



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:

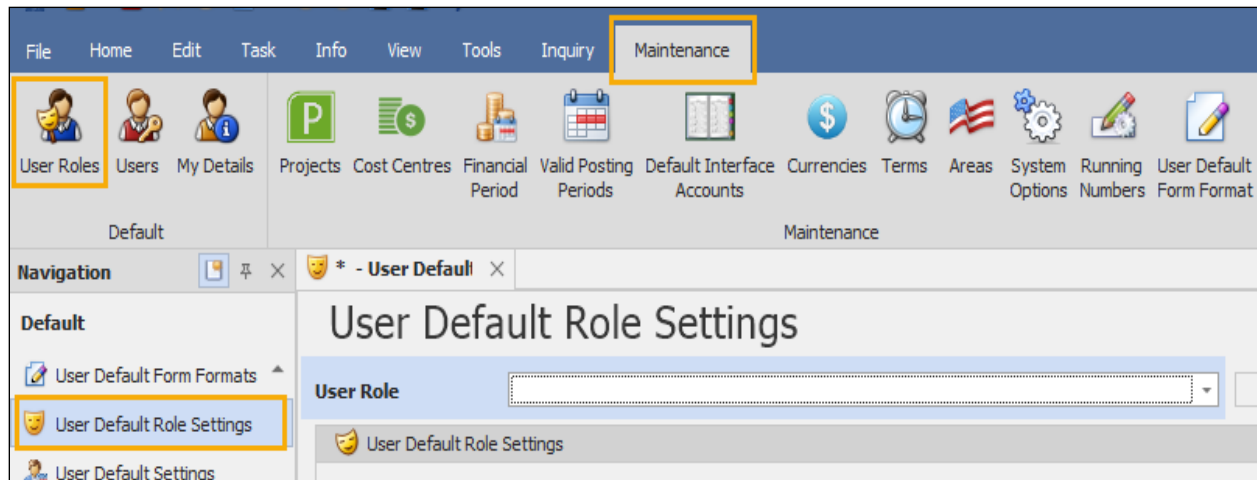
- ✓ Optimum Financials
- ✓ Optimum Advance
- ✓ Optimum Core
- ✓ Optimum Edge
- ✓ Optimum Ace

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**.

The screenshot shows the 'User Default Role Settings' form. In the top toolbar, the 'Save' button is highlighted. The 'User Role' dropdown is set to 'Sales'. The 'Compulsory Select Agent' checkbox is checked. The 'Deposit To' and 'Agent' dropdowns are also visible.

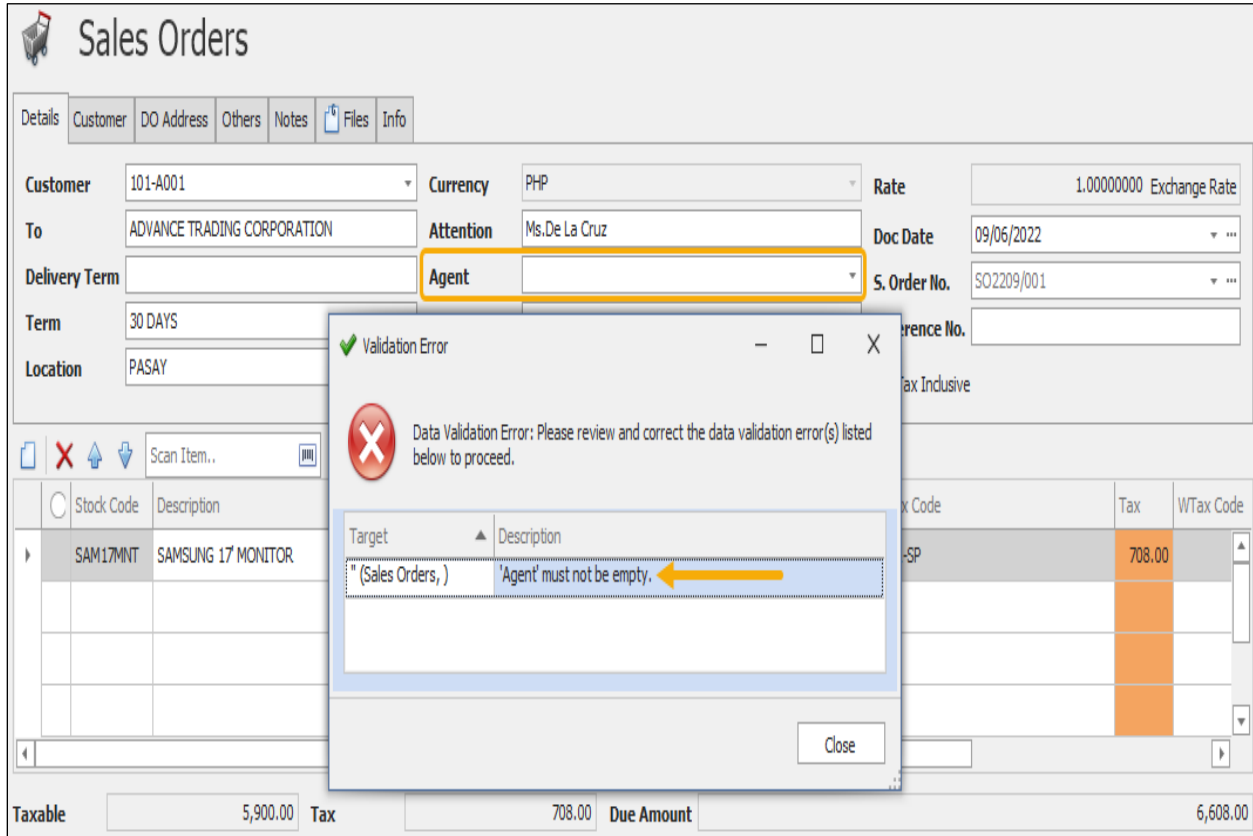
Per User

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

The screenshot shows the 'User Default Settings' form. In the top toolbar, the 'Save' button is highlighted. The 'User' dropdown is empty. The 'Compulsory Select Agent' checkbox is checked. The 'Deposit To' and 'Agent' dropdowns are also visible.

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.



The screenshot shows the 'Sales Orders' application interface. A validation error dialog box is displayed in the center, titled 'Validation Error'. The dialog contains a red 'X' icon and the text: 'Data Validation Error: Please review and correct the data validation error(s) listed below to proceed.' Below this text is a table with two columns: 'Target' and 'Description'. The table contains one row with the following data:

Target	Description
" (Sales Orders,)	'Agent' must not be empty. ←

The dialog box has a 'Close' button at the bottom right. In the background, the 'Sales Orders' form is visible, showing fields for Customer (101-A001), Currency (PHP), Rate (1.00000000), Exchange Rate, To (ADVANCE TRADING CORPORATION), Attention (Ms.De La Cruz), Doc Date (09/06/2022), Delivery Term, Agent (highlighted with a yellow border), S. Order No. (SO2209/001), Term (30 DAYS), Location (PASAY), and a table of items including 'SAMSUNG 17 MONITOR'.



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