Lock Date

English

The **Lock Date** feature in Manager.io allows you to specify a date beyond which transactions occurring on or before it cannot be edited. This is essential for maintaining the integrity of your financial records after they have been finalized.

Guides

Setting the Lock Date

To set a lock date:

- 1. Navigate to the **Settings** tab in the Manager.io interface.
- 2. Click on **Lock Date** in the list of settings options.
- 3. Enter the desired date in the Lock date field.
- 4. Click **Update** to save your changes.



Working with Locked Transactions

Once the lock date is set:

- Editing Restrictions: Transactions dated on or before the lock date cannot be edited
 or deleted. This ensures that your financial statements remain accurate and unaltered
 for closed periods.
- Minor Adjustments Allowed: You can still make small adjustments to these
 transactions, provided they do not affect the numerical values in your financial
 statements. For example, updating a transaction's description or notes is permissible.

By utilizing the lock date feature, you enhance the security of your accounting records and prevent unintended modifications to finalized financial data.