HOW TO IMPLEMENT USER DEFAULT SETTING -PROJECT

[1.0]

Jackson Chin [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



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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.

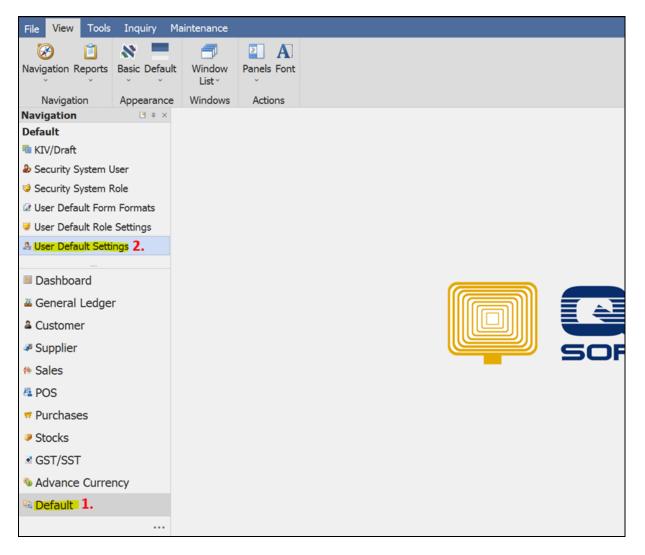
Step 1 : Click on (File -> Modules). Plesae make sure the User Default Setting has ticked.

Module Manager			-	×
Modules & Features			🖻 Tasks	^
Modules & Features	 Batch Email Distribution Landing Cost Packing Lists WTax Stock Commission Group Batch Number Starter Pack Plus Starter Pack Free Edition Itemized Project Knock-Off User Default Setting 1. Partial Exemption Recurring Progress Invoicing Billing Approvals Control Customer / Supplier Item Stock Take Cash Register Integration Maybank2e Credit Control QNE BizPay QNE BizPay Plus E-Commerce Apply Pricing Rule Packing UOM Property Management Post as Accrued AP 	 Meter Billing Advance Manufacturing Cash Flow Forecast Advisc Finished Goods Produce Fixed Commission Rates Renewal System Packing UOM Summary Consolidated Financial Re Stock Sub-Code 	 ✓ Tasks Apply Changes ✓ Save & Close 2. ☑ Close 	
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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.

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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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Delivery Term					Ag	jent				-	Quotation No.	Project A-QT2111/001
Term	C.O.D.				· Va	lidity					Reference No.	
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Taxable			Тах						0.00	Rounding Adj	Du	e Amount



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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

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A User Default Settings				
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Customer				
Supplier	• Other Option	S		
1 Sales				
A POS	Display Tot			
Purchases	With Ratio			
		tained Earnings B/F and C/F		
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▲ GST/SST				
Advance Currency				
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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

* - User Default S ×				
2 User Default	Settings			
User	MICHELLE	•		
User Default Settings				
Deposit To	- Allow to select other deposit to	Viewed by deposit to only		
Agent	- I 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: Pro Allow to select other project	✓ Viewed by project only	Compulsory Select Project	Compulsory Select Detail Project
Stock Category Fro	m Project A: Project A	□ Filter by this category only	Compulsory Select Category	
Stock Group From	Project B: Project B Project C: Project C	☑ Filter by this group only	Compulsory Select Group	
Stock Class From	OK Cancel	□ 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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Step 8: The user is able to select Project A and Project B in their user account but cannot select other projects

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&* - Quotations	×						-			
💰 Quotation	IS									
Details Customer	DO Address Others Note	es 🗂 Files 1	Info lomPay	,						
Customer			Currency				Rate		1.00000000 Exch	ange Rate
То			Attention				Doc Date	17/11/2021		
Delivery Term			Agent			•	Quotation No.	QT2111/013		•
Term	C.O.D.	-	Validity				Reference No.			
Location		•	Project	Ducient	Description		Tax Inclusive	Rounding		
C Stock Dese	x x <th></th> <th></th> <th>Project A Project B</th> <th>Project A Project B</th> <th>New Reloa</th> <th>d</th> <th></th> <th></th> <th></th>			Project A Project B	Project A Project B	New Reloa	d			
Taxable	Тах	۲		0.00	Rounding	ı Adj	Du	e Amount		

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

* - Quotations	Project Profit And ×
📋 Project Pr	ofit And Loss Account With Details
Filter Inquiry	
↑ Filter Option	is With Detail 17 November, 2021
Projects Date From Show Level Other Option Display Tc Include Zc With Ratic	ALL PROJECTS Project Code + Description Project A Project A Project B Proj



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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

2* - Use	er Default S ×					
🔔 Us	ser Default :	Settings				
User		MICHELLE		w		
User De	efault Settings					
Depos	sit To	v	$\ensuremath{\boxdot}$ Allow to select other deposit to	Viewed by deposit to only		
Agent	t	٣	$\ensuremath{\boxtimes}$ Allow to select other agent	□ Viewed by agent only	Compulsory Select Agent	
Purch	aser	*	$\ensuremath{\boxdot}$ Allow to select other purchaser	□ Viewed by purchaser only	Compulsory Select Purchaser	
Locati	ion	×	$\ensuremath{\boxtimes}$ Allow to select other location	□ Viewed by location only	Compulsory Select Location	Compulsory Select Detail Location
Projec	ct	Project A: Pro	Allow to select other project	Viewed by project only	Compulsory Select Project	Compulsory Select Detail Project
Stock	Category Fro	m Project A: Project		□ Filter by this category only	Compulsory Select Category	
Stock	Group From	Project B: Project Project C: Project		☑ Filter by this group only	Compulsory Select Group	
Stock	Class From	Project D: Project OK Cance		□ Filter by this class only	Compulsory Select Class	
Custo	mer Category		Allow to select other customer category	□ Filter by customer category only	Compulsory Select Customer Category	
Suppl	lier Category	*	$\ensuremath{\boxdot}$ Allow to select other supplier category	□ Filter by supplier category only	Compulsory Select Supplier Category	

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

Details	Custome	r DO Addr	ess Ot	ners No	tes 🛛 💾 Fi	es App	provals	Info	JomPay									
Cust	omer							Ŧ	Currency		RM		~]	Rate			1.00000000 Exchange Rate
То									Attention						Doc Date	29/11/2	021	Ψ
Deliv	ery Term								Agent						5. Order No.	SO2111	/006	÷
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Loca	tion							Ŧ	Project			Project Code	- Description	L	Tay Indusius	1	Rounding	
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									2									
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Step 12: But user is not able to view other project's Report since "View by Project Only" is ticked

F	Project Le	edger					
0	ptions Inquiry						
Г							
	C Filter Ac	count Selection					
	Start Date	01/01/2021		• End Da	ite	29/11/2021	
	Account No			т То			
	Project Se	ection					
	All project	s	○ No project	O Main p	rojects	 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**

_					
2	* - User Default S \times				
-	🎎 User Default S	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: Pro · Allow to select other project	☑ Viewed by project only	Compulsory Select Project	Compulsory Select Detail Project
	Stock Category From	n 🖓 Project A: Project A 🚽 🖓	□ Filter by this category only	Compulsory Select Category	
	Stock Group From	Project C: Project C	☑ Filter by this group only	Compulsory Select Group	
	Stock Class From	OK Cancel	□ Filter by this class only	Compulsory Select Class	
	Customer Category	- ZAllow 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

* - Quotations	×					
💰 Quotation	IS					
Details Customer	DO Address Others Notes 🖆 Files	Info JomPay	/			
Customer	700-A001 -	Currency	RM -	Rate	1.0	00000000 Exchange Rate
То	ADVANCE TRADING SDN. BHD.	Attention	Ms. Lee Pui San	Doc Date	18/11/2021	·
Delivery Term		Agent	CINDY -	Quotation No.	QT2111/013	÷
Term	C.O.D	Validity		Reference No.		
Location	•	P <mark>rojec</mark> t		Tax Inclusive	Rounding	

•	 Validatio 	n Error		-		×
	\bigotimes	Pleas	ems were detected during da e read the information below the issues are and how you c	to un	dersta	
	Target		Description			
	" (Quotat	tions,)	'Project' must not be empty.			
					Clos	e

Step 14: If user ticked Compulsory Select Detail Project

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2ω ι	Jser Default S	ettings			
User		MICHELLE	×		
User (Default Settings				
Dep	osit To	- Allow to select other deposit to	Viewed by deposit to only		
Ager	nt	- Allow to select other agent	Viewed by agent only	Compulsory Select Agent	
Purc	haser	- Allow to select other purchaser	□ Viewed by purchaser only	Compulsory Select Purchaser	
Loca	ition	- Allow to select other location	Viewed by location only	Compulsory Select Location	Compulsory Select Detail Location
Proj	ect	Project A: Pro Allow to select other project (Select All)	☑ Viewed by project only	Compulsory Select Project	Compulsory Select Detail Project
Stoc	k Category From	Project A: Project A	□ Filter by this category only	Compulsory Select Category	
Stoc	k Group From		☑ Filter by this group only	Compulsory Select Group	
Stoc	k Class From	OK Cancel	□ Filter by this class only	Compulsory Select Class	
Cust	comer Category	- Allow to select other customer category	□ Filter by customer category only	Compulsory Select Customer Category	
Supp	plier Category	- Allow to select other supplier category	Filter by supplier category only	Compulsory Select Supplier Category	



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

Customer	700-A001		-	Currency			RM		~	Rate			1.000	000000 Exchange Rat
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Location			٣	Project					*	Tax Inclusiv		Rounding		
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