



# DEFAULT SETTING – CUSTOMER / SUPPLIER CATEGORY

[1.0]

Jackson Chin

[14/11/2021]





## SCENARIO

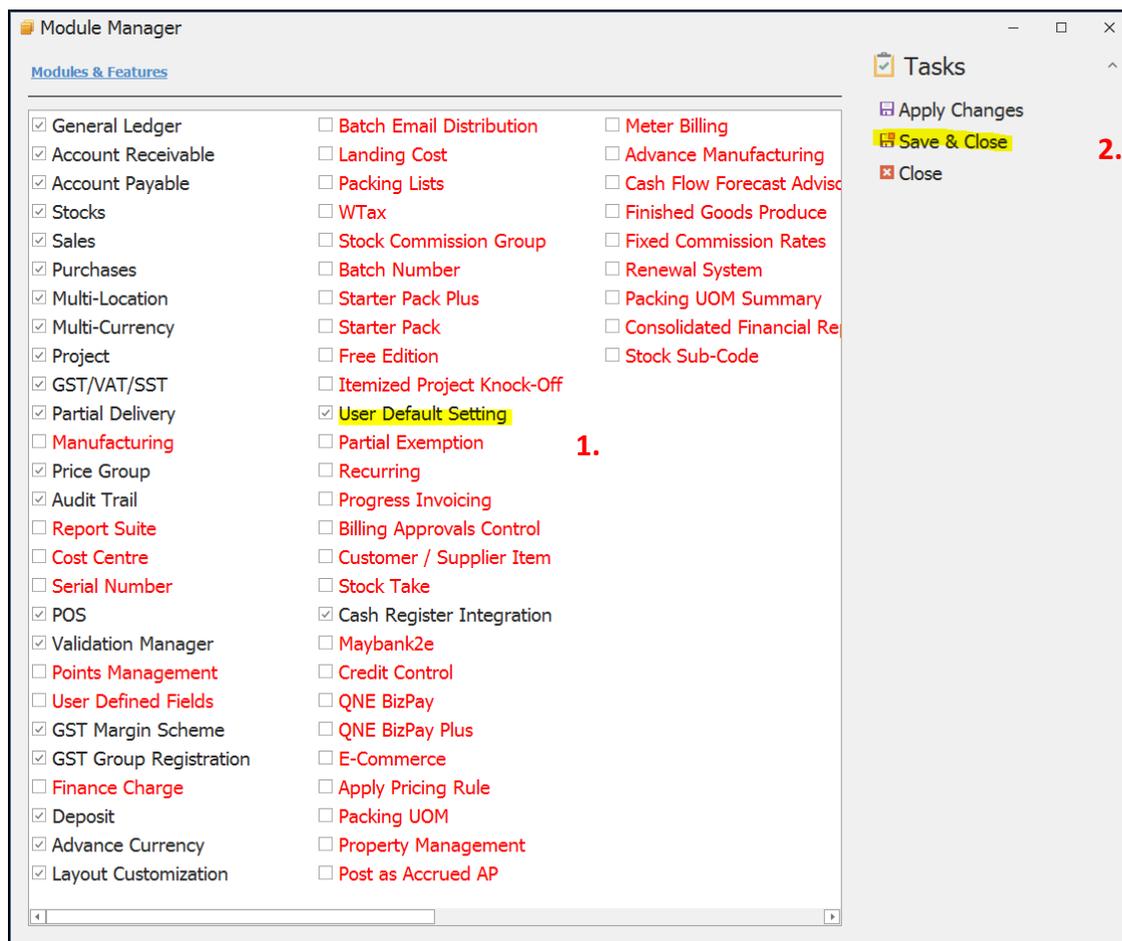
User Michelle is a salesperson only in-charge customer Dealer. In her case, she does not need to deal with the oversea customer or corporate customer thus she does not need to view other transactions or customers besides Dealer only.

## SOLUTION

In this case, we will can define Customer Category in customer maintenance and set default by using User Default Setting Module. This is an additional module; extra charges will incur

You can refer to this KB to setup for Supplier Category.

Step 1 : Click on File > Modules. Tick User Default Setting





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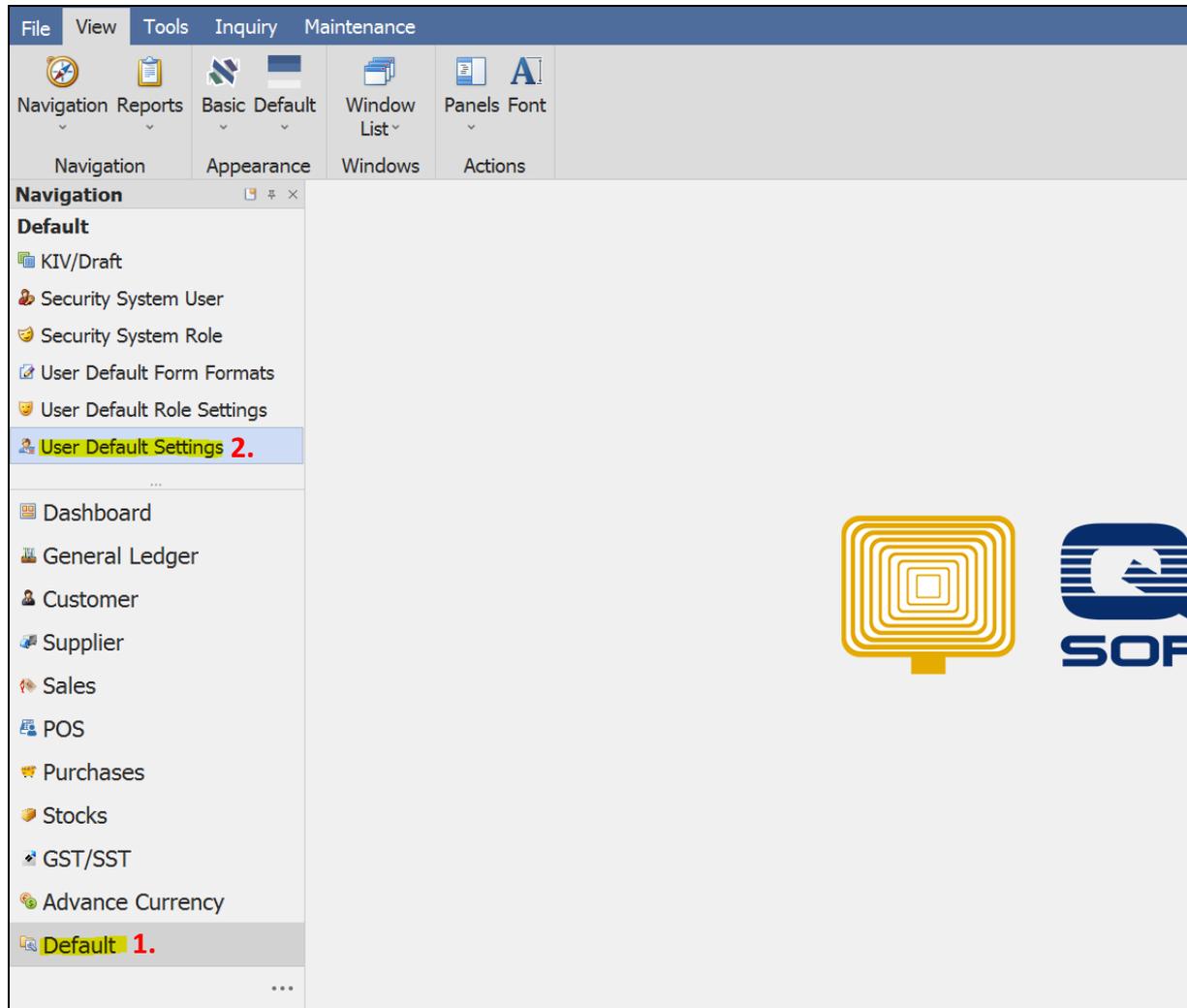
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Step 2 : User can find the User Default Setting at Default -> User Default Setting





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3. Select the user name, set Customer Category and tick Filter by Customer category only

User Default Settings

User: MICHELLE

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:   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: DEALER: Aut...  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

4. When the user Michelle access to Customer Module -> Customer, this user only able to create and view the Dealer Customer Category. This is due to the setting "Allow to select other customer category" is unticked

Customers

Customer Name:

Group Company:

Control Account: 700-0000

Customer #:  Auto Code

Registration #:

Status: ACTIVE

Start Date: 18/11/2021

Category: DEALER

Sales Tax Reg No.:

Service Tax Reg No.:

Group Company:

Details | Picture | Customer Price | Others | Member | Delivery Addresses | Notes | Files

Homepage:

Address:

Address:

Address:

Zip Code:

Contact Person:

Email:

Phone #:

Phone 2 #:

Fax #:

Fax 2 #:

Sales Tax Exemption No.:

Misc:

Business Nature:

Area:

Term: C.O.D.

Agent:

Price Group:

Account Group:

Currency: RM

Default Tax Code:



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5. User only able to see Customer which is Dealer Customer Category in customer listing

Acc #	Name	Registration #	Term	Agent	Area	Balance
700-C001	CARE SOFTWARE SOLUTIONS	323545-A	30 DAYS	CINDY	KL	120,435.00
700-B001	BEST TECH ENGINEERING SDN. BHD.		30 DAYS	PETER	KL	148,792.48

6. In the transaction, user can select the customer under Dealer Category only

The screenshot shows the 'Sales Orders' form with a dropdown menu for the 'Customer' field. The dropdown is open, displaying a search bar and a list of available records. The records are:

- 700-B001 BEST TECH ENGINEERING...
- 700-C001 CARE SOFTWARE SOLUTI...

7. In the Reporting, user can view the **Customer Category** under **DEALER** only.

The screenshot shows the 'Outstanding Sales Order' report. The 'Category' field is set to 'DEALER'. The report includes a filter section with the following fields:

- Date: 01/01/2021 To 18/11/2021
- Document: To
- Require Date: To
- Debtor: To
- Agent: To
- Doc Agent: To
- Area: To
- Category: DEALER To DEALER
- Control A/C: To

Options:

- Outstd. Items
- Conf. Items
- Outstd. Conf. Items
- Cancelled Document Only
- Include Closed Document
- Excluded Virtual Bundle Item



### Select more than one Customer Category

1. Select multiple stoc categories, untick “Allow to select other customer category”, example Corporate and Dealer is selected. Tick “Filter by customer category only” > Click **Save**.

User Default Settings

User: MICHELLE

Stock Category From: (Select All)  CORPORATE: Corp  DEALER: Authorise

Customer Category: CORPORATE: ...  Allow to select other customer category  Filter by customer category only

2. Login as user Michelle, this user is able to choose **Corporate** or **Dealer Customer Category** when create a new customer

Customers

Customer Name: [ ]

Control Account: 700-0000

Customer #: [ ] Auto Code

Registration #: [ ]

Status: ACTIVE

Start Date: 18/11/2021

Category: USER

Category: CORPORATE: Corporate Customers

Category: DEALER: Authorised Dealer



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3. Michelle is able to search / view customer which under Corporate and Dealer in customer maintenance

Acc #	Name	Registration #	Term	Agent	Area	Balance
700-C001	CARE SOFTWARE SOLUTIONS	323545-A	30 DAYS	CINDY	KL	120,435.00
700-U001	UOK (M) SDN. BHD		C.O.D.	CINDY	KL	63,594.24
700-B001	BEST TECH ENGINEERING SDN. BHD.		30 DAYS	PETER	KL	148,792.48
700-C002	COSMIC CONSTRUCTION SDN. BHD.		C.O.D.	PETER	JH	36,827.99
700-A001	ADVANCE TRADING SDN. BHD.	223546-H	C.O.D.	CINDY	JH	(37,226.90)
700-U002	US TECHNOLOGY LIMITED		C.O.D.	SAM	US	25,831.27

4. In the transaction, user can search the customer under Corporate and Dealer Category.

The screenshot shows the 'Sales Orders' window with a dropdown menu for the 'Customer' field. The dropdown is open, showing a list of available records:

Custo...	Name
700-A001	ADVANCE TRADING SDN...
700-B001	BEST TECH ENGINEERIN...
700-C001	CARE SOFTWARE S... BEST TECH ENGINEERING SDN. BHD.
700-C002	COSMIC CONSTRUCTION...
700-U001	UOK (M) SDN. BHD



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5. In the Reporting, user able to view the customer under Corporate and Dealer category

Outstanding Sales Order

Filter More... Selections More Selections Project Selection

Date	<input type="text" value="18/11/2021"/>	To	<input type="text"/>
Document	<input type="text"/>	To	<input type="text"/>
Require Date	<input type="text"/>	To	<input type="text"/>
Debtor	<input type="text"/>	To	<input type="text"/>
Agent	<input type="text"/>	To	<input type="text"/>
Doc Agent	<input type="text"/>	To	<input type="text"/>
Area	<input type="text"/>	To	<input type="text"/>
Category	<input type="text"/>	To	<input type="text"/>
Control A/C	<input type="text"/>	To	<input type="text"/>

Options

Outstd. Items     Conf. Items     Outstd. Conf. Items

Cancelled Document Only     Include Closed Document     Excluded Virtual Bundle Item



### Compulsory Select Customer Category

1. Tick "Compulsory select Customer category"

User Default Settings

User: MICHELLE

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:   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: CORPORATE: ...  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

2. If Michelle does not put any Customer Category when create a customer, system will pop up the error message and not allow to save

Customers

Customer Name: CHONG FA Sdn. Bhd.

Control Account: 700-0000

Customer #: 700-C004 Auto Code

Status: ACTIVE

Start Date: 18/11/2021

Category:  (highlighted in yellow with a red X)

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
'700-C004' (Customers, 700-C004)	'Customer Category' must not be empty.

Close