

# HOW TO IMPLEMENT USER DEFAULT SETTING - LOCATION

[1.0]



**QNE**  
**SOFTWARE**

## **QNE TIPS**

Product : QNE Optimum

Version: 1.00

Doc No : 1

Page No: 1 of 9

REV. No	Nature of Change	Prepared By	Prepared Date	Reviewed & Approved by
1.0	Creation	Ong Saye	18/11/2021	

**Amendment Record**



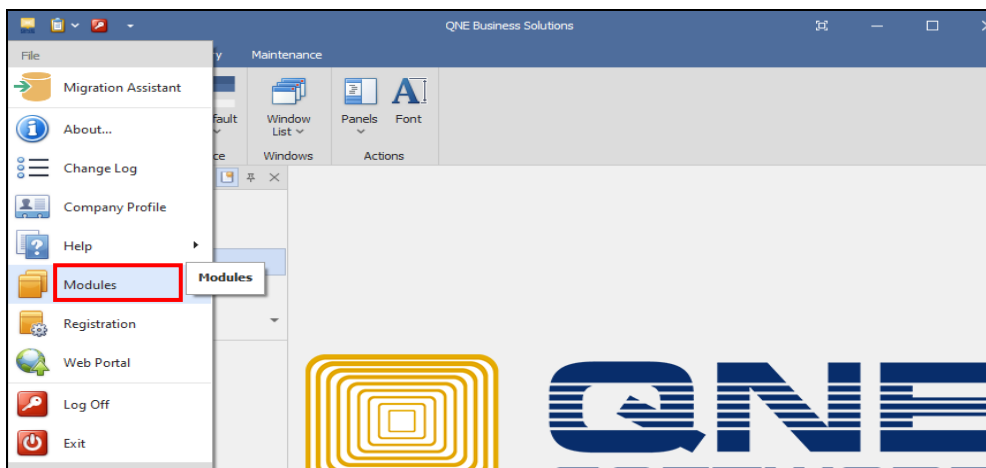
### SCENARIO

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.

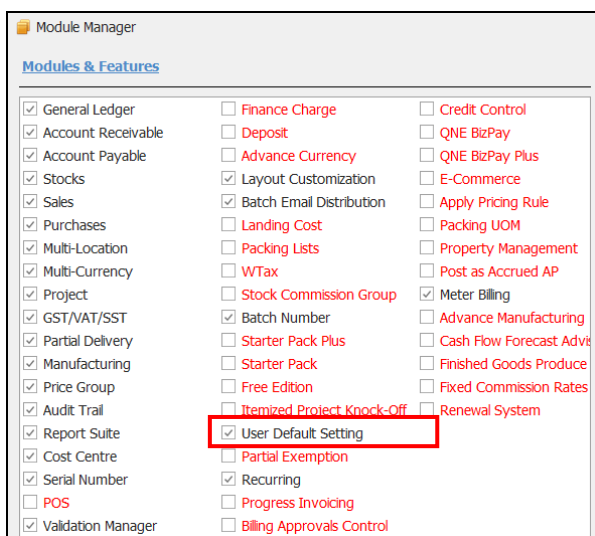
How should we set this?

### SOLUTION

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



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





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Doc No : 1


Page No: 3 of 9

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

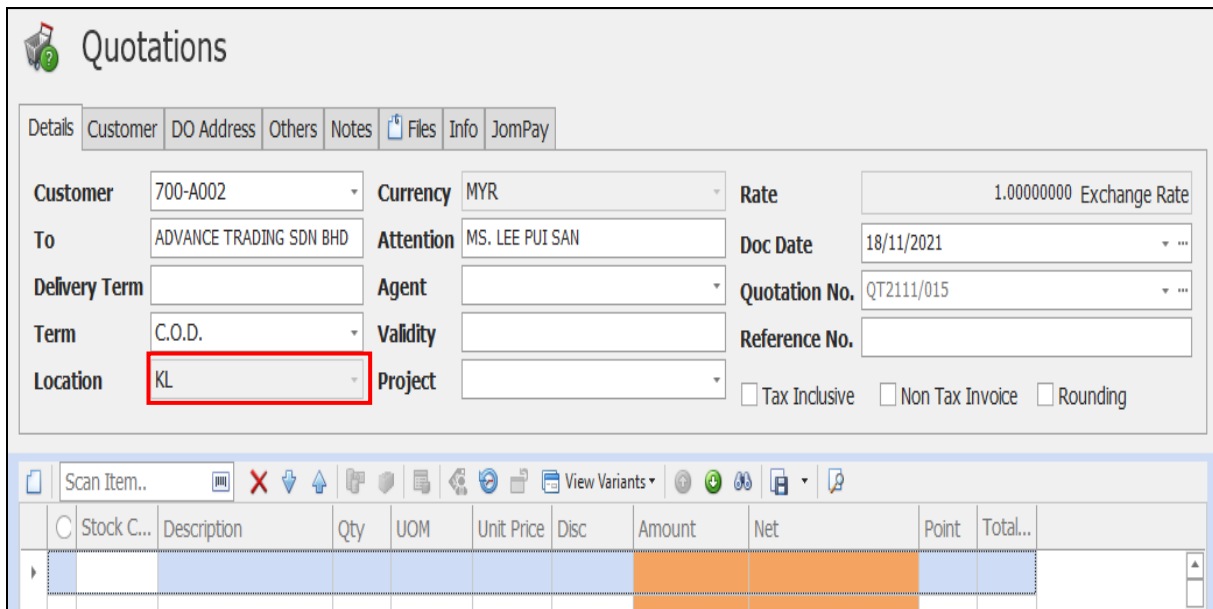
Note: You can create based on user / user roles. In this example we will create under user.

### ALLOW TO SELECT OTHER LOCATION

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

	<b>QNE TIPS</b>	
	Product : QNE Optimum	Version: 1.00
	Doc No : 1	Page No: 4 of 9

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



**Quotations**

Details Customer DO Address Others Notes Files Info JomPay

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: Agent: Quotation No.: QT2111/015

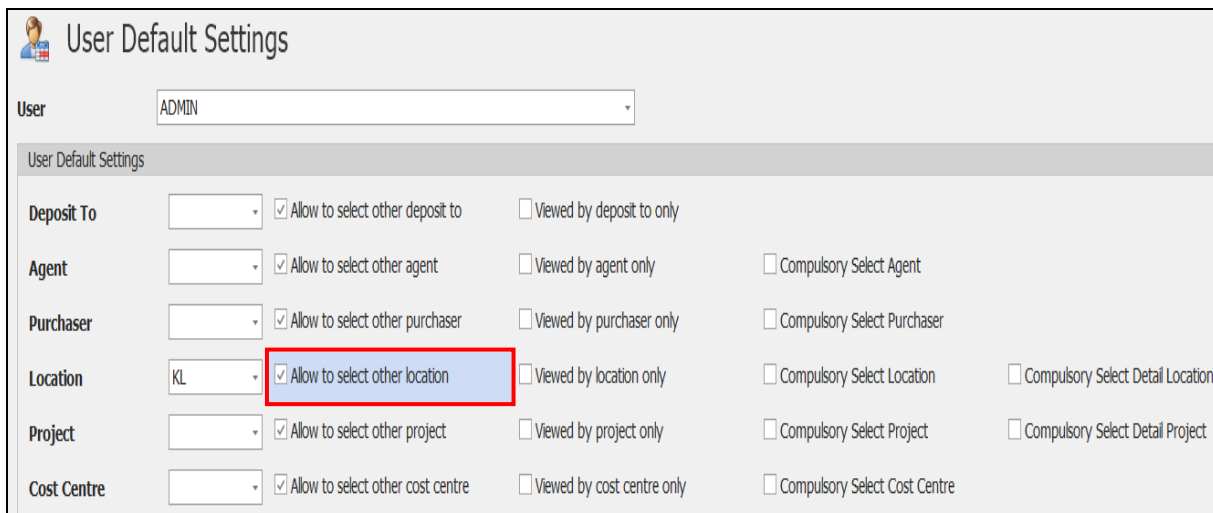
Term: C.O.D. Validity: Reference No.:

Location: **KL** Project: ☐ Tax Inclusive ☐ Non Tax Invoice ☐ Rounding

Scan Item... View Variants

Stock C...	Description	Qty	UOM	Unit Price	Disc	Amount	Net	Point	Total...

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



**User Default Settings**

User: ADMIN

User Default Settings

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: **KL** ☒ 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

Cost Centre: ☐ 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.

## Sales Orders

Details Customer DO Address Others Notes Files Info JomPay


<b>Customer</b>		<b>Currency</b>	MYR	<b>Rate</b>	1.00000000 Exchange Rate
<b>To</b>		<b>Attention</b>		<b>Doc Date</b>	18/11/2021
<b>Delivery Term</b>		<b>Agent</b>		<b>S. Order No.</b>	SO2111/008
<b>Term</b>	C.O.D.	<b>Require Date</b>		<b>Reference No.</b>	
<b>Location</b>	KL	<b>Project</b>		<input type="checkbox"/> Tax Inclusive <input type="checkbox"/> Non Tax Invoice <input type="checkbox"/> Rounding	

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

## VIEW BY LOCATION ONLY


1. If we enable “**Viewed by location only**”.

 User Default Settings

User

User Default Settings

Deposit To	<input type="text"/>	<input checked="" type="checkbox"/> Allow to select other deposit to	<input type="checkbox"/> Viewed by deposit to only	
Agent	<input type="text"/>	<input checked="" type="checkbox"/> Allow to select other agent	<input type="checkbox"/> Viewed by agent only	<input type="checkbox"/> Compulsory Select Agent
Purchaser	<input type="text"/>	<input checked="" type="checkbox"/> Allow to select other purchaser	<input type="checkbox"/> Viewed by purchaser only	<input type="checkbox"/> Compulsory Select Purchaser
Location	<input type="text" value="KL"/>	<input 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 type="text"/>	<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 type="text"/>	<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	<input type="text"/>	To <input type="text"/>	<input checked="" type="checkbox"/> Filter by this category only	<input checked="" type="checkbox"/> Compulsory Select Category
Stock Group From	<input type="text"/>	To <input type="text"/>	<input type="checkbox"/> Filter by this group only	<input type="checkbox"/> Compulsory Select Group

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	Product : QNE Optimum	Version: 1.00
	Doc No : 1	Page No: 6 of 9

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		<b>Stock Location Balance</b>	
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="text"/>	<input checked="" type="checkbox"/> Allow to select other deposit to	<input type="checkbox"/> Viewed by deposit to only	
Agent	<input type="text"/>	<input checked="" type="checkbox"/> Allow to select other agent	<input type="checkbox"/> Viewed by agent only	<input type="checkbox"/> Compulsory Select Agent
Purchaser	<input type="text"/>	<input checked="" type="checkbox"/> Allow to select other purchaser	<input type="checkbox"/> Viewed by purchaser only	<input type="checkbox"/> Compulsory Select Purchaser
Location	KL	<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 type="text"/>	<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 type="text"/>	<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

Options

☐ Include Zero Balance

Order By

Location #	Description
IP	IP
JB	JB
KJ	KAJANG
KL	KL

Order by Stock Code

Date: 18/11/2021

Location From: -

Stock From:

Stock To:

Category From:

Category To:

Group From:

Group To:

Class From:

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:

User Default Settings

Deposit To	<input type="text"/>	<input checked="" type="checkbox"/> Allow to select other deposit to	<input type="checkbox"/> Viewed by deposit to only	
Agent	<input type="text"/>	<input checked="" type="checkbox"/> Allow to select other agent	<input type="checkbox"/> Viewed by agent only	<input type="checkbox"/> Compulsory Select Agent
Purchaser	<input type="text"/>	<input checked="" type="checkbox"/> Allow to select other purchaser	<input type="checkbox"/> Viewed by purchaser only	<input type="checkbox"/> Compulsory Select Purchaser
Location	<input type="text"/>	<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 type="text"/>	<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 type="text"/>	<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	<input type="text"/>	Require Date		Reference No.	
Project		Cost Centre		<input type="checkbox"/> Tax Inclusive <input type="checkbox"/> Non Tax Invoice <input type="checkbox"/> Rounding	


Scan Item..

Stock C...	Description
AAA	AAA

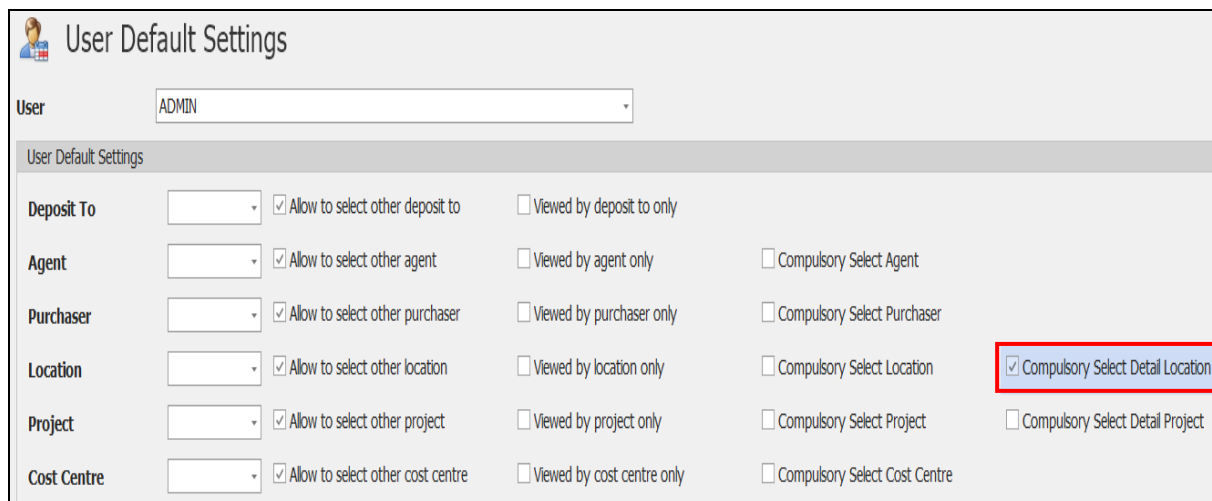
Validation Error

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.

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	Product : QNE Optimum	Version: 1.00
	Doc No : 1	Page No: 9 of 9

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

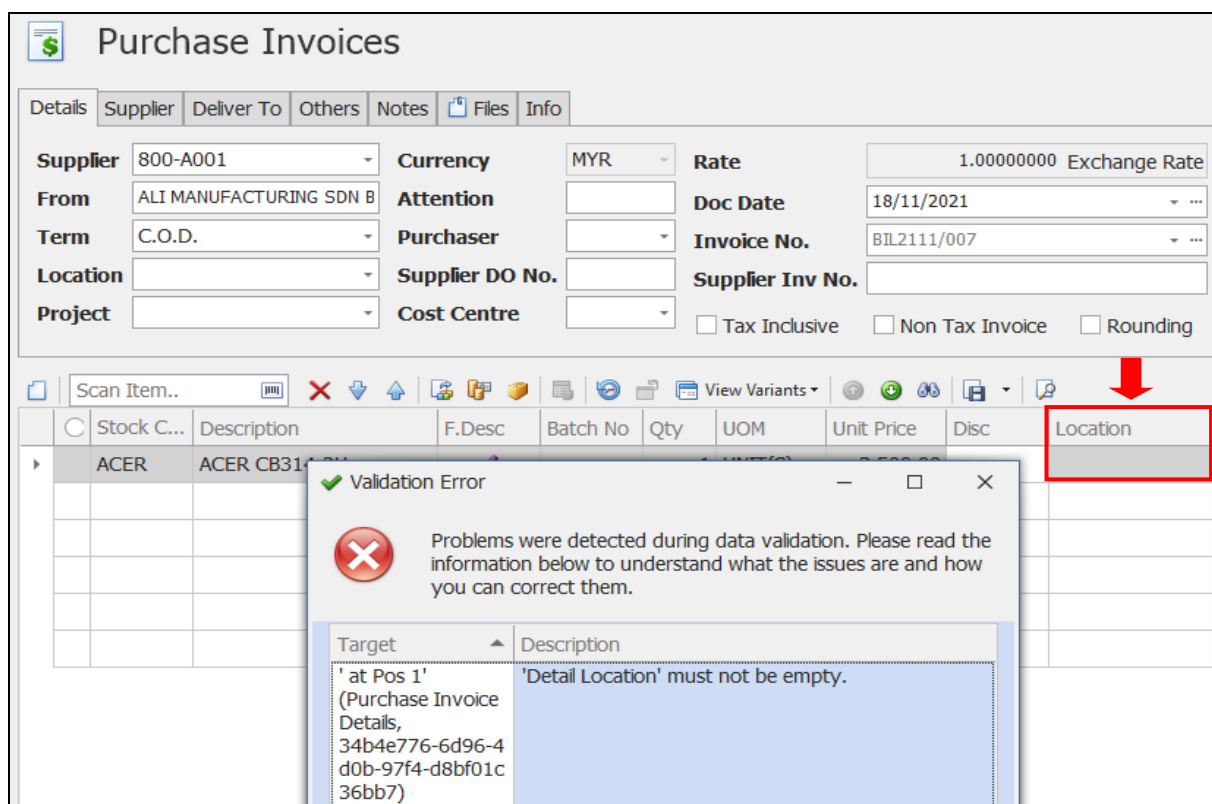


**User Default Settings**

User: ADMIN

Field	Allow to select other	Viewed by	Compulsory Select	Compulsory Select Detail
Deposit To	<input checked="" 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"/> <b>Compulsory Select Detail Location</b>
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: |

Scan Item... | View Variants

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.