



HOW TO SET VALID POSTING PERIOD

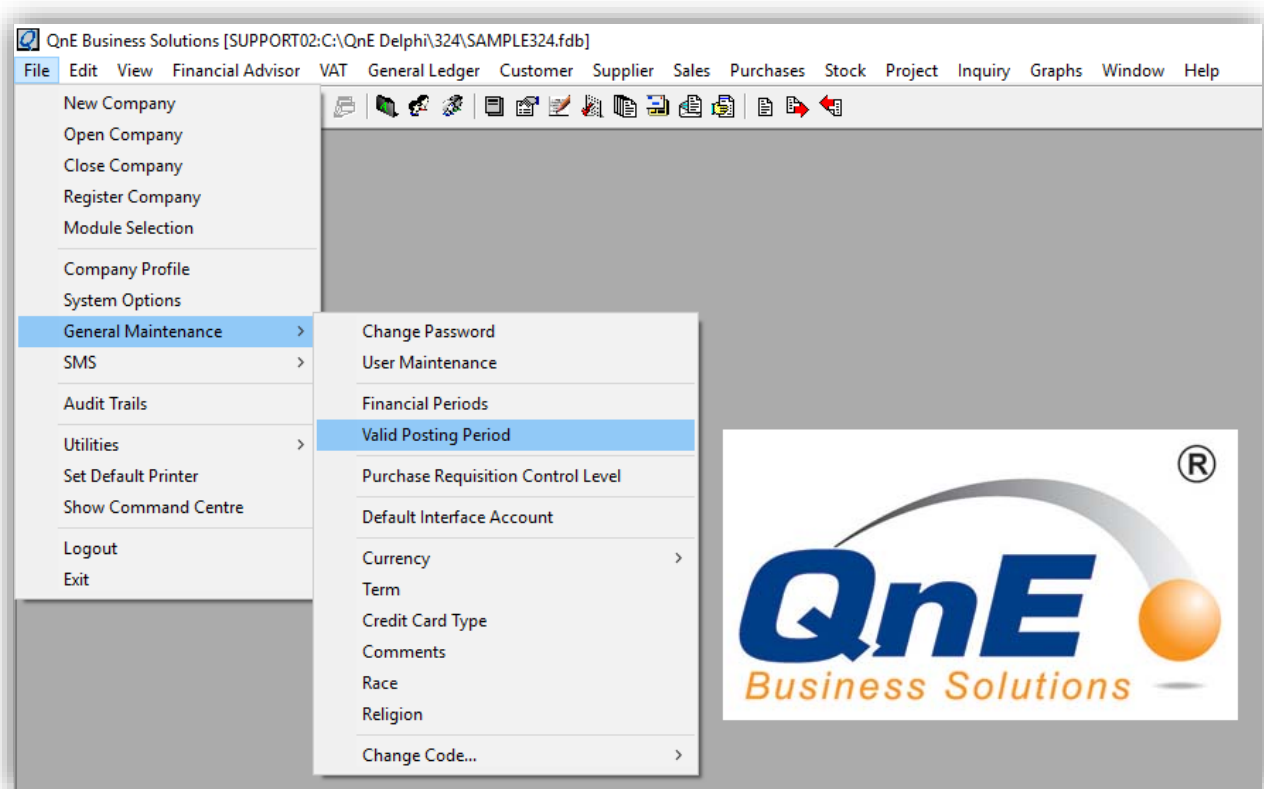
Problem Scenario:

There are cases that we want to disable our users to post a transaction from a certain period (e.g. previous months) and we will only allow them to save transactions for current month

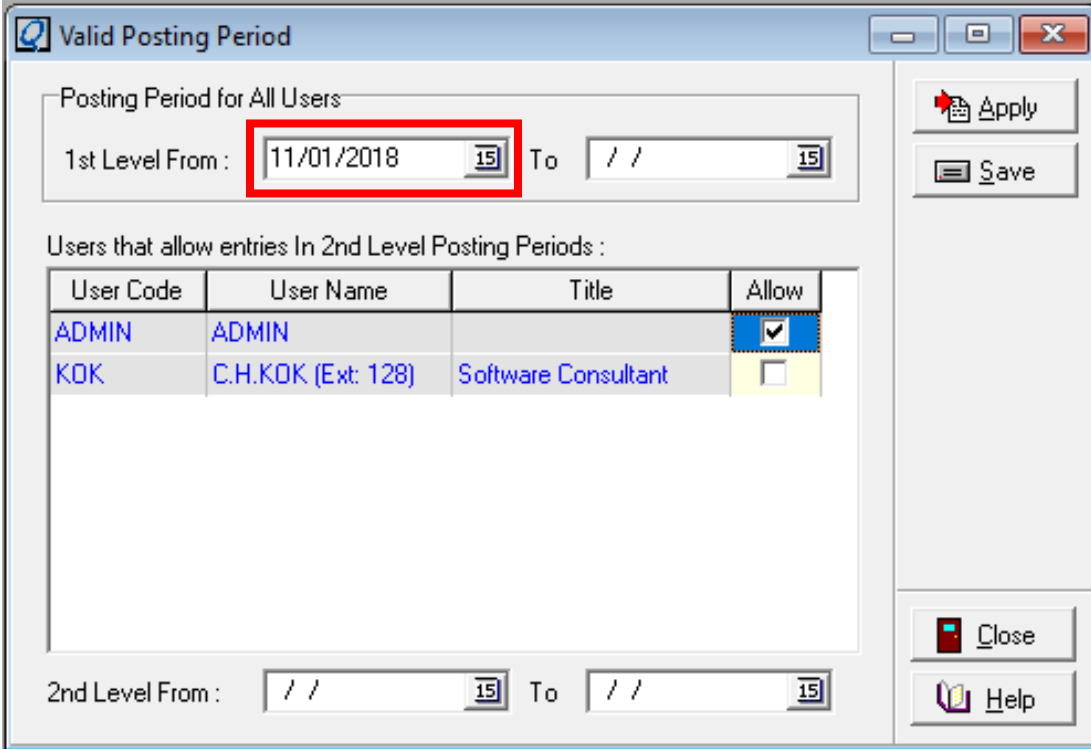
In this case, we need to set our Valid Posting Period

Resolution:

1. Log in as an admin, go to File > General Maintenance > Valid Posting Period



2. Set your preferred date to which users may only be allowed to post transactions (e.g. current month is November and you need to disable users to post transactions for October)



Valid Posting Period

Posting Period for All Users

1st Level From : 11/01/2018 To : //

Users that allow entries In 2nd Level Posting Periods :

User Code	User Name	Title	Allow
ADMIN	ADMIN		<input checked="" type="checkbox"/>
KOK	C.H.KOK (Ext: 128)	Software Consultant	<input type="checkbox"/>

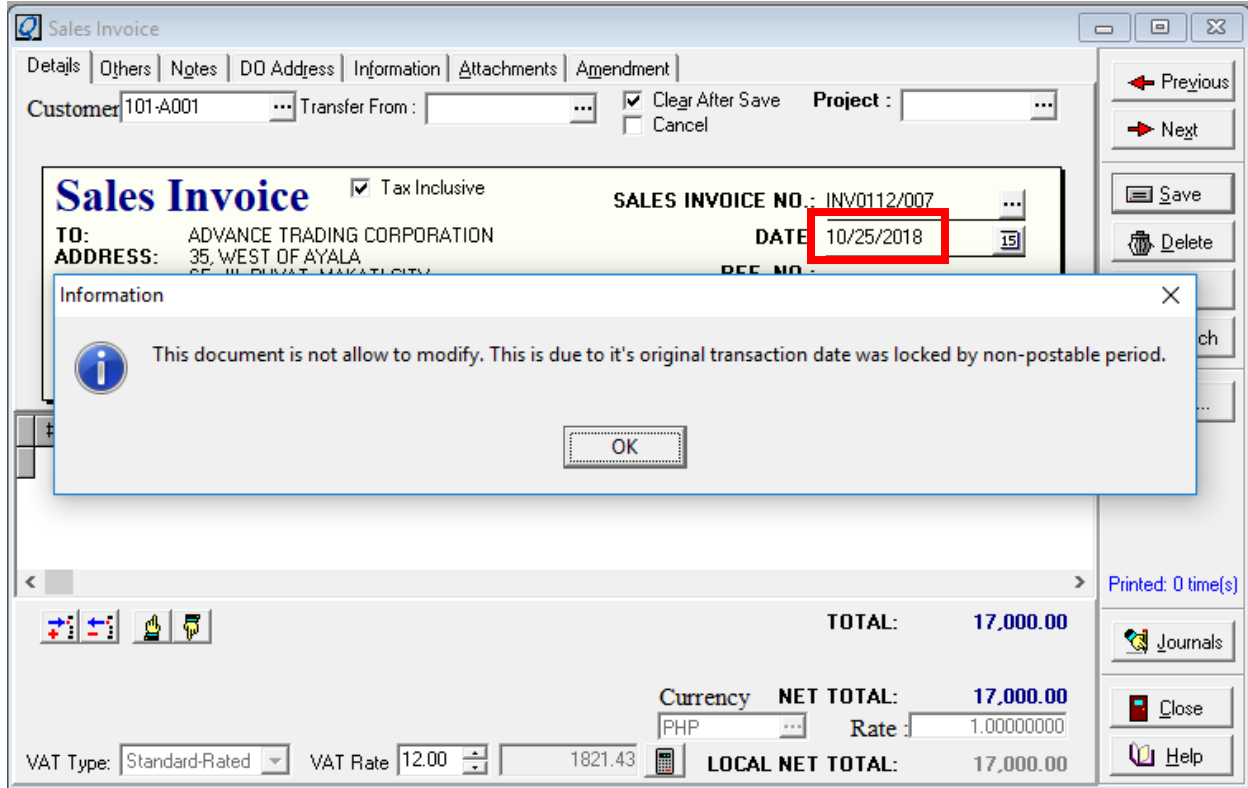
2nd Level From : // To : //

Apply Save Close Help

Click **Apply** then **Save**

Note: Ticking the **Allow** checkbox means that user will be treated as the second level, thus it will not follow the set period under the first level. By default, first level pertain to all users.

From the setup, user will encounter below prompt message when trying to save transactions date beyond the set period



Sales Invoice Tax Inclusive

SALES INVOICE NO.: INV0112/007

DATE: 10/25/2018

Information

This document is not allow to modify. This is due to it's original transaction date was locked by non-postable period.

OK

TOTAL: 17,000.00

NET TOTAL: 17,000.00

Currency: PHP Rate: 1.00000000

LOCAL NET TOTAL: 17,000.00

VAT Type: Standard-Rated VAT Rate: 12.00

NOTE:



If you want your setup for your Valid Posting Period to be per Monthly, you will need to set/update it per month also.