HOW TO IMPLEMENT USER DEFAULT SETTING - LOCATION

[1.0]

Ong Saye

[10/11/2021]

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

Amendment Record

SCENARIO

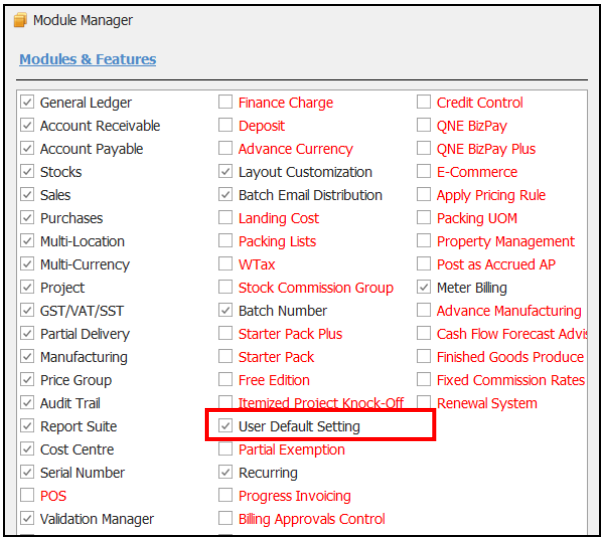
The company has few branches example KL, PJ and Cheras. All users access to the same database to create the invoice, etc. User A handles KL area so when she accesses to Sales / Purchases / Stock modules, she just view the transactions which under location KL will do. Besides, she will just need to check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

How should we set this?

SOLUTION

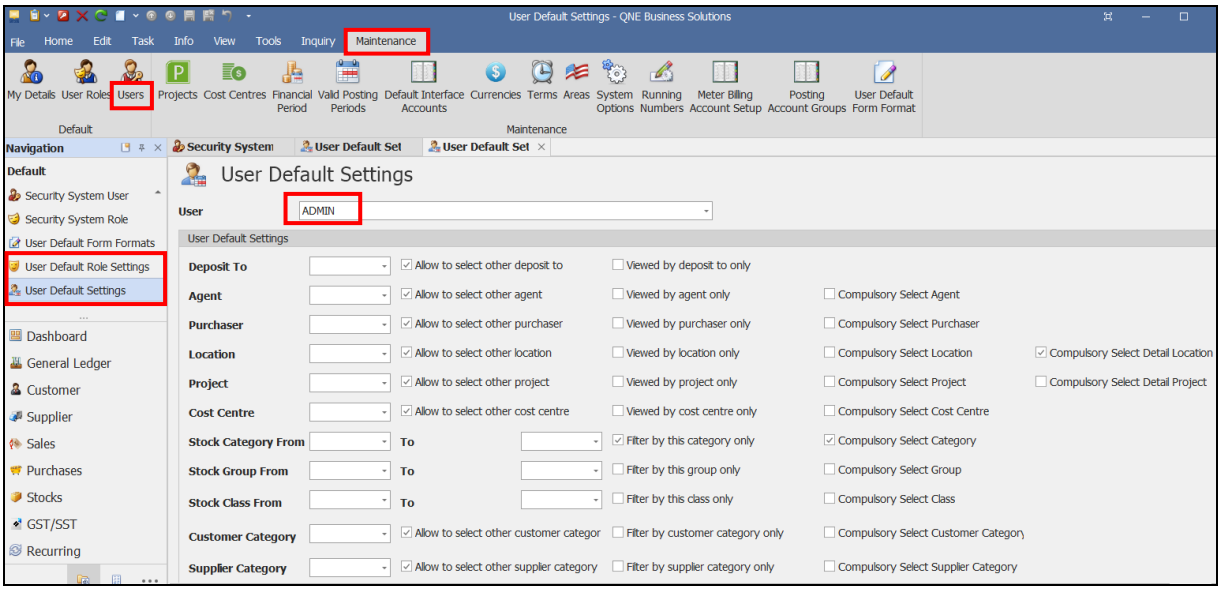
1. Go to **File**, and select **Modules**.

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



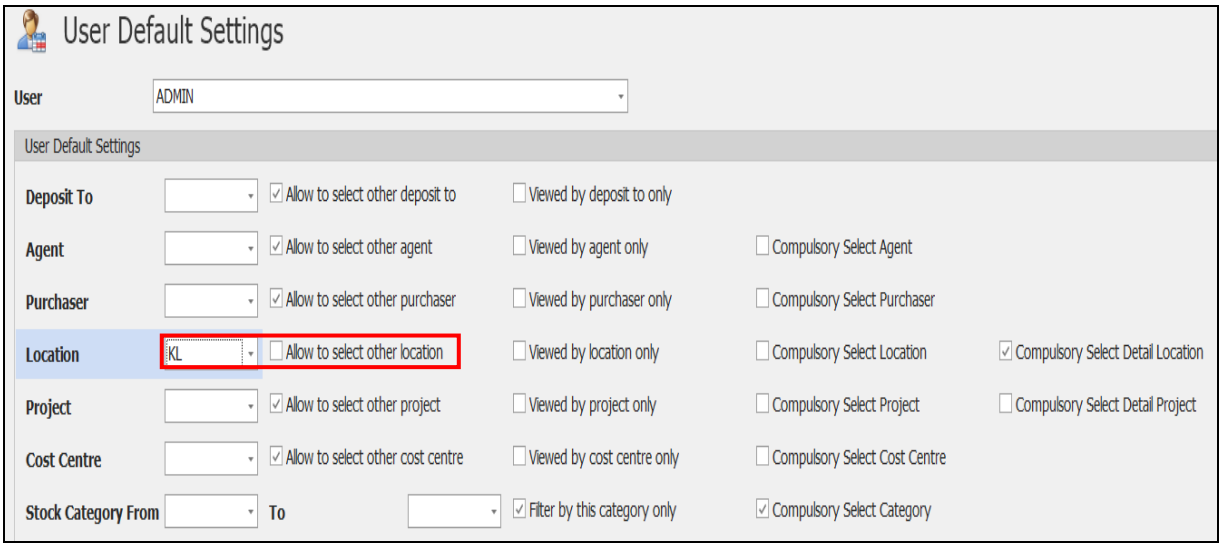
3. Go to **Maintenance** > **User** > **User Default Setting > Select User**.

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

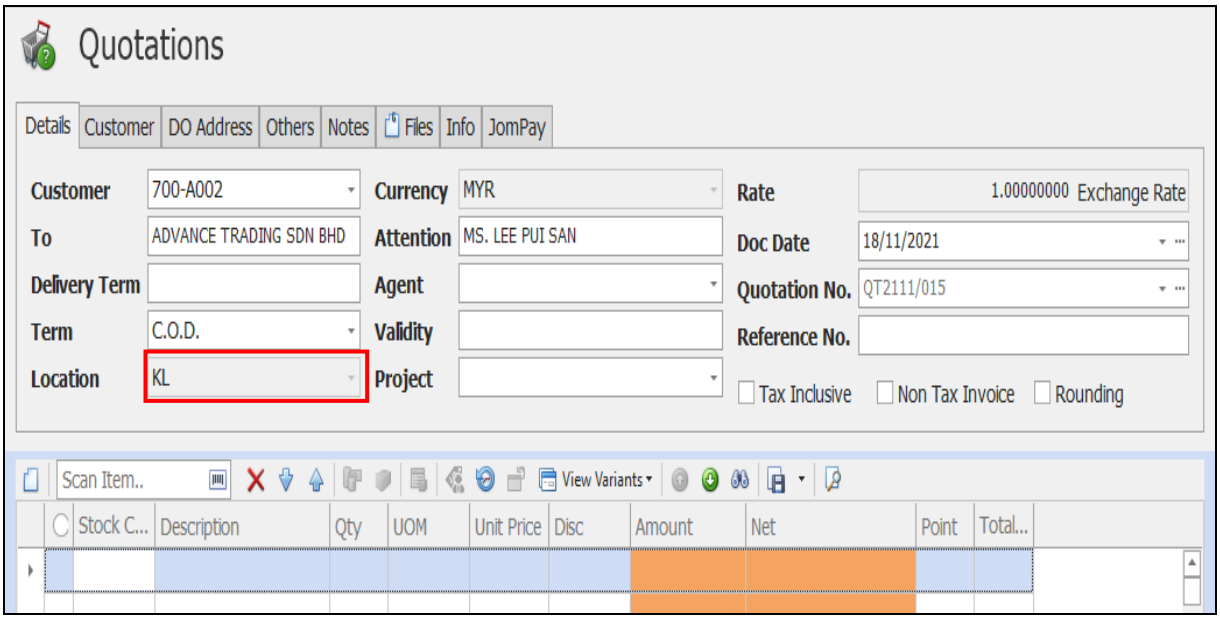


ALLOW TO SELECT OTHER LOCATION

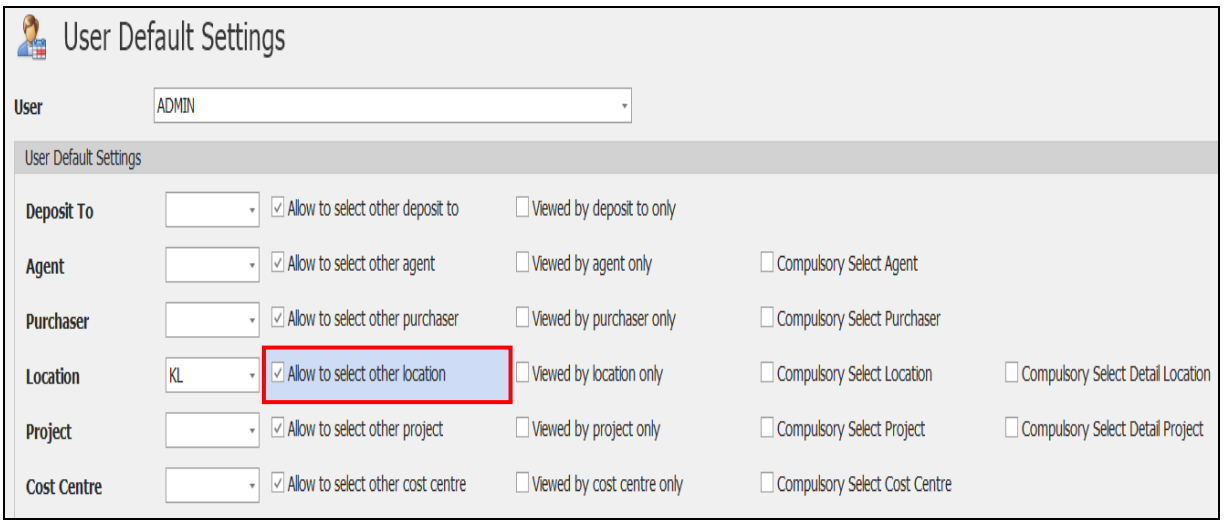
1. User has defined KL as default location, if the user untick **"Allow to select other location"**.



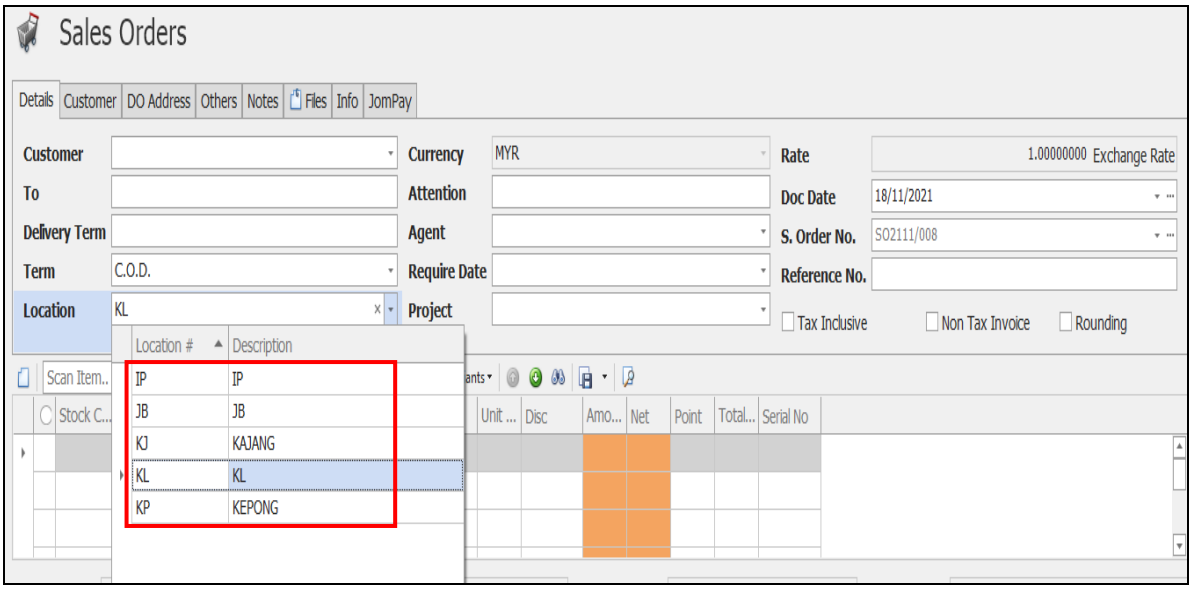
2. When user access Quotation, the Location only showed as KL without any selection.



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

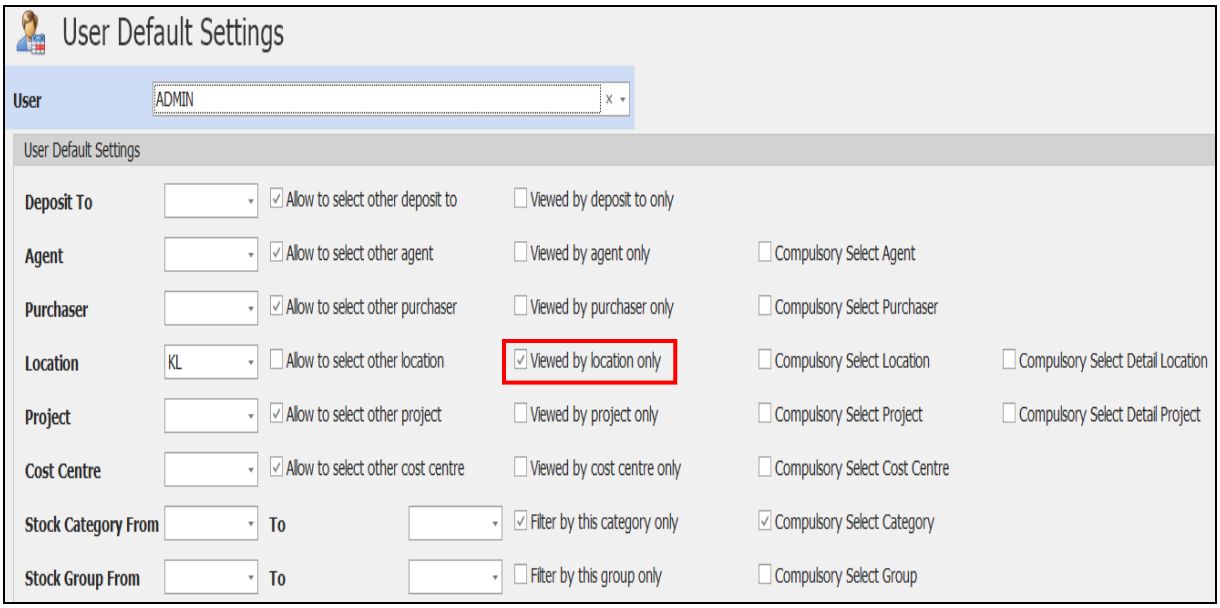


4. System remain KL as default location but user is allowed to select others locations.

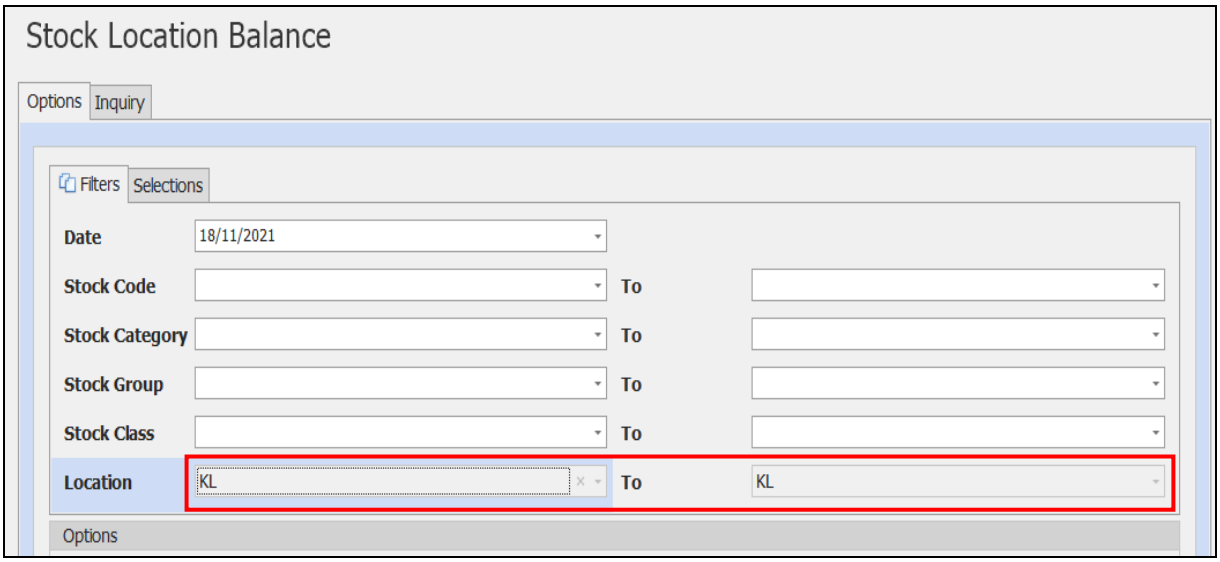


VIEW BY LOCATION ONLY

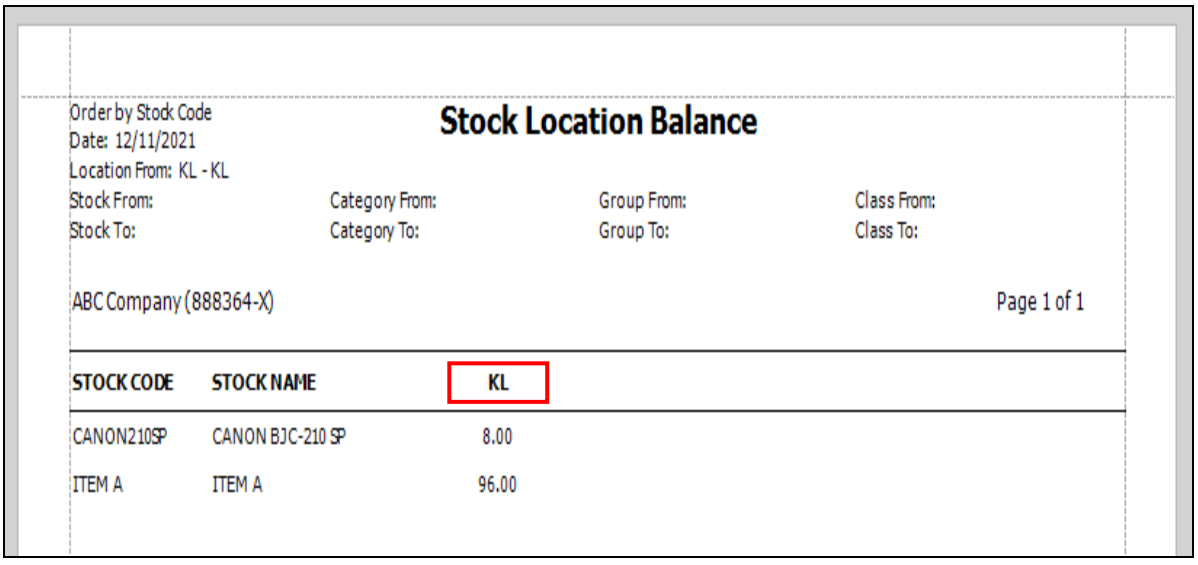
1. If we enable **"Viewed by location only"**.



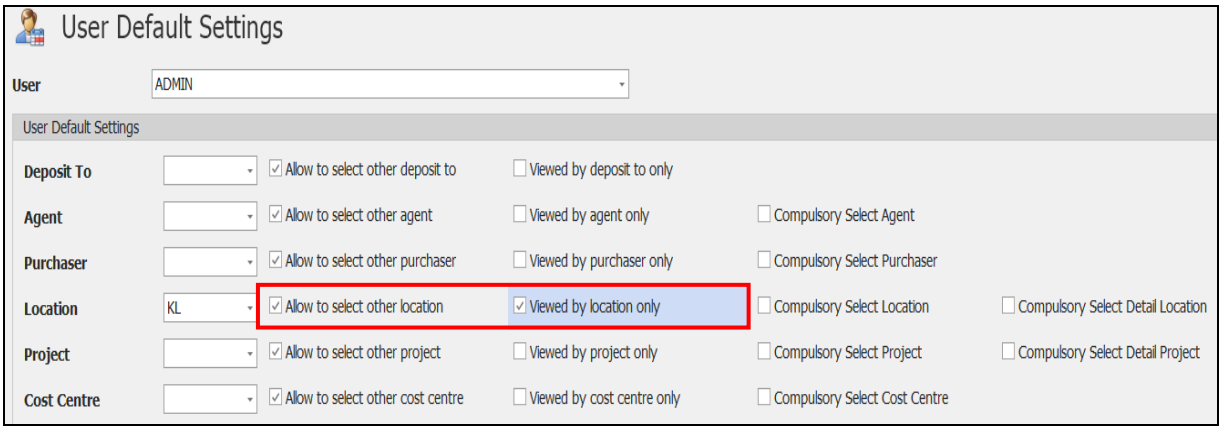
2. The function affect in the report filtering. Example Stock Location Balance report.
   Notice that system display as KL only which based on the default location setting. User cannot select other locations



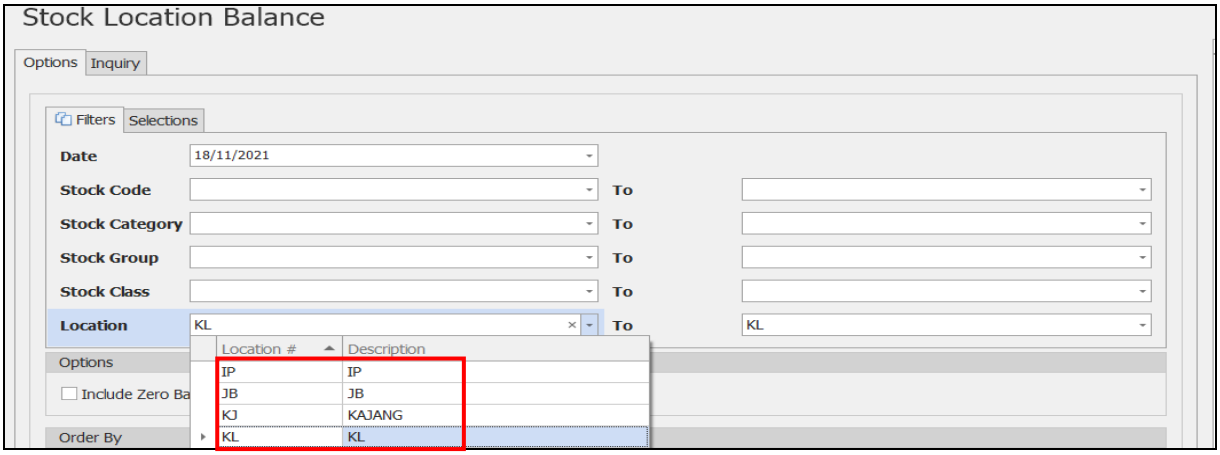
3. When preview system will show the location as KL.

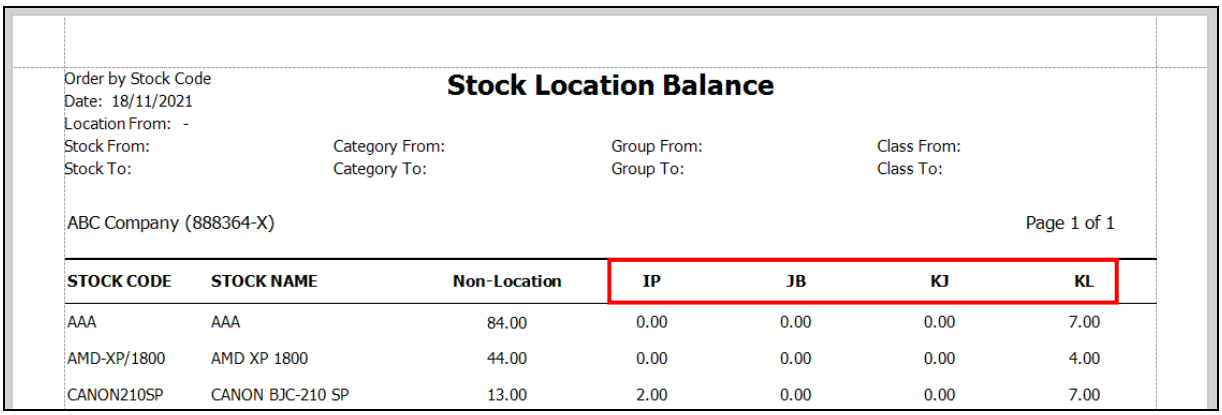


4. If we tick **"Allow to select Other location"** and tick **"Viewed by location only"**.



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





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:

Stock Location Balance

ABC Company (888364-X)

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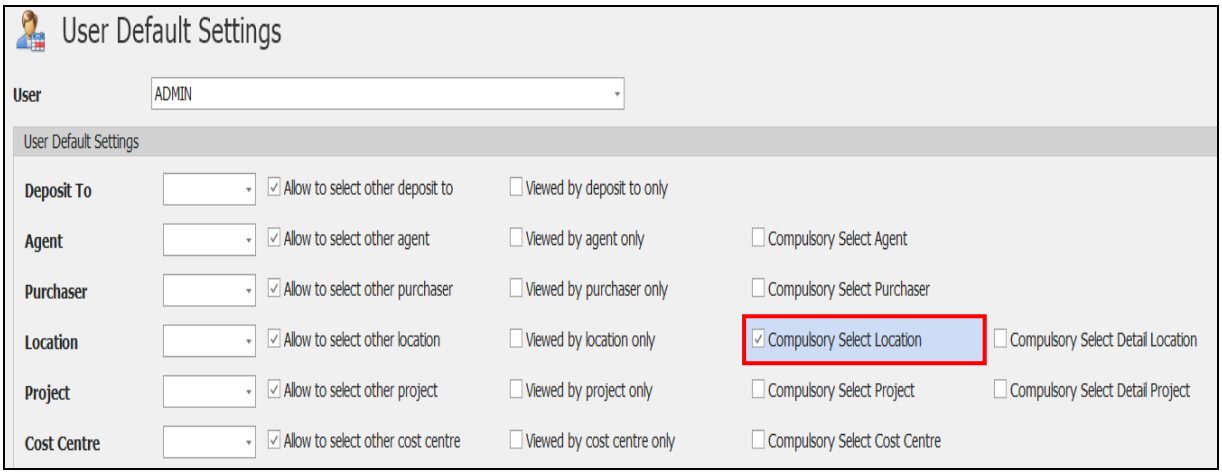
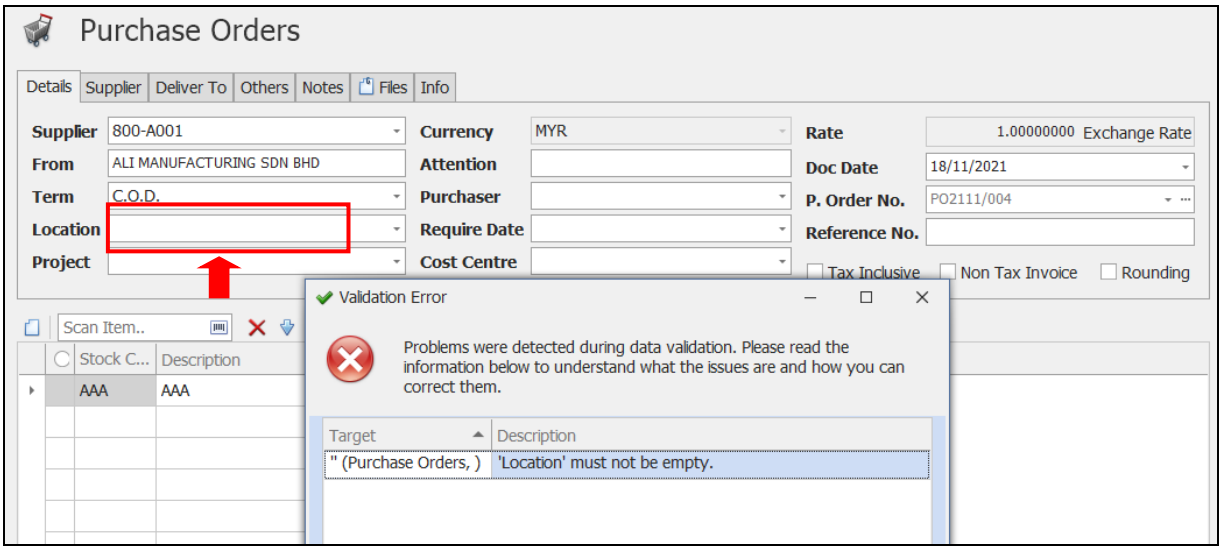
STOCK CODE	STOCK NAME	Non-Location	IP	JB	KJ	KL
AAA	AAA	84.00	0.00	0.00	0.00	7.00
AMD-XP/1800	AMD XP 1800	44.00	0.00	0.00	0.00	4.00
CANON210SP	CANON BJC-210 SP	13.00	2.00	0.00	0.00	7.00

COMPULSORY SELECT LOCATION

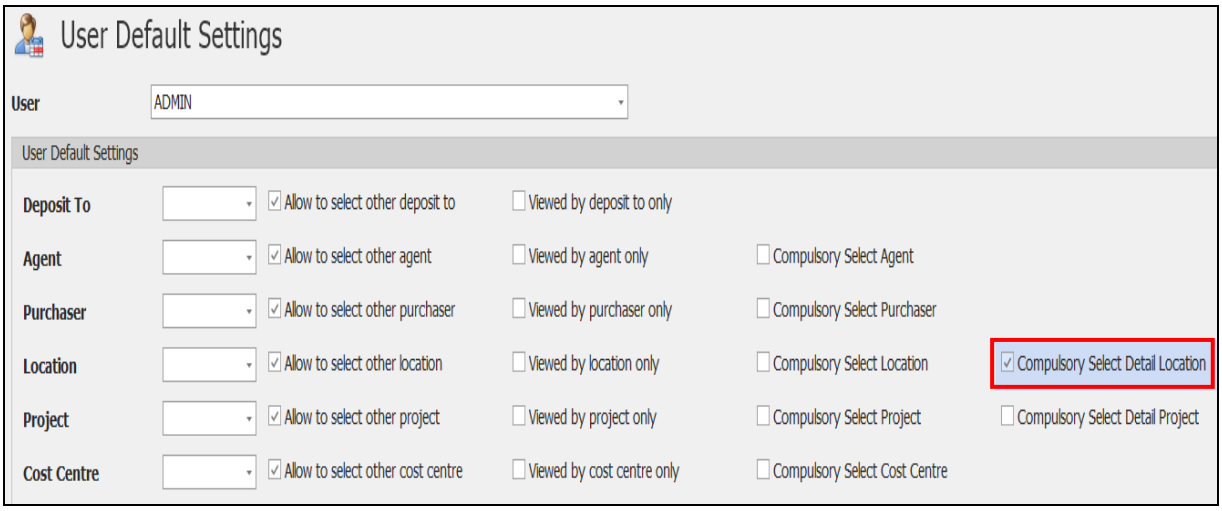
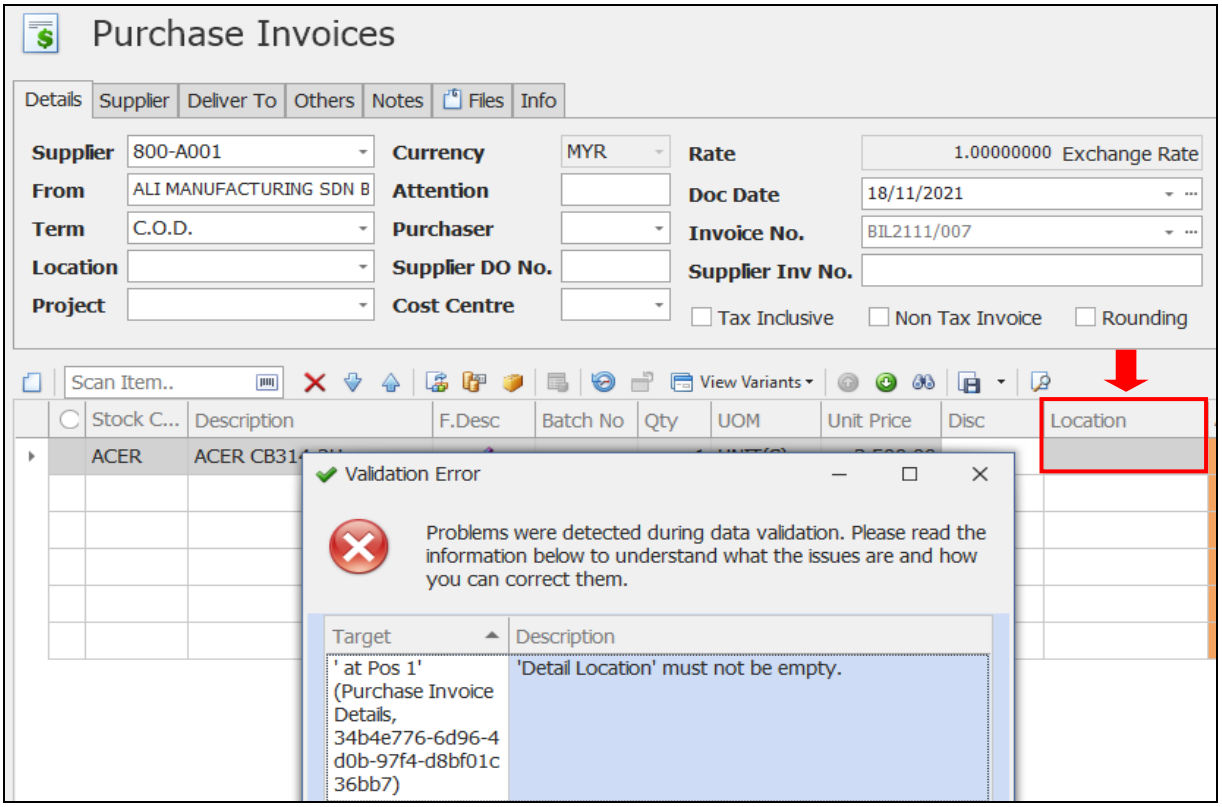
1. If user enable **"Compulsory Select Location"**.



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



3. If user tick "**Compulsory Select Detail Location**".



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