



**Breakthrough Solutions, LLC**  
*Providing solutions to help your business succeed!*

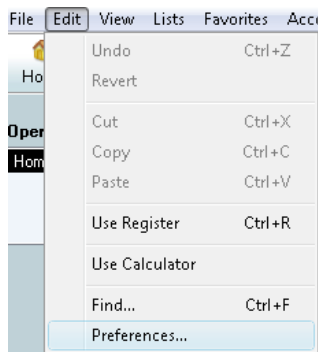
Did you know you can password protect your prior periods' data so it can't be inadvertently changed?

Small businesses may need to provide financial statements monthly to an accountant, a financial institution, or partners. Once this information is in their hands you need to protect that information so no one changes what you've already released.

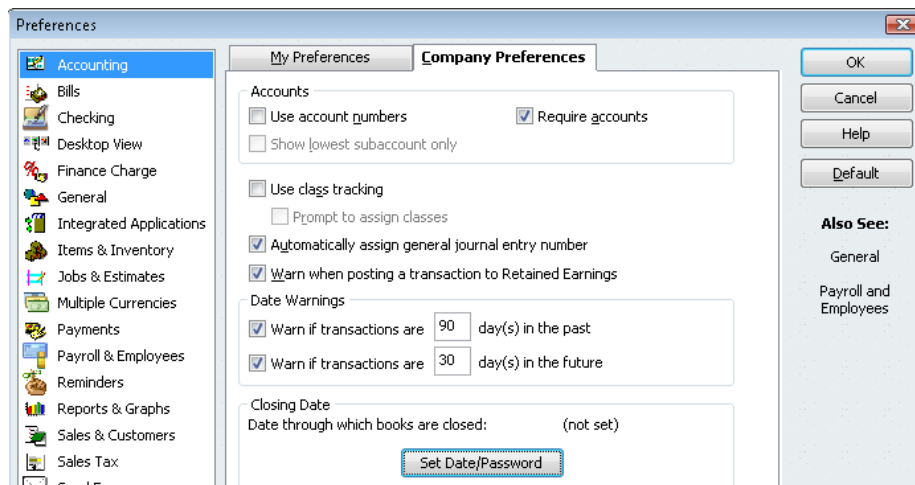
This is especially important once your year end is closed and your tax return has been prepared.

\*Only the administrator can set the password and/or change it.

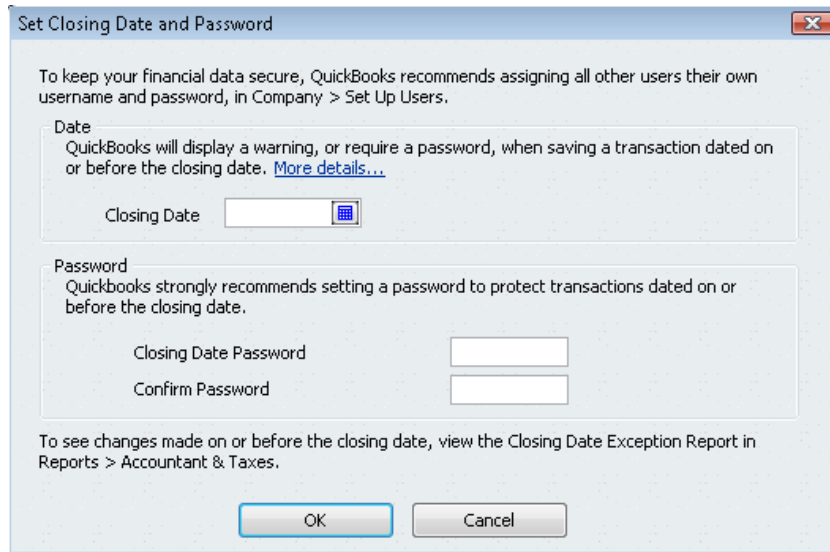
To protect this information QuickBooks® has closing date password capability. Go to the Edit menu, select Preferences



Select the Accounting Preference, the Company Preferences tab




Click on the Set Date/Password button. Enter the date your year, month, or other period is closed. Enter your password and click on OK.



**Set Closing Date and Password**

To keep your financial data secure, QuickBooks recommends assigning all other users their own username and password, in Company > Set Up Users.

**Date**  
QuickBooks will display a warning, or require a password, when saving a transaction dated on or before the closing date. [More details...](#)

Closing Date  

**Password**  
Quickbooks strongly recommends setting a password to protect transactions dated on or before the closing date.

Closing Date Password

Confirm Password

To see changes made on or before the closing date, view the Closing Date Exception Report in Reports > Accountant & Taxes.

The closing password should be kept by one person and should be used if a change needs to be made in the closed period.

\*Remember not to change a transaction if it will affect the balance on your tax return.

Also, don't panic if you lose the password. Just go in and reset the password using this same procedure.