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How to Set Compulsory Select Agent

Overview:

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

Note:

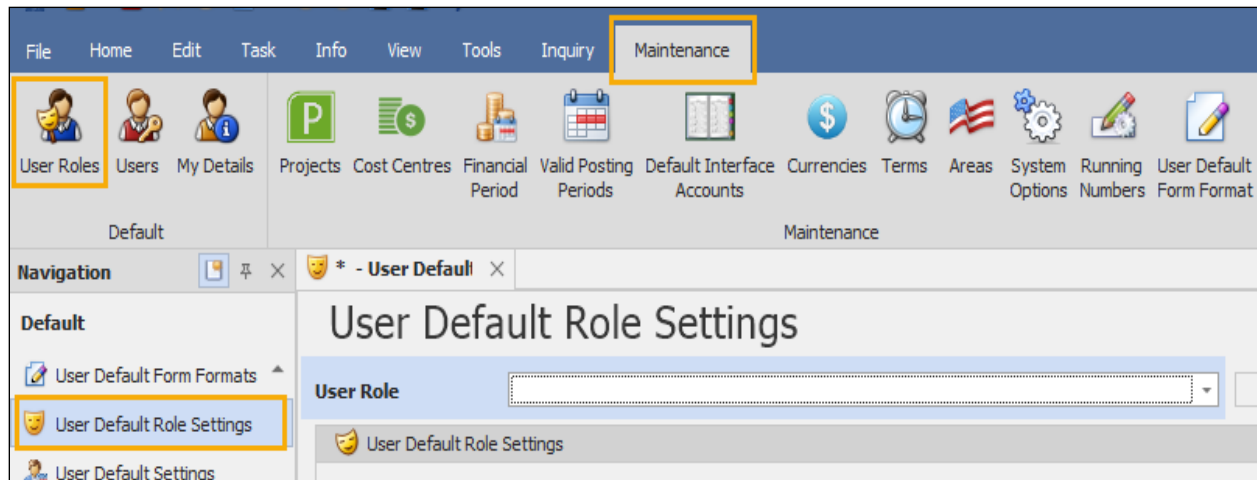This is only applicable to the following Optimum Packages:

- ✓ 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**.

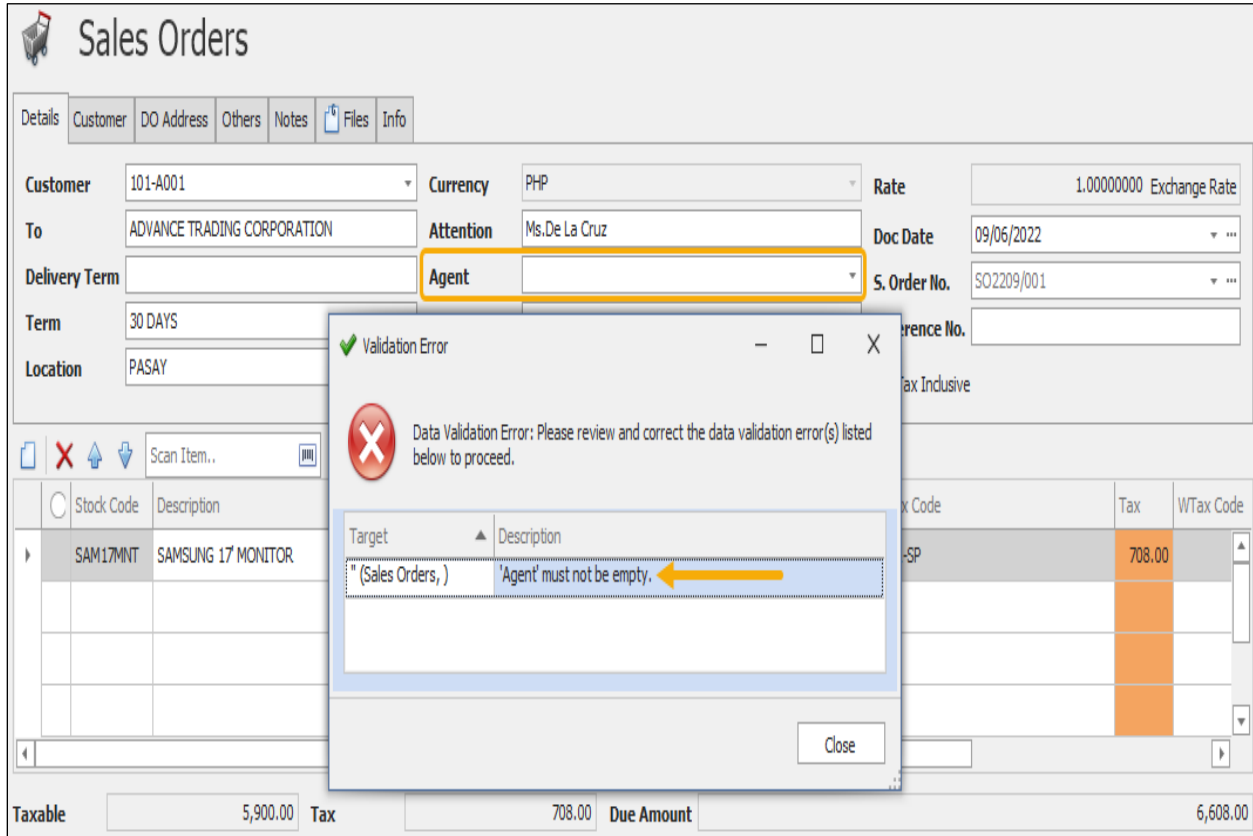2. Select a particular **User Role** and tick **Compulsory Select Agent** then click **Save**.

Per User

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

Application:

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

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