How to set default Agent per User

Overview:

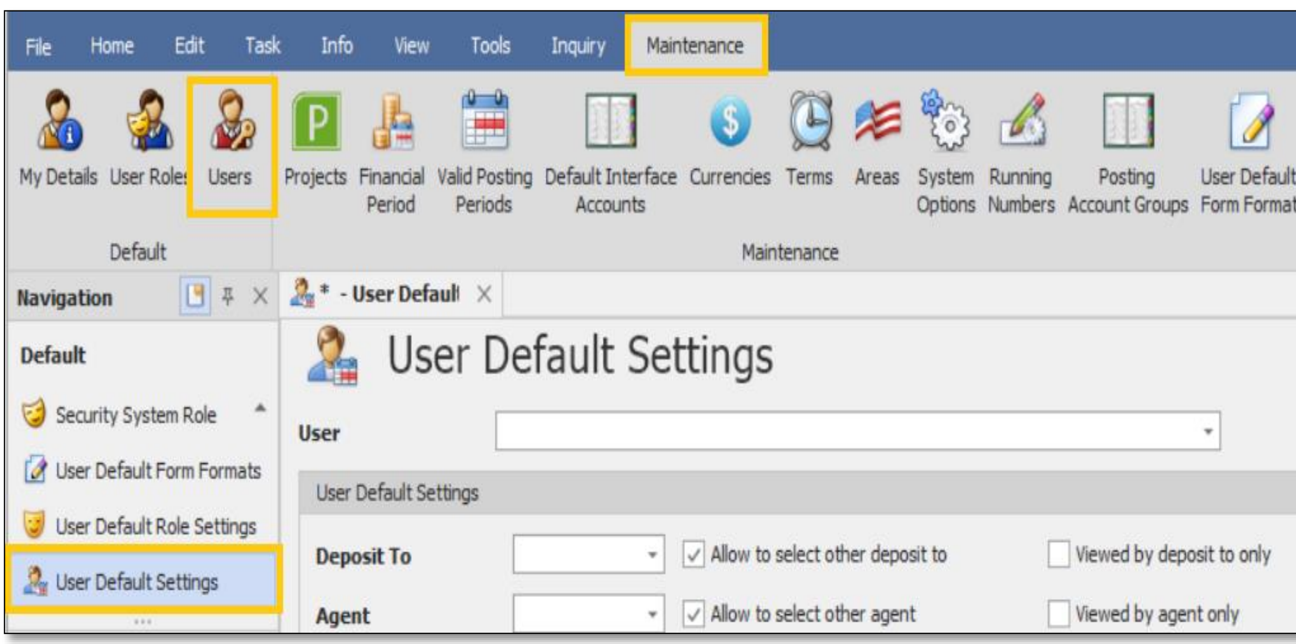
Agent can be selected automatically in any Customer-related Transaction Forms and Reports per User Account. This can be done by using User Default Settings, which the Agent will set as the default for the specific user.

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

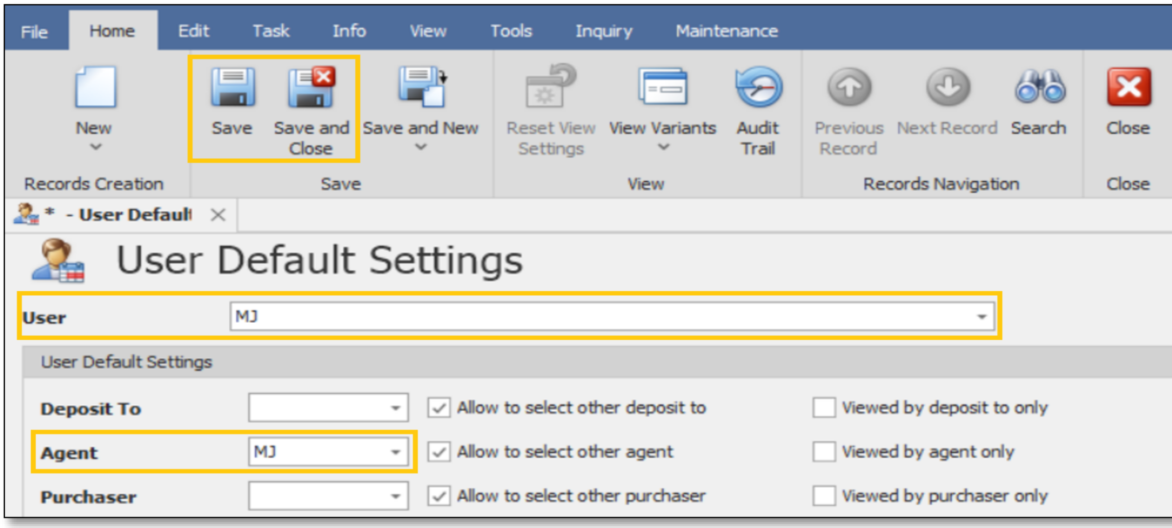
- Optimum Financials
- Optimum Advance
- Optimum Core
- Optimum Edge
- Optimum Ace

Procedure:

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

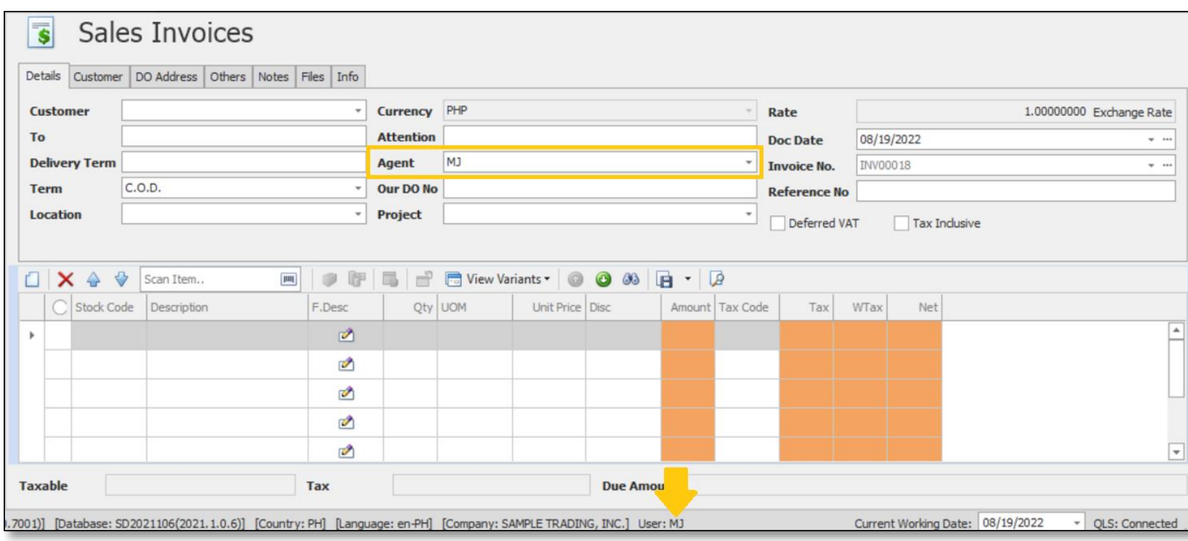


2. Select a particular **User** and choose the default **Agent**. Once done, click **Save** or **Save and Close.**



Application:

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



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