Print management reports.	
☐	Make a backup copy of your entire database, if you have not already done so.	23166
☐	If needed, install either Version 15.1 Update 7 or Version 16.1 Rev 5 (which contains the year-end update).	21593
☐	Advance to a new calendar year (and new fiscal year if applicable) by selecting **Tasks > Close Current Period**.	23013
☐	(Optional) Archive Property Management data.	22450
☐	(Optional) Perform file maintenance.	