

# 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 <u>Compulsory Select Project</u> or <u>Compulsory Select Detail Project</u> 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*.

File	View	iew Tools Inquiry		Maintenance		
Ŷ	Migration Assistant		nt 📃	<del> Module Manager</del>		
1	About	About fault		Modules & Features		
:=	Change	Change Log		Audit Trail	Layout Customization	Recurring
ō —	change	LUG	~	Report Suite	Batch Email Distribution	Progress Invoicing
2	Compan	v Drofilo		✓ Cost Centre	Landing Cost	Billing Approvals Control
	Company Profile			Serial Number	Packing Lists	Customer / Supplier Item
				✓ POS	V WTax	Stock Take
	Help		•	✓ Validation Manager	Stock Commission Group	Cash Register Integration
		•	_	Points Management	Batch Number	✓ Credit Control
	Modules			User Defined Fields	Starter Pack Plus	QNE BizPay
				GST Margin Scheme	Starter Pack	QNE BizPay Plus
£53	Registrat	ion		GST Group Registration	Free Edition	E-Commerce
				Finance Charge	Itemized Project Knock-Off	Apply Pricing Rule
	Web Portal Web			✓ Deposit	User Default Setting	Packing UOM
				Advance Currency	Partial Exemption	Property Management

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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 <u>User Role</u> and tick either *Compulsory Select Project* or *Compulsory Select Detail Project* then click *Save*.

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Records Creation	Save	View	Records Navigation	Close								
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Default	User Default Role Settings											
Draft	User Role	8		•								
Security System User	🤯 User Defau	t Role Settings										
Security System Role	Deposit To		low to select other deposit to	Filter by this deposit to only								
User Default Form Formats	Agent		low to select other agent	Filter by this agent only	Compulsory Select Agent							
🎍 User Default Settings	Purchaser	- V Al	low to select other purchaser	Filter by this purchaser only	Compulsory Select Purchaser							
	Location		low to select other location	Filter by this location only	Compulsory Select Location	Compulsory Select Detail Location						
😬 Dashboard	Project	Al	low to select other project	Filter by this project only	Compulsory Select Project	Compulsory Select Detail Project						
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#### Per User

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

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Default	🎥 User Default Settings											
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凝 Security System User	User Default Settings											
🥹 Security System Role	Deposit To	▼ √ Allow to select other deposit to	Viewed by deposit to only									
User Default Form Formats User Default Role Settings	Agent	✓ Allow to select other agent	Viewed by agent only	Compulsory Select Agent								
Ser Default Note Sectings	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							
III Dashboard	Project	▼ Allow to select other project	Viewed by project only	Compulsory Select Project	Compulsory Select Detail Project							

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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 Custome	r DO Address	Others	Notes	Files	Info							
Customer 101-A001 -					Currency	PHP		~	Rate			
То	TO ADVANCE TRADING CORPORATION				Agent	CINE	CINI Global Project 👻		Doc Date	10/07/2021		
Delivery Term						Our DO No				Invoice No.	INV00002	
Term	30 DAYS				-	Project	TUAS ICA 1 Reference No					
Location					Ŧ	Total Amount			2,000.00	Deferred VA	T Tax Indusive	
Scan Item.	📋 🛛 Scan Item 📖 🗙 🖑 🍦 📴 🥔 🖏 🥵 🥪 📄 🗔 View Variants 🗸 🎯 🞱 🚯 📴 🗸											
C Stock Code Description Project							Qty	UOM	Unit Price	Disc	Amount Tax Code Tax	

While this one pertains to Detail Project (*Compulsory Select Detail Project*) and it allows multiple Projects in a single transaction.

\$	S Purchase Invoices														
Deta	Details Supplier Deliver To Others Notes 15 Files Info														
Sup	plie	r 301-A001				-	Currency	P	HP			- Rat	te		
Fro	m	ALI MANUF/	ACTURING INC				Attention	L	eah Santos			Doc	Date	10/07/2021	
Ter	m	60 DAYS				*	Purchaser	A	LVIN			* Inv	oice No.	BIL2110/001	
Loc	atio	n				-	Supplier DO No.					Sup	Supplier Inv No.		
Pro	ject					-	Cost Centre 🔹					- L	Deferred VAT	Tax Inclusive	
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	$\bigcirc$	Stock Code	Description	Qty	UOM	Project	Unit Price	Disc	Amount	Tax Code	Тах	WTax Co	ode WTax	Net	
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# 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

🔋 Sa	Sales Invoices											
Details Custo	ner DO Address Others Notes Files	Info										
Customer	101-A001	- Curi	rency	PHP		Ŧ	Rate					
То	ADVANCE TRADING CORPORATION	Atte	ention	Ms.De	e La Cruz		Doc Date	10/07	/2021			
Delivery Ter	n		ent	CIND	r	Ŧ	Invoice No.	INV00002				
Term	30 DAYS	• Our	DO No			_	Reference No					
Location	Location					Ŧ	Deferred VA	т [	Tax Inclusive			
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► AMD-	P/1 AMD XP 1800				below to under	stand	what the issues a	are and	how you can con	rect them.		
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							ť must not be emp	hờ.				
Taxable	2,000.00 <b>Tax</b>			_						Close		

## Compulsory Select Detail Project

\$	S Purchase Invoices												
Deta	Details Supplier Deliver To Others Notes 11 Files Info												
Sup	plie	r 301-A001					Currency	PHP ~	Rate				
Fro	m	ALI MANUF	ACTURING INC				Attention	Leah Santos	Doc Date	10/07/2021			
Ter	m	60 DAYS -					Purchaser	ALVIN -	Invoice No.	BIL2110/001			
	ject Sca		IIII	× 🌵			Supplier DO N Cost Centre	Validation Error					
	$\bigcirc$	Stock Code	Description	Qty	UOM	Project	Unit Price	Target   Description	-				
•		AMD-XP/1800	AMD XP 1800	1	UNITS		5,950.00	at Pos 1' (Purchase 'Detail Project' must n	ot be empty.				
		ASUS-EX	ASUS TECH	1	UNITS	2121	2,300.00	Invoice Details, a976aaba-4112-451e					
		CANON210SP	CANON BJC	1	UNITS	SIA	1,800.00						
Таха	ble		9,490.	00 Ta	×		1,138.80			Close			



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

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