



Year-End Processes Checklist

Year-end reporting provides critical data to measure your practice performance during the past year. To make the most of your year-end data you'll want to understand your financial position, review your performance, set your goals, and make plans to execute.

We've created a checklist to help ensure your practice covers all of the reporting bases when closing out this year.

Not sure how to complete an item? Check out the Pulse **Year-End Processes** document for detailed instructions.

- ☐ **Total Sales Report**
- ☐ **Accounts Receivable Report**
- ☐ **Inventory Counts Report**
- ☐ **Increase Prices Report**
- ☐ **Top Selling Items Report**
- ☐ **Inactive Client Report**
- ☐ **Tax Rate Change**