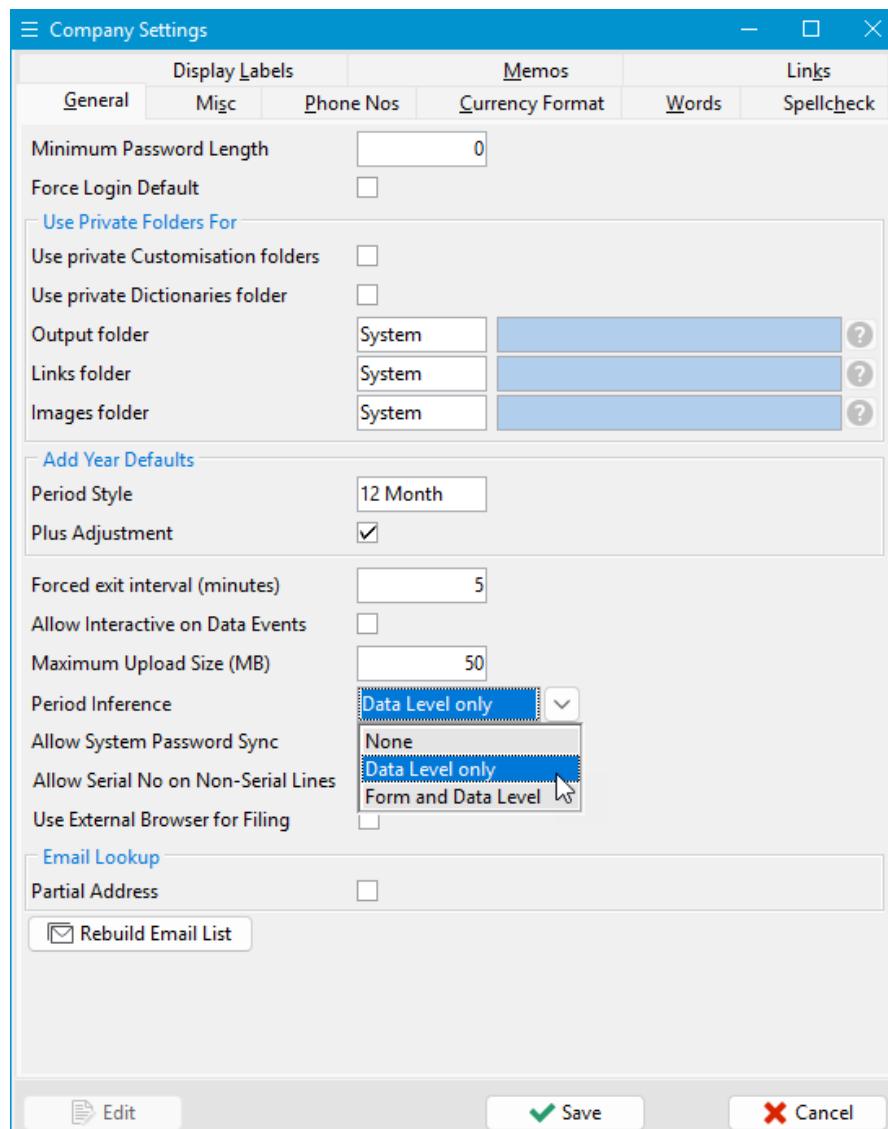**Period Inference in Accredo**

Smarter Period Selection for Faster, More Accurate Data Entry

Accredo's Period Inference settings allow the system to automatically determine the correct financial period based on the date entered on a document or transaction. This helps streamline data entry, reduce manual effort, and minimise mismatches between dates and periods.

The Period Inference setting can be found under:
Navigator > Company > Configuration > Settings

What Is Period Inference?

Period Inference controls how Accredo interprets the transaction or document date to set the Period ID. Instead of relying solely on manual input, the system can automatically choose the correct period, improving accuracy and consistency across the system.

There are three available modes, allowing organisations to decide how automated they want period selection to be.

Period Inference Modes

1. None
No inference takes place. Users must manually ensure that the date and Period ID match.
This option is useful for organisations needing full manual control, particularly where overlapping periods might otherwise cause ambiguity.

2. Data Level Only (Default)
Inference applies to data-level processes such as automation and the web service.
When a document or transaction date is entered, the Period ID will automatically default to the period that corresponds to that date.
This ensures external integrations and automated processes remain consistent with the organisation's period structure.

3. Form and Data Level
Inference applies within the Accredo user interface as well as at the data level.
When a user changes a date on a form, the Period ID automatically updates to match.
This option provides the most streamlined data entry experience and helps reduce user error.

Important Note:
When using Form and Data Level inference, it is strongly recommended that Available Periods in all modules be restricted so that the same day and month do not fall within more than one year.
This prevents ambiguity when determining which period a date should belong to.

Why Period Inference Is Useful

Reduces Data Entry Errors
Automatically aligning dates and periods helps prevent incorrect postings and reduces the need for period-end corrections.

Speeds Up Workflows
Users and integrations no longer need to manually select periods for every transaction, improving overall processing speed.

Improves Accounting Accuracy
Consistent period inference ensures that financial reporting reflects accurate period assignments across all modules.

Flexible for Different Business Needs
Whether an organisation prefers strict manual control or efficient automation, Period Inference provides options to suit a range of workflows.

Choosing the Right Mode

None – Best for organisations with complex or overlapping period structures where date inference may cause ambiguity.
Data Level Only – Ideal for environments using imports, automation, or integrations that require consistent period matching.
Form and Data Level – Suitable for high-volume data entry teams who benefit from automated, real-time period updates.