



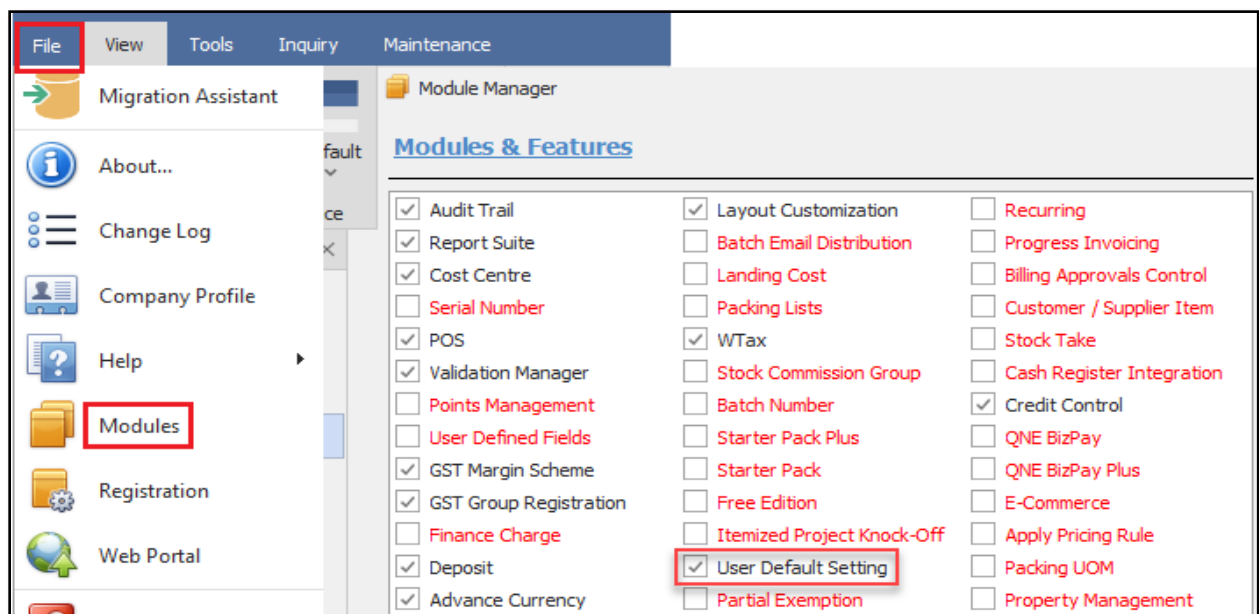
How to Set Compulsory Select Cost Centre

Overview:

Users may forget to select a Cost Centre in the transaction which will affect the reporting related to Cost Centre. To prevent this, selecting a Cost Centre can be set up as compulsory.

Procedure:

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



Note:

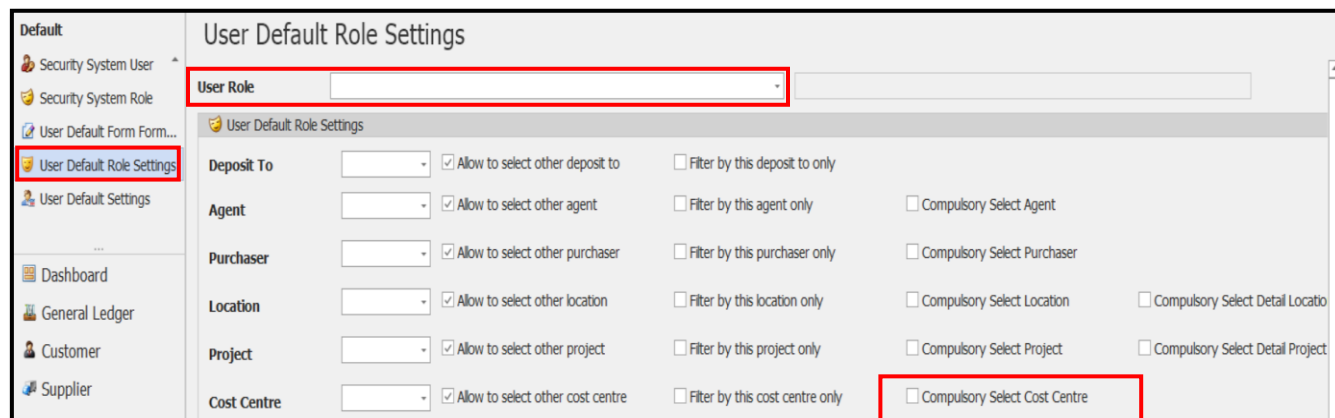
This is only applicable to the following Optimum Packages:

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

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

Per User Role

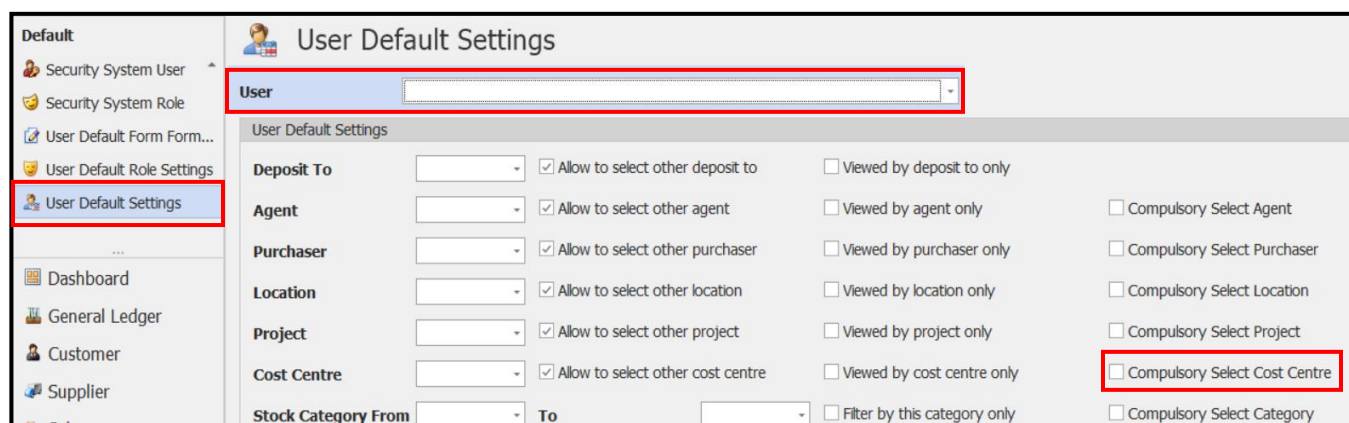
Go to **Maintenance > User Roles > User Default Role Settings**. Select a particular User Role and tick *Compulsory Select Cost Centre* then click **Save**.



The screenshot shows the 'User Default Role Settings' form. On the left sidebar, 'User Default Role Settings' is highlighted. The main form has a 'User Role' dropdown at the top, which is highlighted with a red box. Below it, there are several rows of settings for Deposit To, Agent, Purchaser, Location, Project, and Cost Centre. Each row has a dropdown menu, a checked 'Allow to select other' checkbox, and a 'Filter by this' checkbox. The 'Compulsory Select Cost Centre' checkbox at the bottom right is highlighted with a red box.

Per User

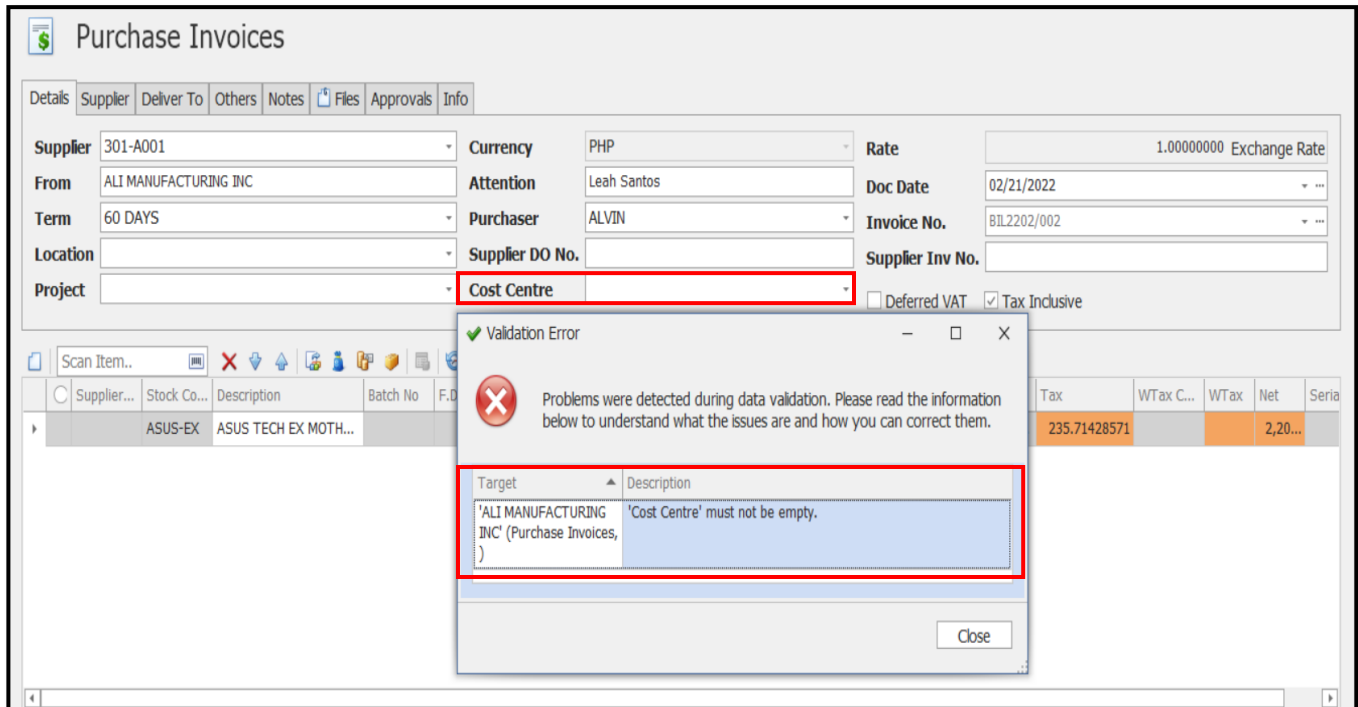
Go to **Maintenance > User Roles > User Default Settings**. Select a particular User and tick *Compulsory Select Cost Centre* then click **Save**.



The screenshot shows the 'User Default Settings' form. On the left sidebar, 'User Default Settings' is highlighted. The main form has a 'User' dropdown at the top, which is highlighted with a red box. Below it, there are several rows of settings for Deposit To, Agent, Purchaser, Location, Project, and Cost Centre. Each row has a dropdown menu, a checked 'Allow to select other' checkbox, and a 'Viewed by' checkbox. The 'Compulsory Select Cost Centre' checkbox at the bottom right is highlighted with a red box.

Application:

If the user forgot to select a Cost Centre, a validation error will appear upon saving the transaction to remind the user to select a Cost Centre.



The screenshot displays the 'Purchase Invoices' form in the QNE software. The 'Cost Centre' field is highlighted with a red rectangle. A 'Validation Error' dialog box is open, showing a red 'X' icon and 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 box contains a table with the following data:

Target	Description
'ALI MANUFACTURING INC' (Purchase Invoices,)	'Cost Centre' must not be empty.

The dialog box also has a 'Close' button at the bottom right.



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