



How to set default Purchaser per User

Overview:

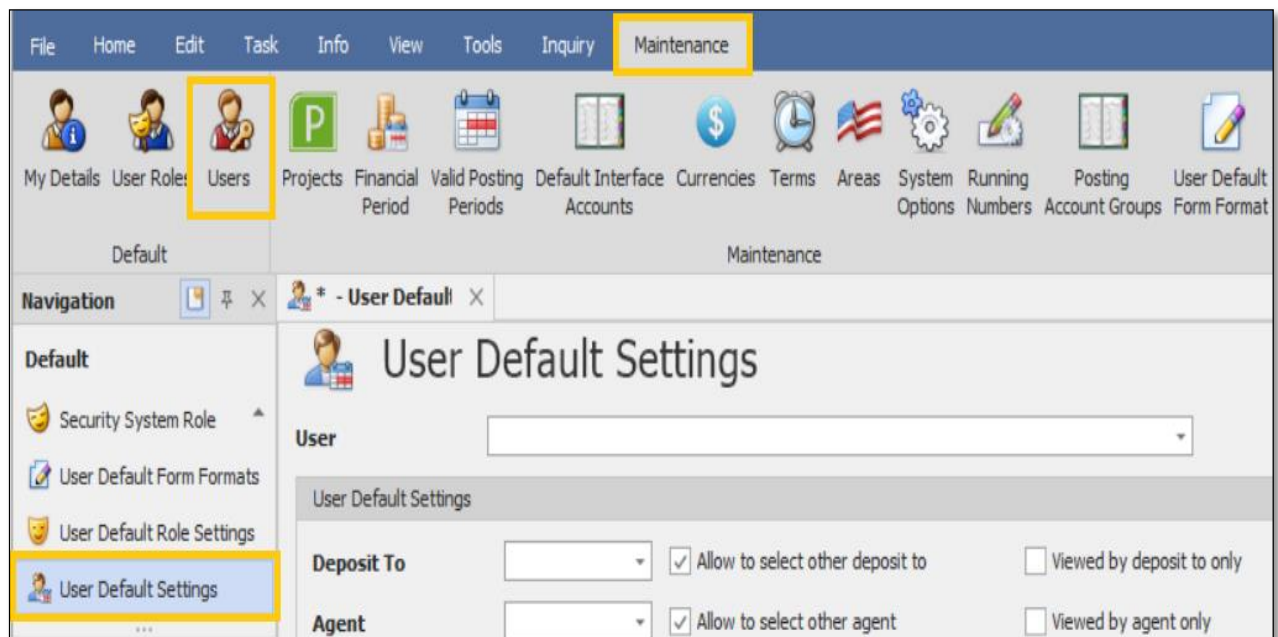
Purchaser can be selected automatically in any Supplier-related Transaction Forms and Reports per User Account. This can be done by using User Default Settings, which the Purchaser will set as the default for the specific user.

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

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

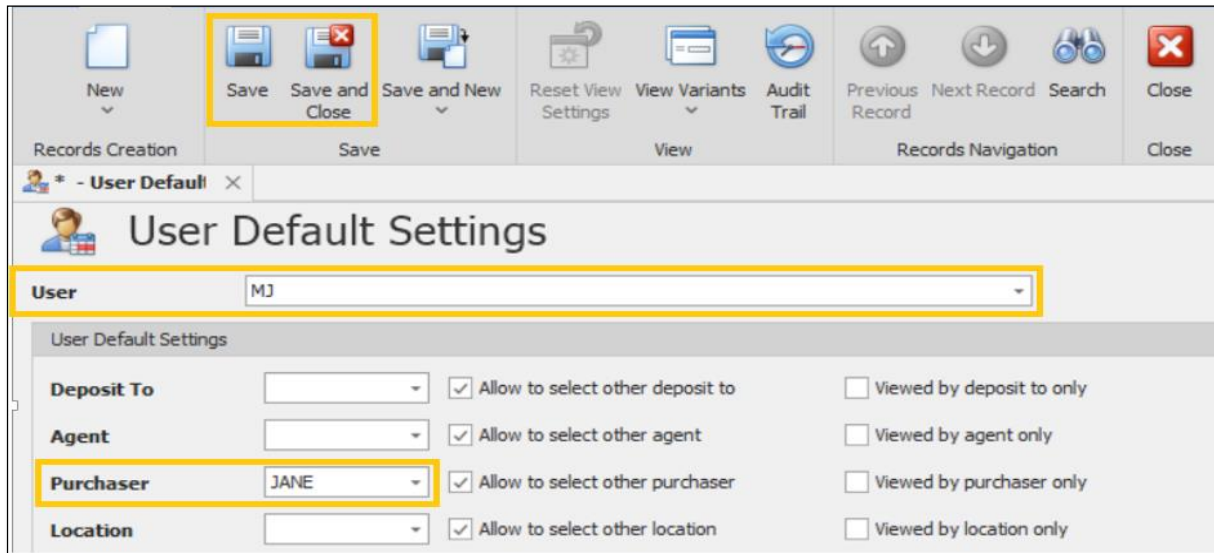
Procedure:

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



The screenshot displays the QNE Software interface. The top menu bar includes 'File', 'Home', 'Edit', 'Task', 'Info', 'View', 'Tools', 'Inquiry', and 'Maintenance'. The 'Maintenance' menu is highlighted. Below the menu bar, there is a row of icons representing various functions: 'My Details', 'User Roles', 'Users', 'Projects', 'Financial Period', 'Valid Posting Periods', 'Default Interface Accounts', 'Currencies', 'Terms', 'Areas', 'System Options', 'Running Numbers', 'Posting Account Groups', and 'User Default Form Format'. The 'Users' icon is highlighted with a yellow box. Below this row, there is a 'Navigation' pane on the left with a 'Default' section containing 'Security System Role', 'User Default Form Formats', 'User Default Role Settings', and 'User Default Settings'. The 'User Default Settings' item is highlighted with a yellow box. The main area of the interface shows the 'User Default Settings' form. It has a 'User' dropdown menu. Below this, there are two sections: 'User Default Settings' and 'User Default Settings'. The first section has 'Deposit To' and 'Agent' dropdown menus, each with a checkbox for 'Allow to select other deposit to' and 'Viewed by deposit to only'. The second section has 'Agent' and 'Viewed by agent only' checkboxes.

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



User Default Settings

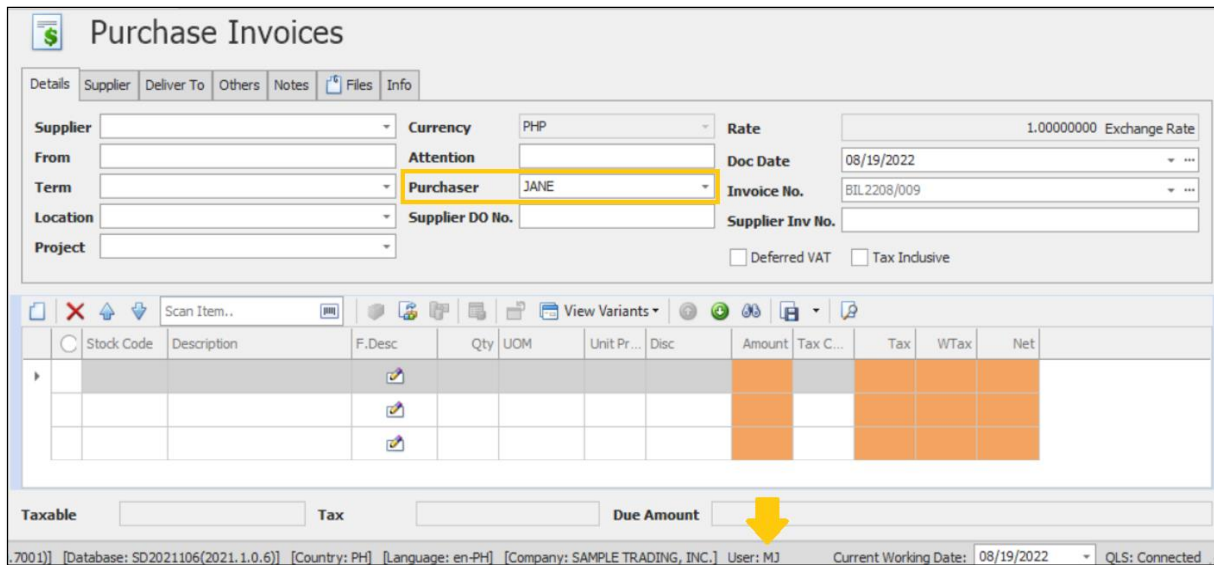
User: MJ

Purchaser: JANE

Other fields: Deposit To, Agent, Location, and checkboxes for 'Allow to select other...' and 'Viewed by...' are present.

Application:

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



Purchase Invoices

Supplier: [blank] Currency: PHP Rate: 1.00000000 Exchange Rate

From: [blank] Attention: [blank] Doc Date: 08/19/2022

Term: [blank] **Purchaser: JANE** Invoice No.: BIL2208/009

Location: [blank] Supplier DO No.: [blank] Supplier Inv No.: [blank]

Project: [blank] ☐ Deferred VAT ☐ Tax Inclusive

Stock Code	Description	F.Desc	Qty	UOM	Unit Pr...	Disc	Amount	Tax C...	Tax	WTax	Net

Taxable: [blank] Tax: [blank] Due Amount: [blank]

7001]] [Database: SD2021106(2021.1.0.6)] [Country: PH] [Language: en-PH] [Company: SAMPLE TRADING, INC.] User: MJ Current Working Date: 08/19/2022 QLS: Connected



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

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