HOW TO SET VALID POSTING PERIOD
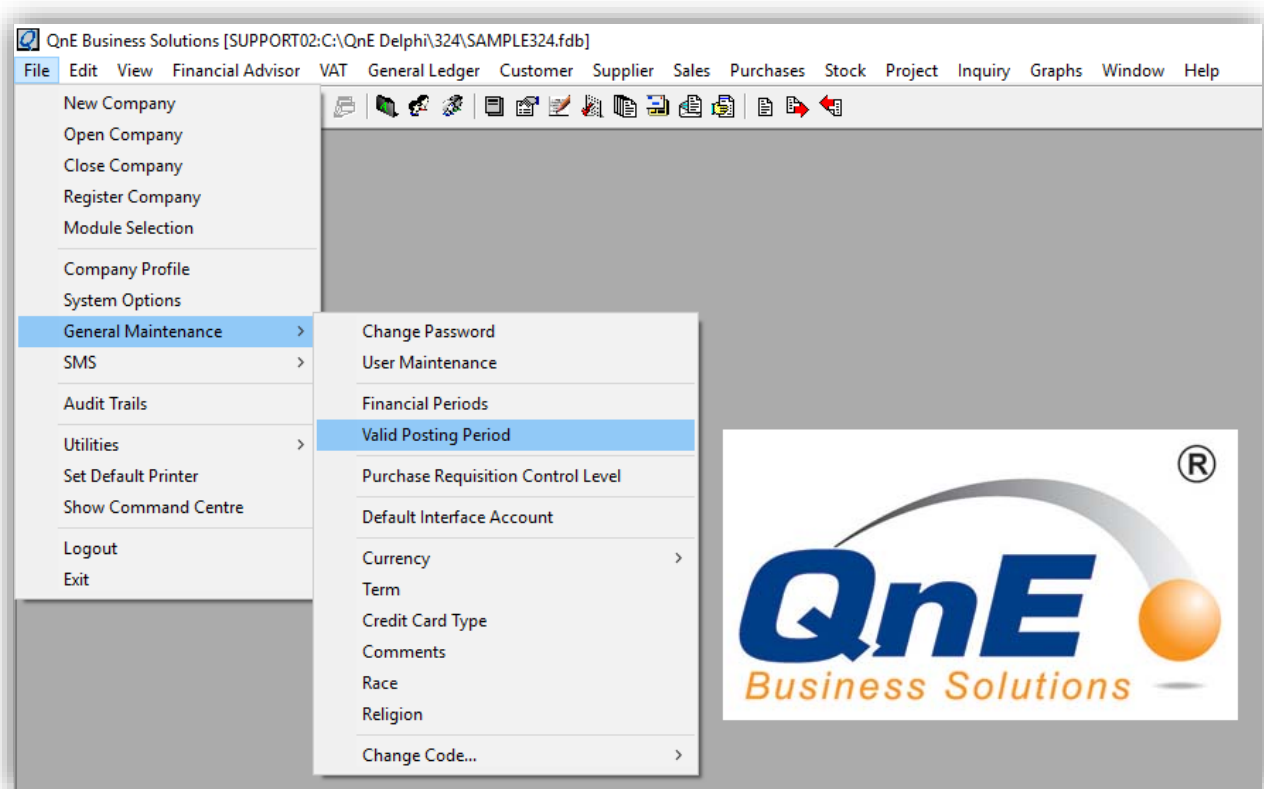
Problem Scenario:

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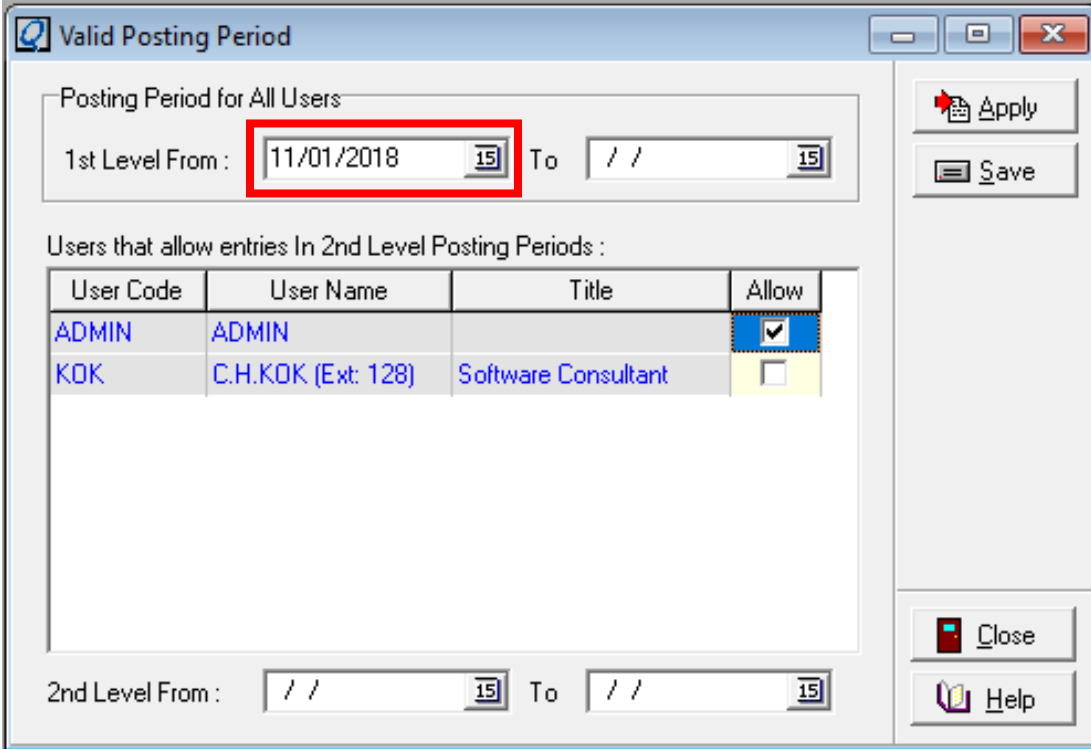
In this case, we need to set our Valid Posting Period

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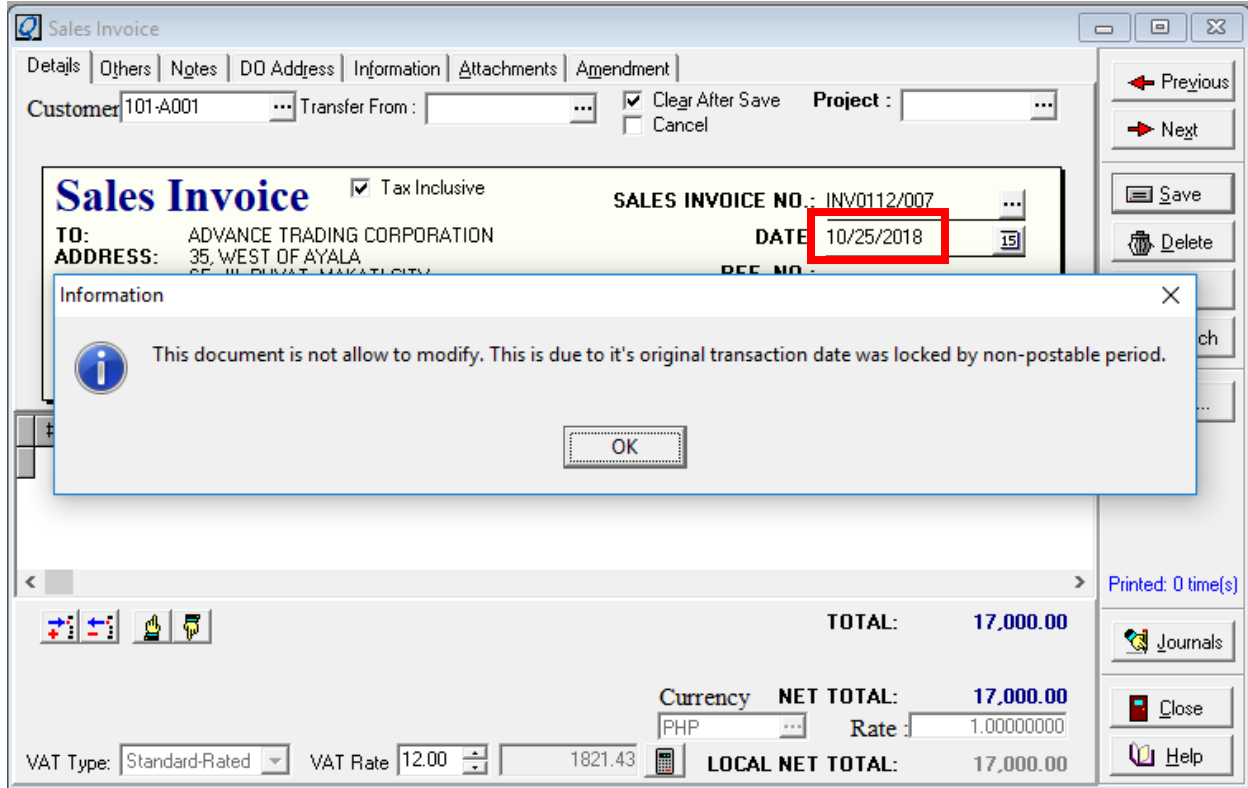
Click **Apply** then **Save**

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

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.