HOW TO IMPLEMENT USER DEFAULT SETTING - PROJECT

[1.0]

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[14/10/2020]

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

Amendment Record

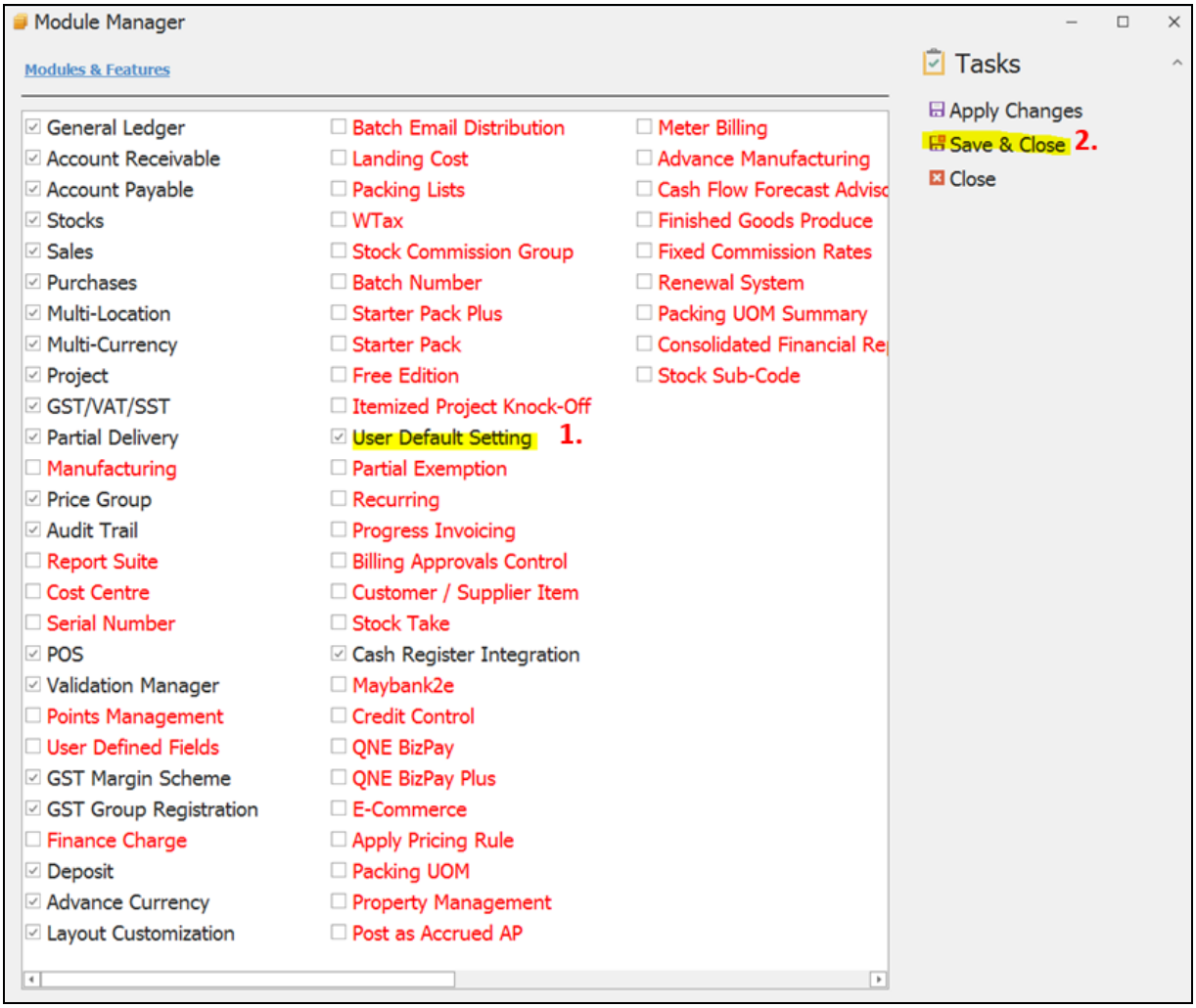
SCENARIO

User Michelle only in-charge the Project A and she will not involve in other projects. So she only can create, read, edit and update the document or account relevant with **Project A** only.

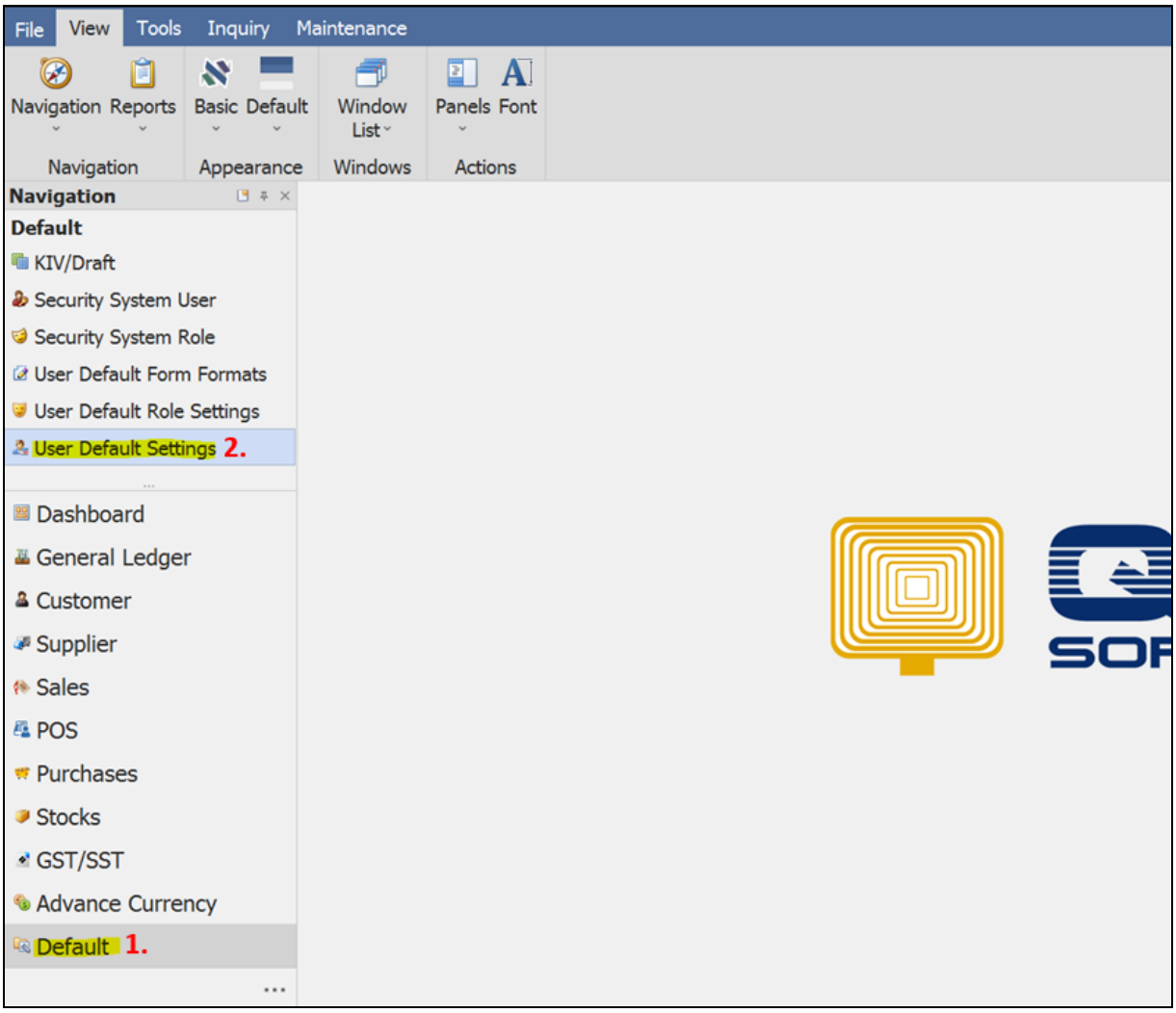
SOLUTION

Before Using this **User Default Setting**, please make sure the **User Default Setting** has been ticked and save. This is additional module, extra charges is occurred.

Step 1 : Click on (File -> Modules). Plesae make sure the User Default Setting has ticked.



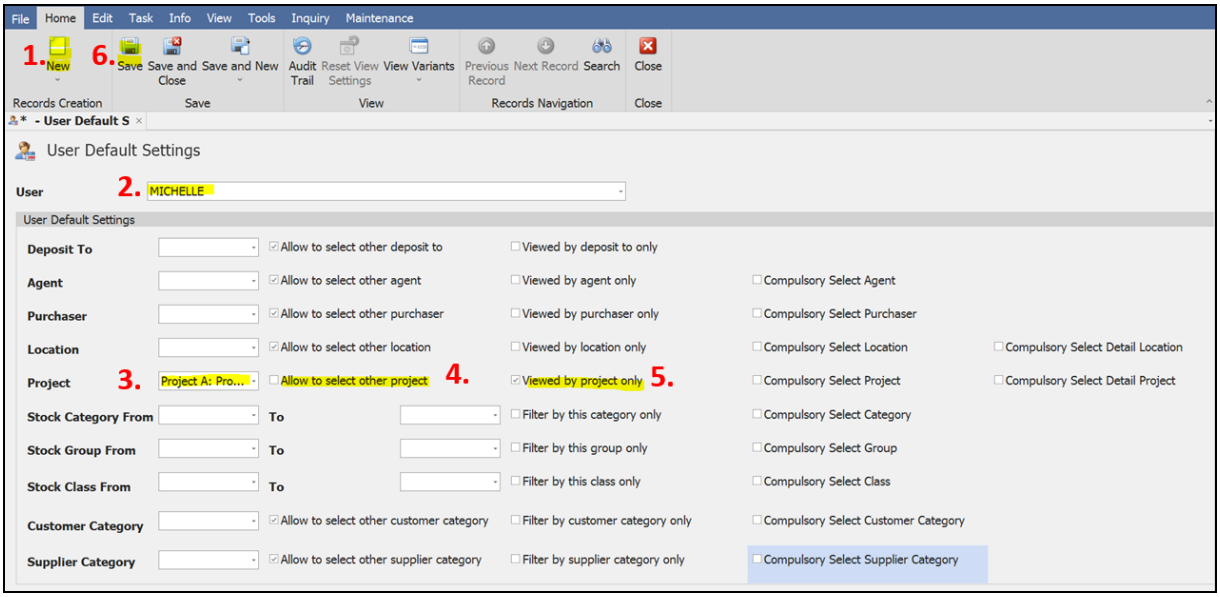
Step 2 : User can find the User Default Setting Default -> User Default Setting



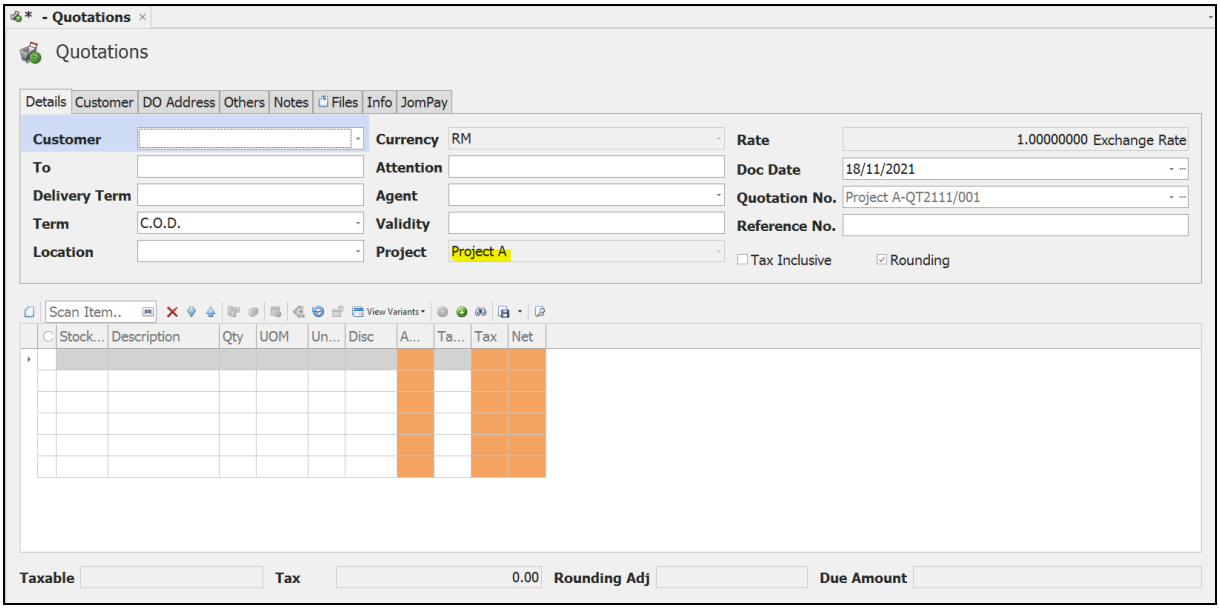
Step 3 : Once you enter the **User Default Setting** click on **New** to create.

VIEW BY PROJECT AND NOT ALLOW SELECT OTHER PROJECT

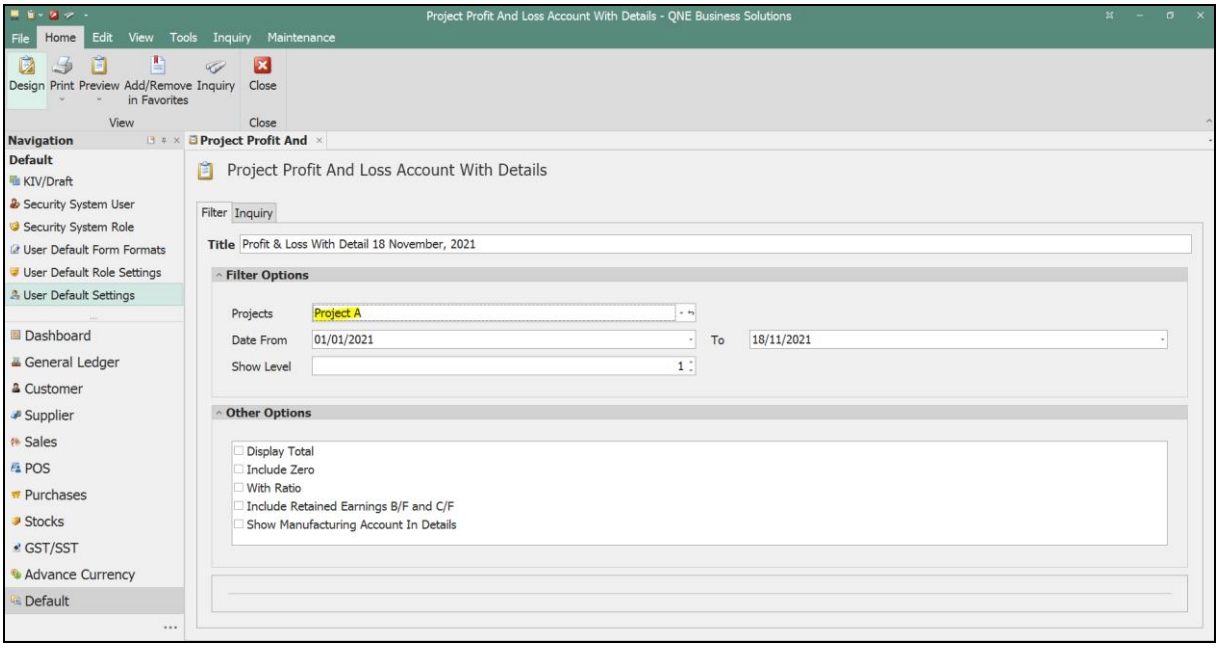
Step 4 : Select project (E.g. Project A). Next, Tick **Viewed by project only.** After complete the setting , click **Save**.



Step 5: When Michelle login the transaction example Sales -> Quotation, system only shows Project A. User not allow to see and choose other projects. Since “Allow to select other project” is unticked.

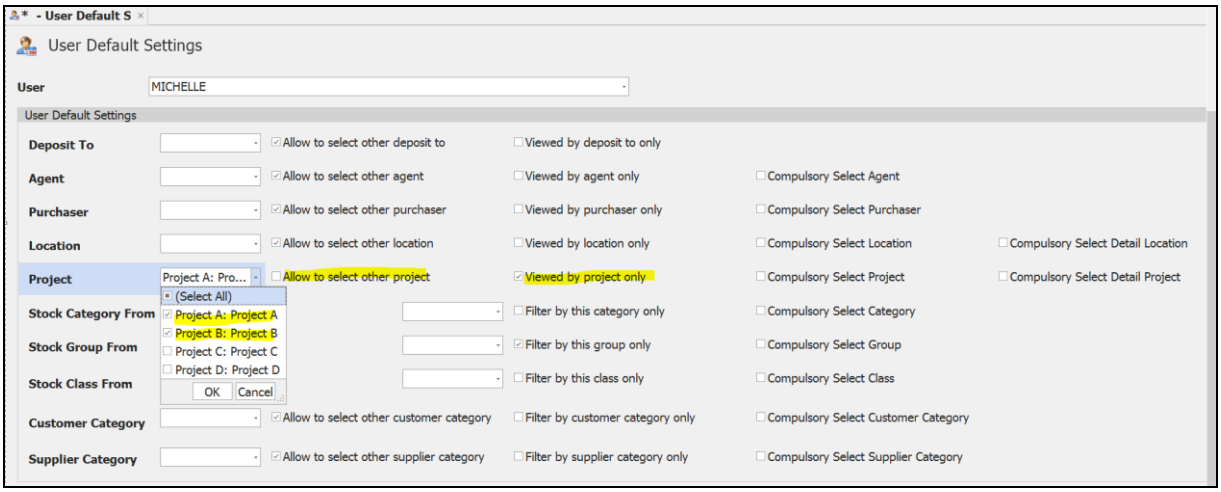


Step 6: View -> Report -> Project -> Project Profit & Loss Acount -> Project Profit & Loss Acount with details, user can only view **Project A report .** Since “View by Project is Ticked” means user only can view own project

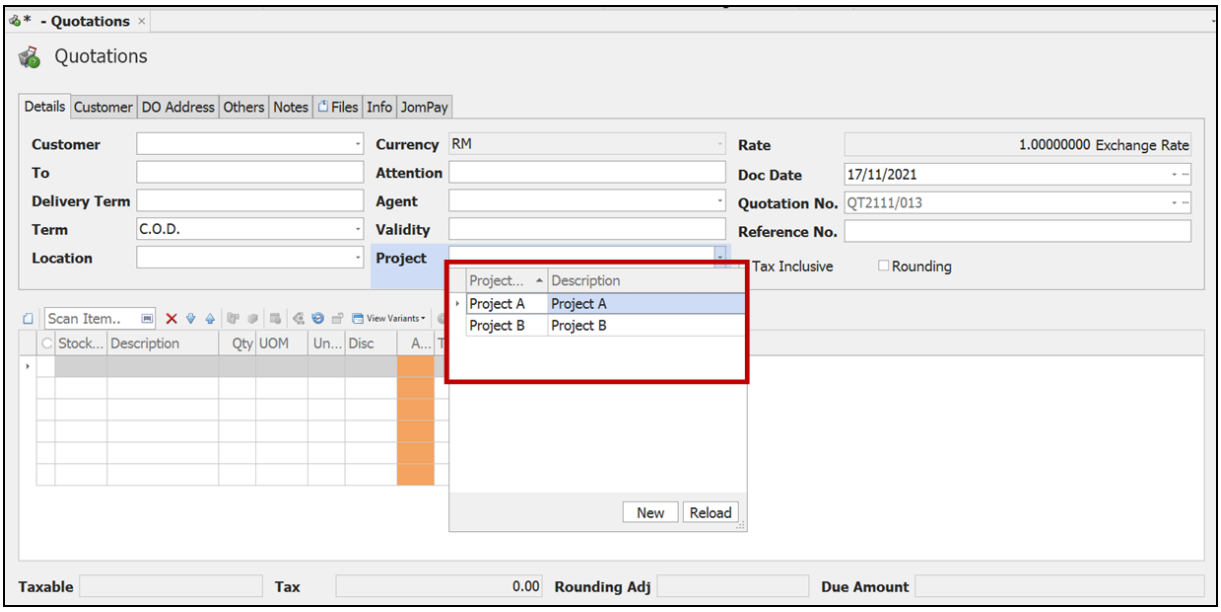


SELECT MORE THAN ONE PROJECTS, NOT ALLOW TO SELECT THE OTHER PROJECT AND VIEWED BY PROJECT ONLY.

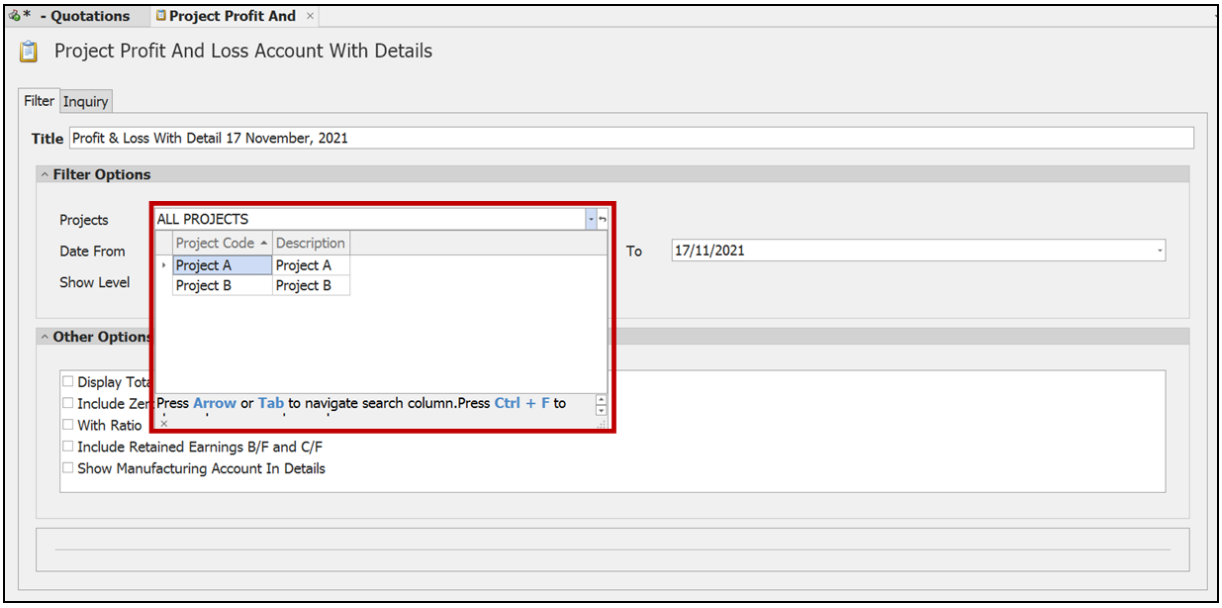
Step 7: If User has set 2 project (Project A & B) in the **User Default Setting**, and tick View by Project only



Step 8: The user is able to select Project A and Project B in their user account but cannot select other projects

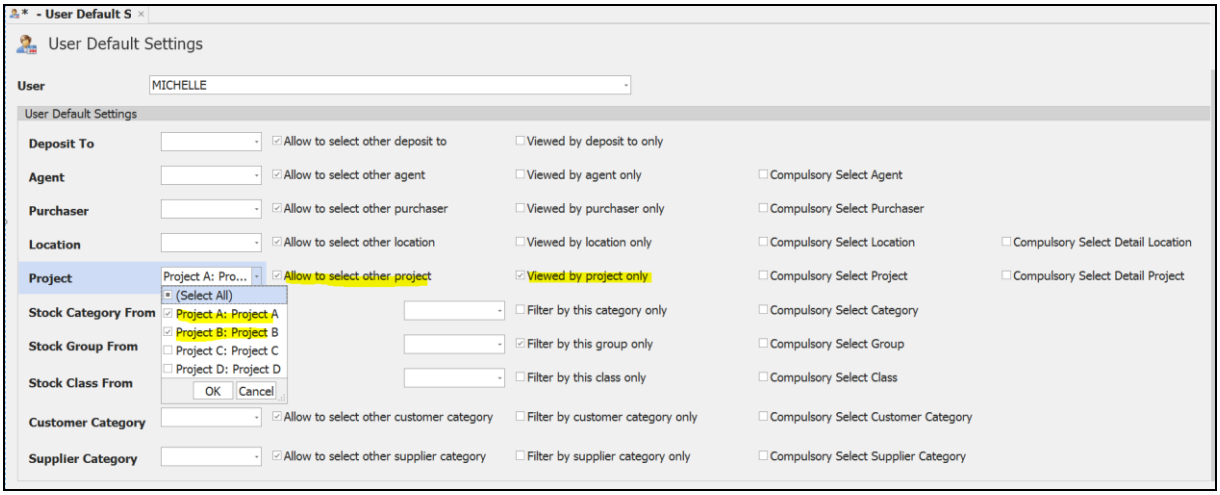


Step 9: In the reporting, user can also view Project A and Project B only

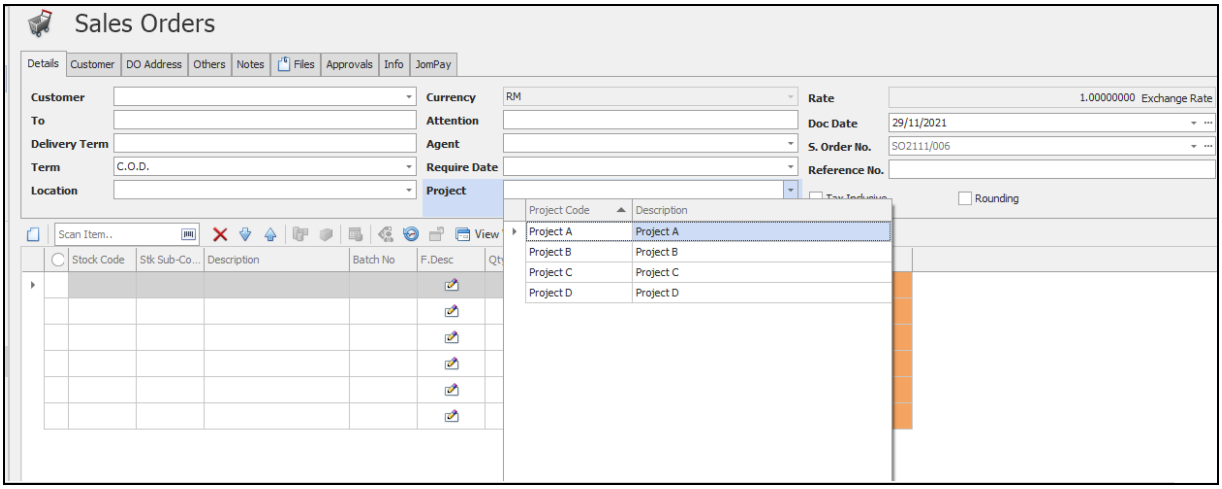


SELECT 2 PROJECTS, ALLOW TO SELECT OTHER PROJECT AND TICK VIEWED BY PROJECT ONLY.

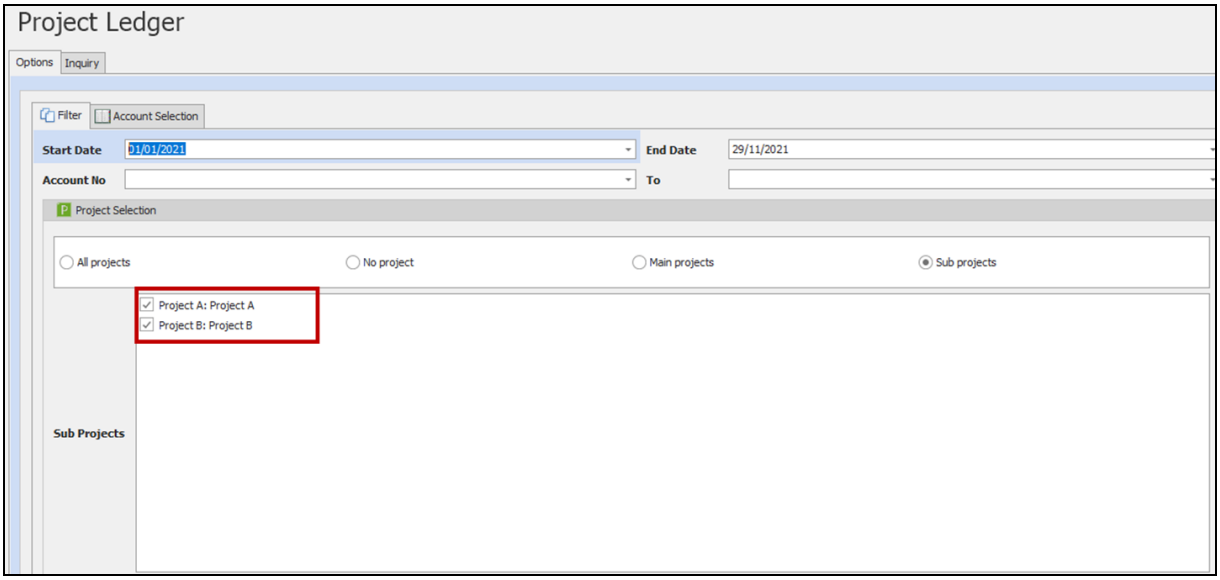
Step 10: If user has set 2 project (Project A & B) in the **User Default Setting**, tick Allow to select other project, tick View by Project only



Step 11: User can view and select other project other thanProject A & Project B

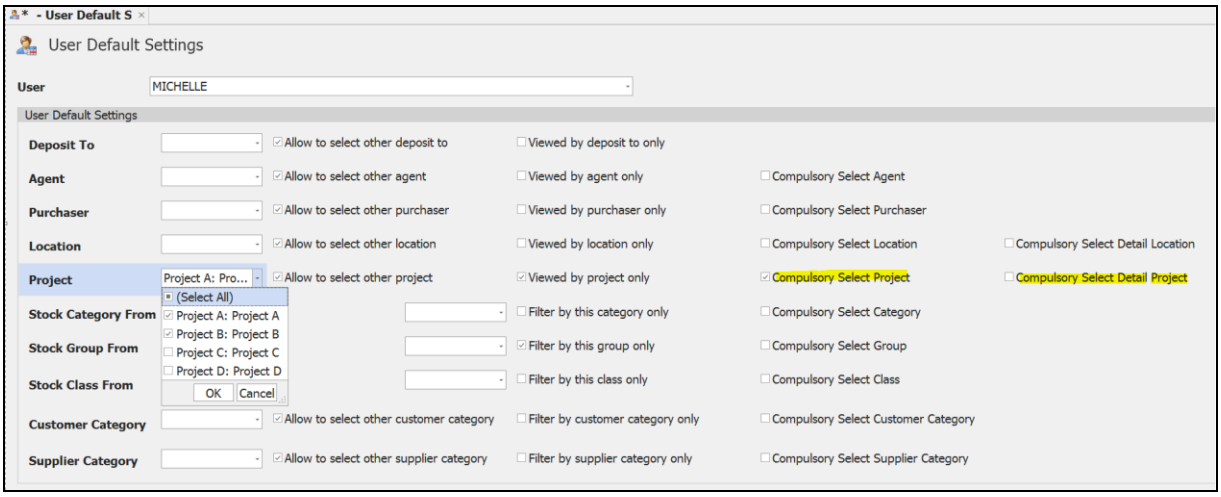


Step 12: But user is not able to view other project's Report since "View by Project Only" is ticked

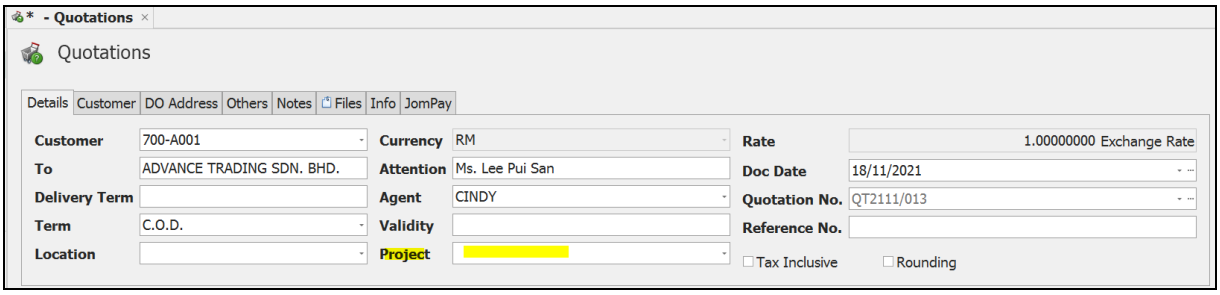


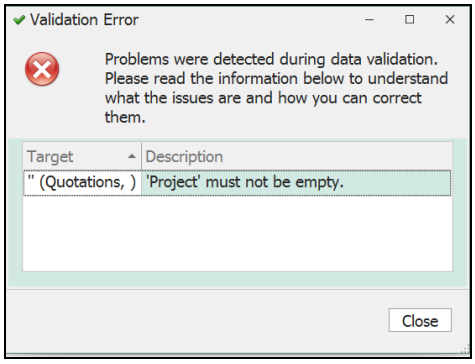
COMPULSORY SELECT PROJECT OR COMPULSORY SELECT DETAIL PROJECT.

Step 13: If user ticked **Compulsory Select Project**

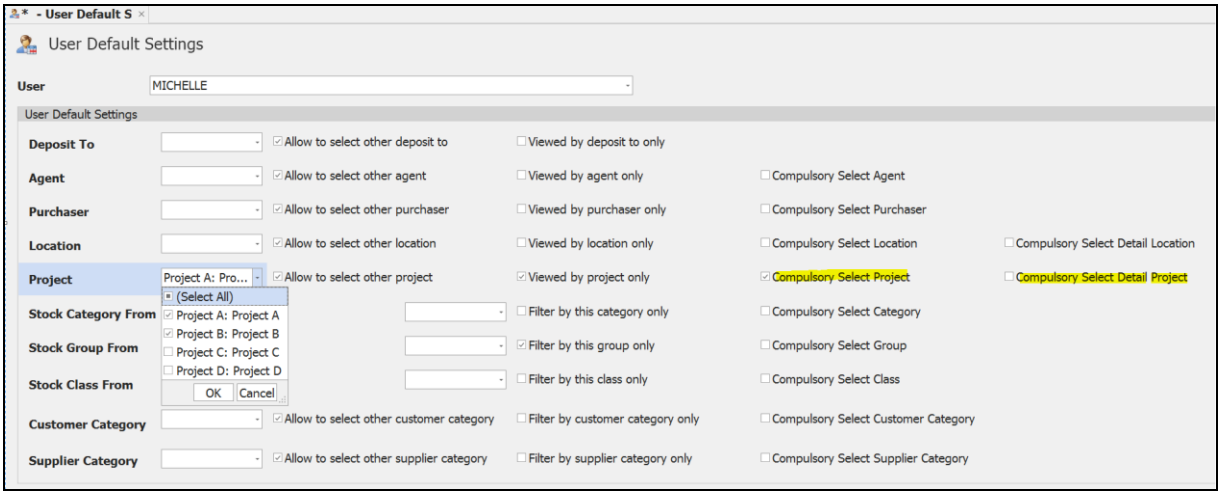
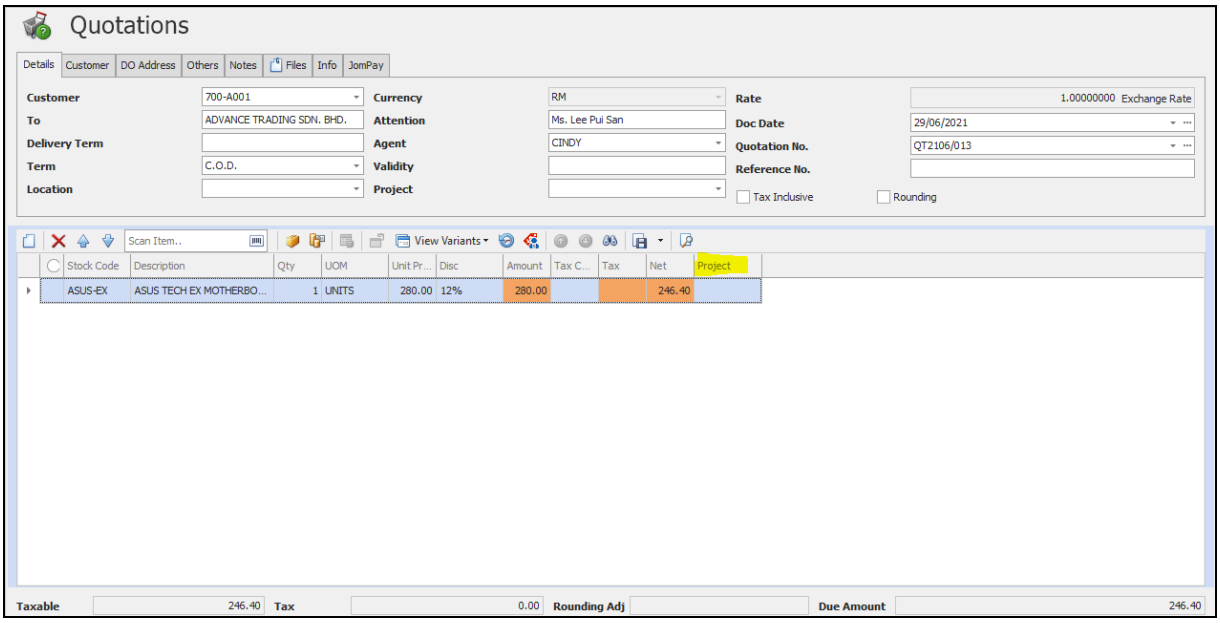
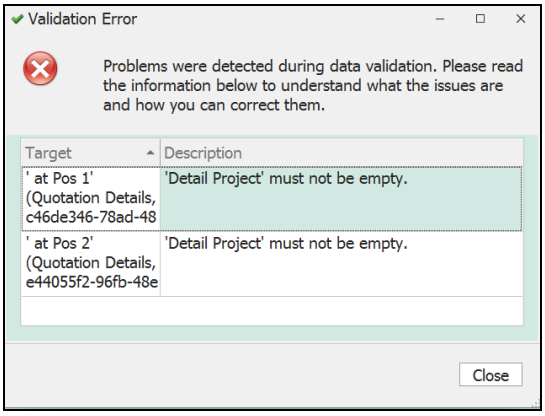


User should update project in the header else error message will be prompt as below and not allow to save





Step 14: If user ticked **Compulsory Select Detail Project**



User should update Detail Project in the transaction else system not allow to save