



HOW TO IMPLEMENT USER DEFAULT SETTINGS - AGENT

[1.0]

CRIMSEN

[11/11/2021]



SCENARIO

In Default Interface Accounts, there is no agent column to set as default

DIA	Account	Description
General		
	Bank account	MAYBANK
	Bank charges	BANK CHARGES
	Debtor control account	TRADE DEBTORS
	Creditor control account	TRADE CREDITORS
	Unrealised forex gain	UNREALISED FOREX GAIN
	Unrealised forex loss	UNREALISED FOREX LOSS
	Debtor control foreign exchange account	
	Creditor control foreign exchange account	
	Rounding adjustment	ROUNDING ADJUSTMENT
	Unrealised forex gain GL	
	Unrealised forex loss GL	
Sales		
	Cash from cash sales	CASH IN HAND
	Credit sales returns	
Purchases		
	Cash from cash purchase	CASH IN HAND

Customer requests to set agent as default to different user in the system.

For example, user, CINDY can only see own customer while another user, Jessica, who is the leader of CINDY, can see her team agents and customers.



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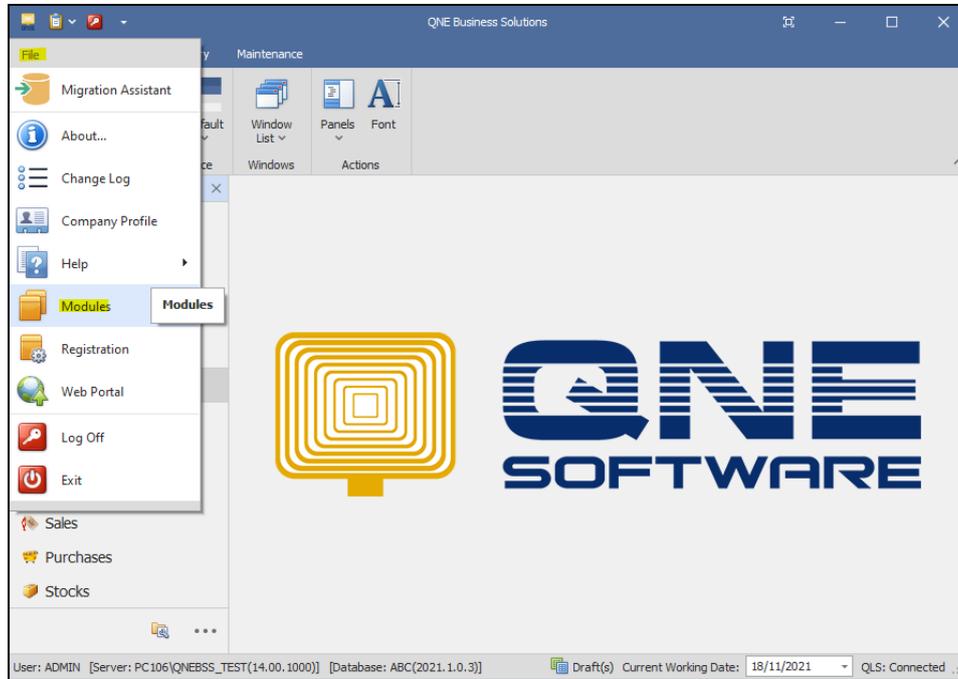
Version: 1.00

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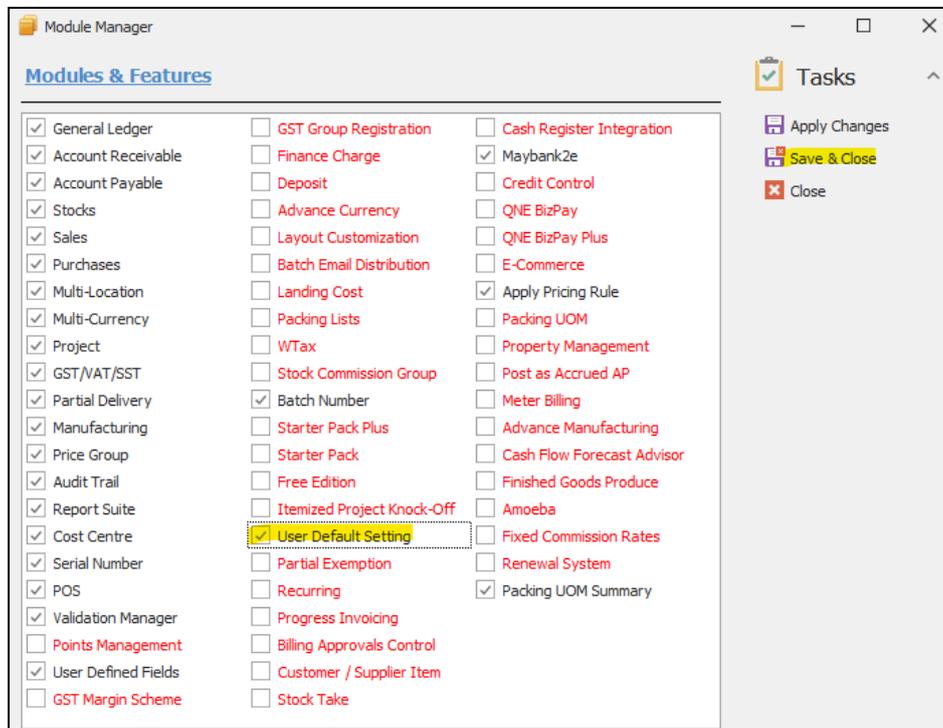
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SOLUTION

1. Go to File > **Modules**

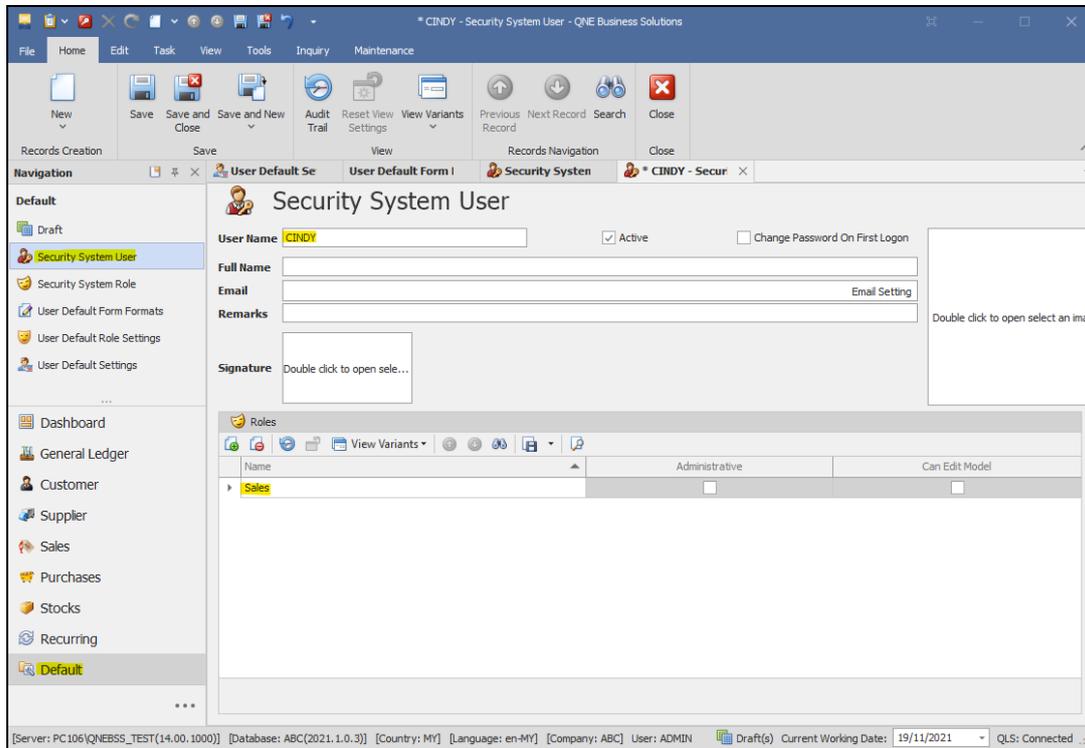


2. Tick **User Default Settings**. Additional module incurs extra charges. Save & Close.

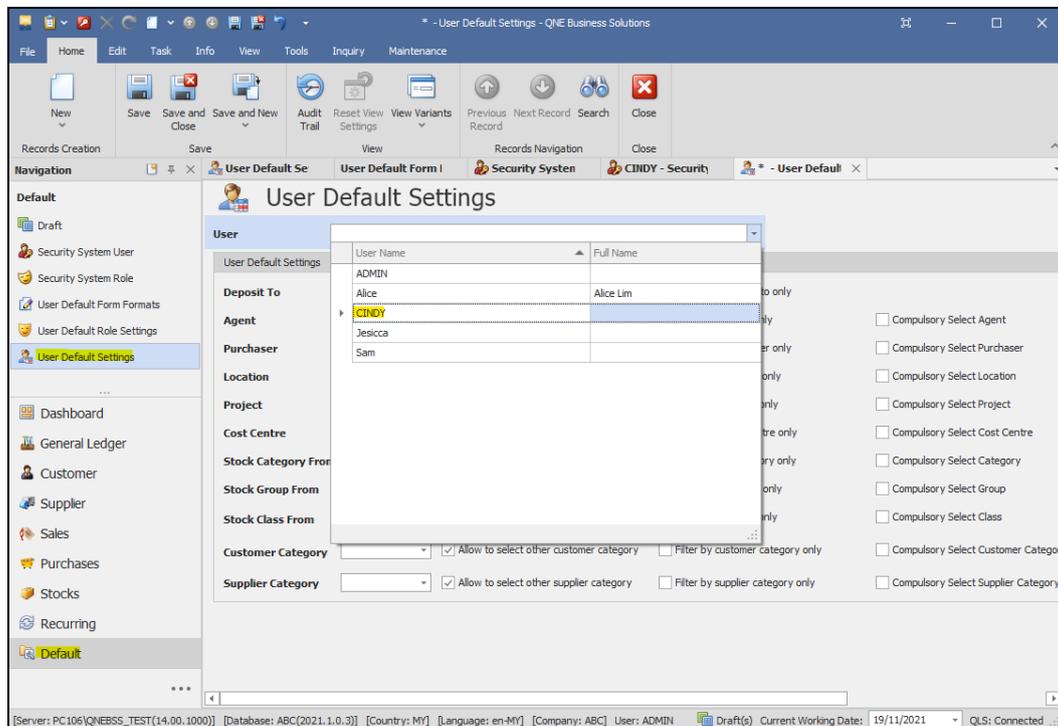




3. Create a user at Defaults > **Security System User**. Set the roles.



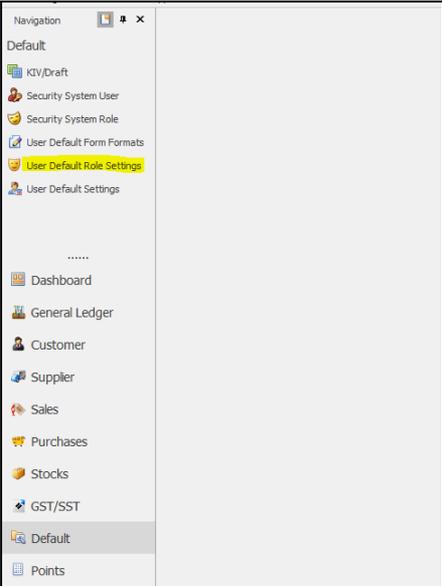
4. Go to Default > **User Default Settings**. Select the User created just now.



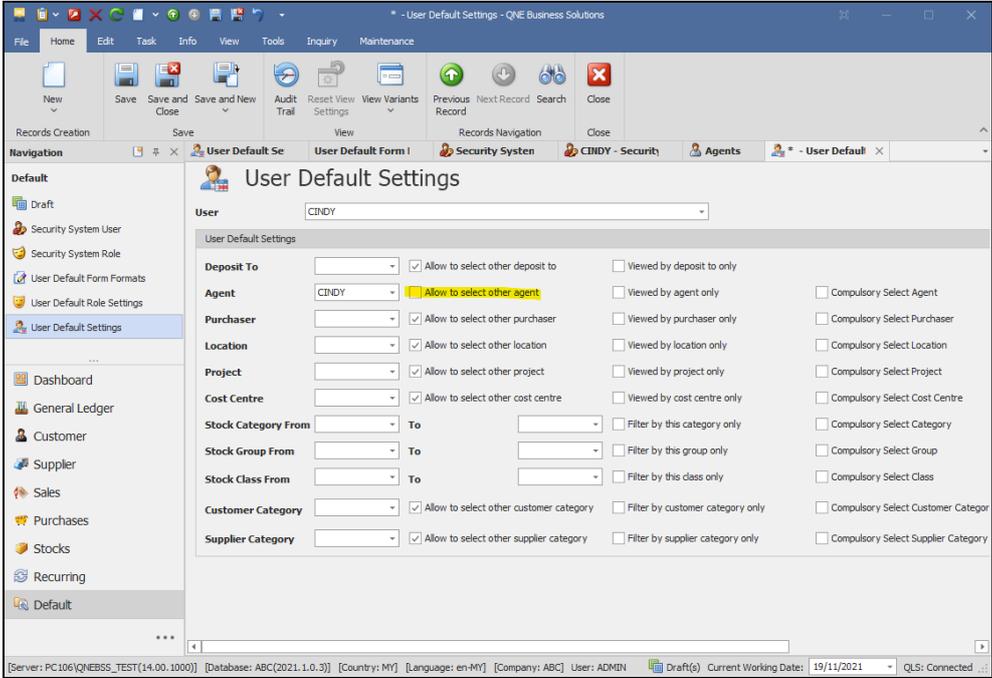
Note: This example uses User Default Settings. You can use another similar method which is **User Default Role Settings**.

Refer to below link on how to set the user roles.

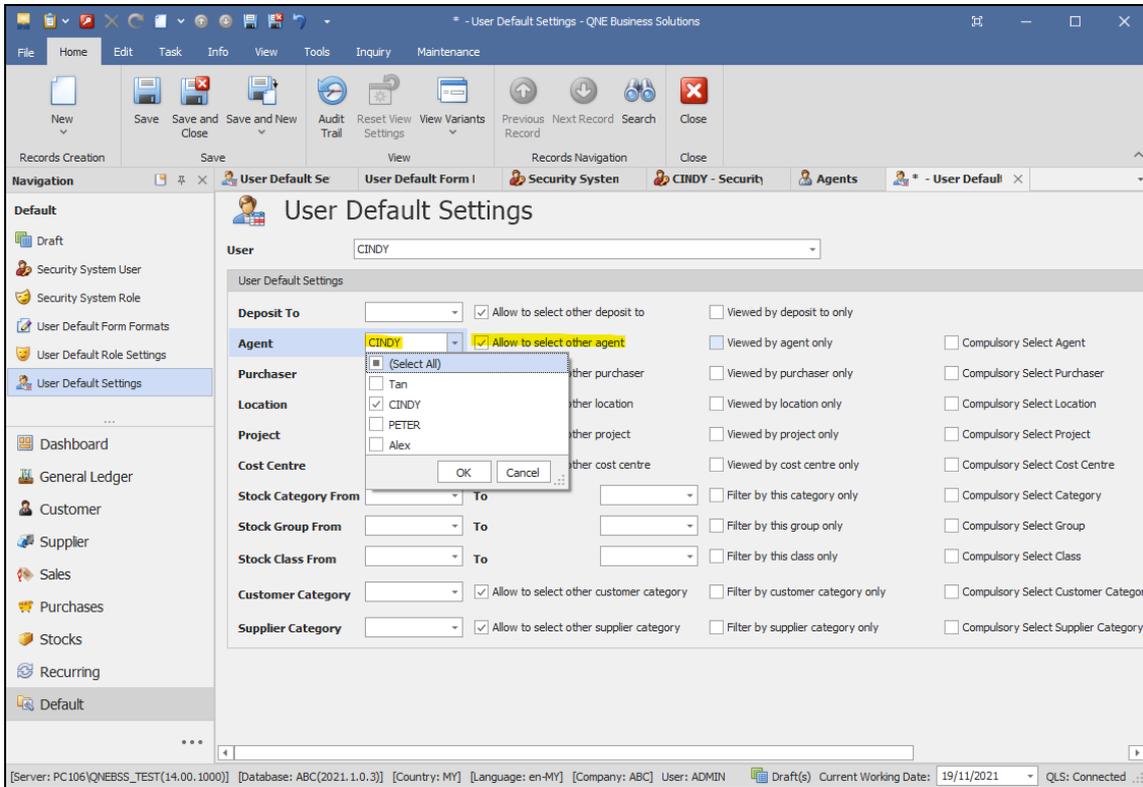
<https://support.qne.com.my/support/solutions/articles/81000389123-how-to-create-user-and-user-roles-video->



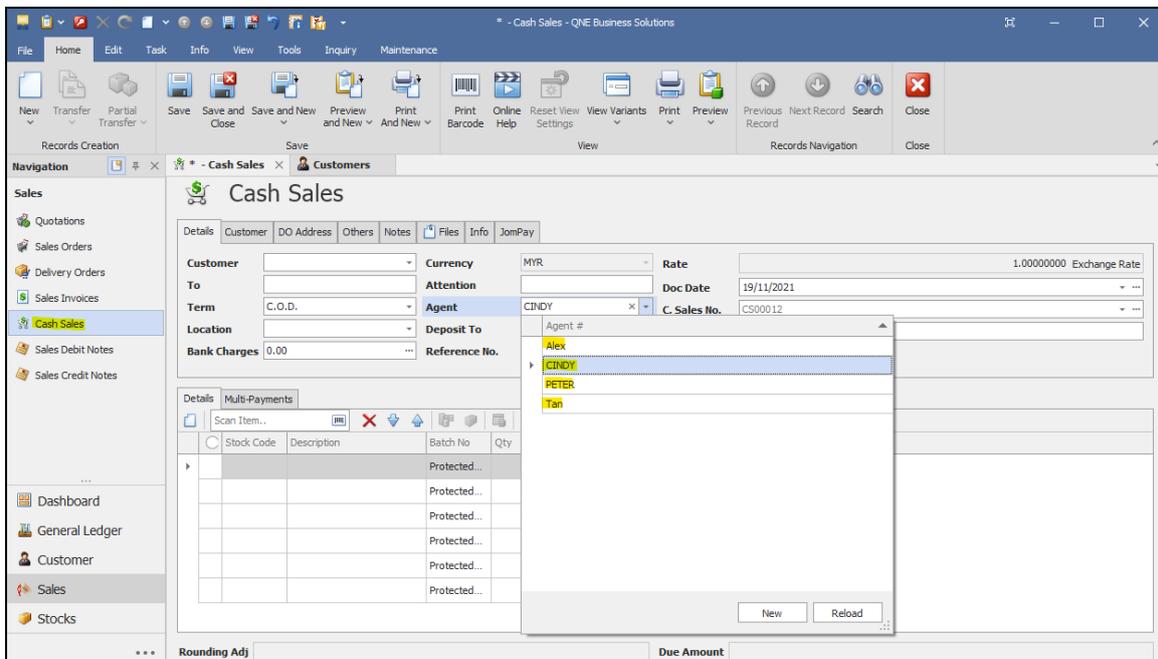
5. Select default agent for this user at **Agent**. Untick **“Allow to select to other agent”**



6. Tick "Allow to select to other agent"



User can select other agents when create transaction.





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User can select other agents' customers as well

The screenshot shows the 'Cash Sales' form in QNE Business Solutions. A dialog box titled 'Customers' is open, displaying a list of available records. The dialog box has a search field and a 'Find:' label. The list of records is as follows:

Customer #	Name	Agent
700-C001	CARE SOFTWARE SOLUTIONS	Alex
700-A001	Advance Trading SDN BHD	CINDY
700-J001	JASMINE	CINDY
700-C002	CARE SOFTWARE	PETER
700-B001	BEST TECH ENGINEERING SDN. BHD.	Tan

The 'Agent' column in the dialog box has a dropdown arrow next to it, indicating that users can filter the list by agent. The main form in the background shows fields for Customer, Currency (MYR), Rate (1.00000000 Exchange Rate), Doc Date (19/11/2021), C. Sales No. (CS00012), and Cheque No. There is also a 'Post To AR' checkbox and a 'Rounding' checkbox.

7. Tick "View by agent only"

The screenshot shows the 'User Default Settings' form in QNE Business Solutions. The 'User' field is set to 'CINDY'. The 'User Default Settings' section contains the following fields and options:

Field	Value	Allow to select other	Viewed by	Compulsory Select
Deposit To	[Dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/> Viewed by deposit to only	
Agent	CINDY	<input type="checkbox"/> Allow to select other agent	<input checked="" type="checkbox"/> Viewed by agent only	<input type="checkbox"/> Compulsory Select Agent
Purchaser	[Dropdown]	<input checked="" type="checkbox"/> Allow to select other purchaser	<input type="checkbox"/> Viewed by purchaser only	<input type="checkbox"/> Compulsory Select Purchaser
Location	[Dropdown]	<input checked="" type="checkbox"/> Allow to select other location	<input type="checkbox"/> Viewed by location only	<input type="checkbox"/> Compulsory Select Location
Project	[Dropdown]	<input checked="" type="checkbox"/> Allow to select other project	<input type="checkbox"/> Viewed by project only	<input type="checkbox"/> Compulsory Select Project
Cost Centre	[Dropdown]	<input checked="" type="checkbox"/> Allow to select other cost centre	<input type="checkbox"/> Viewed by cost centre only	<input type="checkbox"/> Compulsory Select Cost Centre
Stock Category From	[Dropdown]	To [Dropdown]	<input type="checkbox"/> Filter by this category only	<input type="checkbox"/> Compulsory Select Category
Stock Group From	[Dropdown]	To [Dropdown]	<input type="checkbox"/> Filter by this group only	<input type="checkbox"/> Compulsory Select Group
Stock Class From	[Dropdown]	To [Dropdown]	<input type="checkbox"/> Filter by this class only	<input type="checkbox"/> Compulsory Select Class
Customer Category	[Dropdown]	<input checked="" type="checkbox"/> Allow to select other customer category	<input type="checkbox"/> Filter by customer category only	<input type="checkbox"/> Compulsory Select Customer Category
Supplier Category	[Dropdown]	<input checked="" type="checkbox"/> Allow to select other supplier category	<input type="checkbox"/> Filter by supplier category only	<input type="checkbox"/> Compulsory Select Supplier Category



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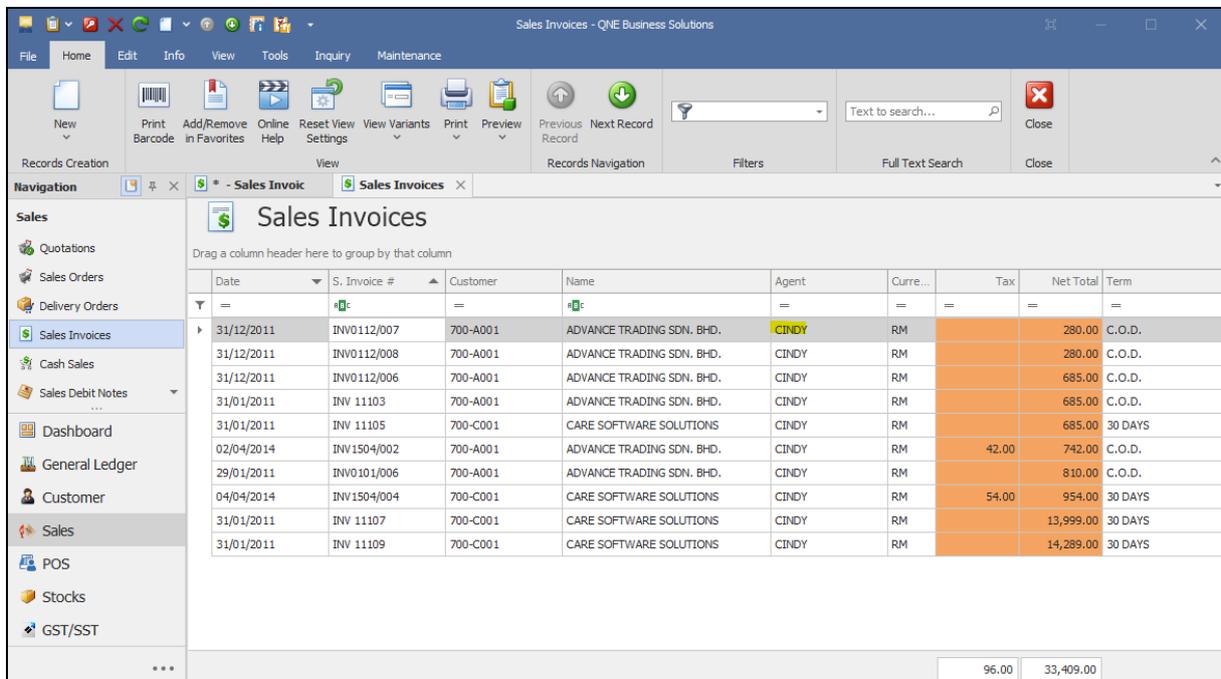
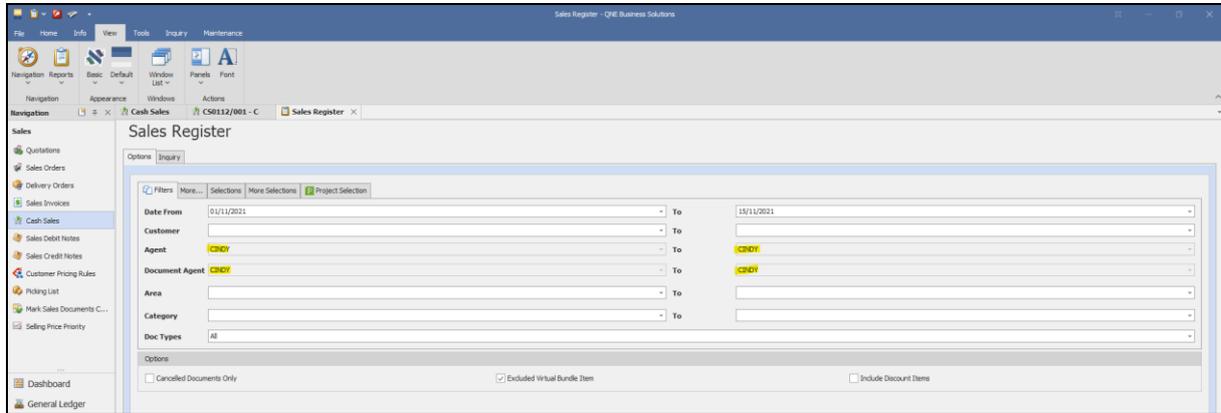
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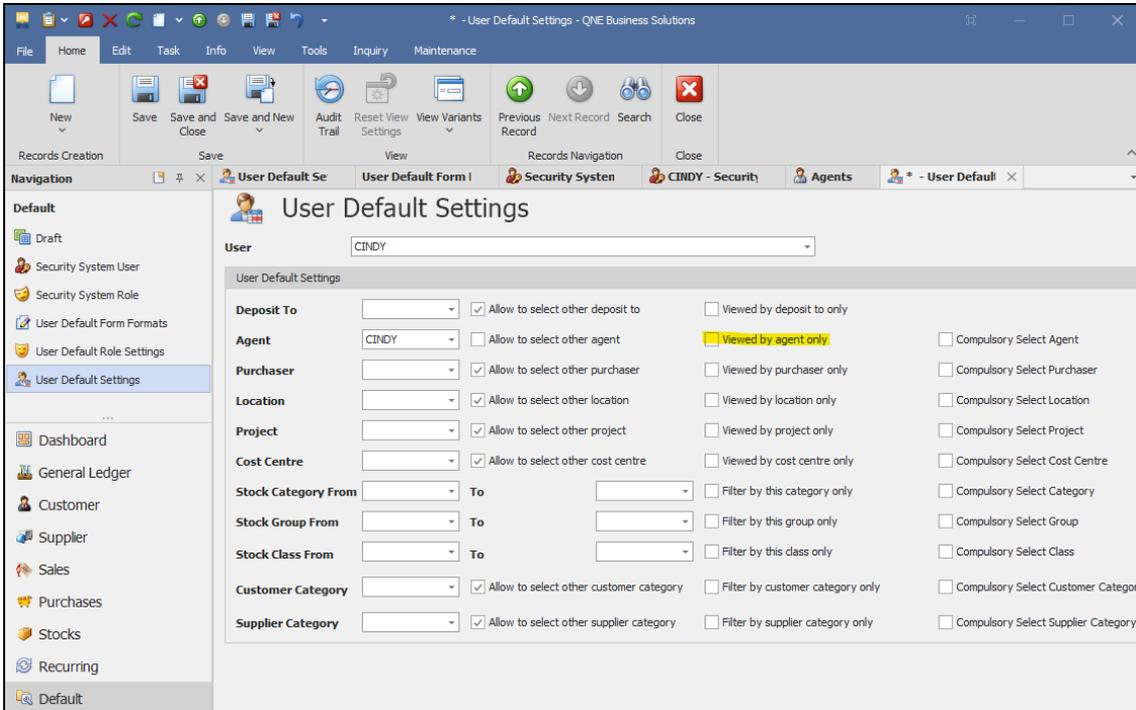
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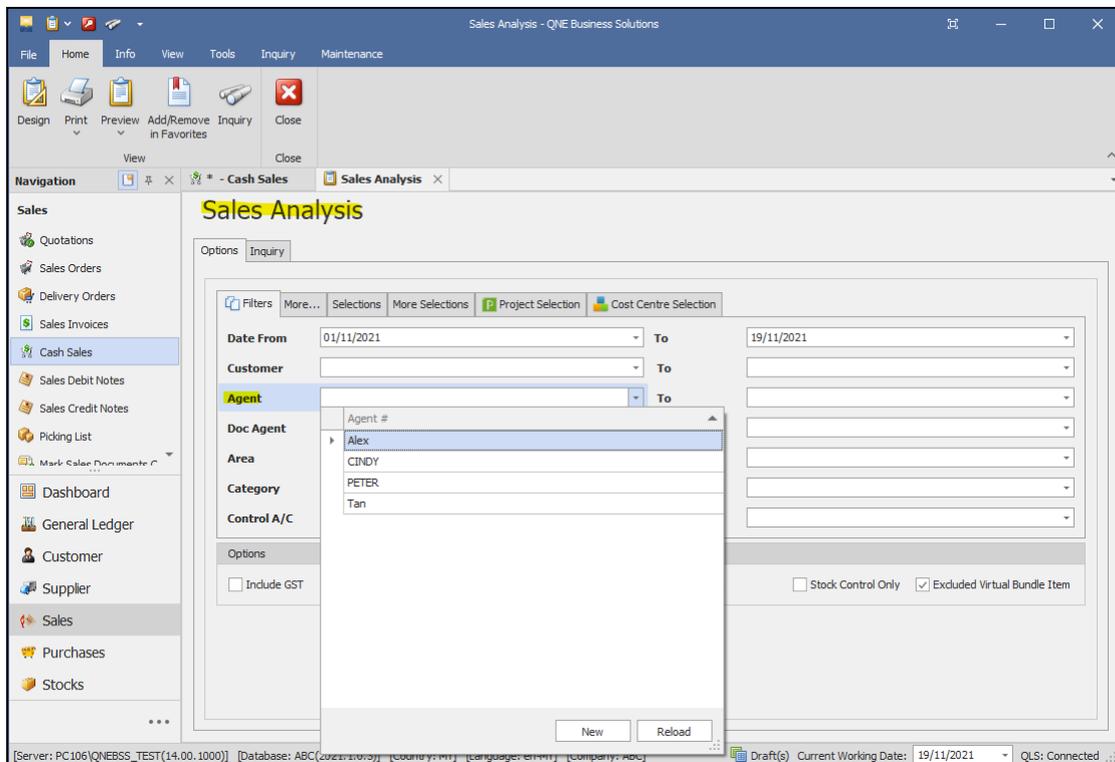
User cannot see transactions by other agents.



8. Untick "View by agent only"



User can see transactions and customers by other agents in reports.





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Sales Invoices - QNE Business Solutions

Navigation: Sales Invoices

Date	S. Invoice #	Customer	Name	Agent	Curre...	Tax	Net Total	Term
09/01/2011	INV 11100	700-8001	BEST TECH ENGINEERING SDN. BHD.	Alex	RM		16.50	30 DAYS
31/12/2011	INV0112/008	700-A001	ADVANCE TRADING SDN. BHD.	CINDY	RM		280.00	C.O.D.
31/01/2011	INV 11107	700-C001	CARE SOFTWARE SOLUTIONS	CINDY	RM		13,999.00	30 DAYS
29/01/2011	INV0101/006	700-A001	ADVANCE TRADING SDN. BHD.	CINDY	RM		810.00	C.O.D.
31/01/2011	INV 11109	700-C001	CARE SOFTWARE SOLUTIONS	CINDY	RM		14,289.00	30 DAYS
31/01/2011	INV 11103	700-A001	ADVANCE TRADING SDN. BHD.	CINDY	RM		685.00	C.O.D.
31/01/2011	INV 11105	700-C001	CARE SOFTWARE SOLUTIONS	CINDY	RM		685.00	30 DAYS
02/04/2014	INV1504/002	700-A001	ADVANCE TRADING SDN. BHD.	CINDY	RM	42.00	742.00	C.O.D.
04/04/2014	INV1504/004	700-C001	CARE SOFTWARE SOLUTIONS	CINDY	RM	54.00	954.00	30 DAYS
31/12/2011	INV0112/007	700-A001	ADVANCE TRADING SDN. BHD.	CINDY	RM		280.00	C.O.D.
31/12/2011	INV0112/006	700-A001	ADVANCE TRADING SDN. BHD.	CINDY	RM		685.00	C.O.D.
31/01/2011	INV 11101	700-8001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM		13,999.00	30 DAYS
31/01/2011	INV 11112	700-8001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM		1,780.00	30 DAYS
31/01/2011	INV 11108	700-8001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM		14,289.00	30 DAYS
10/02/2011	INV 11113	700-8001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM		4,410.00	30 DAYS
03/04/2014	INV1504/003	700-8001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM	48.00	848.00	30 DAYS
31/01/2011	INV 11111	700-8001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM		15,369.00	30 DAYS
05/04/2014	INV1504/005	700-D001	DELL COMPUTER SDN. BHD.	Tan	RM	60.00	1,060.00	C.O.D.
31/01/2011	INV 11110	700-D001	DELL COMPUTER SDN. BHD.	Tan	RM		685.00	C.O.D.
31/12/2011	INV0112/010	700-U002	US TECHNOLOGY LIMITED	Tan	USD		162.23	C.O.D.
15/02/2011	INV 11106	700-D001	DELL COMPUTER SDN. BHD. ?0?0	Tan	RM		1,700.00	C.O.D.
21/01/2011	INV 11104	700-W001	WAI HONG INTERNATIONAL TRADING	Tan	RM		13,999.00	C.O.D.
31/01/2011	INV0101/008	700-D001	DELL COMPUTER SDN. BHD.	Tan	RM		400.00	C.O.D.
							204.00	102,126.73

9. Tick "Compulsory Select Agent"

User Default Settings - QNE Business Solutions

Navigation: User Default Settings

User: CINDY

User Default Settings

Deposit To	<input type="checkbox"/> Allow to select other deposit to	<input type="checkbox"/> Viewed by deposit to only	
Agent	<input type="checkbox"/> Allow to select other agent	<input type="checkbox"/> Viewed by agent only	<input checked="" type="checkbox"/> Compulsory Select Agent
Purchaser	<input type="checkbox"/> Allow to select other purchaser	<input type="checkbox"/> Viewed by purchaser only	<input type="checkbox"/> Compulsory Select Purchaser
Location	<input type="checkbox"/> Allow to select other location	<input type="checkbox"/> Viewed by location only	<input type="checkbox"/> Compulsory Select Location
Project	<input type="checkbox"/> Allow to select other project	<input type="checkbox"/> Viewed by project only	<input type="checkbox"/> Compulsory Select Project
Cost Centre	<input type="checkbox"/> Allow to select other cost centre	<input type="checkbox"/> Viewed by cost centre only	<input type="checkbox"/> Compulsory Select Cost Centre
Stock Category From	<input type="checkbox"/> Filter by this category only		<input type="checkbox"/> Compulsory Select Category
Stock Group From	<input type="checkbox"/> Filter by this group only		<input type="checkbox"/> Compulsory Select Group
Stock Class From	<input type="checkbox"/> Filter by this class only		<input type="checkbox"/> Compulsory Select Class
Customer Category	<input type="checkbox"/> Allow to select other customer category	<input type="checkbox"/> Filter by customer category only	<input type="checkbox"/> Compulsory Select Customer Category
Supplier Category	<input type="checkbox"/> Allow to select other supplier category	<input type="checkbox"/> Filter by supplier category only	<input type="checkbox"/> Compulsory Select Supplier Category



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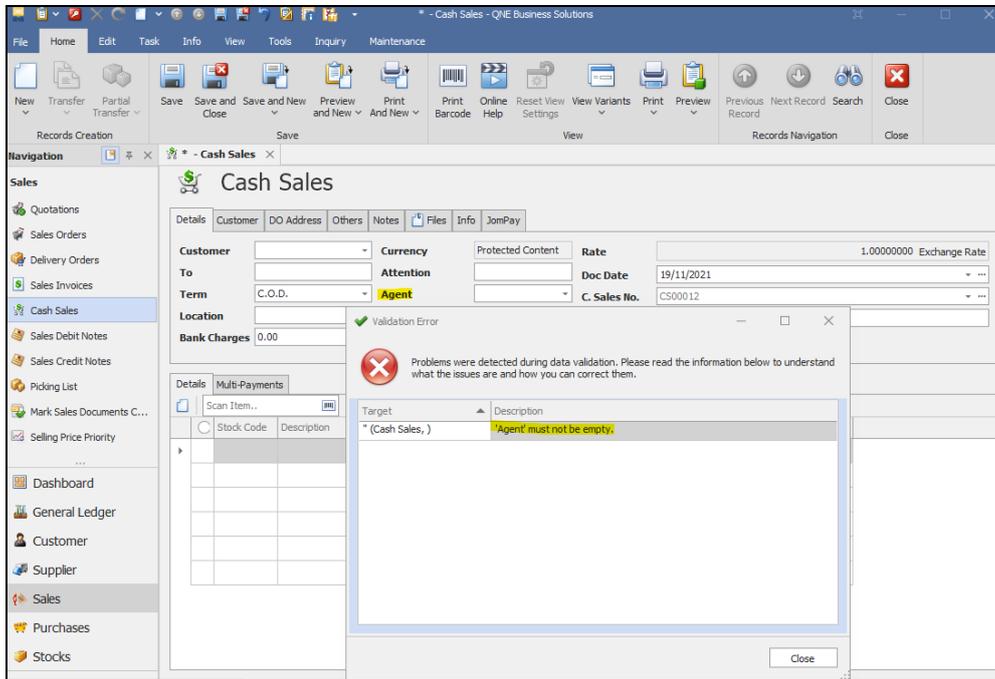
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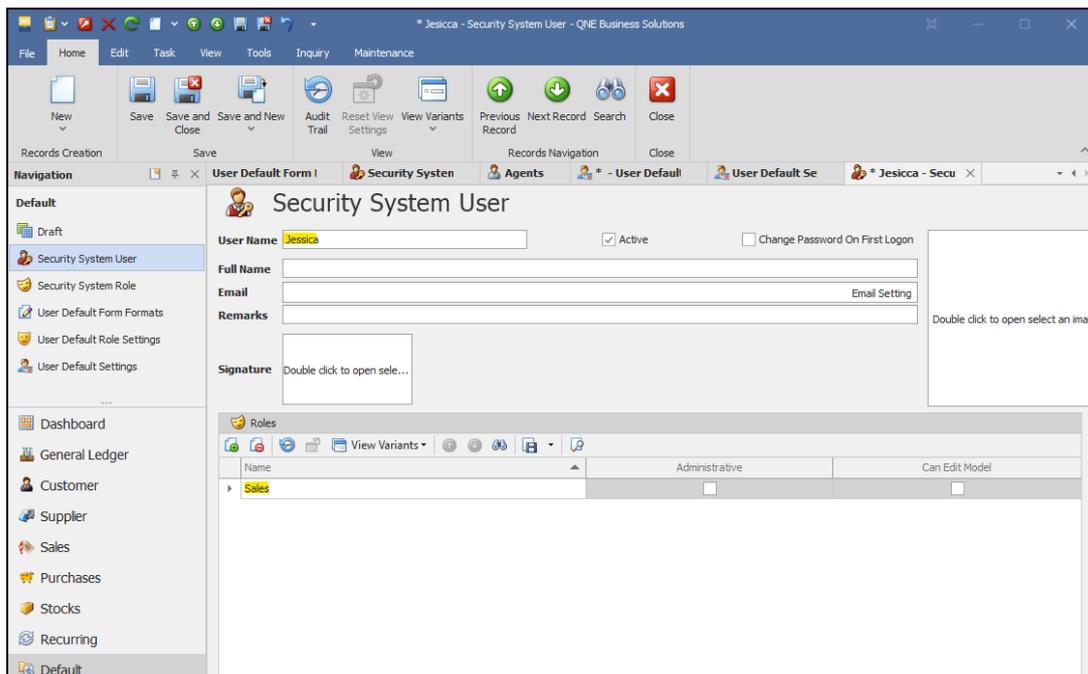
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User cannot save without key in agent

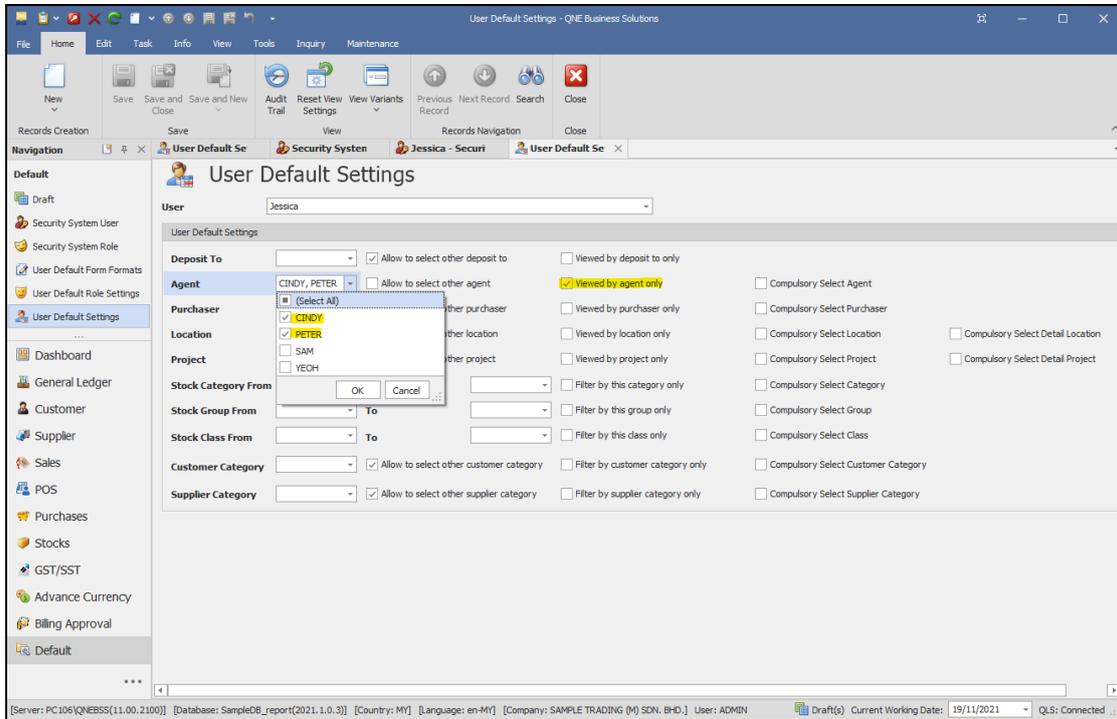


FOR LEADER TO VIEW OWN TEAM MEMBER'S CUSTOMERS

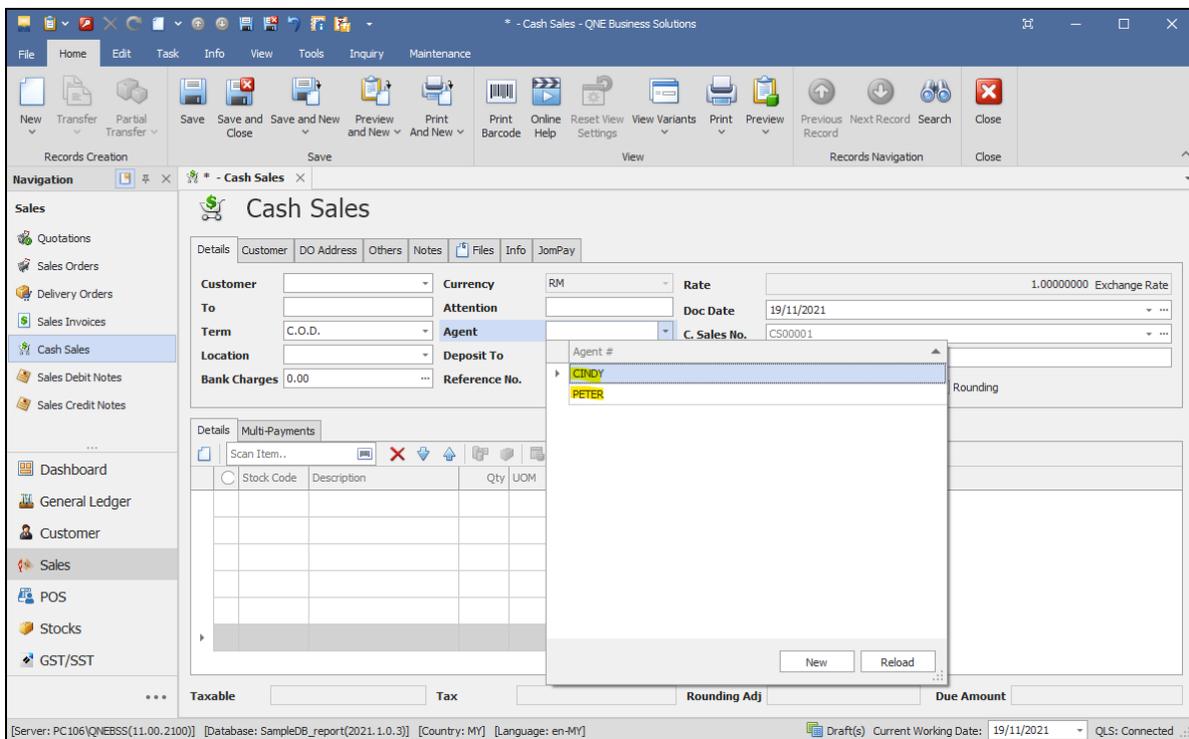
1. Create another user



2. Set team agents of Jessica. Tick Allow to select other agents.



User can only select from default agents.





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Cash Sales

Customer: Currency: RM Rate: 1.0000000 Exchange Rate

Doc Date: 19/11/2021 C. Sales No.: CS00001 Cheque No.:

Available records:

Customer #	Name	Agent
700-C001	CARE SOFTWARE SOLUTIONS	CINDY
700-A001	ADVANCE TRADING SDN. BHD.	CINDY
700-T001	TRIWAY DEBTOR	CINDY
700-W002	WEST DIGITAL SDN BHD	CINDY
700-B001	BEST TECH ENGINEERING SDN. BHD.	PETER

Table columns: Amount, Tax C..., Tax, Net

Server: PC106\QNEBSS(11.00.2100) [Database: SampleDB_report(2021.1.0.3)] [Country: MY] [Language: en-MY] Draft(s) Current Working Date: 19/11/2021

User can only view transactions and reports by default agents.

Sales Invoices

Date	S. Invoice #	Customer	Name	Agent	Curre...	Tax	Net Total	Term
31/12/2011	INV0112/008	700-A001	ADVANCE TRADING SDN. BHD.	CINDY	RM		280.00	C.O.D.
31/01/2011	INV 1107	700-C001	CARE SOFTWARE SOLUTIONS	CINDY	RM		13,999.00	30 DAYS
29/01/2011	INV0101/006	700-A001	ADVANCE TRADING SDN. BHD.	CINDY	RM		810.00	C.O.D.
31/01/2011	INV 1109	700-C001	CARE SOFTWARE SOLUTIONS	CINDY	RM		14,289.00	30 DAYS
31/01/2011	INV 1103	700-A001	ADVANCE TRADING SDN. BHD.	CINDY	RM		685.00	C.O.D.
31/01/2011	INV 1105	700-C001	CARE SOFTWARE SOLUTIONS	CINDY	RM		685.00	30 DAYS
02/04/2014	INV1504/002	700-A001	ADVANCE TRADING SDN. BHD.	CINDY	RM	42.00	742.00	C.O.D.
04/04/2014	INV1504/004	700-C001	CARE SOFTWARE SOLUTIONS	CINDY	RM	54.00	954.00	30 DAYS
31/12/2011	INV0112/007	700-A001	ADVANCE TRADING SDN. BHD.	CINDY	RM		280.00	C.O.D.
31/12/2011	INV0112/006	700-A001	ADVANCE TRADING SDN. BHD.	CINDY	RM		685.00	C.O.D.
31/01/2011	INV 1101	700-B001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM		13,999.00	30 DAYS
31/01/2011	INV 1112	700-B001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM		1,780.00	30 DAYS
09/01/2011	INV 1100	700-B001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM		16.50	30 DAYS
31/01/2011	INV 1108	700-B001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM		14,289.00	30 DAYS
10/02/2011	INV 1113	700-B001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM		4,410.00	30 DAYS
03/04/2014	INV1504/003	700-B001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM	48.00	848.00	30 DAYS
31/01/2011	INV 1111	700-B001	BEST TECH ENGINEERING SDN. BHD.	PETER	RM		15,369.00	30 DAYS

Summary: 144.00, 84,120.50

Server: PC106\QNEBSS(11.00.2100) [Database: SampleDB_report(2021.1.0.3)] [Country: MY] [Language: en-MY] Draft(s) Current Working Date: 19/11/2021



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The screenshot displays the 'Sales Analysis' window in QNE Business Solutions. The interface includes a top menu bar with 'File', 'Home', 'Info', 'View', 'Tools', 'Inquiry', and 'Maintenance'. Below this is a toolbar with icons for 'Print', 'Preview', 'Add/Remove in Favorites', 'Inquiry', and 'Close'. A navigation pane on the left lists various sales-related functions such as 'Quotations', 'Sales Orders', 'Delivery Orders', 'Sales Invoices', 'Cash Sales', 'Sales Debit Notes', and 'Sales Credit Notes'. The main area is titled 'Sales Analysis' and contains a 'Filters' section with tabs for 'More...', 'Selections', 'More Selections', and 'Project Selection'. The 'Filters' section includes fields for 'Date From' (01/11/2021) and 'To' (19/11/2021), 'Customer', 'Agent', 'Doc Agent', 'Area', 'Category', and 'Control A/C'. A dropdown menu for 'Agent' is open, showing 'CINDY' and 'PETER'. There are also checkboxes for 'Include GST', 'Stock Control Only', and 'Excluded Virtual Bundle Item'. The status bar at the bottom shows the server path '[Server: PC106]\QNEBSS(11.00.2100)', database name '[Database: SampleDB_]', and current working date '19/11/2021'.