



HOW TO IMPLEMENT USER DEFAULT SETTING - PROJECT

[1.0]

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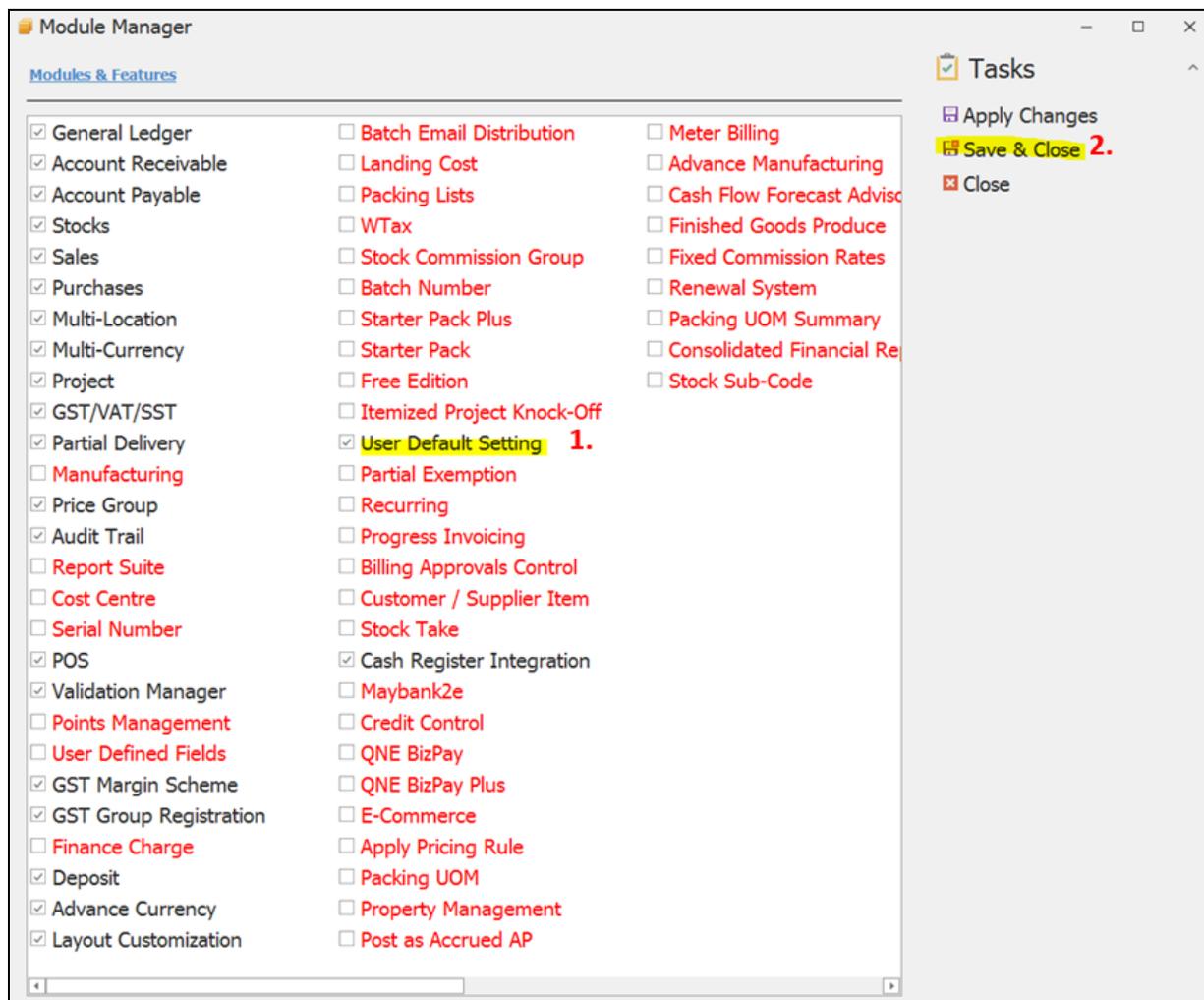
SCENARIO

User Michelle only in-charge the Project A and she will not involve in other projects. So she only can create, read, edit and update the document or account relevant with **Project A** only.

SOLUTION

Before Using this **User Default Setting**, please make sure the **User Default Setting** has been ticked and save. This is additional module, extra charges is occurred.

Step 1 : Click on (File -> Modules). Plesae make sure the User Default Setting has ticked.





QNE
SOFTWARE

QNE TIPS

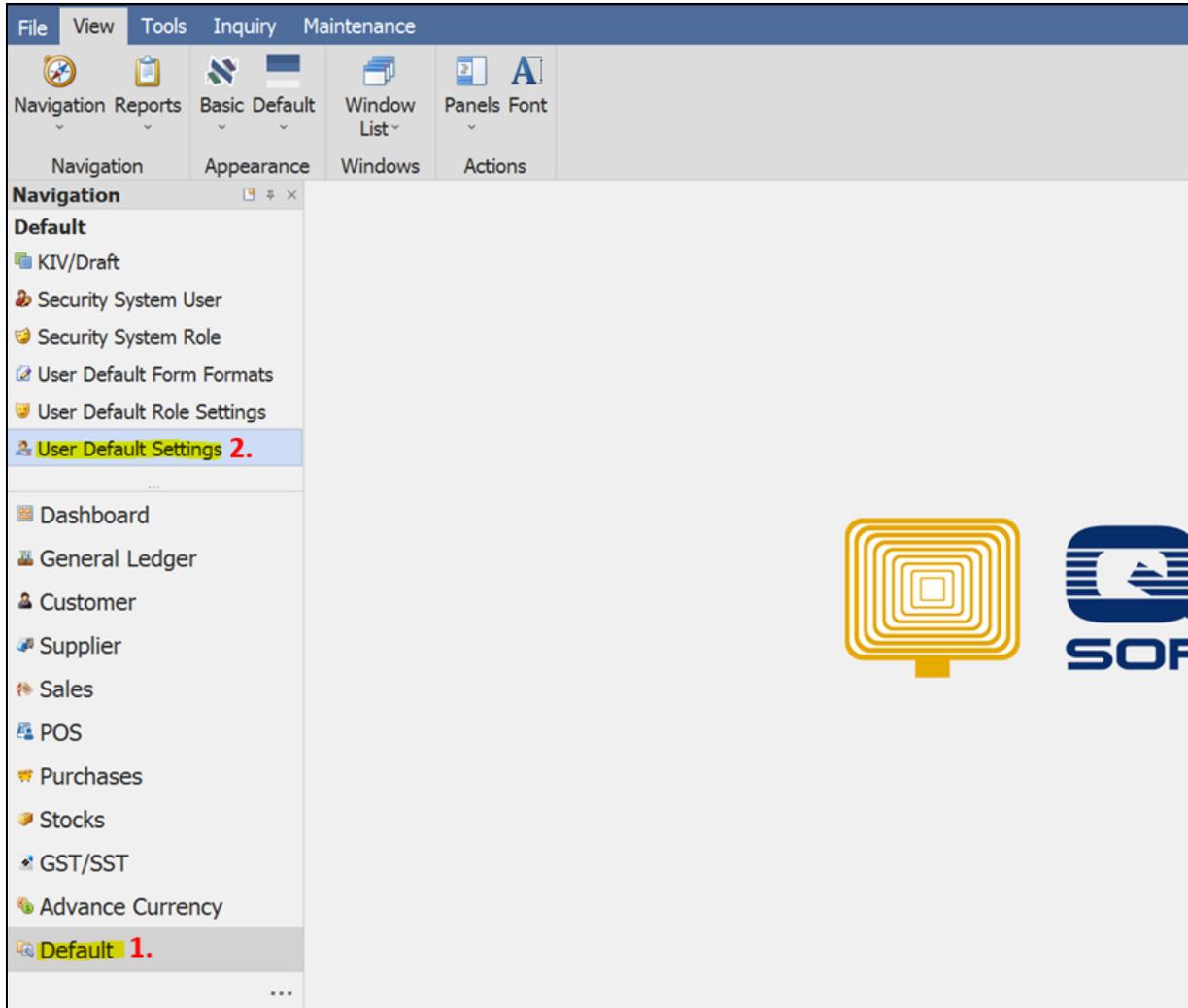
Product : QNE Optimum

Version: 1.00

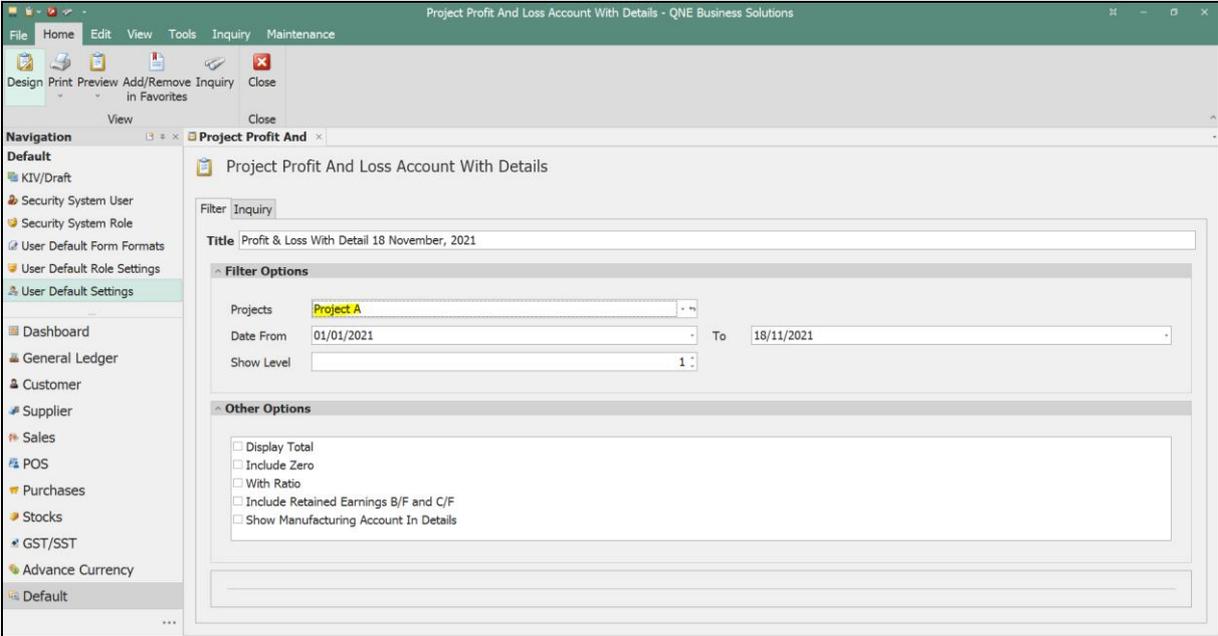
Doc No : 1

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Step 2 : User can find the User Default Setting Default -> User Default Setting

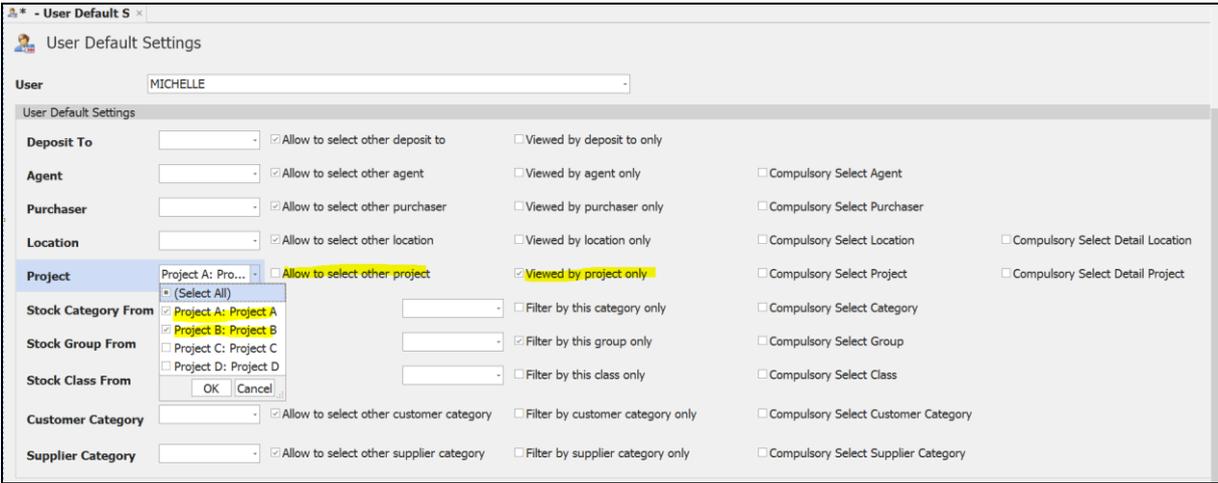


Step 6: View -> Report -> Project -> Project Profit & Loss Account -> Project Profit & Loss Account with details, user can only view **Project A report** . Since “View by Project is Ticked” means user only can view own project



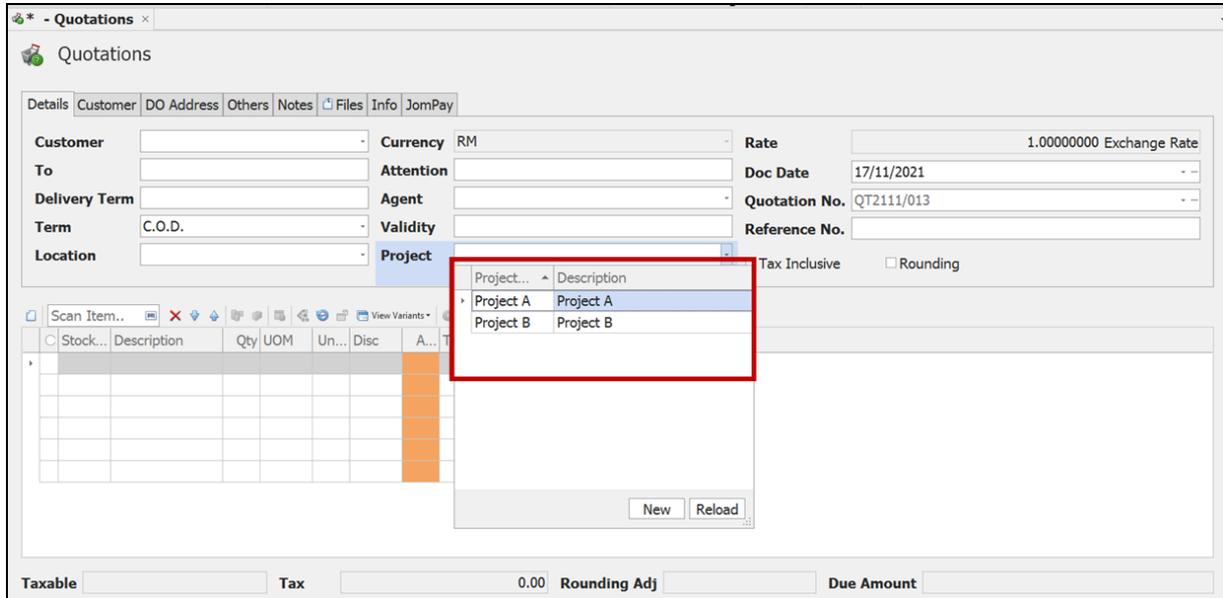
SELECT MORE THAN ONE PROJECTS, NOT ALLOW TO SELECT THE OTHER PROJECT AND VIEWED BY PROJECT ONLY.

Step 7: If User has set 2 project (Project A & B) in the **User Default Setting**, and tick View by Project only

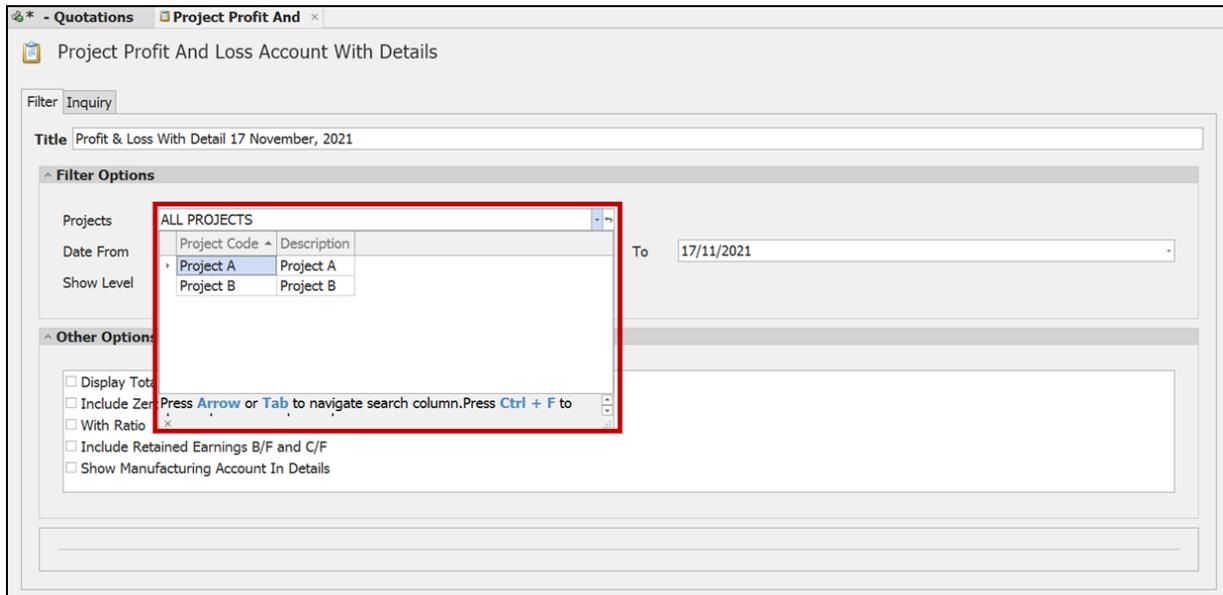




Step 8: The user is able to select Project A and Project B in their user account but cannot select other projects



Step 9: In the reporting, user can also view Project A and Project B only





SELECT 2 PROJECTS, ALLOW TO SELECT OTHER PROJECT AND TICK VIEWED BY PROJECT ONLY.

Step 10: If user has set 2 project (Project A & B) in the **User Default Setting**, tick Allow to select other project, tick View by Project only

User Default Settings

User: MICHELLE

Project: Project A: Project A

Allow to select other project

Viewed by project only

Step 11: User can view and select other project other than Project A & Project B

Sales Orders

Project: Project A

Project Code	Description
Project A	Project A
Project B	Project B
Project C	Project C
Project D	Project D



Step 12: But user is not able to view other project's Report since "View by Project Only" is ticked

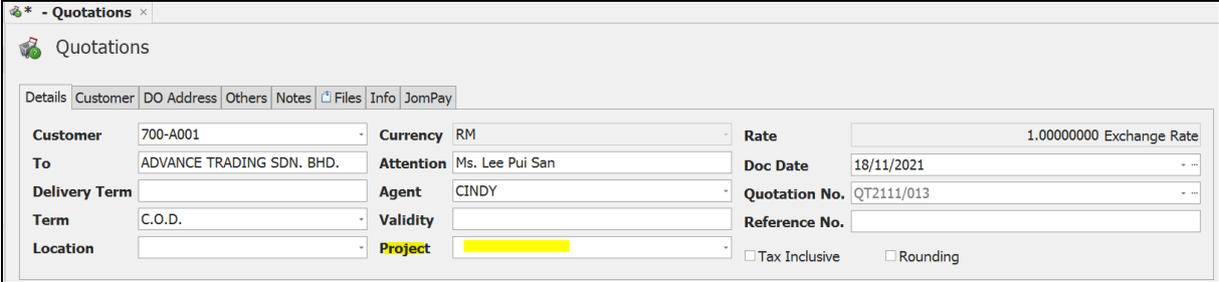
The screenshot shows the 'Project Ledger' window with the 'Project Selection' section. Under 'Project Selection', there are radio buttons for 'All projects', 'No project', 'Main projects', and 'Sub projects'. The 'Sub projects' option is selected. Below these, there are two checked checkboxes: 'Project A: Project A' and 'Project B: Project B', which are highlighted with a red box. The 'Sub Projects' section is empty.

COMPULSORY SELECT PROJECT OR COMPULSORY SELECT DETAIL PROJECT.

Step 13: If user ticked **Compulsory Select Project**

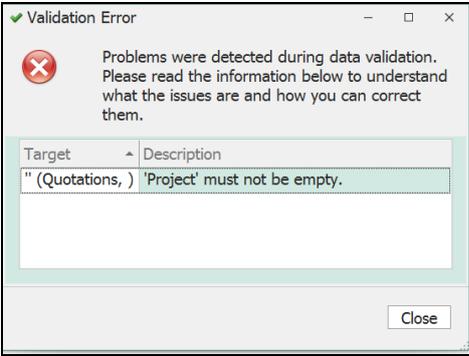
The screenshot shows the 'User Default Settings' window for user 'MICHELLE'. The 'Project' section is expanded, showing a list of projects: 'Project A: Project A', 'Project B: Project B', 'Project C: Project C', and 'Project D: Project D'. The 'Project A: Project A' option is selected. In the 'User Default Settings' section, the 'Compulsory Select Project' checkbox is checked and highlighted in yellow. Other checkboxes for 'Compulsory Select Detail Project', 'Compulsory Select Agent', 'Compulsory Select Purchaser', 'Compulsory Select Location', 'Compulsory Select Category', 'Compulsory Select Group', 'Compulsory Select Class', 'Compulsory Select Customer Category', and 'Compulsory Select Supplier Category' are unchecked.

User should update project in the header else error message will be prompt as below and not allow to save



The screenshot shows the 'Quotations' form with the following details:

- Customer: 700-A001
- To: ADVANCE TRADING SDN. BHD.
- Delivery Term: C.O.D.
- Term: C.O.D.
- Location: (empty)
- Currency: RM
- Attention: Ms. Lee Pui San
- Agent: CINDY
- Validity: (empty)
- Project: (empty, highlighted in yellow)
- Rate: 1.00000000 Exchange Rate
- Doc Date: 18/11/2021
- Quotation No.: QT2111/013
- Reference No.: (empty)



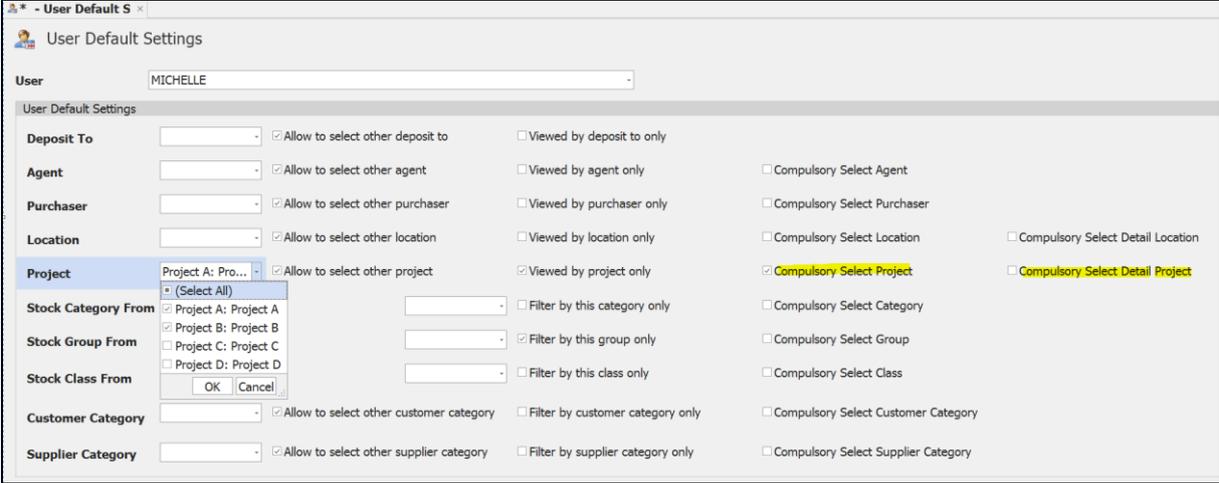
Validation Error

Problems were detected during data validation. Please read the information below to understand what the issues are and how you can correct them.

Target	Description
" (Quotations,)	'Project' must not be empty.

Close

Step 14: If user ticked Compulsory Select Detail Project



The screenshot shows the 'User Default Settings' form for user 'MICHELLE'. The 'Project' field is selected, and the 'Compulsory Select Detail Project' checkbox is checked.

User Default Settings

User: MICHELLE

User Default Settings

- Deposit To: (empty) Allow to select other deposit to Viewed by deposit to only
- Agent: (empty) Allow to select other agent Viewed by agent only Compulsory Select Agent
- Purchaser: (empty) Allow to select other purchaser Viewed by purchaser only Compulsory Select Purchaser
- Location: (empty) Allow to select other location Viewed by location only Compulsory Select Location Compulsory Select Detail Location
- Project: Project A: Pro... (Select All) Allow to select other project Viewed by project only **Compulsory Select Project** **Compulsory Select Detail Project**
- Stock Category From: Project A: Project A Filter by this category only Compulsory Select Category
- Stock Group From: Project B: Project B Filter by this group only Compulsory Select Group
- Stock Class From: Project C: Project C Filter by this class only Compulsory Select Class
- Customer Category: (empty) Allow to select other customer category Filter by customer category only Compulsory Select Customer Category
- Supplier Category: (empty) Allow to select other supplier category Filter by supplier category only Compulsory Select Supplier Category

User should update Detail Project in the transaction else system not allow to save

Quotations

Details Customer DO Address Others Notes Files Info JomPay

Customer	700-A001	Currency	RM	Rate	1.00000000 Exchange Rate
To	ADVANCE TRADING SON. BHD.	Attention	Ms. Lee Pui San	Doc Date	29/06/2021
Delivery Term		Agent	CINDY	Quotation No.	QT2106/013
Term	C.O.D.	Validity		Reference No.	
Location		Project		<input type="checkbox"/> Tax Inclusive	<input type="checkbox"/> Rounding

Stock Code	Description	Qty	UOM	Unit Pr...	Disc	Amount	Tax C...	Tax	Net	Project
ASUS-EX	ASUS TECH EX MOTHERBO...	1	UNITS	280.00	12%	280.00			246.40	

Taxable: 246.40 Tax: 0.00 Rounding Adj: Due Amount: 246.40

Validation Error

❌

Problems were detected during data validation. Please read the information below to understand what the issues are and how you can correct them.

Target	Description
' at Pos 1' (Quotation Details, c46de346-78ad-48	'Detail Project' must not be empty.
' at Pos 2' (Quotation Details, e44055f2-96fb-48e	'Detail Project' must not be empty.

Close