



Osprey Approach: What are Financial Templates?

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This guide will go through how Osprey's financial templates work and how you can utilise them

Financial templates work in conjunction with the access template, as these dictate what financial posting privileges the user has.

These templates are applied on a per-user basis, however, any updates to the template will affect all users assigned.

What financial templates does Osprey come with?

Osprey offers by default, 2 options; **Month End & Not Allowed**, but further templates can be added or amended at any time.

Users with access to Month End within the Access template have access to amend period sets, and view previous period ends, but cannot perform Month or Year End unless they also have the Month End financial security template.

The **Month End** financial access template also comes with the ability to Authorise and Post requisitions to the client ledger.

The **Not Allowed** Access template has all options turned off and is set to new users by default. This access template is not customisable.

What other template options are available?

Not only can supervisors amend the existing templates, but also add new templates, giving further control to your firm. The below options are available to enable.

Financial Area	Security option
Client Ledgers	Out of Period Posting
Nominal Ledgers	Out of Period Posting
Purchase Ledgers	Out of Period Posting
Banks and Journals	Out of Period Posting Authorise Requisitions Post Requisitions
Supervisor	Run Period End Run Month End