

HOW TO IMPLEMENT USER DEFAULT SETTINGS - PURCHASER

[1.0]

CRIMSEN

[15/11/2021]



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Product : QNE Optimum

Version: 1.00

Doc No : 1

Page No: 1/13

REV. No	Nature of Change	Prepared By	Prepared Date	Reviewed & Approved by
1.0	Creation	Crimsen Than	15/11/2021	

Amendment Record



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QNE TIPS

Product : QNE Optimum

Version: 1.00

Doc No : 1

Page No: 2/13

SCENARIO

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

DIA	Account	Description
General		
	Bank account	HAYBANK
	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 purchaser as default to different user in the system.



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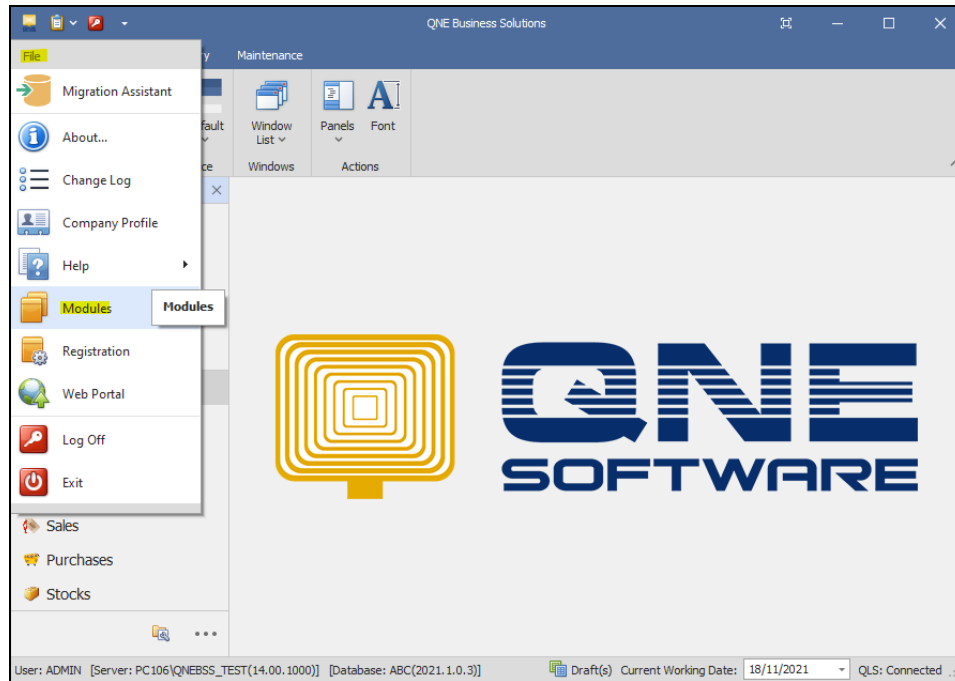
Version: 1.00

Doc No : 1

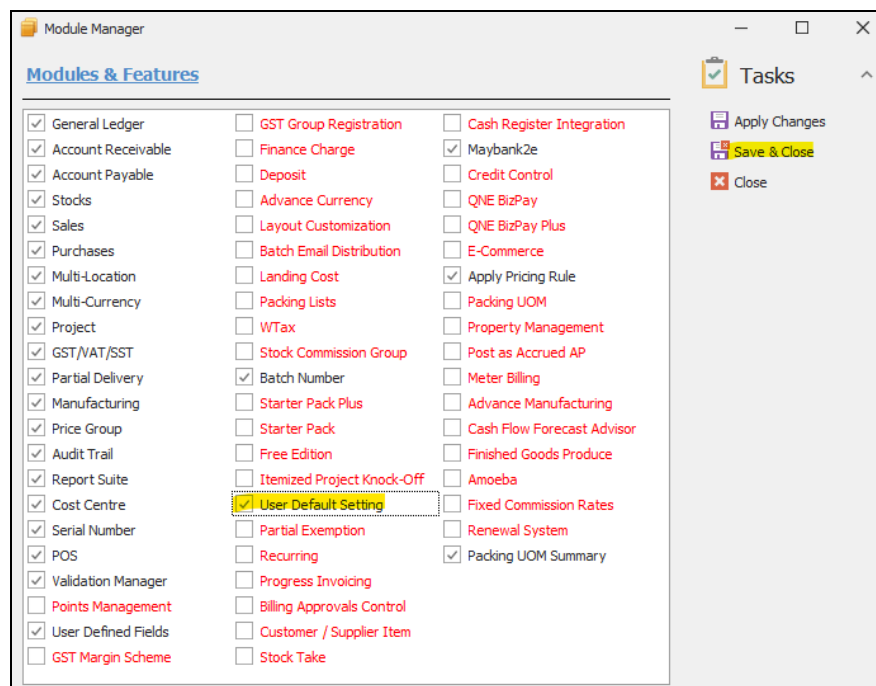
Page No: 3/13

SOLUTION

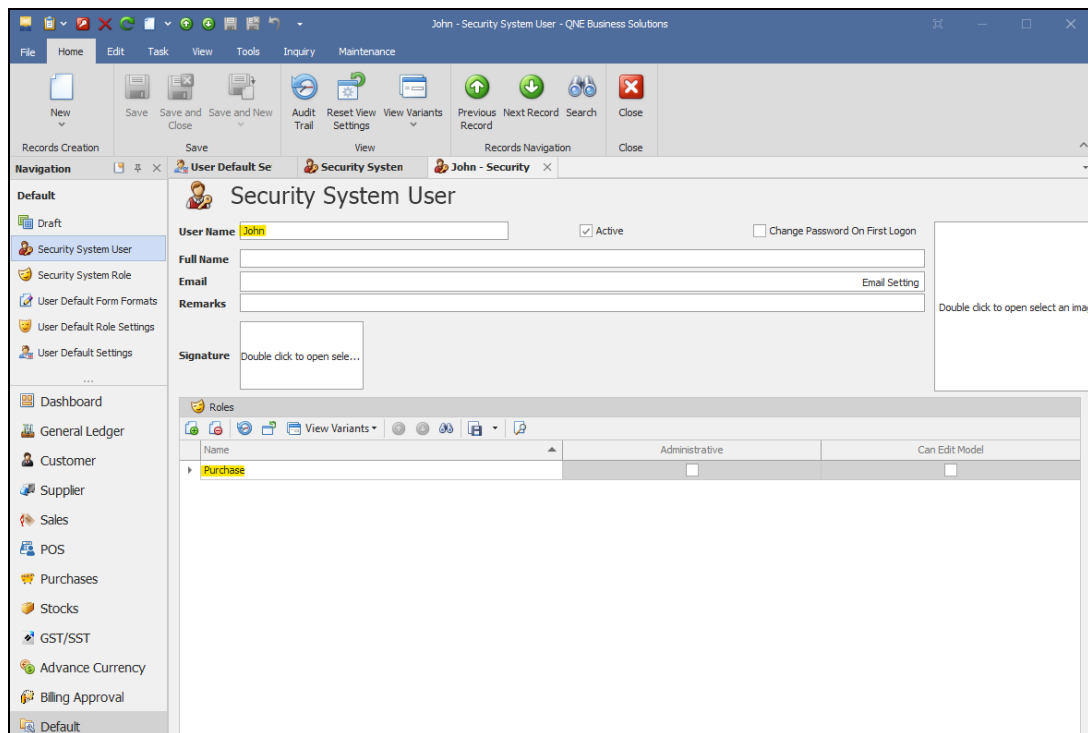
1. Go to File > **Modules**



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



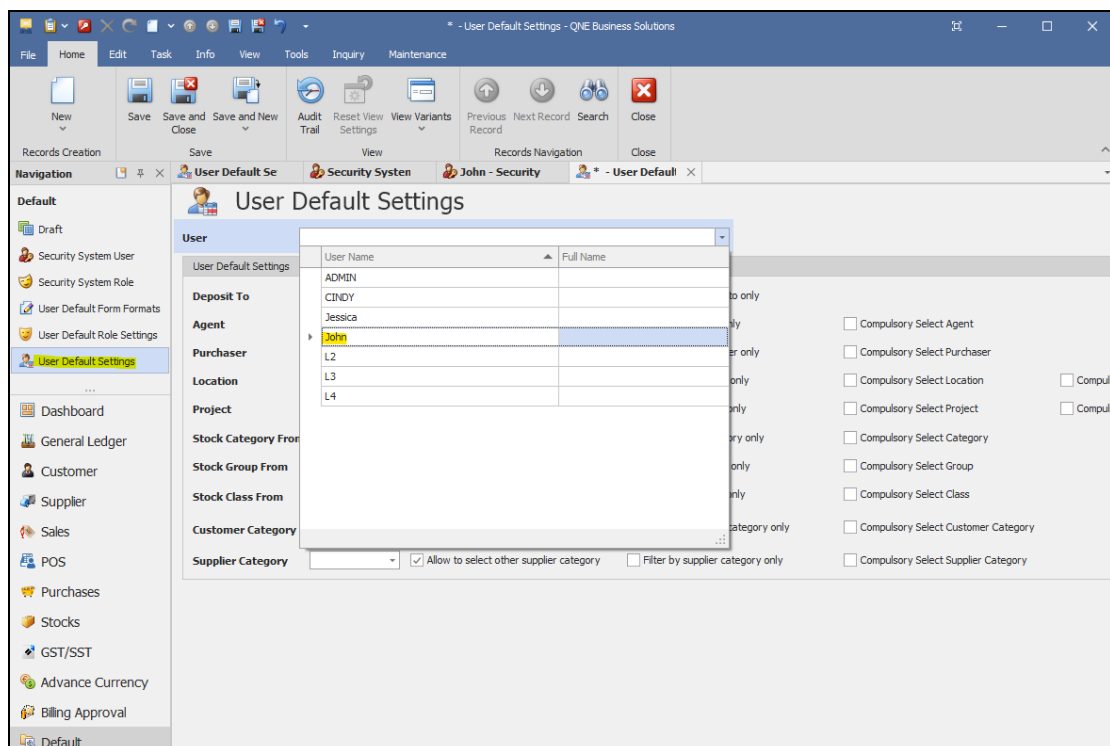
3. Create a user at Defaults > **Security System User**. Set the roles.




The screenshot shows the 'Security System User' form. The 'User Name' field is filled with 'John'. The 'Full Name' field is empty. The 'Email' field is empty. The 'Remarks' field is empty. The 'Signature' field is empty. The 'Roles' section shows a table with columns 'Name', 'Administrative', and 'Can Edit Model'. The 'Purchase' role is selected.

Name	Administrative	Can Edit Model
Purchase	<input type="checkbox"/>	<input type="checkbox"/>

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



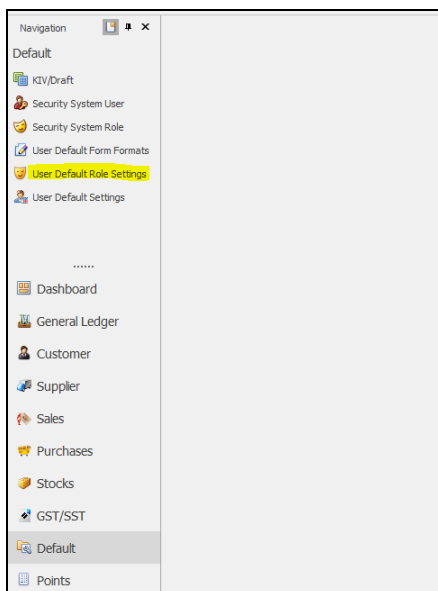
The screenshot shows the 'User Default Settings' form. The 'User' dropdown is set to 'John'. The 'Deposit To' field is empty. The 'Agent' field is empty. The 'Purchaser' field is empty. The 'Location' field is empty. The 'Project' field is empty. The 'Stock Category From' field is empty. The 'Stock Group From' field is empty. The 'Stock Class From' field is empty. The 'Customer Category' field is empty. The 'Supplier Category' field is empty. The 'Allow to select other supplier category' checkbox is checked. The 'Filter by supplier category only' checkbox is unchecked.

 QNE SOFTWARE		QNE TIPS	
Product : QNE Optimum		Version: 1.00	
Doc No : 1		Page No: 5/13	

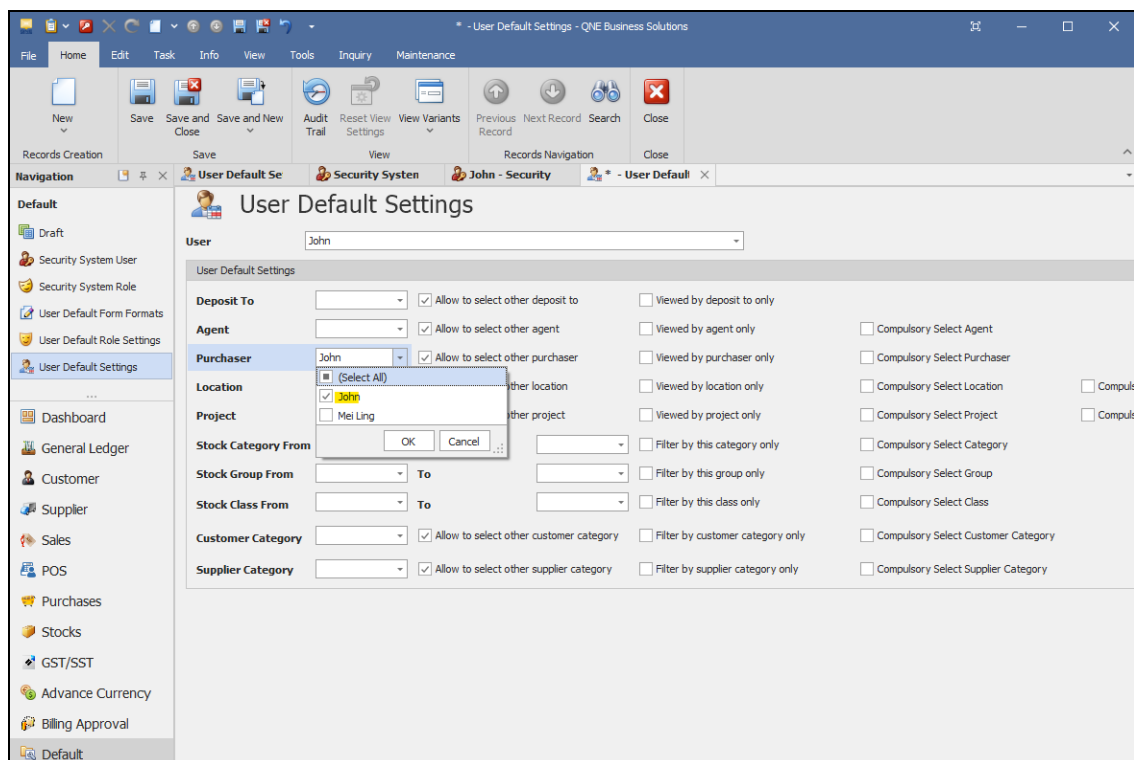
This example uses User Default Settings. You can use another similar method which is **User Default Role Settings**.

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 purchaser for this user at **Purchaser**





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Product : QNE Optimum

Version: 1.00

Doc No : 1

Page No: 6/13

6. Untick "Allow to select to other purchaser"

so that this user can only select the default purchaser.



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Product : QNE Optimum

Version: 1.00

Doc No : 1

Page No: 7/13

Cash Purchases

Supplier: [Dropdown] Currency: RM Rate: 1.00000000 Exchange Rate

From: [Dropdown] Type: Suppliers Find: [Text] Search

Available records:

Supplier #	Name	Purchaser
800-B001	BNC TECHNOLOGY SDN BHD	John
800-D001	DELL ENTERPRISE SDN BHD	John
800-D002	DIGITAL METAL LIMITED	John
800-F001	FUTURE I-TECH SDN BHD	John
800-K001	KTA SUPPLIES	John

New Reload

7. Tick "Allow to select to other purchaser"

User Default Settings

User: John

User Default Settings

Field	Value	Allow to select other [Field]	Filter by [Field] only	Compulsory Select [Field]
Deposit To	[Dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Agent	[Dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Compulsory Select Agent
Purchaser	John	<input checked="" type="checkbox"/> Allow to select other purchaser	<input type="checkbox"/>	<input type="checkbox"/> Compulsory Select Purchaser
Location	[Dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Compulsory Select Location <input type="checkbox"/> Compulsory Select Detail Location
Project	[Dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Compulsory Select Project <input type="checkbox"/> Compulsory Select Detail Project
Stock Category From	[Dropdown]		<input type="checkbox"/>	<input type="checkbox"/> Compulsory Select Category
Stock Group From	[Dropdown]		<input type="checkbox"/>	<input type="checkbox"/> Compulsory Select Group
Stock Class From	[Dropdown]		<input type="checkbox"/>	<input type="checkbox"/> Compulsory Select Class
Customer Category	[Dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Compulsory Select Customer Category
Supplier Category	[Dropdown]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Compulsory Select Supplier Category



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QNE TIPS

Product : QNE Optimum

Version: 1.00

Doc No : 1

Page No: 8/13

so that this user can select other purchasers also instead of just the default purchaser.

Server: PC106\QNEBSS_TEST(14.00.1000) [Database: ABC(2021.1.0.3)] [Country: MY] [Language: en-MY] [Company: ABC] User: Alice
Draft(s) Current Working Date: 15/11/2021 QLS: Connected

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 QLS: Connected



QNE SOFTWARE

QNE TIPS

Product : QNE Optimum

Version: 1.00

Doc No : 1

Page No: 9/13

8. Tick "Viewed by purchaser only"

User Default Settings

User: John

Deposit To: ☒ Allow to select other deposit to ☐ Viewed by deposit to only

Agent: ☒ Allow to select other agent ☐ Viewed by agent only ☐ Compulsory Select Agent

Purchaser: John ☐ Allow to select other purchaser ☒ Viewed by purchaser only ☐ Compulsory Select Purchaser

Location: ☒ Allow to select other location ☐ Viewed by location only ☐ Compulsory Select Location ☐ Compulsory Select Detail Location

Project: ☒ Allow to select other project ☐ Viewed by project only ☐ Compulsory Select Project ☐ Compulsory Select Detail Project

Stock Category From: To: ☐ Filter by this category only ☐ Compulsory Select Category

Stock Group From: To: ☐ Filter by this group only ☐ Compulsory Select Group

Stock Class From: To: ☐ Filter by this class only ☐ Compulsory Select Class

Customer Category: ☒ Allow to select other customer category ☐ Filter by customer category only ☐ Compulsory Select Customer Category

Supplier Category: ☒ Allow to select other supplier category ☐ Filter by supplier category only ☐ Compulsory Select Supplier Category

so that **cannot** see transactions and reports by other purchasers

Outstanding Purchase Order

Date: 01/01/2021 To: 15/11/2021

Document: To:

Require Date: To:

Supplier: Protected Content To: Protected Content

Purchaser: John To: John

Area: To:

Category: Protected Content To: Protected Content

Control A/C: To:

Options: ☒ Outbid. Items ☐ Conf. Items ☐ Outbid. Conf. Items

☐ Cancelled Document Only ☐ Include Closed Document ☒ Excluded Virtual Bundle Item



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QNE TIPS

Product : QNE Optimum

Version: 1.00

Doc No : 1

Page No: 10/13

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QNE TIPS

Product : QNE Optimum

Version: 1.00

Doc No : 1

Page No: 11/13

9. Untick “Viewed by purchaser only”

Server: PC106\QNESS(1.00.2100) [Database: SampleDB_report(2021.1.0.3)] [Country: MY] [Language: en-MY] [Company: SAMPLE TRADING (M) SDN. BHD.] User: ADMIN Draft(s) Current Working Date: 19/11/2021 QLS: Connected

so that can see transactions and reports by other purchasers

Server: PC106\QNESS_TEST(14.00.10000) [Database: ABC(2021.1.0.3)] [Country: MY] [Language: en-MY] [Company: ABC] User: Alice Draft(s) Current Working Date: 15/11/2021 QLS: Connected



QNE SOFTWARE

QNE TIPS

Product : QNE Optimum

Version: 1.00

Doc No : 1

Page No: 12/13

Purchase Invoices - QNE Business Solutions

File Home Edit Info View Tools Inquiry Maintenance

New Print Barcode Add/Remove in Favorites Online Help Reset View Settings View Variants Print Preview Previous Record Next Record Text to search... Close

Records Creation View Records Navigation Filters Full Text Search Close

Purchases

- Purchase Requisitions
- Purchase Orders
- Goods Received Notes
- Purchase Invoices**
- Cash Purchases
- Purchase Debit Notes
- Purchase Returns

Dashboard

General Ledger

Supplier

Purchases

Stocks

GST/SST

Purchase Invoices (Received)

Drag a column header here to group by that column

Date	P. Invoice #	Supplier	Name	Purchaser	Curre...	Tax	Net Total
01/06/2011	BIL0106/001	800-F001	FUTURE I-TECH SDN BHD	John	RM		994.00
31/01/2011	BIL0101/006	800-A001	ALT MANUFACTURING SDN. BHD.	John	RM		550.00
29/01/2011	BIL0101/002	800-D001	DELL ENTERPRISE SDN. BHD.	John	RM		1,440.00
31/01/2011	BIL 01083	800-B001	BNC TECHNOLOGY SDN. BHD.	John	RM		30,480.00
31/01/2011	BIL 01086	800-A001	ALT MANUFACTURING SDN. BHD.	John	RM		200.00
01/01/2011	BIL 01081	800-D001	DELL ENTERPRISE SDN. BHD.	John	RM		1,440.00
01/01/2011	BIL 01082	800-K001	KTA SUPPLIES	John	RM		43,000.00
31/05/2011	BIL0105/001	800-A001	ALI MANUFACTURING SDN. BHD.	John	RM		219,980.00
31/01/2011	BIL 01089	800-K001	KTA SUPPLIES	John	RM		5,550.00
31/01/2011	BIL 01087	800-B001	BNC TECHNOLOGY SDN. BHD.	John	RM		10,999.00
31/01/2011	BIL0101/001	800-A001	ALT MANUFACTURING SDN. BHD.	John	RM		6,585.00
01/01/2011	BIL 01080	800-K001	KTA SUPPLIES	John	RM		1,960.00
23/01/2011	BIL 01084	800-D001	DELL ENTERPRISE SDN. BHD.	John	RM		2,380.00
25/01/2011	BIL0101/004	800-A001	ALI MANUFACTURING SDN. BHD.	John	RM		2,000.00
31/01/2011	BIL 01085	800-D001	DELL ENTERPRISE SDN. BHD.	John	RM		5,950.00
30/01/2011	BIL0101/003	800-T001	TRIWAY CREDITOR	Mei Ling	RM		600.00
01/07/2011	BIL0107/001	800-T002	TECH COM INTERNATIONAL	Mei Ling	USD		752.10
01/01/2011	BIL 01079	800-T001	TRIWAY CREDITOR	Mei Ling	RM		1,800.00

336,660.10

10. Tick "Compulsory Select Purchaser"

User Default Settings - QNE Business Solutions

File Home Edit Task Info View Tools Inquiry Maintenance

New Save Save and Close Audit Trail Reset View Settings View Variants Previous Record Next Record Search Close

Records Creation View Records Navigation Close


User Default Settings

User: John

User Default Settings

Deposit To	<input type="checkbox"/> Allow to select other deposit to	<input type="checkbox"/> Viewed by deposit to only	<input type="checkbox"/> Compulsory Select Agent
Agent	<input type="checkbox"/> Allow to select other agent	<input type="checkbox"/> Viewed by agent only	<input type="checkbox"/> Compulsory Select Purchaser
Purchaser	<input type="checkbox"/> Allow to select other purchaser	<input type="checkbox"/> Viewed by purchaser only	<input type="checkbox"/> Compulsory Select Location
Location	<input type="checkbox"/> Allow to select other location	<input type="checkbox"/> Viewed by location only	<input type="checkbox"/> Compulsory Select Detail Location
Project	<input type="checkbox"/> Allow to select other project	<input type="checkbox"/> Viewed by project only	<input type="checkbox"/> Compulsory Select Project
Stock Category From	To	<input type="checkbox"/> Filter by this category only	<input type="checkbox"/> Compulsory Select Category
Stock Group From	To	<input type="checkbox"/> Filter by this group only	<input type="checkbox"/> Compulsory Select Group
Stock Class From	To	<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

[Server: PC106\QNEBSS(11.00.2100)] [Database: SampleDB_report(2021.1.0.3)] [Country: MY] [Language: en-40] [Company: SAMPLE TRADING (M) SDN. BHD.] User: ADMIN Draft(6) Current Working Date: 19/11/2021 QLS: Connected

		QNE TIPS	
Product : QNE Optimum		Version: 1.00	
Doc No : 1		Page No: 13/13	

so that user cannot save without key in purchaser.

* - Cash Purchases - QNE Business Solutions

File Home Edit Task Info View Tools Inquiry Maintenance

New Transfer Partial Transfer Save Save and Close Save and New Preview and New Print And New Online Help Reset View Settings View Variants Print Preview Previous Record Next Record Search Close

Records Creation Save View Records Navigation Close

Navigation * - Cash Purcha

Purchases

- Purchase Requisitions
- Purchase Orders
- Goods Received Notes
- Purchase Invoices
- Cash Purchases
- Purchase Debit Notes
- Purchase Returns

Cash Purchases

Details Supplier Deliver To Others Notes Files Info

Supplier From Payment By Bank Charges Location

Currency RM Attention Purchaser

Rate 1.00000000 Exchange Rate
 Doc Date 19/11/2021
 CP No. CP2111/001

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
*(Cash Purchases,)	'Purchaser' must not be empty.

Multi Payments

Scan Item.. Stock Code

Dashboard General Ledger Supplier Purchases Stocks GST/SST

Tax Net

Close