

# DEFAULT SETTING – CUSTOMER / SUPPLIER CATEGORY

[1.0]

Jackson Chin

[14/11/2021]



**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	Jackson Chin	14/11/2021	

**Amendment Record**



### SCENARIO

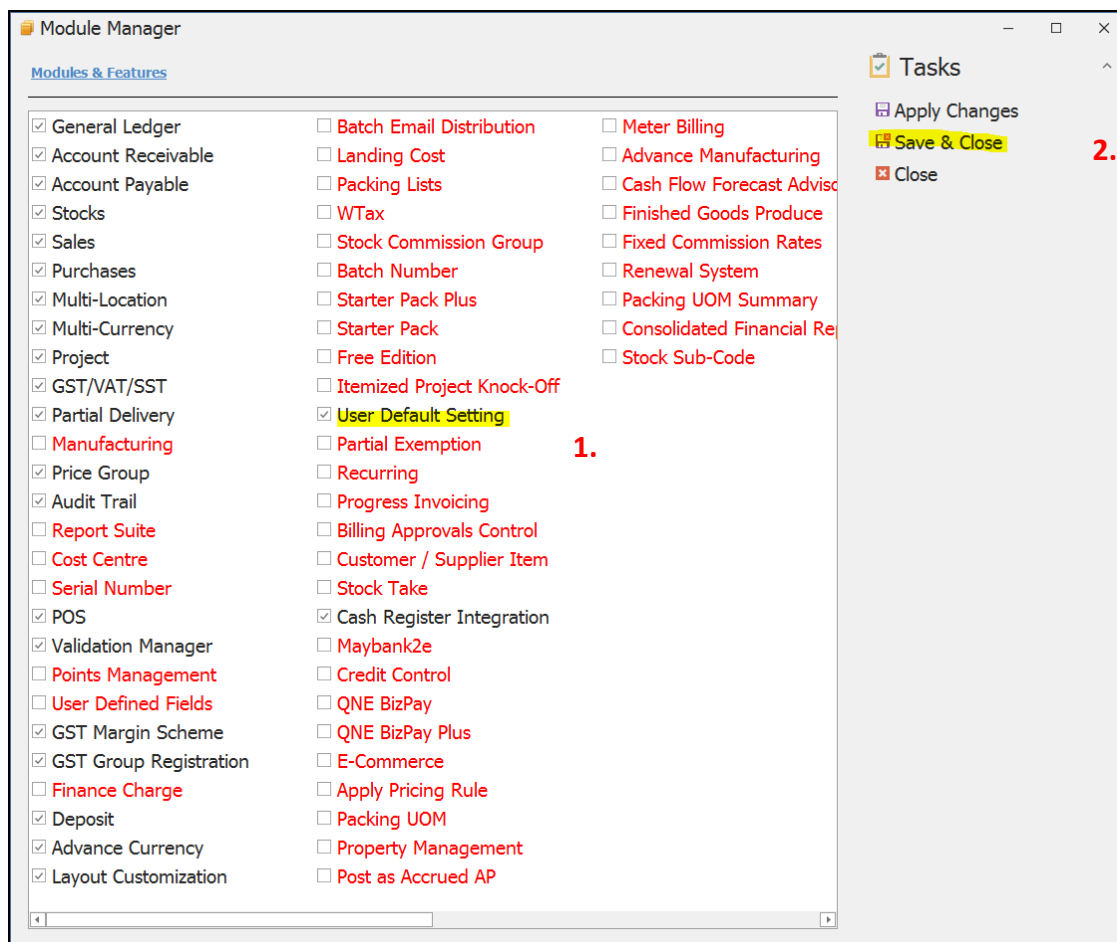
User Michelle is a salesperson only in-charge customer Dealer. In her case, she does not need to deal with the oversea customer or corporate customer thus she does not need to view other transactions or customers besides Dealer only.

### SOLUTION

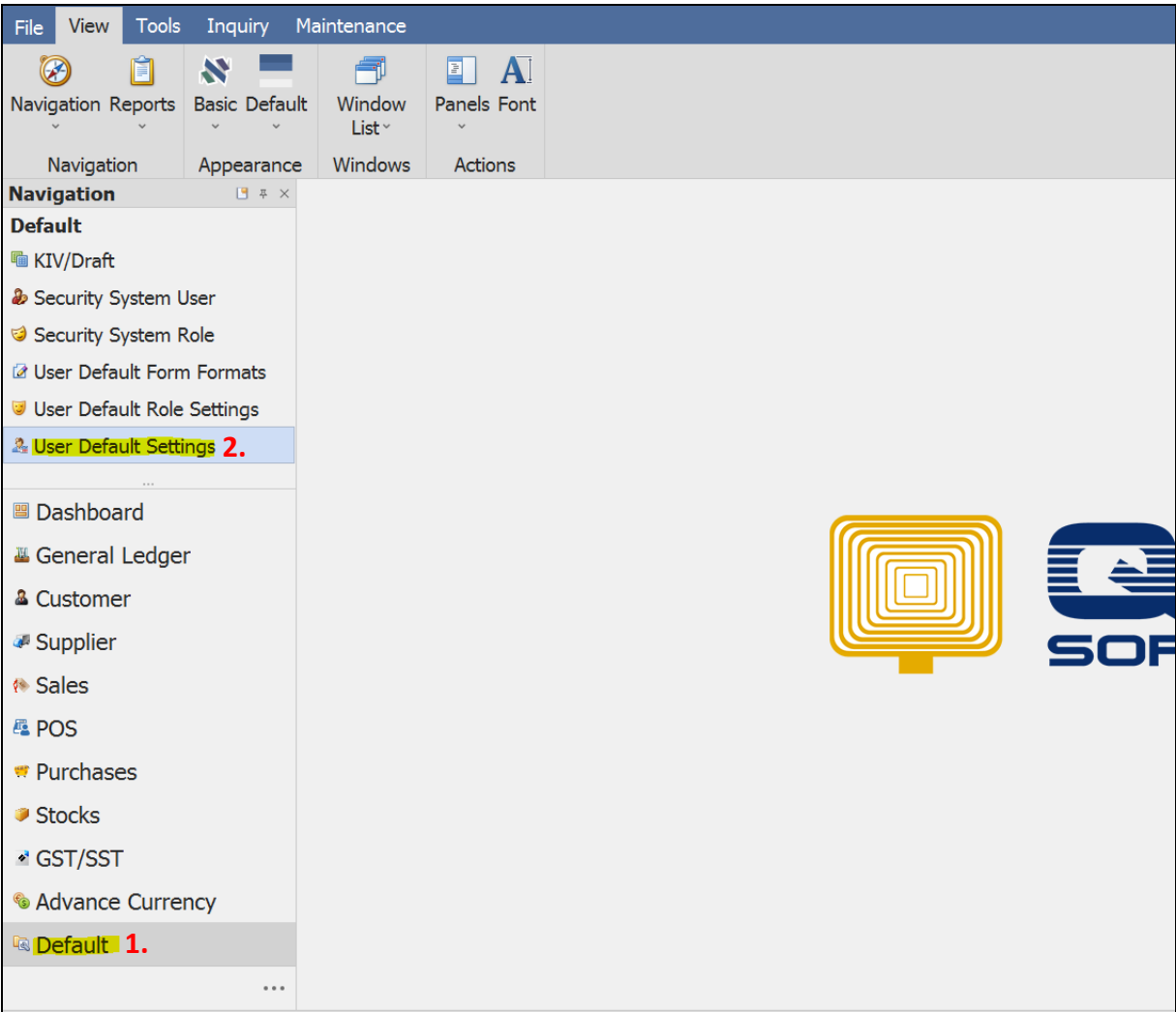
In this case, we will can define Customer Category in customer maintenance and set default by using User Default Setting Module. This is an additional module; extra charges will incur

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

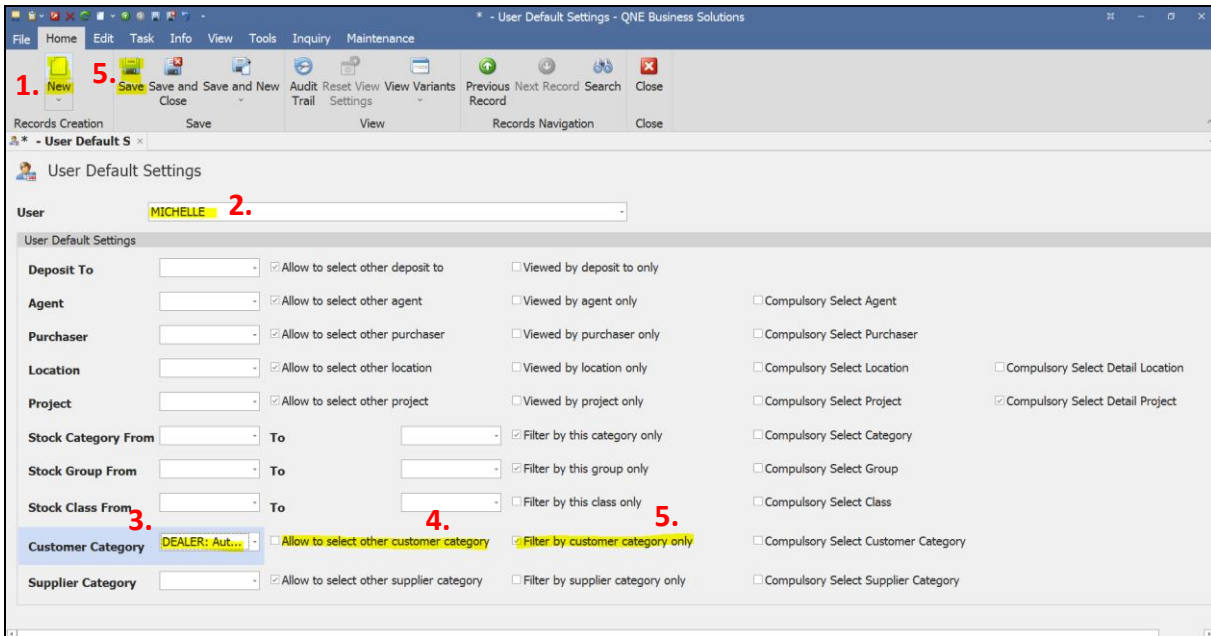
Step 1 : Click on File > Modules. Tick User Default Setting



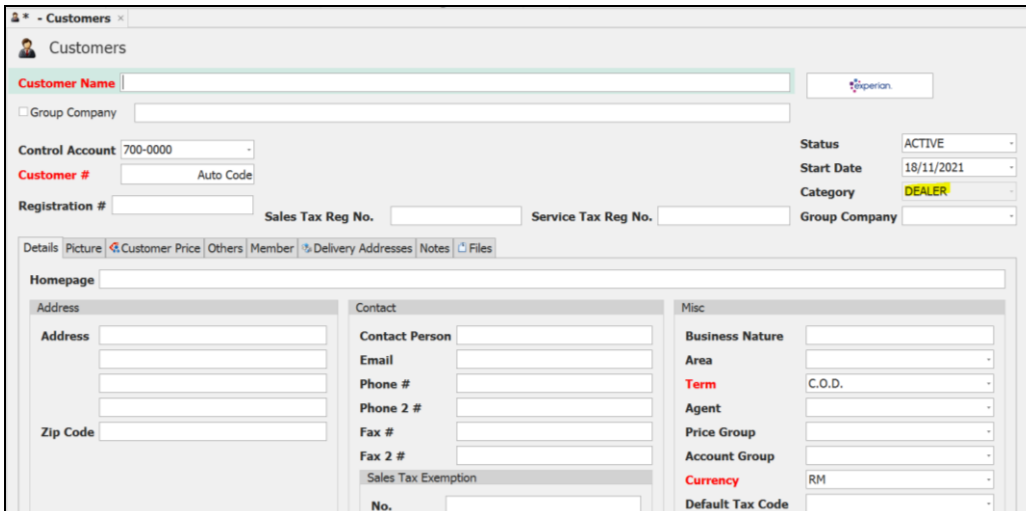
Step 2 : User can find the User Default Setting at Default -> User Default Setting




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

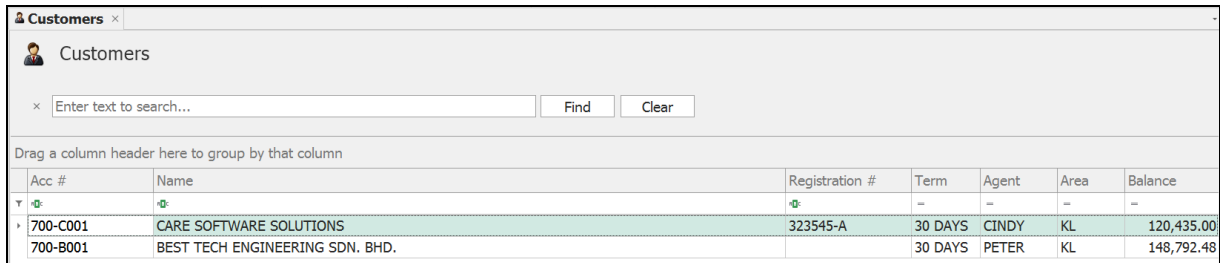


4. When the user Michelle access to Customer Module -> Customer, this user only able to create and view the Dealer Customer Category. This is due to the setting “Allow to select other customer category” is unticked



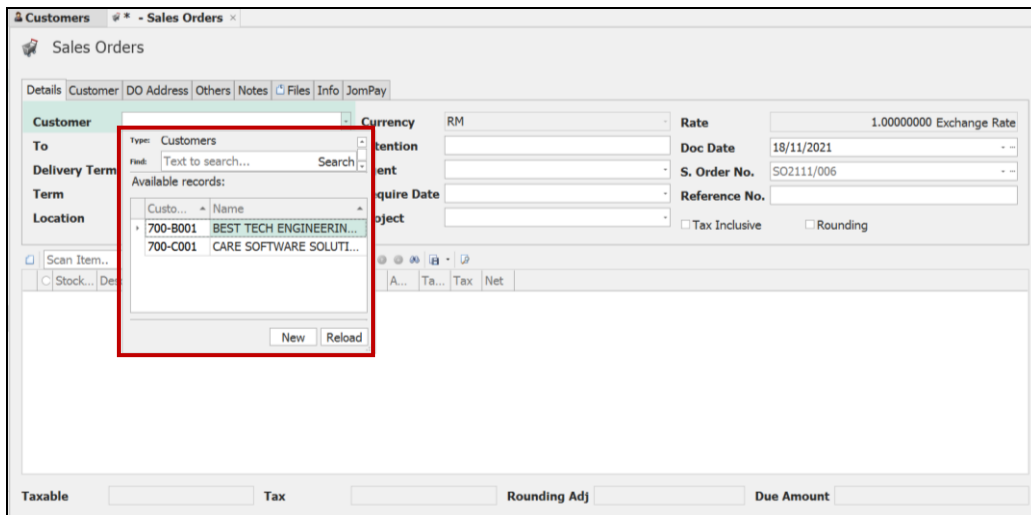
		<b>QNE TIPS</b>	
		Product : QNE Optimum	Version: 1.00
		Doc No : 1	Page No: 5 of 9

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



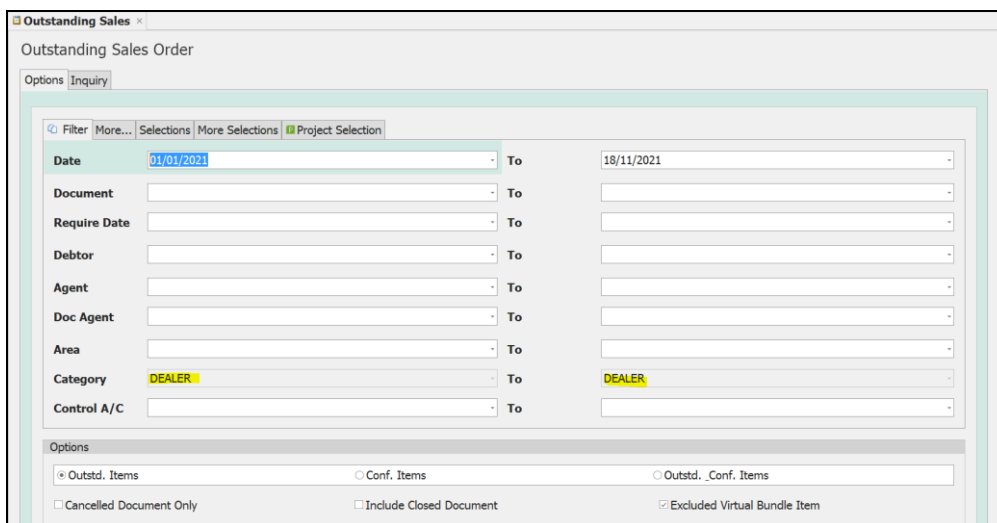
Acc #	Name	Registration #	Term	Agent	Area	Balance
700-C001	CARE SOFTWARE SOLUTIONS	323545-A	30 DAYS	CINDY	KL	120,435.00
700-B001	BEST TECH ENGINEERING SDN. BHD.		30 DAYS	PETER	KL	148,792.48

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




The screenshot shows the 'Sales Orders' window with the 'Customer' dropdown menu open. The dropdown list shows two options: '700-B001 BEST TECH ENGINEERING' and '700-C001 CARE SOFTWARE SOLUTIONS'. The dropdown is highlighted with a red box.

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

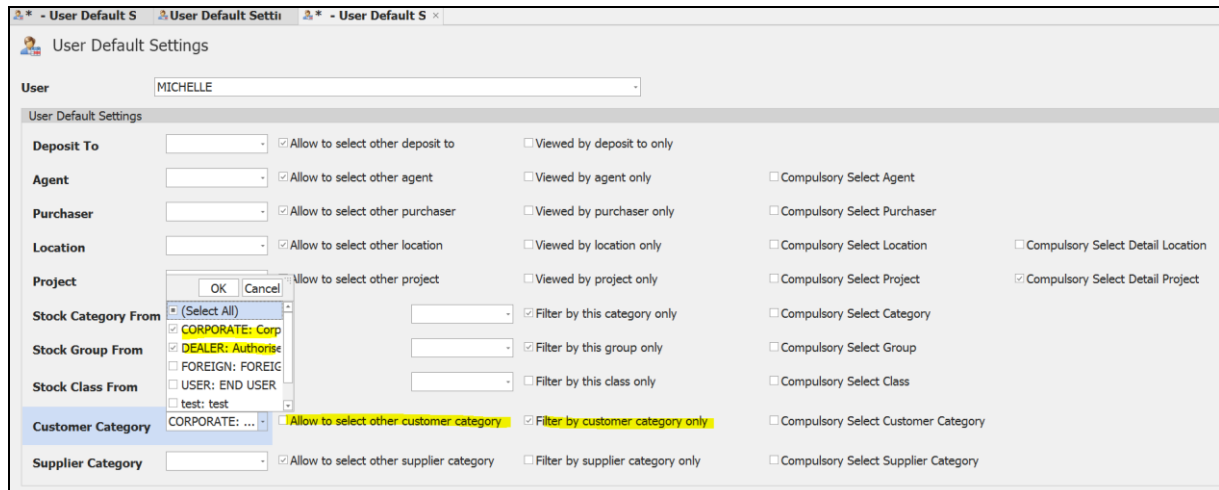


The screenshot shows the 'Outstanding Sales' window with the 'Filter' tab selected. The 'Category' filter is set to 'DEALER'. The 'Date' filter is set to '01/01/2021' to '18/11/2021'. The 'Document' filter is set to 'To'. The 'Require Date' filter is set to 'To'. The 'Debtor' filter is set to 'To'. The 'Agent' filter is set to 'To'. The 'Doc Agent' filter is set to 'To'. The 'Area' filter is set to 'To'. The 'Control A/C' filter is set to 'To'. The 'Options' section shows 'Outstd. Items' selected, 'Conf. Items' unselected, and 'Outstd. Conf. Items' unselected. The 'Cancelled Document Only' checkbox is unselected, 'Include Closed Document' checkbox is unselected, and 'Excluded Virtual Bundle Item' checkbox is selected.

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

### 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

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:  ☒ Filter by this category only ☐ Compulsory Select Category

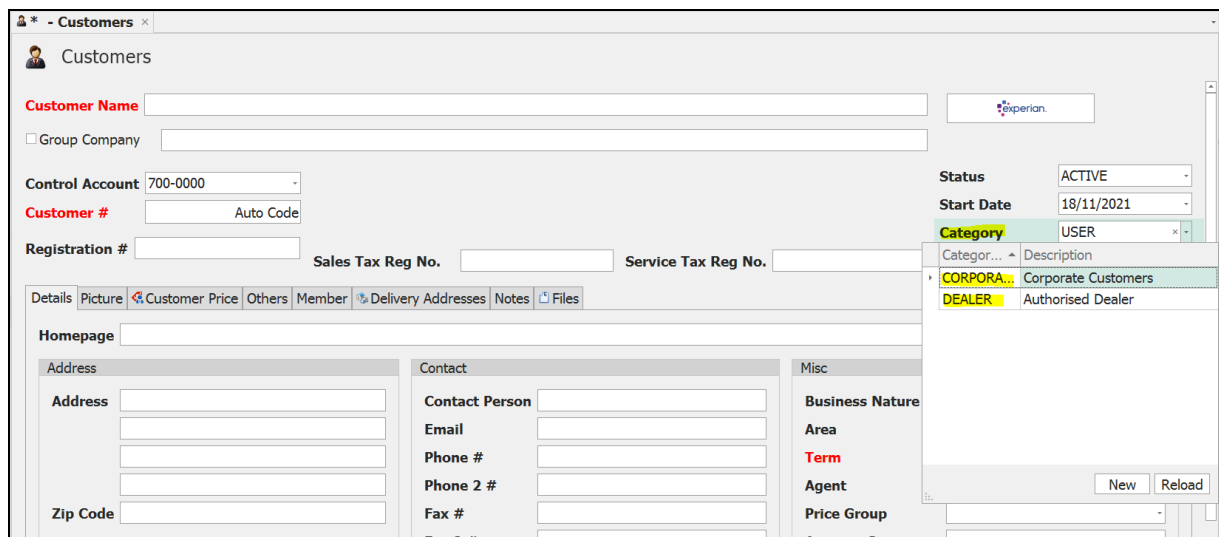
Stock Group From:  ☒ Filter by this group only ☐ Compulsory Select Group

Stock Class From:  ☐ 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

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



Customers

Customer Name:

☐ Group Company

Control Account: 700-0000

Customer #:  Auto Code

Registration #:  Sales Tax Reg No.  Service Tax Reg No.

Status: ACTIVE

Start Date: 18/11/2021

Category: USER

Category Description:   
CORPORATE: Corporate Customers   
DEALER: Authorised Dealer

Homepage:

Address:

Contact Person:

Email:

Phone #:

Phone 2 #:

Fax #:

Fax 2 #:

Business Nature:

Area:


Term:

Agent:

Price Group:

Account Group:

New Reload

		<b>QNE TIPS</b>	
Product : QNE Optimum		Version: 1.00	
Doc No : 1		Page No: 7 of 9	

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

**Customers**

Enter text to search... Find Clear

Drag a column header here to group by that column

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.

**Sales Orders**

Details Customer DO Address Others Notes Files Info JomPay

**Customer** Type: Customers Find: Search

Available records:

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

New Reload

Currency: RM Rate: 1.00000000 Exchange Rate

Doc Date: 18/11/2021

S. Order No.: SO2111/006

Reference No.:

☐ Tax Inclusive ☐ Rounding



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

Outstanding Sales

Outstanding Sales Order

Filter

More...

Selections

More Selections

Project Selection

Date

Document

Require Date

Debtor

Agent

Doc Agent

Area

Category

Control A/C

New

Reload

Category #	Description
CORPORATE	Corporate Customers
DEALER	Authorised Dealer

To

18/11/2021

To

To

To

To

To

To

To

To

Options

☒ Outstd. Items


☐ Conf. Items

☐ Outstd. Conf. Items

☐ Cancelled Document Only

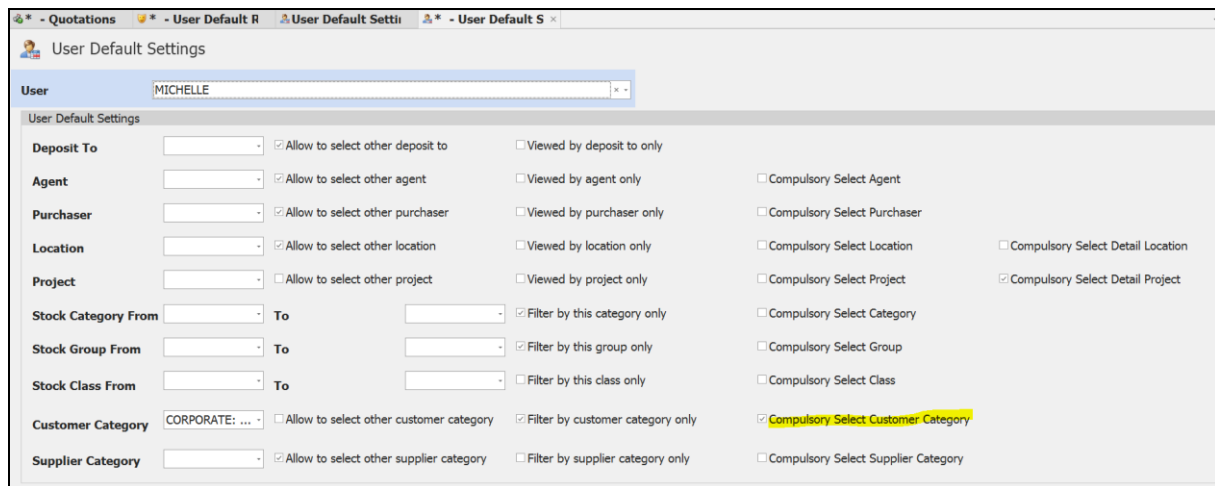
☐ Include Closed Document

☒ Excluded Virtual Bundle Item

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

## Compulsory Select Customer Category

1. Tick "Compulsory select Customer category"



User Default Settings

User: MICHELLE

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
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 checked="" type="checkbox"/> Filter by this category only	<input type="checkbox"/> Compulsory Select Category
Stock Group From	To	<input checked="" 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	CORPORATE: ...	<input type="checkbox"/> Allow to select other customer category	<input checked="" type="checkbox"/> Filter by customer category only
Supplier Category		<input checked="" type="checkbox"/> Allow to select other supplier category	<input type="checkbox"/> Filter by supplier category only

**Compulsory Select Customer Category** (highlighted in yellow)

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.

Group Company: ☐

Control Account: 700-0000

Customer #: 700-C004 (Auto Code)

Registration #:

Sales Tax Reg No.:

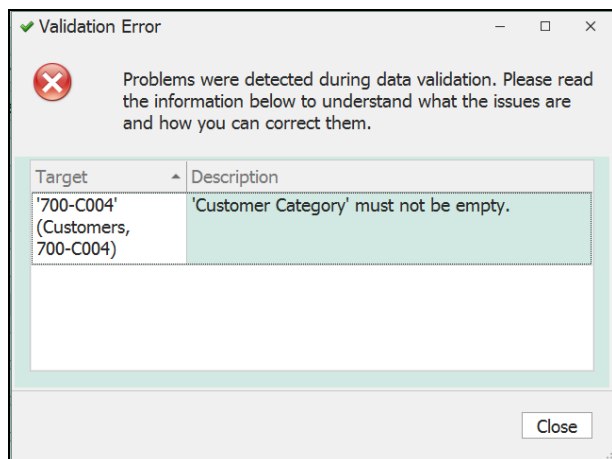
Service Tax Reg No.:

Status: ACTIVE

Start Date: 18/11/2021

Category:  (highlighted in yellow)

Group Company:



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