



How to Set Compulsory Select Purchaser

Overview:

End-users may forget to select the Purchaser in the transaction which will affect the reporting related to Purchases by Purchaser. Compulsory Select Purchaser is used to prompt end-users if they have not selected the Purchaser.

Note:

This is only applicable to the following Optimum Packages:

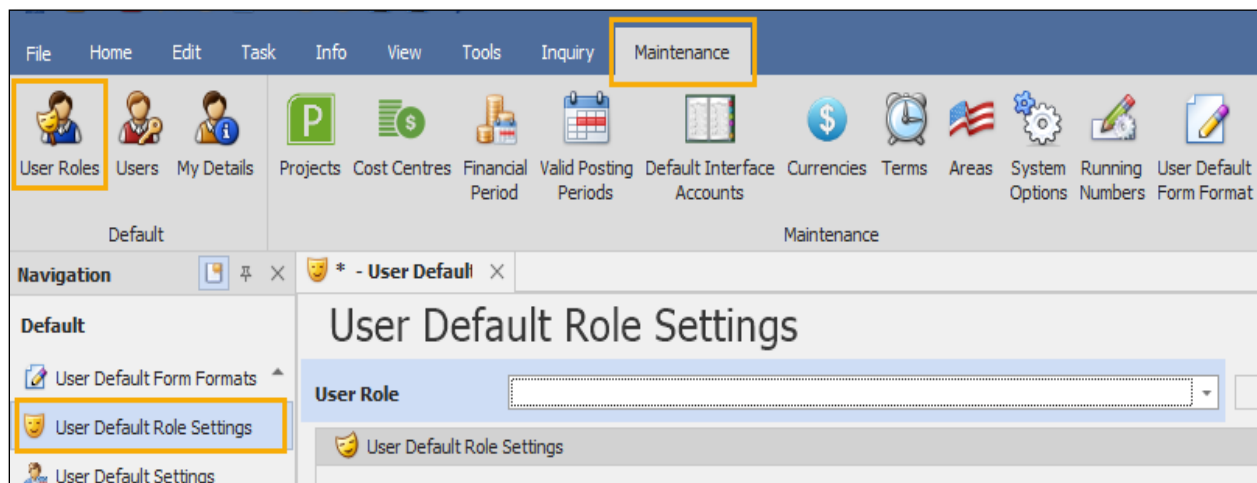
- ✓ Optimum Financials
- ✓ Optimum Advance
- ✓ Optimum Core
- ✓ Optimum Edge
- ✓ Optimum Ace

Procedure:

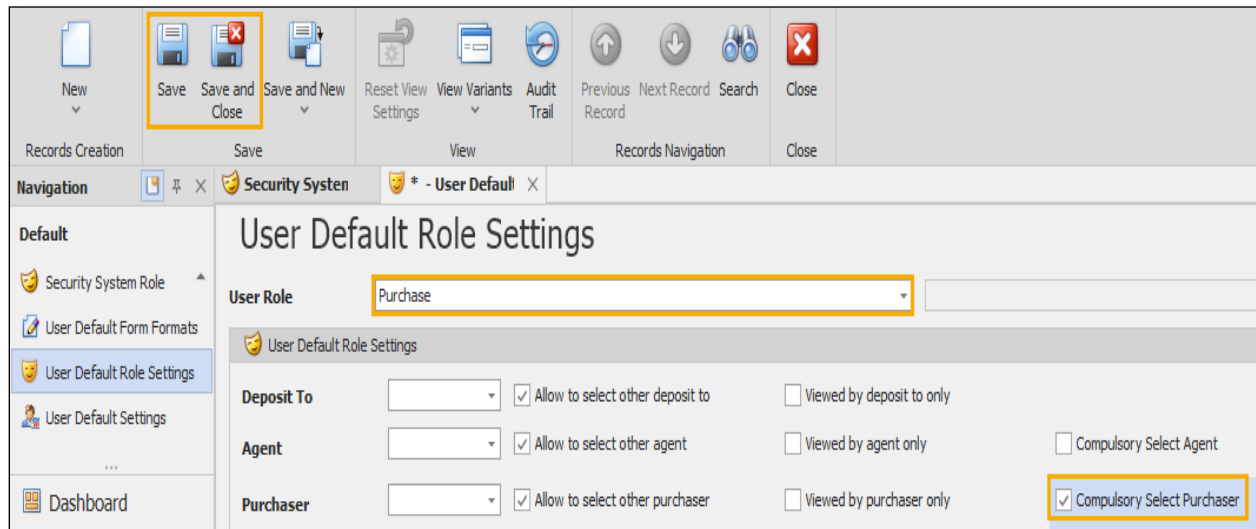
There are two ways this is done, *per User Role* or *per User*.

Per User Role

1. Go to **Maintenance > User Roles > User Default Role Settings**.



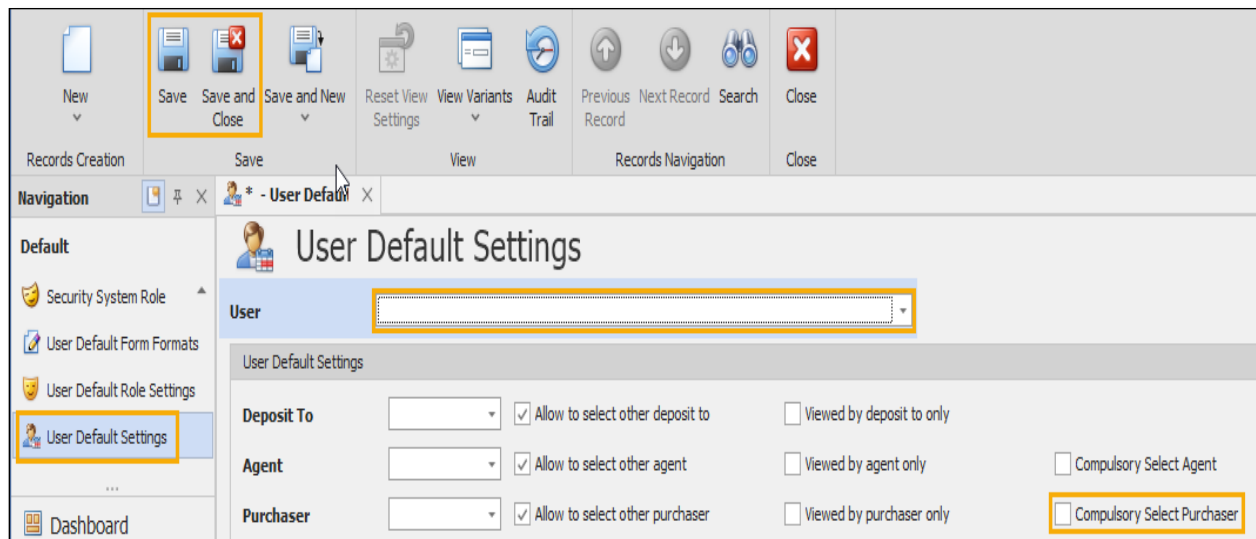
2. Select a particular **User Role** and tick **Compulsory Select Purchaser** then click **Save**.



The screenshot shows the 'User Default Role Settings' form. The 'User Role' dropdown is set to 'Purchase'. The 'Compulsory Select Purchaser' checkbox is checked. The 'Save' button is highlighted with a yellow box.

Per User

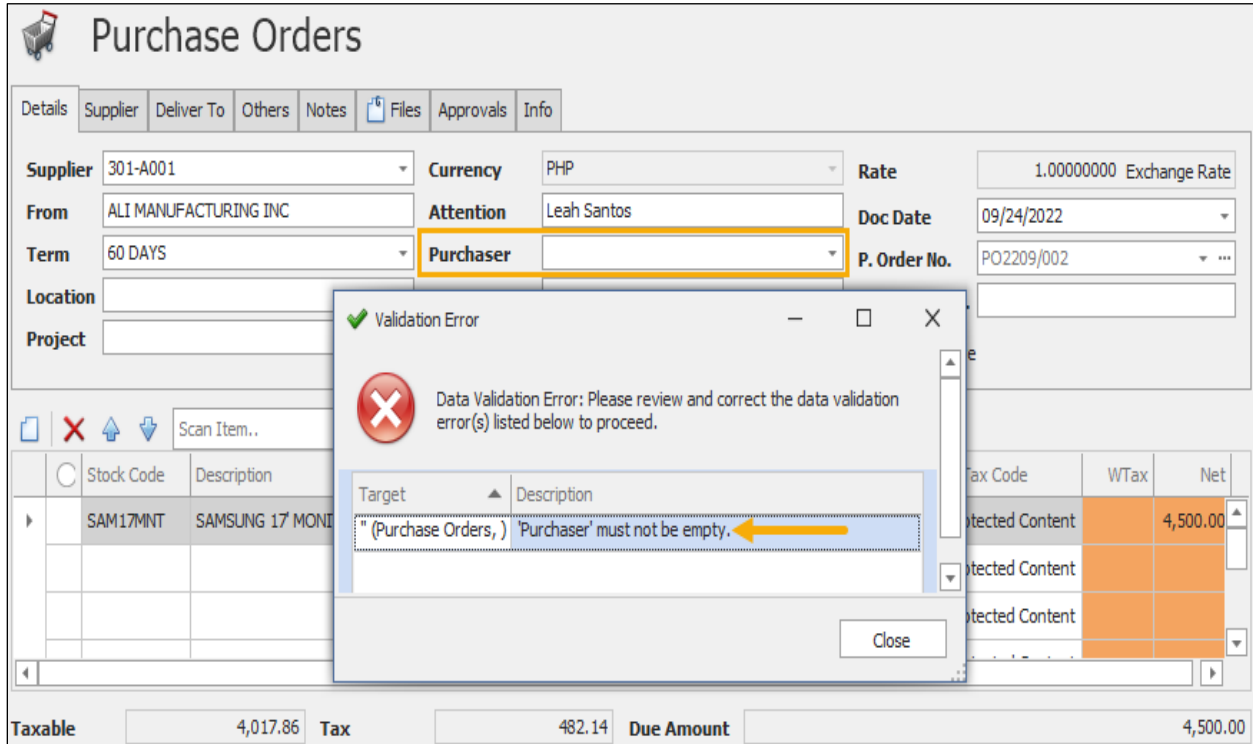
1. Go to **Maintenance > User Roles > User Default Settings**.
2. Select a particular **User** and tick **Compulsory Select Purchaser** then click **Save**.



The screenshot shows the 'User Default Settings' form. The 'User' dropdown is empty. The 'Compulsory Select Purchaser' checkbox is checked. The 'Save' button is highlighted with a yellow box.

Application:

If the end-user forgot to select the Purchaser, the dialog box below will appear upon saving which prompts the end-user to select the Purchaser because it is compulsory.



The screenshot shows the 'Purchase Orders' application interface. A validation error dialog box is displayed in the foreground, indicating a 'Data Validation Error: Please review and correct the data validation error(s) listed below to proceed.' The error message is: '(Purchase Orders,) 'Purchaser' must not be empty.' The 'Purchaser' field in the background form is highlighted with a yellow box. The background form includes fields for Supplier (301-A001), Currency (PHP), Rate (1.00000000), From (ALI MANUFACTURING INC), Attention (Leah Santos), Doc Date (09/24/2022), Term (60 DAYS), P. Order No. (PO2209/002), Location, and Project. A table at the bottom shows Taxable (4,017.86), Tax (482.14), and Due Amount (4,500.00).

Target	Description
(Purchase Orders,)	'Purchaser' must not be empty.



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