



How to set Compulsory Select Project or Detail Project

Problem Scenario:

End-users may forget to select a project in the transaction which will affect the reporting related to Project module.

Resolution:

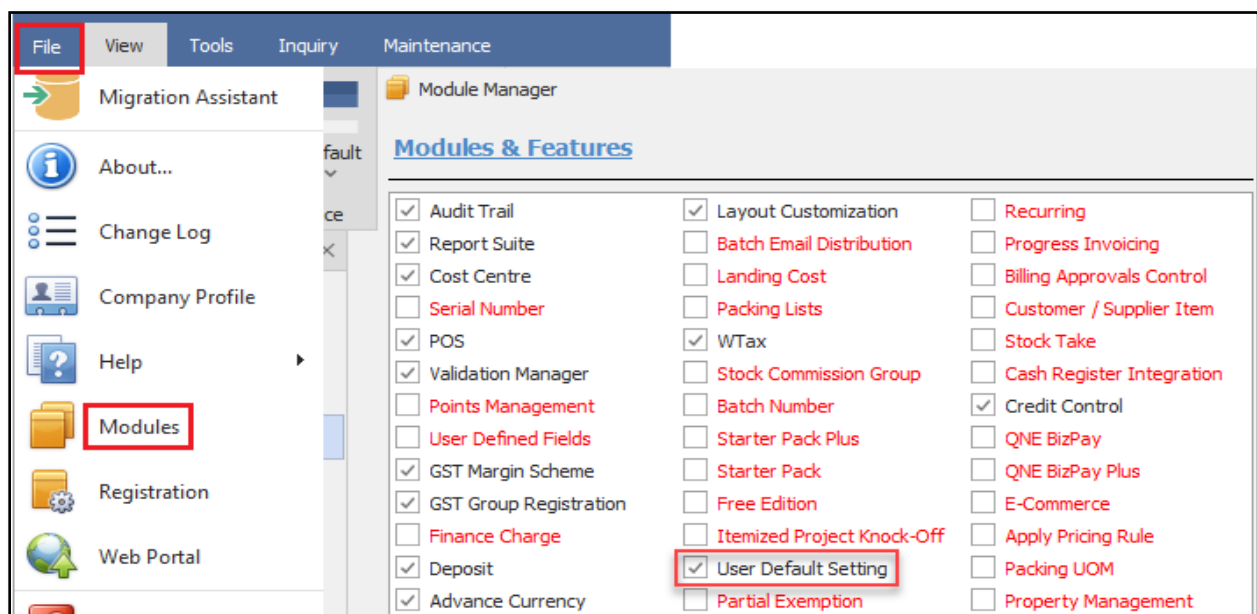
Set Compulsory Select Project or Compulsory Select Detail Project in User Default Settings.

Note:

This is only applicable to the following Optimum Packages:

- ✓ Optimum Financials
- ✓ Optimum Advance
- ✓ Optimum Core
- ✓ Optimum Edge
- ✓ Optimum Ace

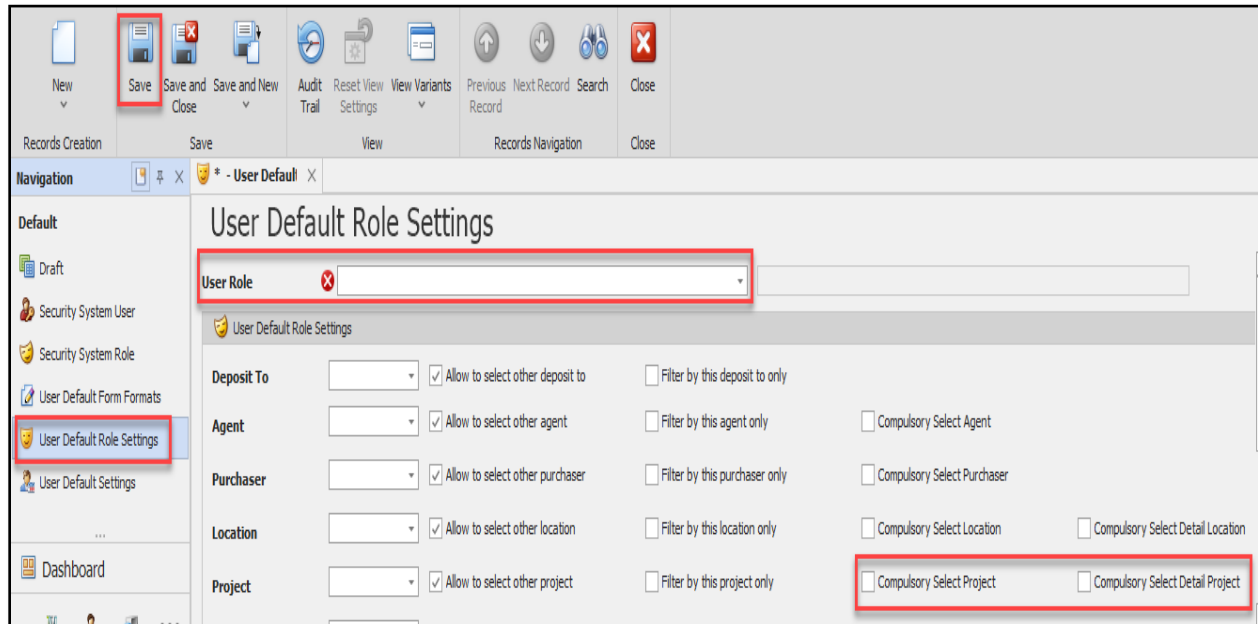
Make sure that the **User Default Setting** is enabled in Module Manager. Go to *File > Modules*.



There are two ways this is done. Per **User Role** or **User**.

Per User Role

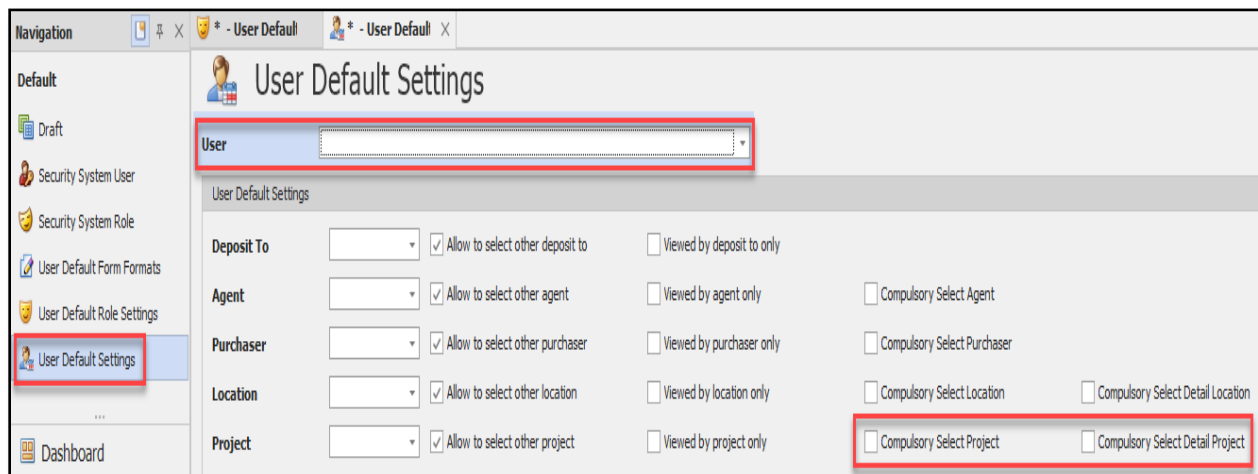
Go to **Maintenance > User Roles > User Default Role Settings**. Select a particular User Role and tick either **Compulsory Select Project** or **Compulsory Select Detail Project** then click **Save**.



The screenshot shows the 'User Default Role Settings' form. The 'User Role' dropdown is highlighted with a red box. The 'Project' section has two checkboxes: 'Compulsory Select Project' and 'Compulsory Select Detail Project', both of which are highlighted with a red box.

Per User

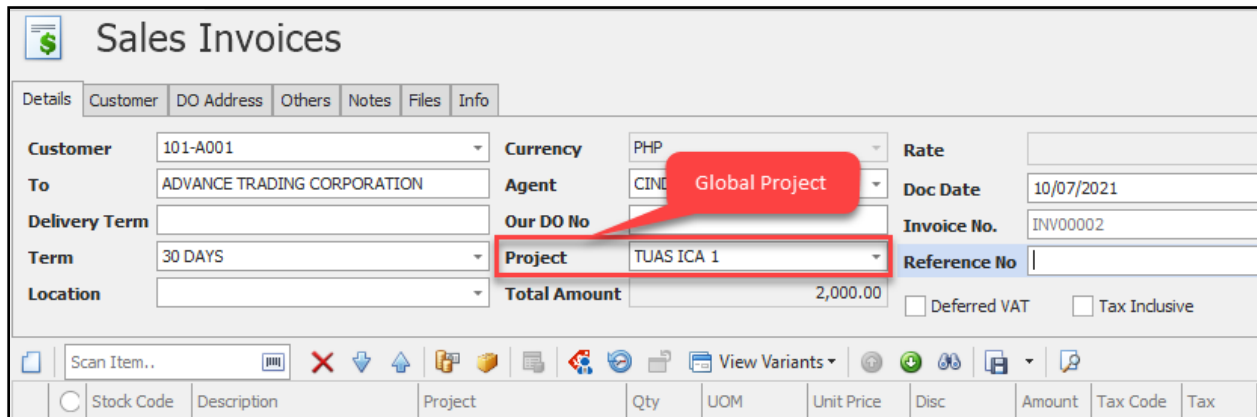
Go to **Maintenance > User Roles > User Default Settings**. Select a particular User and tick either **Compulsory Select Project** or **Compulsory Select Detail Project** then click **Save**.



The screenshot shows the 'User Default Settings' form. The 'User' dropdown is highlighted with a red box. The 'Project' section has two checkboxes: 'Compulsory Select Project' and 'Compulsory Select Detail Project', both of which are highlighted with a red box.

Please note that *Compulsory Select Project* and *Compulsory Select Detail Project* cannot be set at the same time for the same User(s) and User Role(s). Please see below for the difference of the two.

This pertains to Global Project (*Compulsory Select Project*) which means the whole transaction is allocated to one Selected Project.



Sales Invoices

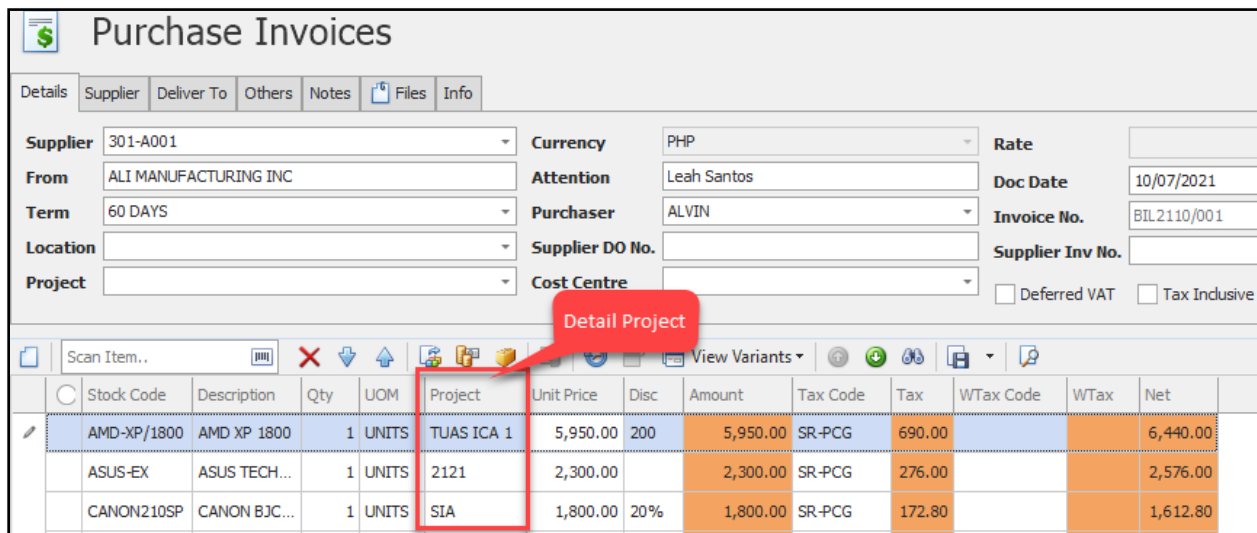
Details Customer DO Address Others Notes Files Info

Customer: 101-A001 Currency: PHP Rate:
 To: ADVANCE TRADING CORPORATION Agent: CINC Doc Date: 10/07/2021
 Delivery Term: Our DO No: Invoice No.: INV00002
 Term: 30 DAYS Project: TUAS ICA 1 Reference No.:
 Location: Total Amount: 2,000.00
☐ Deferred VAT ☐ Tax Inclusive

Scan Item.. View Variants

Stock Code	Description	Project	Qty	UOM	Unit Price	Disc	Amount	Tax Code	Tax
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While this one pertains to Detail Project (*Compulsory Select Detail Project*) and it allows multiple Projects in a single transaction.



Purchase Invoices

Details Supplier Deliver To Others Notes Files Info

Supplier: 301-A001 Currency: PHP Rate:
 From: ALI MANUFACTURING INC Attention: Leah Santos Doc Date: 10/07/2021
 Term: 60 DAYS Purchaser: ALVIN Invoice No.: BIL2110/001
 Location: Supplier DO No.: Supplier Inv No.:
 Project: Cost Centre:
☐ Deferred VAT ☐ Tax Inclusive

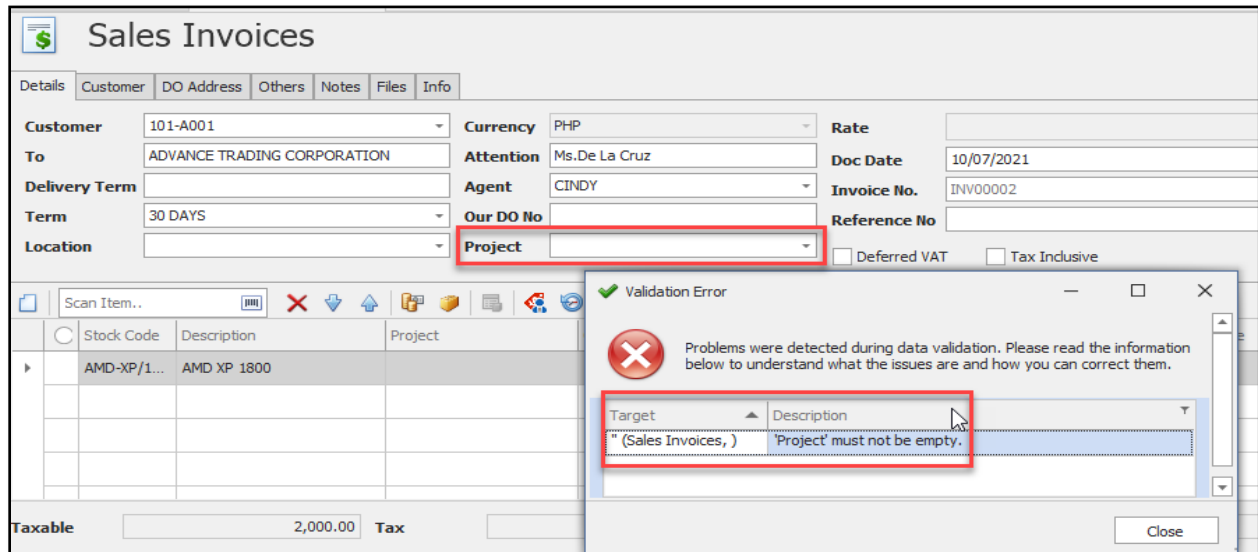
Scan Item.. View Variants

Stock Code	Description	Qty	UOM	Project	Unit Price	Disc	Amount	Tax Code	Tax	WTax Code	WTax	Net
AMD-XP/1800	AMD XP 1800	1	UNITS	TUAS ICA 1	5,950.00	200	5,950.00	SR-PCG	690.00			6,440.00
ASUS-EX	ASUS TECH...	1	UNITS	2121	2,300.00		2,300.00	SR-PCG	276.00			2,576.00
CANON210SP	CANON BJC...	1	UNITS	SIA	1,800.00	20%	1,800.00	SR-PCG	172.80			1,612.80

How does it work?

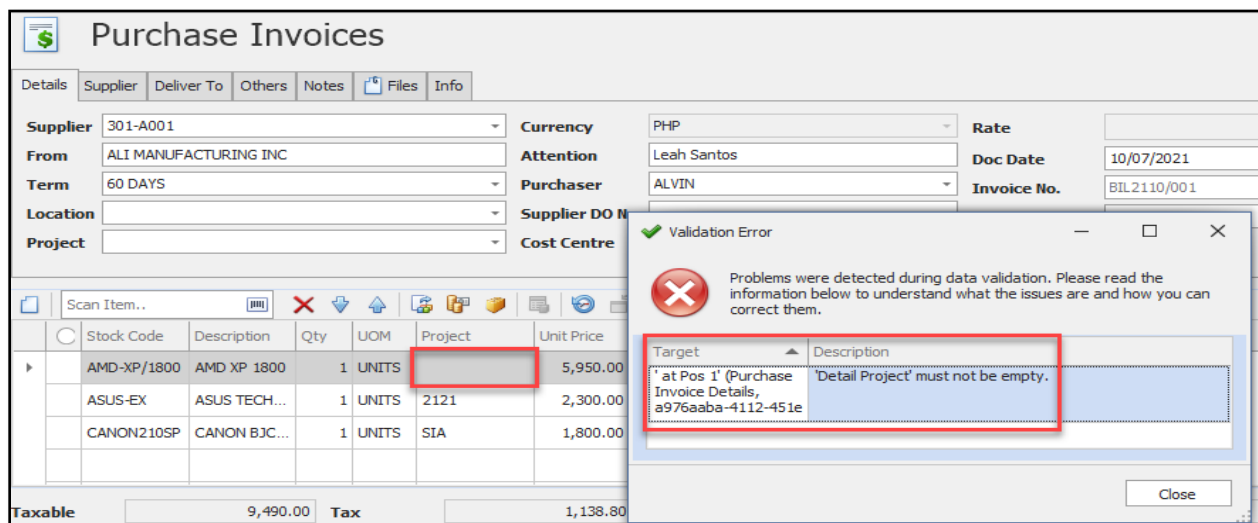
If the user forgot to select a Project or Detail Project(s), a validation error will appear to remind the user to select a Project upon saving the transaction.

Compulsory Select Project



The screenshot shows the 'Sales Invoices' form. The 'Project' field is highlighted with a red box. A 'Validation Error' dialog box is open, displaying the message: 'Problems were detected during data validation. Please read the information below to understand what the issues are and how you can correct them.' The dialog lists the error: 'Target: (Sales Invoices,) Description: Project must not be empty.'

Compulsory Select Detail Project



The screenshot shows the 'Purchase Invoices' form. The 'Project' field is highlighted with a red box. A 'Validation Error' dialog box is open, displaying the message: 'Problems were detected during data validation. Please read the information below to understand what the issues are and how you can correct them.' The dialog lists the error: 'Target: at Pos 1 (Purchase Invoice Details, a976aaba-4112-451e Description: Detail Project must not be empty.'



For further concerns regarding this matter, please contact support to assist you or create ticket thru this link <https://support.qne.com.ph>