



HOW TO IMPLEMENT USER DEFAULT SETTING - LOCATION

[1.0]

Ong Saye

[10/11/2021]



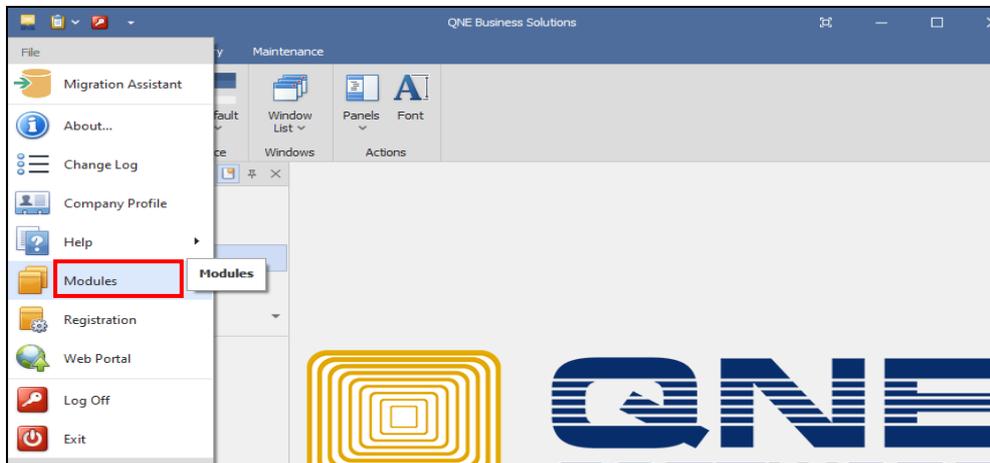
SCENARIO

The company has few branches example KL, PJ and Cheras. All users access to the same database to create the invoice, etc. User A handles KL area so when she accesses to Sales / Purchases / Stock modules, she just view the transactions which under location KL will do. Besides, she will just need to check the stock balance under KL without other branches.

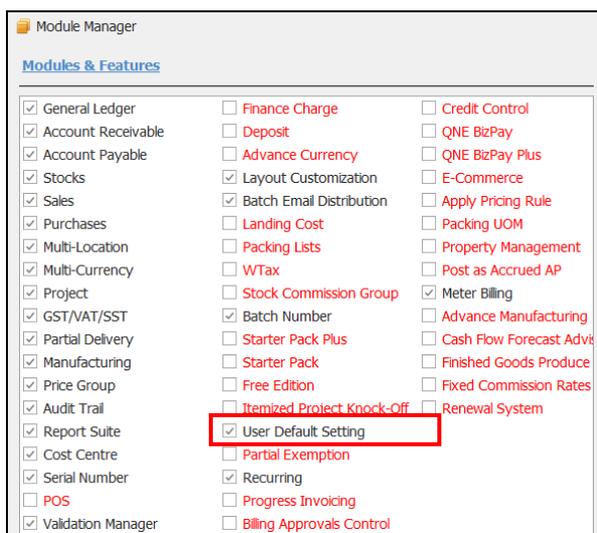
How should we set this?

SOLUTION

1. Go to **File**, and select **Modules**.



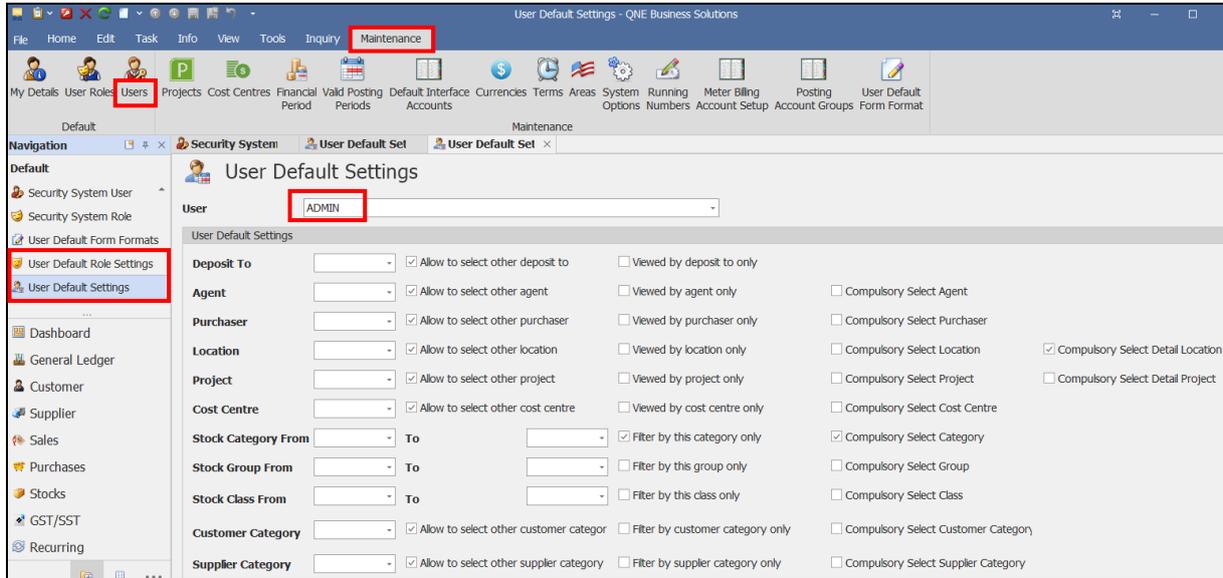
2. Ensure the **User Default Setting** is enable. Please notice that this module is chargeable.





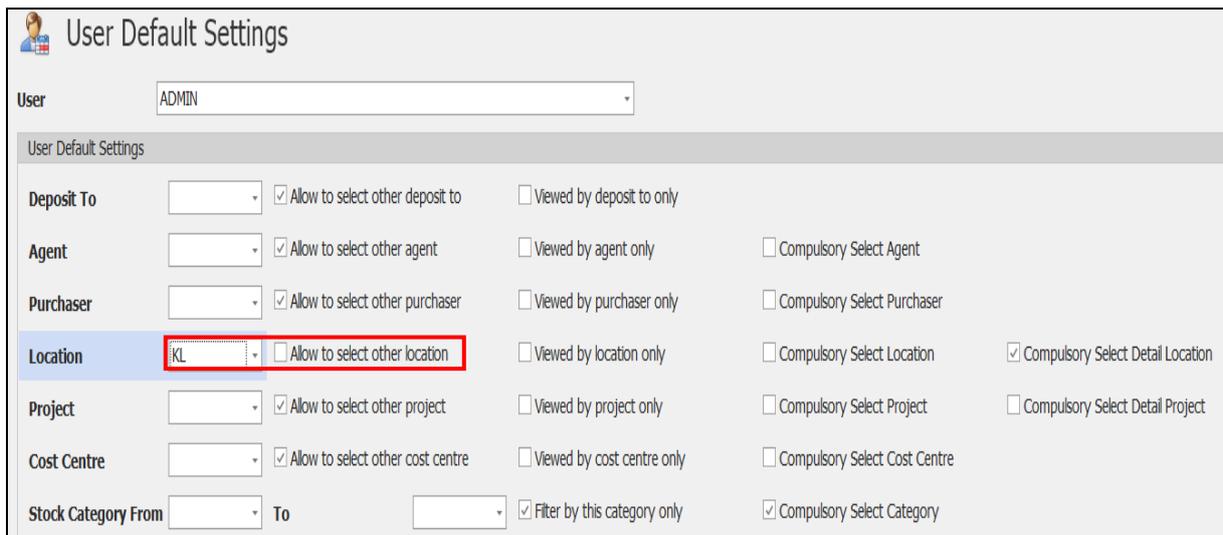
3. Go to **Maintenance > User > User Default Setting > Select User.**

Note: You can create based on user / user roles. In this example we will create under user.

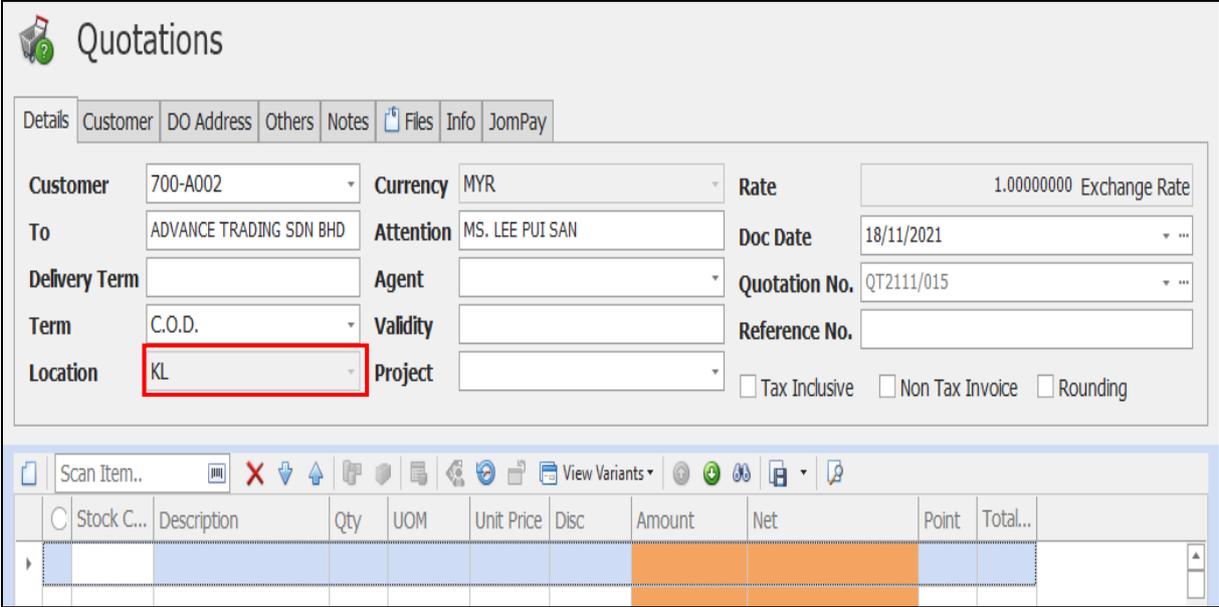


ALLOW TO SELECT OTHER LOCATION

1. User has defined KL as default location, if the user untick **“Allow to select other location”**.



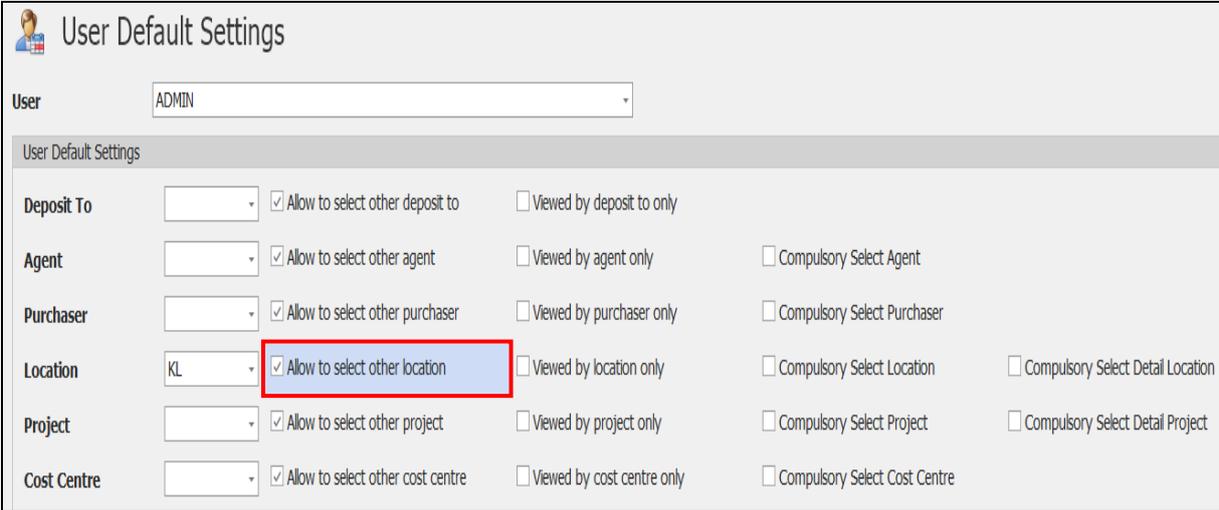
2. When user access Quotation, the Location only showed as KL without any selection.



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

- Customer: 700-A002
- Currency: MYR
- Rate: 1.00000000 Exchange Rate
- To: ADVANCE TRADING SDN BHD
- Attention: MS. LEE PUI SAN
- Doc Date: 18/11/2021
- Delivery Term: [Empty]
- Agent: [Empty]
- Quotation No.: QT2111/015
- Term: C.O.D.
- Validity: [Empty]
- Reference No.: [Empty]
- Location: **KL** (highlighted with a red box)
- Project: [Empty]
- Tax Inclusive:
- Non Tax Invoice:
- Rounding:

3. If we enable "Allow to select other location".



The screenshot shows the 'User Default Settings' form for user 'ADMIN'. The settings are as follows:

- 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: KL Allow to select other location Viewed by location only Compulsory Select Location Compulsory Select Detail Location
- Project: [Empty] Allow to select other project Viewed by project only Compulsory Select Project Compulsory Select Detail Project
- Cost Centre: [Empty] Allow to select other cost centre Viewed by cost centre only Compulsory Select Cost Centre



4. System remain KL as default location but user is allowed to select others locations.

The screenshot shows the 'Sales Orders' form with a 'Location' dropdown menu open. The dropdown list contains the following items:

Location #	Description
IP	IP
JB	JB
KJ	KAJANG
KL	KL
KP	KEPONG

The 'KL' option is currently selected and highlighted in blue. The background form shows fields for Customer, Currency (MYR), Rate (1.00000000), Doc Date (18/11/2021), S. Order No. (S02111/008), and Reference No. There are also checkboxes for Tax Inclusive, Non Tax Invoice, and Rounding.

VIEW BY LOCATION ONLY

1. If we enable "Viewed by location only".

The screenshot shows the 'User Default Settings' form for user 'ADMIN'. The 'Location' field is set to 'KL'. The 'Viewed by location only' checkbox is checked and highlighted with a red box. Other settings include:

- Deposit To: [Dropdown] Allow to select other deposit to Viewed by deposit to only
- Agent: [Dropdown] Allow to select other agent Viewed by agent only Compulsory Select Agent
- Purchaser: [Dropdown] Allow to select other purchaser Viewed by purchaser only Compulsory Select Purchaser
- Location: KL Allow to select other location Viewed by location only Compulsory Select Location Compulsory Select Detail Location
- Project: [Dropdown] Allow to select other project Viewed by project only Compulsory Select Project Compulsory Select Detail Project
- Cost Centre: [Dropdown] Allow to select other cost centre Viewed by cost centre only Compulsory Select Cost Centre
- Stock Category From: [Dropdown] To: [Dropdown] Filter by this category only Compulsory Select Category
- Stock Group From: [Dropdown] To: [Dropdown] Filter by this group only Compulsory Select Group



- 2. The function affect in the report filtering. Example Stock Location Balance report.
Notice that system display as KL only which based on the default location setting. User cannot select other locations

Stock Location Balance

Options Inquiry

Filters Selections

Date: 18/11/2021

Stock Code: [] To: []

Stock Category: [] To: []

Stock Group: [] To: []

Stock Class: [] To: []

Location: [KL] To: [KL]

Options

- 3. When preview system will show the location as KL.

Order by Stock Code
Date: 12/11/2021
Location From: KL - KL

Stock From: Category From: Group From: Class From:
Stock To: Category To: Group To: Class To:

ABC Company (888364-X) Page 1 of 1

STOCK CODE	STOCK NAME	KL
CANON210SP	CANON BJC-210 SP	8.00
ITEM A	ITEM A	96.00



4. If we tick "Allow to select Other location" and tick "Viewed by location only".

User Default Settings

User: ADMIN

User Default Settings

Deposit To	<input type="checkbox"/> Allow to select other deposit to	<input type="checkbox"/> Viewed by deposit to only	
Agent	<input checked="" type="checkbox"/> Allow to select other agent	<input type="checkbox"/> Viewed by agent only	<input type="checkbox"/> Compulsory Select Agent
Purchaser	<input checked="" type="checkbox"/> Allow to select other purchaser	<input type="checkbox"/> Viewed by purchaser only	<input type="checkbox"/> Compulsory Select Purchaser
Location	<input checked="" type="checkbox"/> Allow to select other location	<input checked="" type="checkbox"/> Viewed by location only	<input type="checkbox"/> Compulsory Select Location <input type="checkbox"/> Compulsory Select Detail Location
Project	<input checked="" type="checkbox"/> Allow to select other project	<input type="checkbox"/> Viewed by project only	<input type="checkbox"/> Compulsory Select Project <input type="checkbox"/> Compulsory Select Detail Project
Cost Centre	<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

5. System allow to select other locations in the report.

Stock Location Balance

Options Inquiry

Filters Selections

Date: 18/11/2021

Stock Code: To

Stock Category: To

Stock Group: To

Stock Class: To

Location: KL To KL

Location #	Description
IP	IP
JB	JB
KJ	KAJANG
KL	KL

Order by Stock Code
Date: 18/11/2021
Location From: -
Stock From: Category From: Group From: Class From:
Stock To: Category To: Group To: Class To:

ABC Company (888364-X) Page 1 of 1

STOCK CODE	STOCK NAME	Non-Location	IP	JB	KJ	KL
AAA	AAA	84.00	0.00	0.00	0.00	7.00
AMD-XP/1800	AMD XP 1800	44.00	0.00	0.00	0.00	4.00
CANON210SP	CANON BJC-210 SP	13.00	2.00	0.00	0.00	7.00



COMPULSORY SELECT LOCATION

1. If user enable “Compulsory Select Location”.

User Default Settings

User: ADMIN

User Default Settings

Deposit To	<input type="checkbox"/> Allow to select other deposit to	<input type="checkbox"/> Viewed by deposit to only	
Agent	<input checked="" type="checkbox"/> Allow to select other agent	<input type="checkbox"/> Viewed by agent only	<input type="checkbox"/> Compulsory Select Agent
Purchaser	<input checked="" type="checkbox"/> Allow to select other purchaser	<input type="checkbox"/> Viewed by purchaser only	<input type="checkbox"/> Compulsory Select Purchaser
Location	<input checked="" type="checkbox"/> Allow to select other location	<input type="checkbox"/> Viewed by location only	<input checked="" type="checkbox"/> Compulsory Select Location <input type="checkbox"/> Compulsory Select Detail Location
Project	<input checked="" type="checkbox"/> Allow to select other project	<input type="checkbox"/> Viewed by project only	<input type="checkbox"/> Compulsory Select Project <input type="checkbox"/> Compulsory Select Detail Project
Cost Centre	<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

2. When user saving a transaction without Location, system will not allow to save.

Purchase Orders

Details Supplier Deliver To Others Notes Files Info

Supplier: 800-A001 Currency: MYR Rate: 1.00000000 Exchange Rate

From: ALI MANUFACTURING SDN BHD Attention: Doc Date: 18/11/2021

Term: C.O.D. Purchaser: P. Order No.: PO2111/004

Location: Require Date: Reference No.:

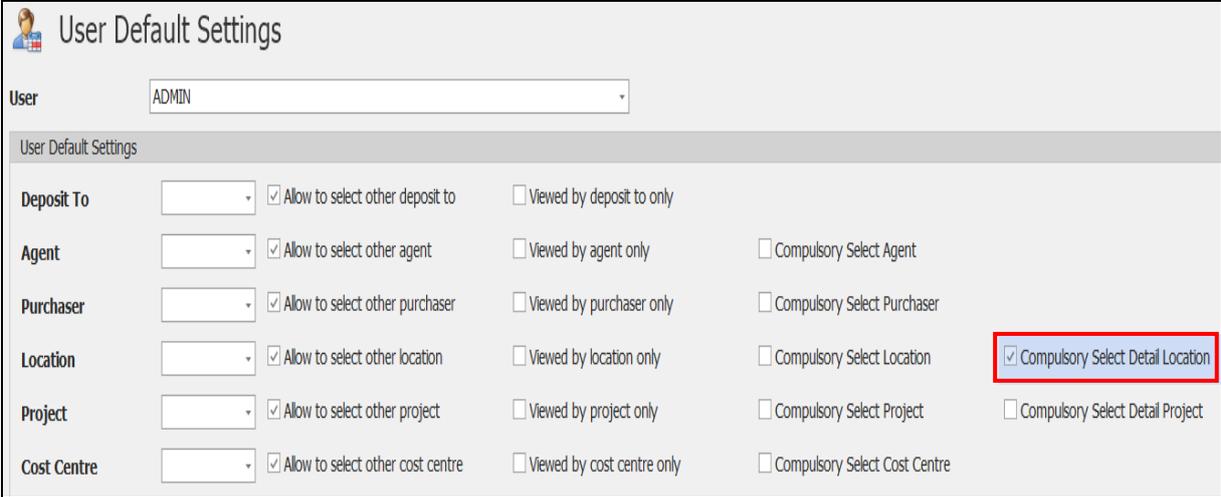
Project: Cost Centre: Tax Inclusive Non Tax Invoice Rounding

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
" (Purchase Orders,)	'Location' must not be empty.

3. If user tick “Compulsory Select Detail Location”.



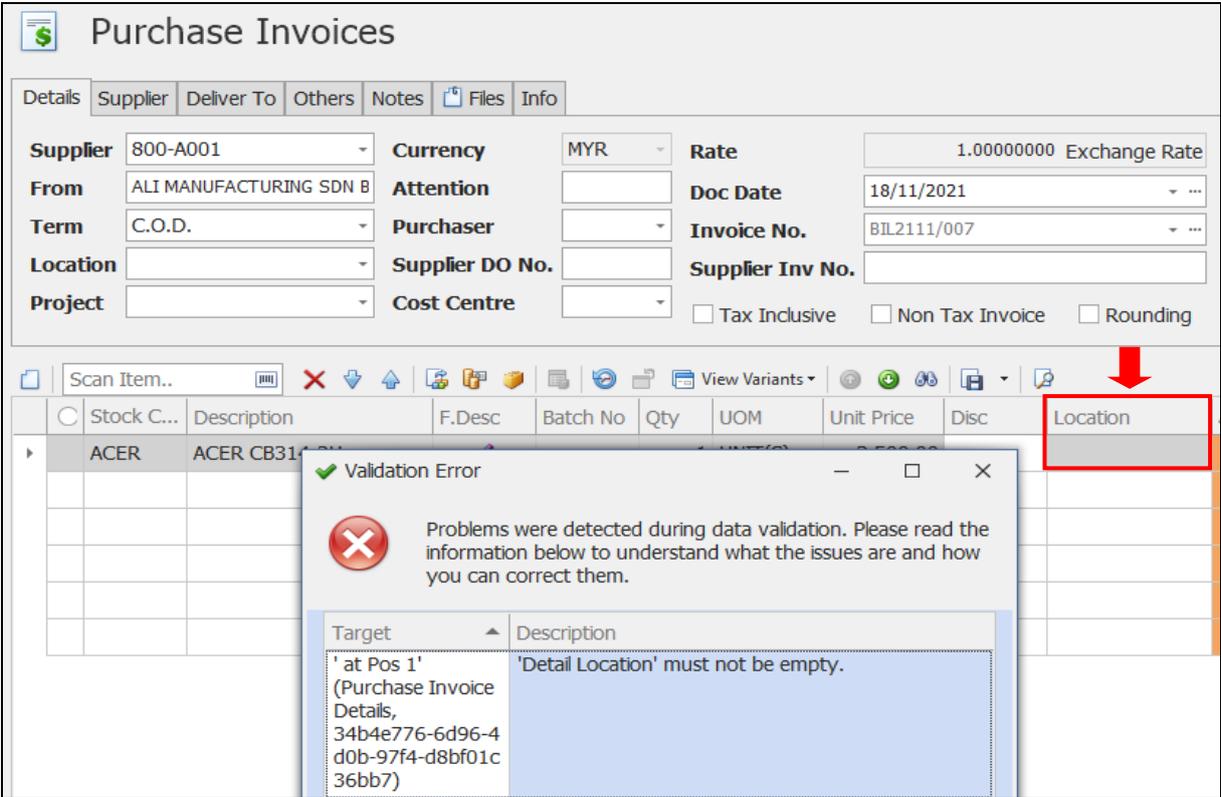
User Default Settings

User: ADMIN

User Default Settings

Deposit To	<input type="checkbox"/> Allow to select other deposit to	<input type="checkbox"/> Viewed by deposit to only	
Agent	<input checked="" type="checkbox"/> Allow to select other agent	<input type="checkbox"/> Viewed by agent only	<input type="checkbox"/> Compulsory Select Agent
Purchaser	<input checked="" type="checkbox"/> Allow to select other purchaser	<input type="checkbox"/> Viewed by purchaser only	<input type="checkbox"/> Compulsory Select Purchaser
Location	<input checked="" type="checkbox"/> Allow to select other location	<input type="checkbox"/> Viewed by location only	<input type="checkbox"/> Compulsory Select Location <input checked="" type="checkbox"/> Compulsory Select Detail Location
Project	<input checked="" type="checkbox"/> Allow to select other project	<input type="checkbox"/> Viewed by project only	<input type="checkbox"/> Compulsory Select Project <input type="checkbox"/> Compulsory Select Detail Project
Cost Centre	<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

4. Validation Error will occur when Detail Location is empty.



Purchase Invoices

Details | Supplier | Deliver To | Others | Notes | Files | Info

Supplier: 800-A001 | Currency: MYR | Rate: 1.00000000 | Exchange Rate

From: ALI MANUFACTURING SDN B | Attention: | Doc Date: 18/11/2021

Term: C.O.D. | Purchaser: | Invoice No.: BIL2111/007

Location: | Supplier DO No.: | Supplier Inv No.:

Project: | Cost Centre: | Tax Inclusive | Non Tax Invoice | Rounding

Stock C...	Description	F.Desc	Batch No	Qty	UOM	Unit Price	Disc	Location
ACER	ACER CB31...							

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' (Purchase Invoice Details, 34b4e776-6d96-4d0b-97f4-d8bf01c36bb7)	'Detail Location' must not be empty.