



# How to Restrict Users from Canceling or Closing Transactions

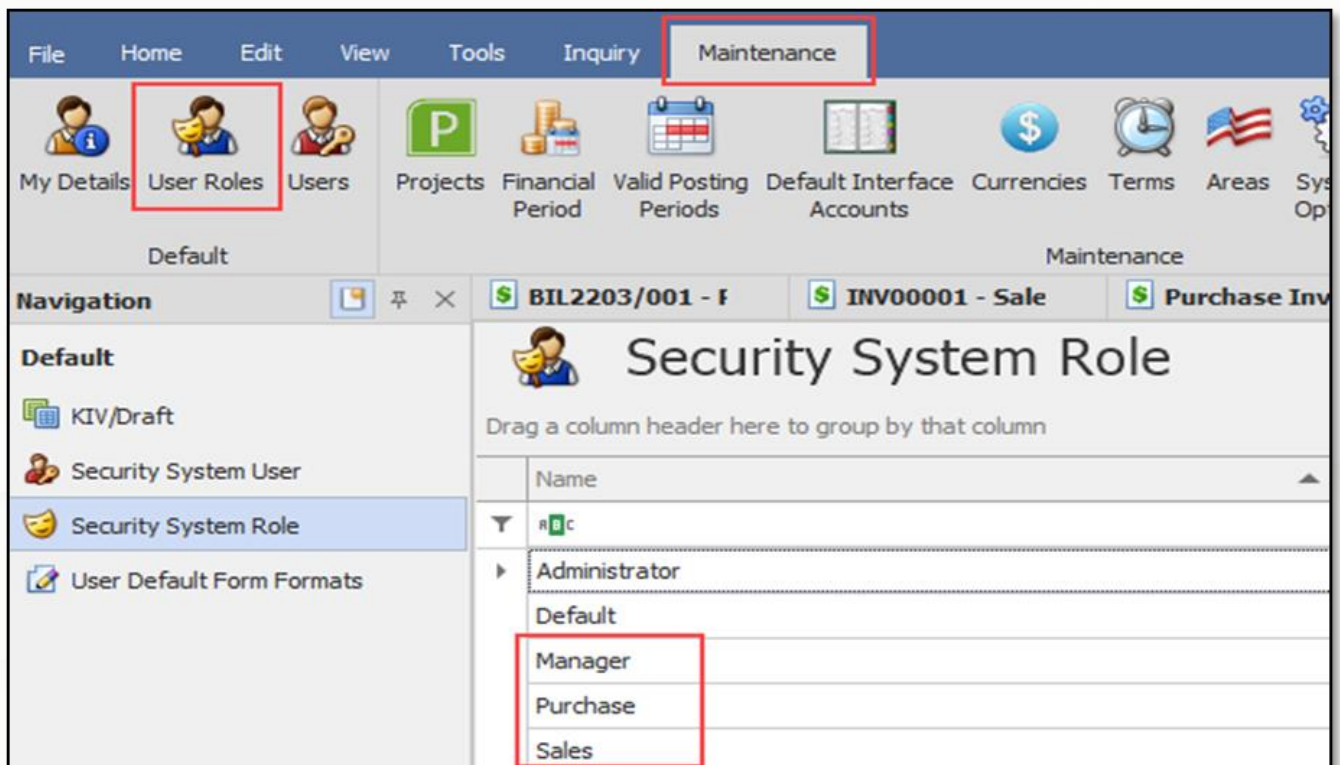
## Overview:

In accounting software, some users may not be allowed to cancel transactions because of security and control purposes. Cancelling a transaction can have significant impacts on the financial statements of a company, and as a result, it is important to restrict the ability to cancel transactions to only authorized personnel.

The QNE system allows cancellation and/or closing of documents. These can also be restricted to specific user(s) only who is authorized to cancel and/or close transactions

## Solution

1. Go to Maintenance > User Roles. Double-click the System Role that the non-authorized users belong to or are assigned to.





You can refer to Maintenance > Users > Select the non-authorized user > The roles are stated at the bottom

**Security System User**

User Name: LIM ☒ Active

Full Name:

Email:

Remarks:

Signature: Double click to open sele...

**Roles**

Name	Administrative
Sales	<input type="checkbox"/>

2. Under the 'Other Operations' tab, untick the check boxes for Allow Mark Documents as Cancelled and/or Allow Mark Documents as Closed and click Save.

**Security System Role**

Name: Sales ☐ Administrative

☐ Change New Password Every  Days

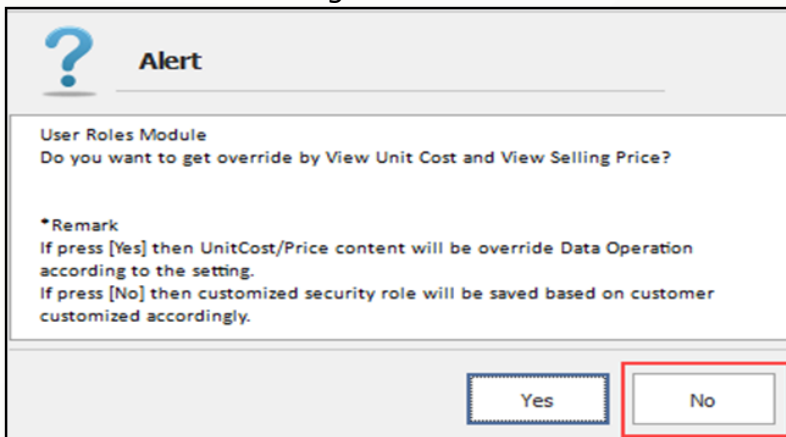
Description: Sales Department

**Permissions**

Other Operations

Operation	Allow
Access Windows Application	<input type="checkbox"/>
Allow Create Stock Batch Number	<input checked="" type="checkbox"/>
Allow Mark Documents as Bounced/Revert Cheque	<input type="checkbox"/>
Allow Mark Documents as Cancelled	<input type="checkbox"/>
Allow Mark Documents as Closed	<input type="checkbox"/>
Allow Mark Documents as PD Cheque	<input type="checkbox"/>

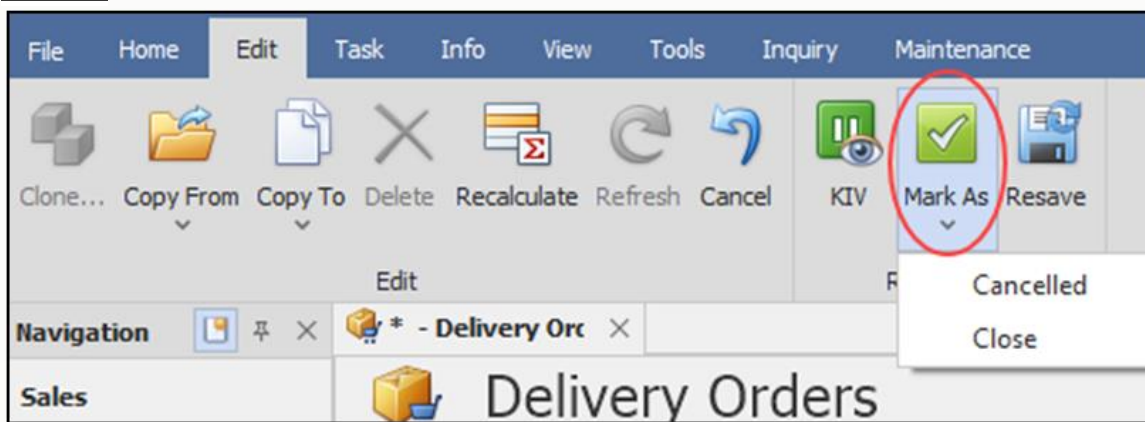
3. Click 'No' on this dialog box.



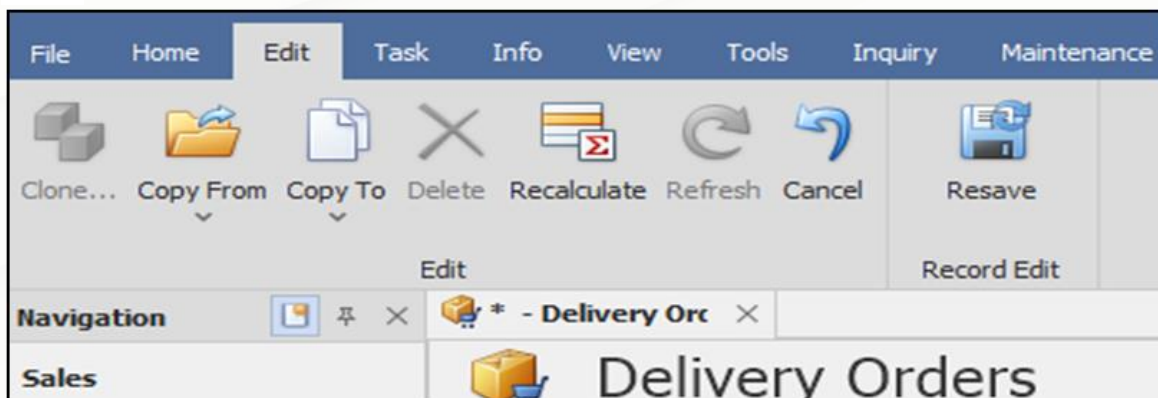
4. For the changes to take effect, get the users to log out and log back in.

5. The 'Mark As' button is no longer available under the Edit menu.

#### Before



#### After





1. System Role settings apply to all users that are assigned to it
2. It is recommended to have a separate System Role for the specific users authorized to cancel and/or close transactions
3. Because ADMIN has complete access rights, this advice does not apply to user roles with ADMIN