



How to set default Agent per User

Overview:

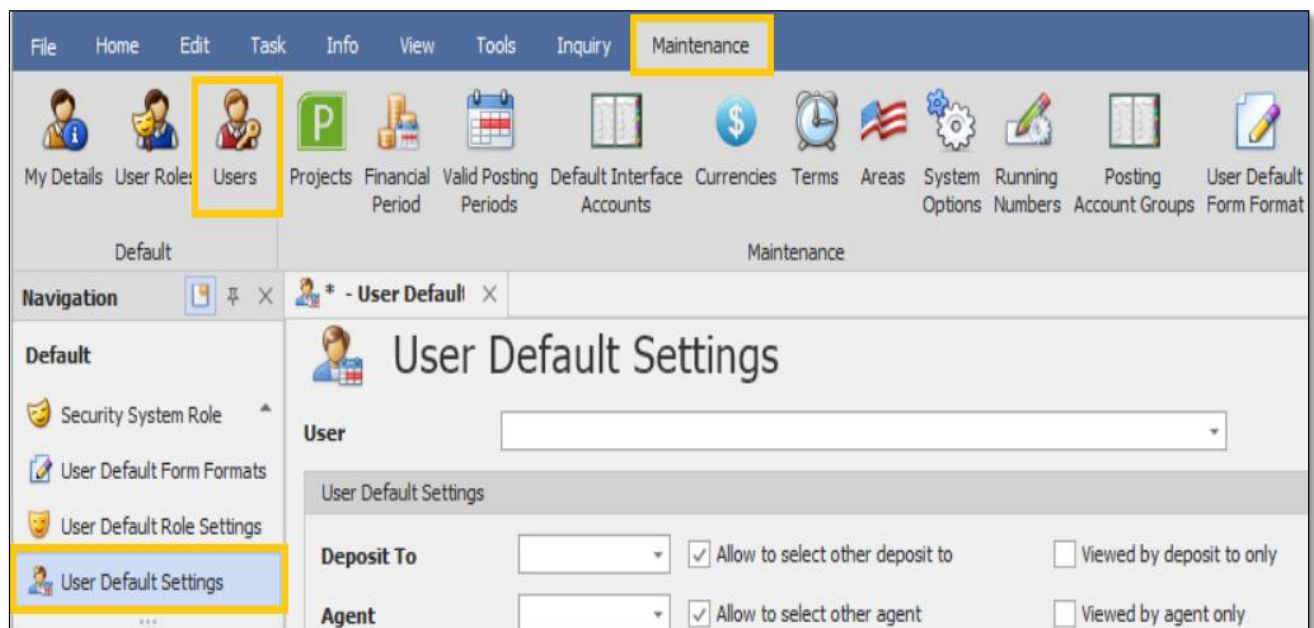
Agent can be selected automatically in any Customer-related Transaction Forms and Reports per User Account. This can be done by using User Default Settings, which the Agent will set as the default for the specific user.

Note: This is only applicable to the following Optimum Packages:

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

Procedure:

1. Go to **Maintenance > Users > User Default Settings**.



2. Select a particular **User** and choose the default **Agent**. Once done, click **Save** or **Save and Close**.

The screenshot shows the 'User Default Settings' window. The top toolbar contains buttons for 'New', 'Save', 'Save and Close', 'Save and New', 'Reset View Settings', 'View Variants', 'Audit Trail', 'Previous Record', 'Next Record', 'Search', and 'Close'. The 'Save and Close' button is highlighted with a yellow box. Below the toolbar, the 'User' dropdown is set to 'MJ'. The 'Agent' dropdown is also highlighted with a yellow box and set to 'MJ'. Other fields like 'Deposit To' and 'Purchaser' are visible with their respective settings.

Application:

Agent is now selected automatically in Customer Transaction Forms and Report Filtering.

The screenshot shows the 'Sales Invoices' window. The 'Details' section contains fields for 'Customer', 'Currency', 'Rate', 'To', 'Attention', 'Doc Date', 'Delivery Term', 'Agent', 'Invoice No.', 'Term', 'Our DO No.', 'Reference No.', 'Location', and 'Project'. The 'Agent' dropdown is highlighted with a yellow box and set to 'MJ'. A yellow arrow points to the 'Due Amount' field at the bottom of the window.



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