



Hide Other Form and Report Formats from Other Users

Overview:

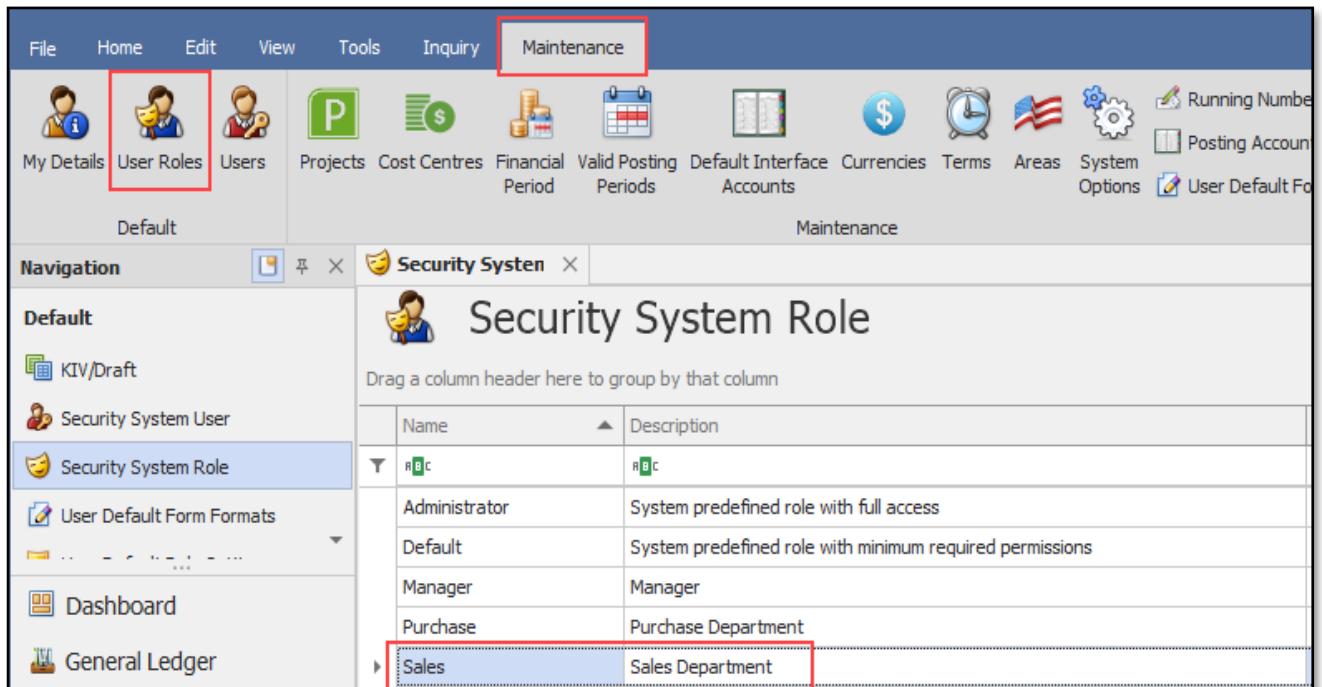
The QNE system has multiple formats for every form and report. There is also an option to hide all other formats that are not in use or should not be used by a particular group of users (users under the same User Role) and leaving only the formats that are set as default. This is done by modifying the access rights or permissions of that particular User Role.

Scenario:

For example, hide all other formats from users under the *Sales Department* User Role.

Procedure:

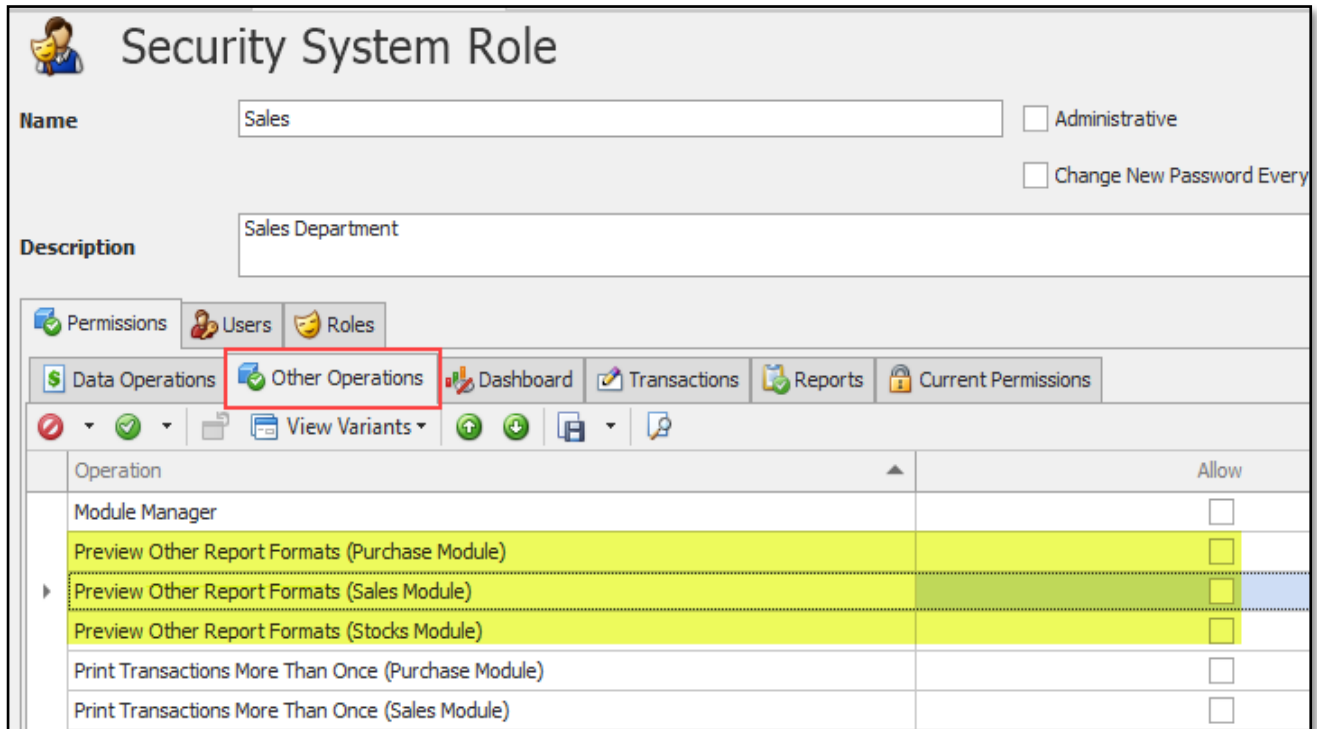
1. Go to *Maintenance > User Role*. Double-click the User Role to be modified (e.g. Sales Department).



Name	Description
Administrator	System predefined role with full access
Default	System predefined role with minimum required permissions
Manager	Manager
Purchase	Purchase Department
Sales	Sales Department

Note: Access rights/permissions are defined per User Role. All users under a particular User Role will have the same access.

2. Under the 'Other Operations' tab, untick the following highlighted permissions accordingly.



Security System Role

Name: ☐ Administrative

☐ Change New Password Every

Description:

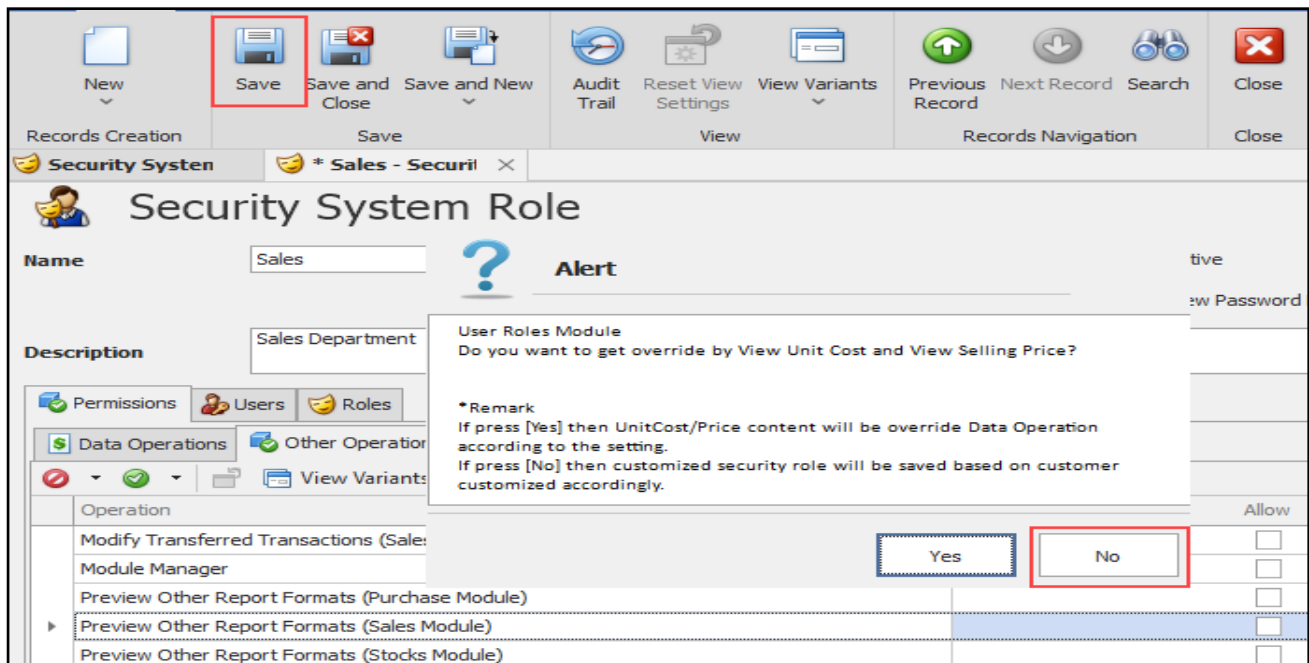
Permissions Users Roles

Data Operations **Other Operations** Dashboard Transactions Reports Current Permissions

View Variants

Operation	Allow
Module Manager	<input type="checkbox"/>
Preview Other Report Formats (Purchase Module)	<input type="checkbox"/>
Preview Other Report Formats (Sales Module)	<input type="checkbox"/>
Preview Other Report Formats (Stocks Module)	<input type="checkbox"/>
Print Transactions More Than Once (Purchase Module)	<input type="checkbox"/>
Print Transactions More Than Once (Sales Module)	<input type="checkbox"/>

3. Click Save and click 'No' on the Alert dialog box.



New Save Save and Close Save and New Audit Trail Reset View Settings View Variants Previous Record Next Record Search Close

Records Creation Save View Records Navigation Close

Security System * Sales - Securil

Security System Role

Name: **Alert**

Description:

Permissions Users Roles

Data Operations Other Operation View Variants

Operation

Modify Transferred Transactions (Sales)

Module Manager

Preview Other Report Formats (Purchase Module)

Preview Other Report Formats (Sales Module)

Preview Other Report Formats (Stocks Module)

Allow

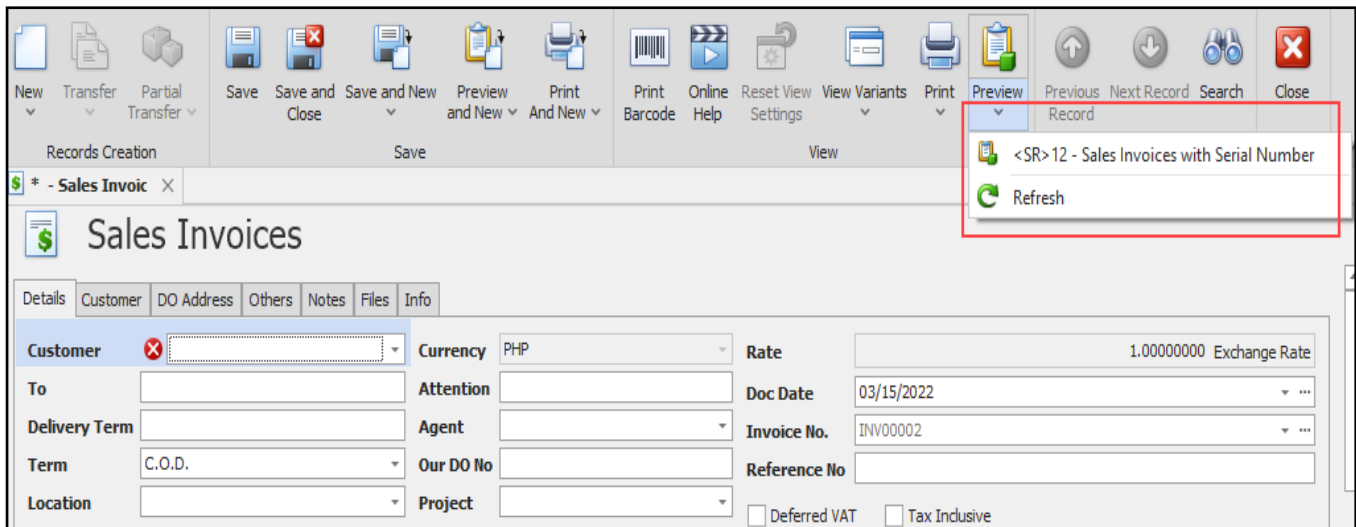
Yes No

User Roles Module
Do you want to get override by View Unit Cost and View Selling Price?

*Remark
If press [Yes] then UnitCost/Price content will be override Data Operation according to the setting.
If press [No] then customized security role will be saved based on customer customized accordingly.

Application:

In the Sales Invoice transaction and Sales Margin Analysis report, for example, only their default format will be shown under the Preview options.



Sales Invoices

Details Customer DO Address Others Notes Files Info

Customer Currency PHP Rate 1.00000000 Exchange Rate

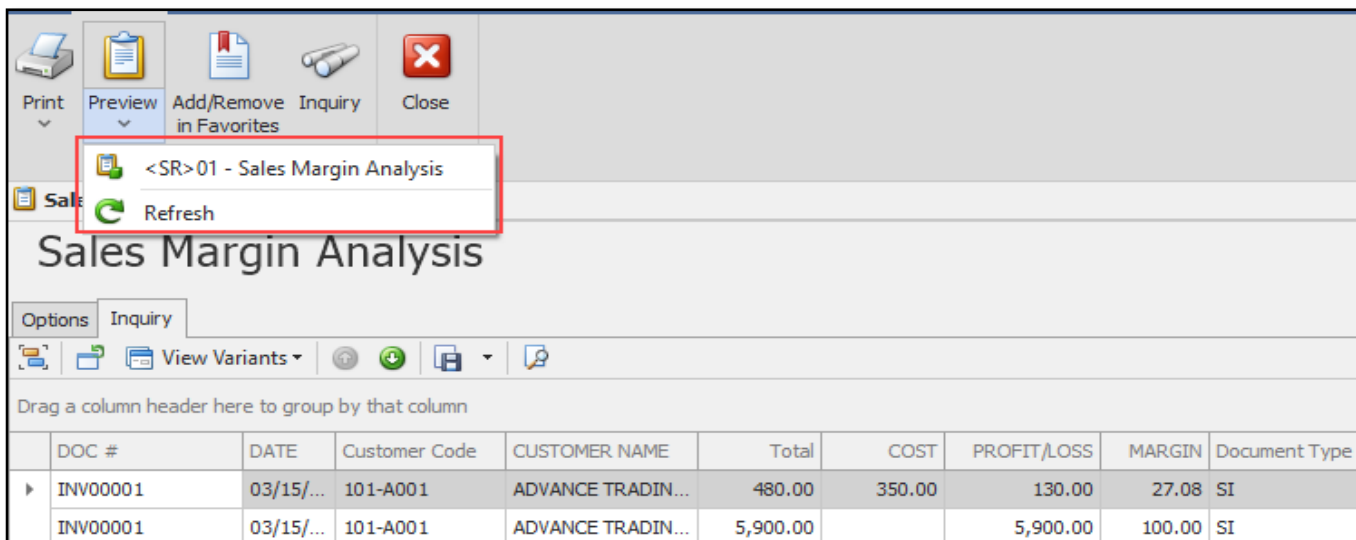
To Attention Doc Date 03/15/2022

Delivery Term Agent Invoice No. INV00002

Term C.O.D. Our DO No Reference No

Location Project

☐ Deferred VAT ☐ Tax Inclusive



Sales Margin Analysis

Options Inquiry

View Variants

Drag a column header here to group by that column

	DOC #	DATE	Customer Code	CUSTOMER NAME	Total	COST	PROFIT/LOSS	MARGIN	Document Type
▶	INV00001	03/15/...	101-A001	ADVANCE TRADIN...	480.00	350.00	130.00	27.08	SI
	INV00001	03/15/...	101-A001	ADVANCE TRADIN...	5,900.00		5,900.00	100.00	SI



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