

HOW TO IMPLEMENT USER DEFAULT SETTING - PROJECT

[1.0]

Jackson Chin

[14/10/2020]



QNE
SOFTWARE

QNE TIPS

Product : QNE Optimum

Version: 1.00

Doc No : 1

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

Amendment Record



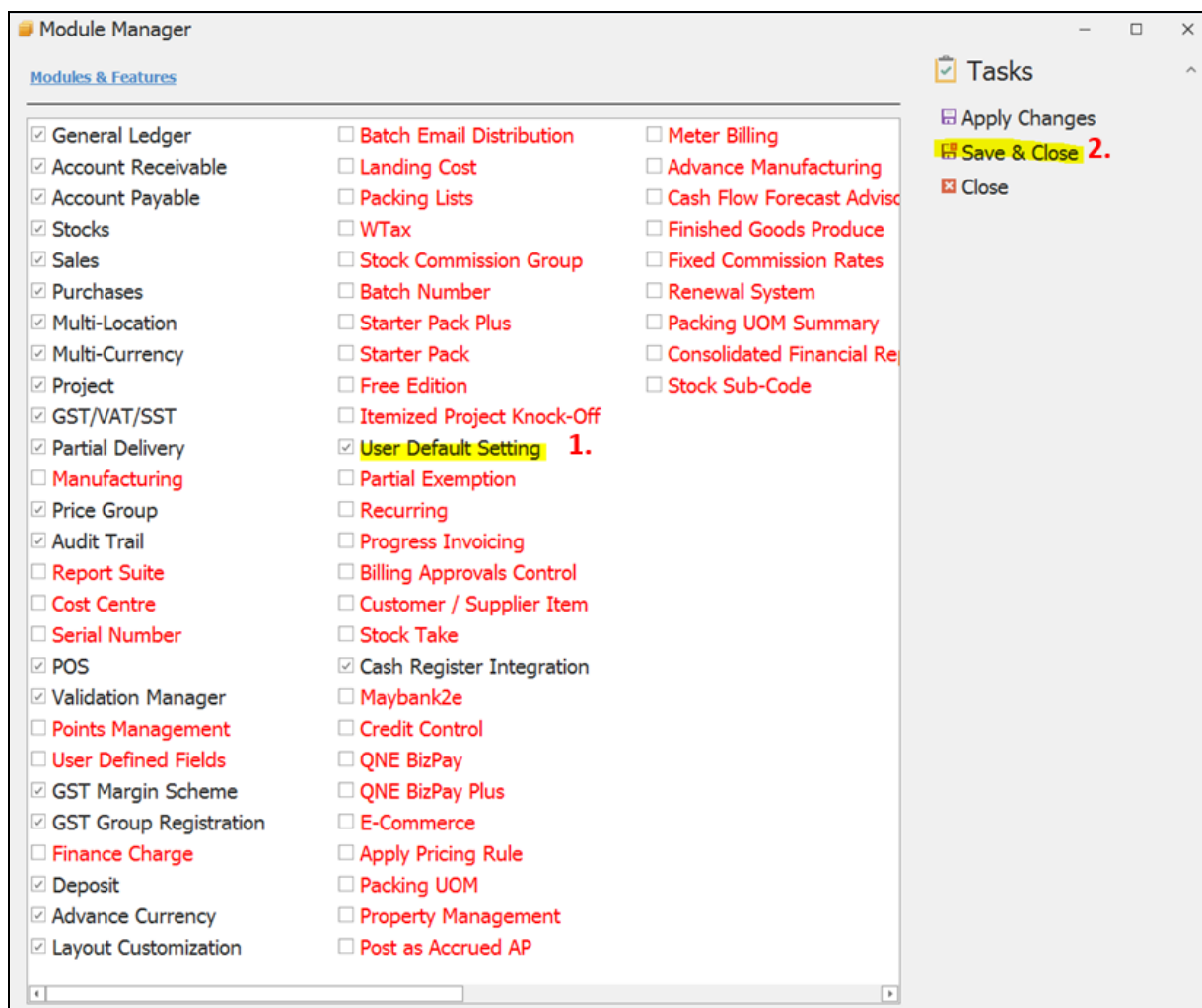
SCENARIO


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

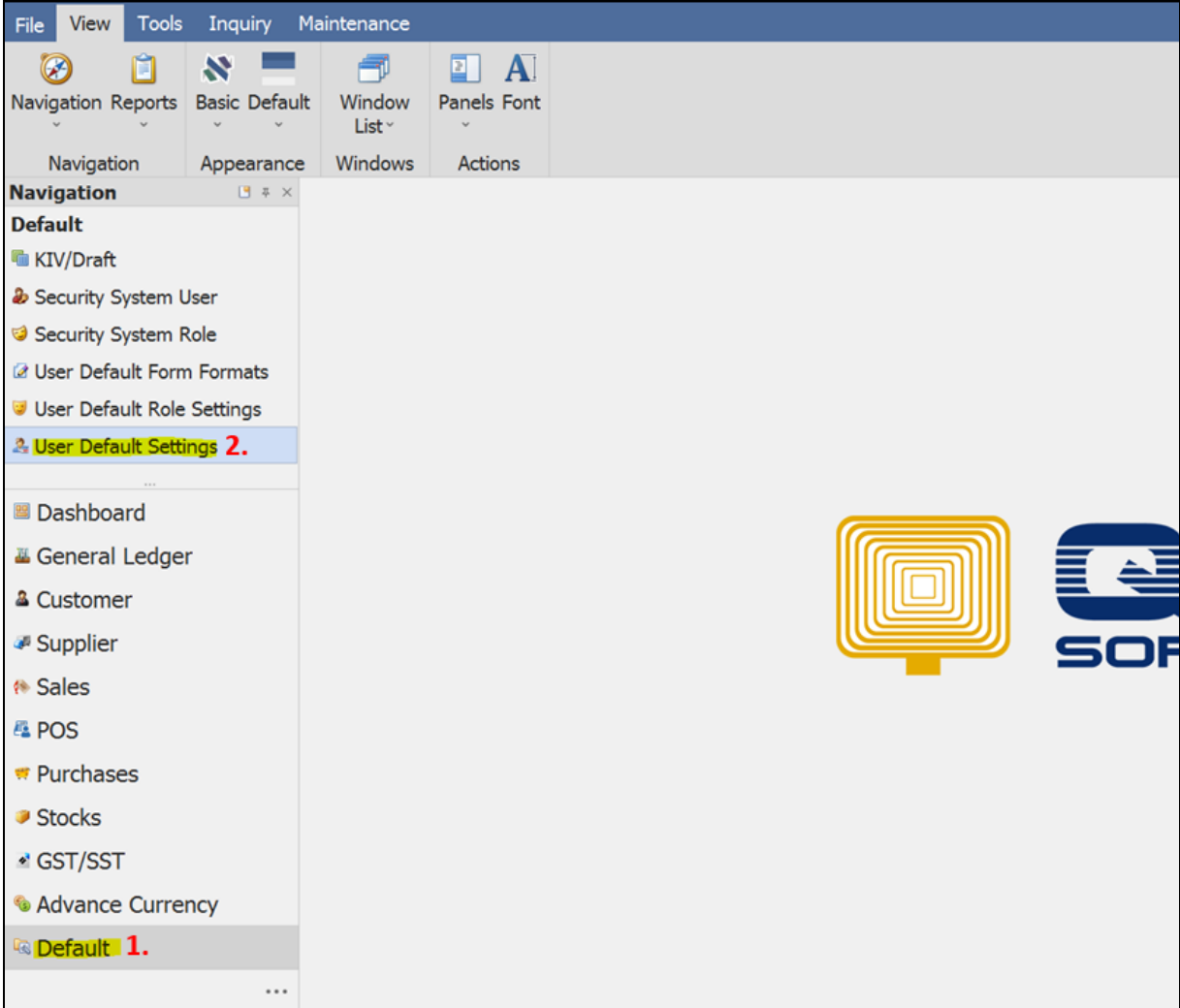
Before Using this **User Default Setting**, please make sure the **User Default Setting** has been ticked and save. This is additional module, extra charges is occurred.


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



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

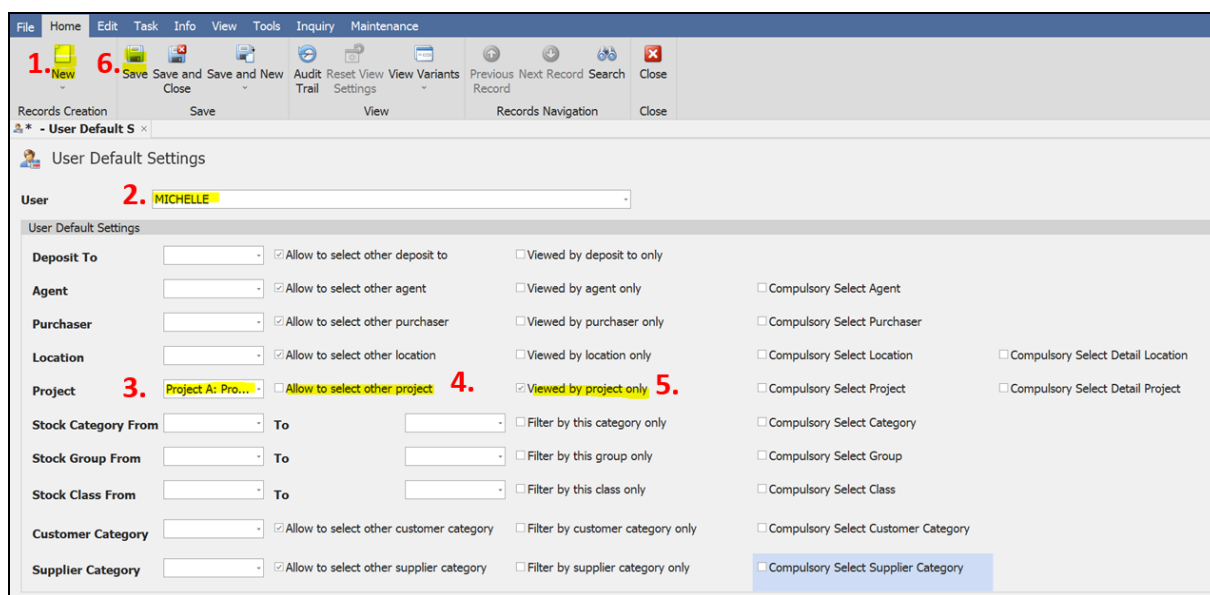


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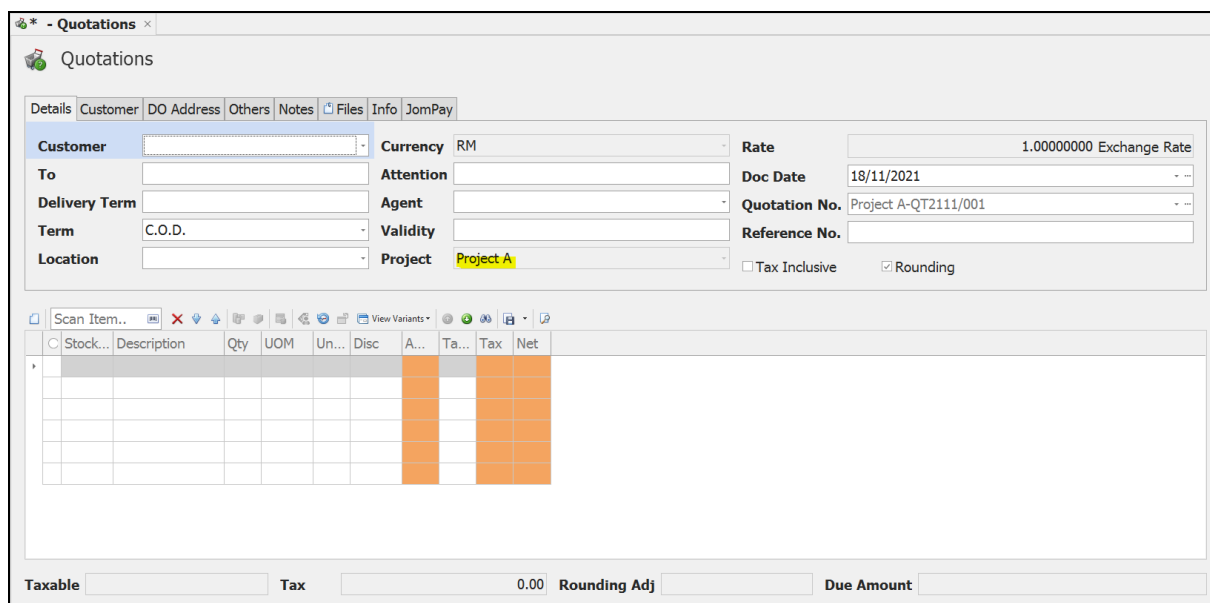
Step 3 : Once you enter the **User Default Setting** click on **New** to create.


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**.

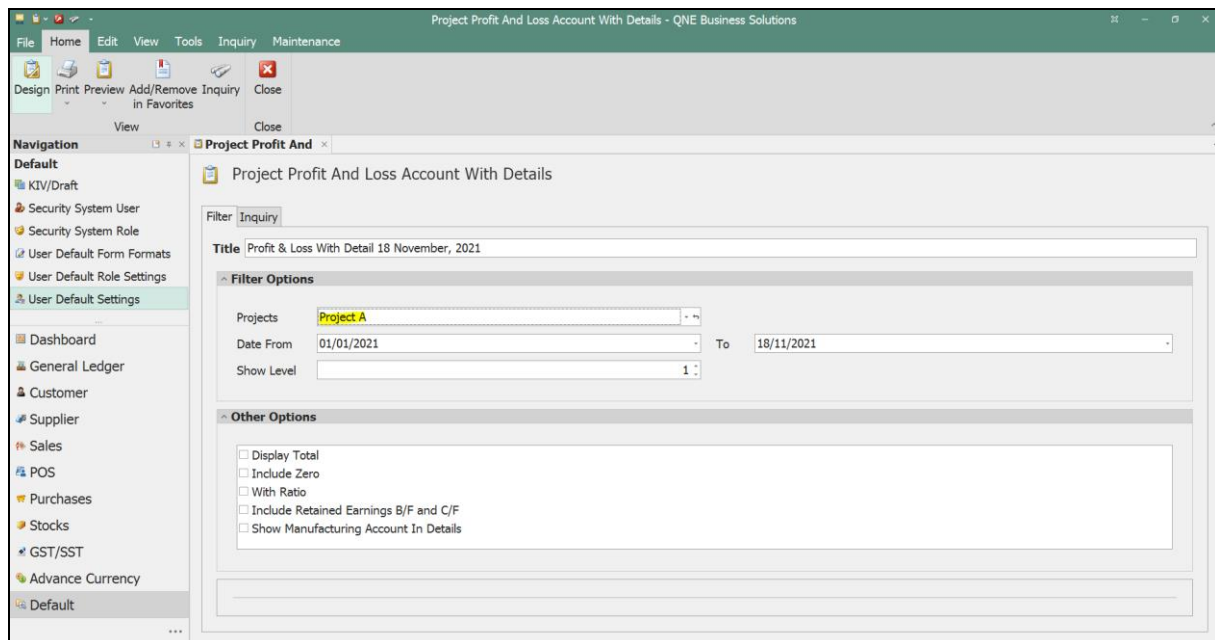


Step 5: When Michelle login the transaction example Sales -> Quotation, system only shows Project A. User not allow to see and choose other projects. Since “Allow to select other project” is unticked.



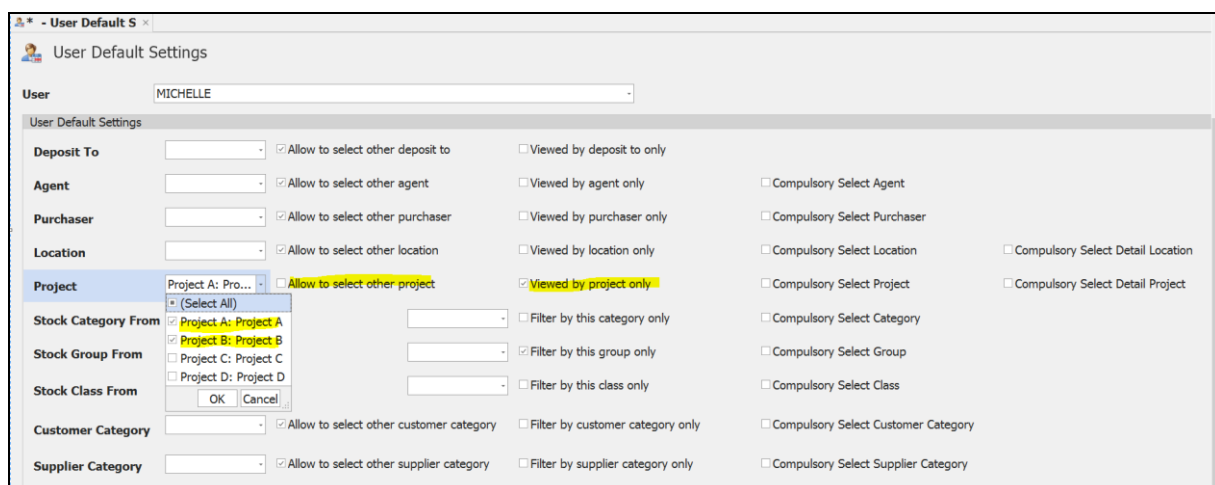
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Step 6: View -> Report -> Project -> Project Profit & Loss Account -> Project Profit & Loss Account with details, user can only view **Project A report** . Since “View by Project is Ticked” means user only can view own project



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





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*** - Quotations**

Quotations

Details Customer DO Address Others Notes Files Info JomPay

Customer [] Currency RM Rate 1.00000000 Exchange Rate

To [] Attention [] Doc Date 17/11/2021

Delivery Term [] Agent [] Quotation No. QT2111/013

Term C.O.D. Validity [] Reference No. []

Location [] Project [] Tax Inclusive ☐ Rounding ☐

C	Stock...	Description	Qty	UOM	Un...	Disc	A...	T
>								

Project... Description

- Project A Project A
- Project B Project B

New Reload

Taxable [] Tax [] 0.00 Rounding Adj [] Due Amount []

Project Profit And Loss Account With Details

Filter Inquiry

Title Profit & Loss With Detail 17 November, 2021

Filter Options

Projects ALL PROJECTS

Project Code	Description
Project A	Project A
Project B	Project B
Project B	Project B

Date From To 17/11/2021

Show Level

Other Options


☐ Display Total

☐ Include Zero

☐ With Ratio

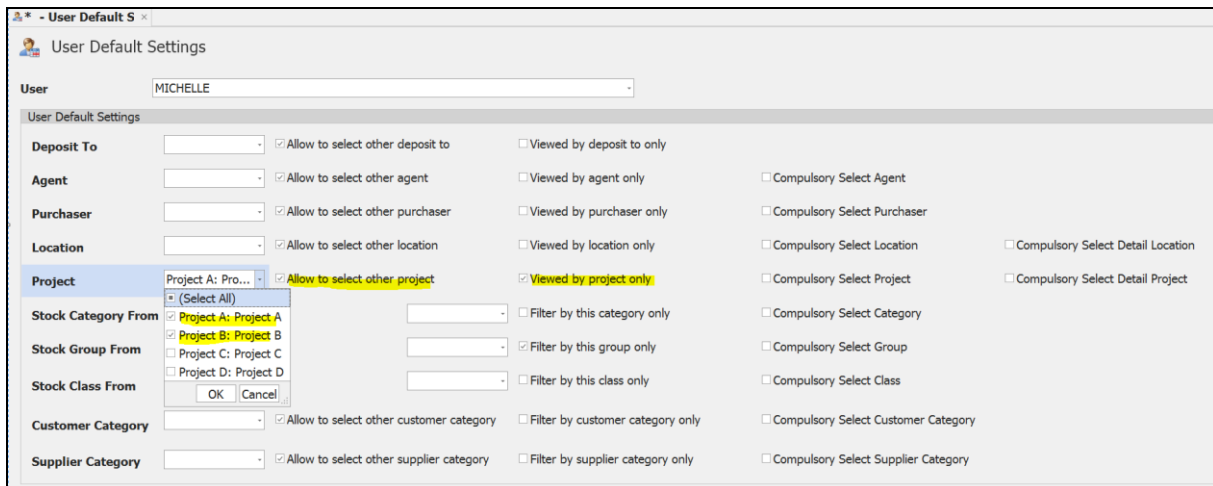
☐ Include Retained Earnings B/F and C/F

☐ Show Manufacturing Account In Details

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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



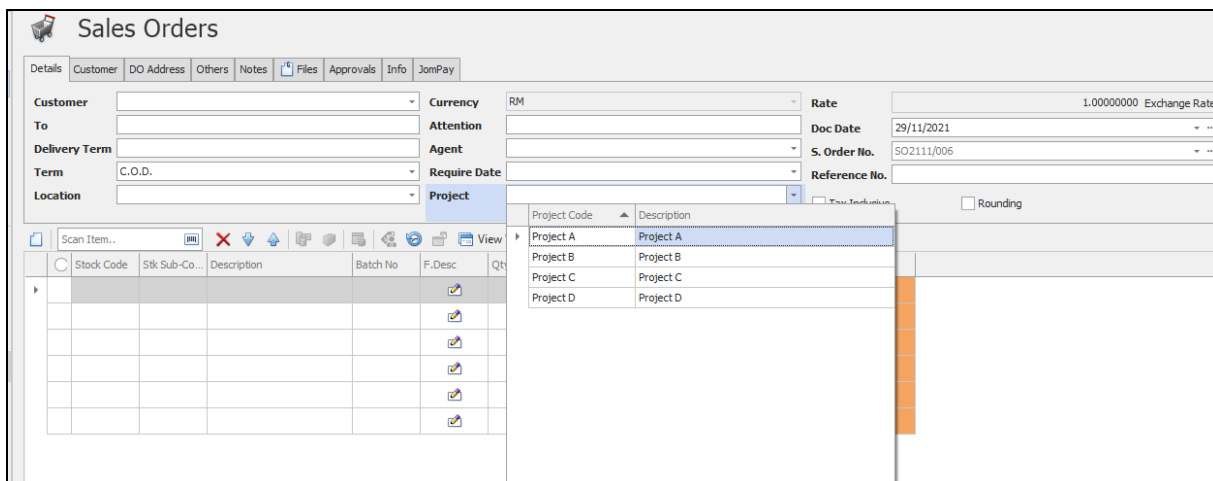
User Default Settings

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 type="checkbox"/> Allow to select other agent	<input type="checkbox"/> Viewed by agent only	<input type="checkbox"/> Compulsory Select Agent
Purchaser	<input type="checkbox"/> Allow to select other purchaser	<input type="checkbox"/> Viewed by purchaser only	<input type="checkbox"/> Compulsory Select Purchaser
Location	<input type="checkbox"/> Allow to select other location	<input type="checkbox"/> Viewed by location only	<input type="checkbox"/> Compulsory Select Location <input type="checkbox"/> Compulsory Select Detail Location
Project	<input checked="" type="checkbox"/> Allow to select other project	<input checked="" type="checkbox"/> Viewed by project only	<input type="checkbox"/> Compulsory Select Project <input type="checkbox"/> Compulsory Select Detail Project
Stock Category From	<input type="checkbox"/> Filter by this category only	<input type="checkbox"/> Compulsory Select Category	
Stock Group From	<input type="checkbox"/> Filter by this group only	<input type="checkbox"/> Compulsory Select Group	
Stock Class From	<input type="checkbox"/> Filter by this class only	<input type="checkbox"/> Compulsory Select Class	
Customer Category	<input type="checkbox"/> Allow to select other customer category <input type="checkbox"/> Filter by customer category only	<input type="checkbox"/> Compulsory Select Customer Category	
Supplier Category	<input type="checkbox"/> Allow to select other supplier category <input type="checkbox"/> Filter by supplier category only	<input type="checkbox"/> Compulsory Select Supplier Category	

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



Sales Orders

Details Customer DO Address Others Notes Files Approvals Info JomPay

Customer: Currency: RM Rate: 1.00000000 Exchange Rate

To: Attention: Doc Date: 29/11/2021

Delivery Term: Agent: S. Order No.: SO2111/006

Term: C.O.D. Require Date: Reference No.:

Location: Project:

Project Code Description

Project A	Project A
Project B	Project B
Project C	Project C
Project D	Project D

Scan Item... ☐ Stock Code ☐ Ssk Sub-Co. ☐ Description ☐ Batch No. ☐ F.Desc ☐ Qt



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

Project Ledger

Options Inquiry

Filter Account Selection

Start Date: 01/01/2021 End Date: 29/11/2021

Account No: To:

Project Selection

☐ All projects ☐ No project ☐ Main projects ☒ Sub projects

☒ Project A: Project A
☒ Project B: Project B

Sub Projects

COMPULSORY SELECT PROJECT OR COMPULSORY SELECT DETAIL PROJECT.

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

User Default Settings

User: MICHELLE

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: ☒ Allow to select other location ☐ Viewed by location only ☐ Compulsory Select Location ☐ Compulsory Select Detail Location

Project: Project A: Project A ☒ 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

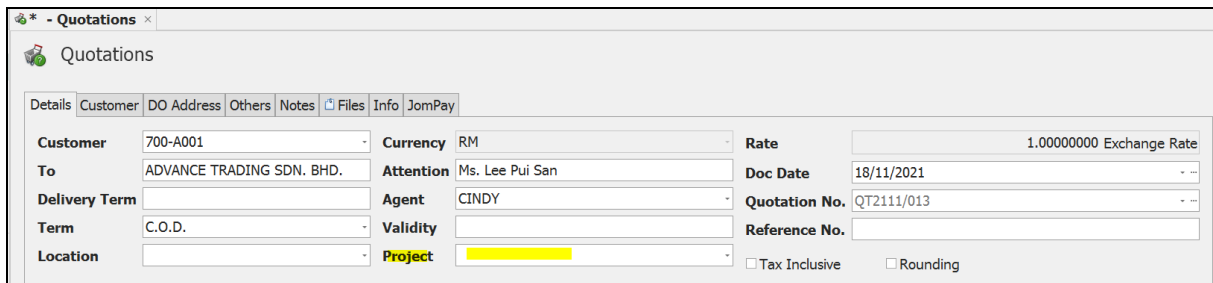
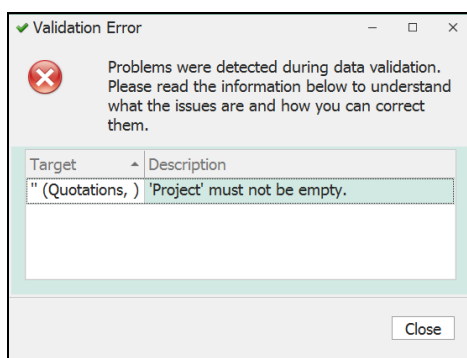
Stock Class From: ☐ Filter by this class only ☐ Compulsory Select Class

Customer Category: ☒ Allow to select other customer category ☐ Filter by customer category only ☐ Compulsory Select Customer Category

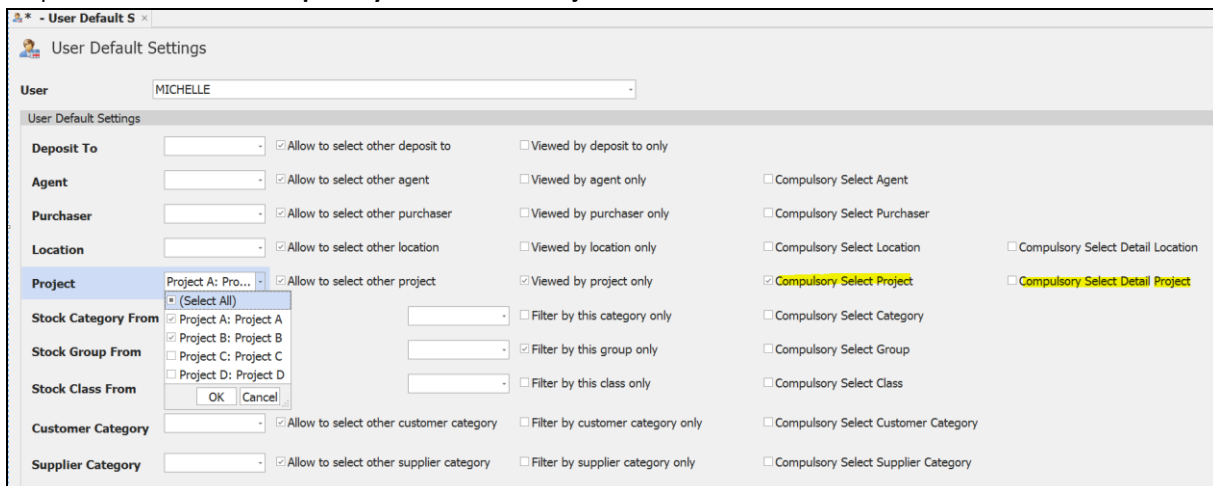
Supplier Category: ☒ Allow to select other supplier category ☐ Filter by supplier category only ☐ Compulsory Select Supplier Category


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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**



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

Quotations

Details Customer DO Address Others Notes Files Info JomPay

Customer: 700-A001 Currency: RM Rate: 1.00000000 Exchange Rate

To: ADVANCE TRADING SON. BHD. Attention: Ms. Lee Pui San Doc Date: 29/06/2021

Delivery Term: C.O.D. Agent: CINDY Quotation No.: QT2106/013

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

Location: Project:

☐ Tax Inclusive ☐ Rounding

Stock Code	Description	Qty	UOM	Unit Pr...	Disc	Amount	Tax C...	Tax	Net	Project
ASUS-EX	ASUS TECH EX MOTHERBO...	1	UNITS	280.00	12%	280.00			246.40	

Taxable: 246.40 Tax: 0.00 Rounding Adj: Due Amount: 246.40

✓ 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' (Quotation Details, c46de346-78ad-48	'Detail Project' must not be empty.
' at Pos 2' (Quotation Details, e44055f2-96fb-48e	'Detail Project' must not be empty.

Close