



How to set Compulsory select Stock Group

Overview:

End-users may forget to select type of Group in Stock Item Maintenance, which will affect the Inventory reporting. Compulsory Select Group is used to prompt end-users if they have not selected any Group.

Note:

This is only applicable to the following Optimum Packages:

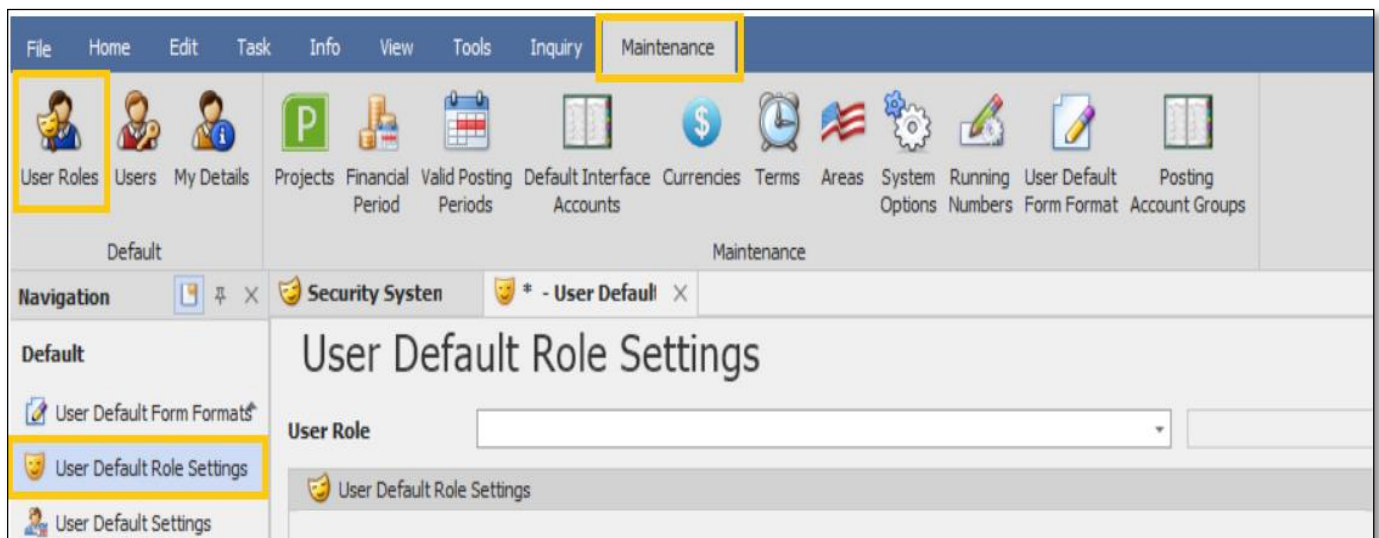
- ✓ Optimum Financials
- ✓ Optimum Advance
- ✓ Optimum Core
- ✓ Optimum Edge
- ✓ Optimum Ace

Procedure:

There are two different approaches to this, it can be 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 Group** then click **Save** or **Save and Close**.

The screenshot shows the 'User Default Role Settings' window. The 'User Role' dropdown is set to 'Manager'. The 'Compulsory Select Group' checkbox is checked. The 'Save' button is highlighted in the top toolbar.

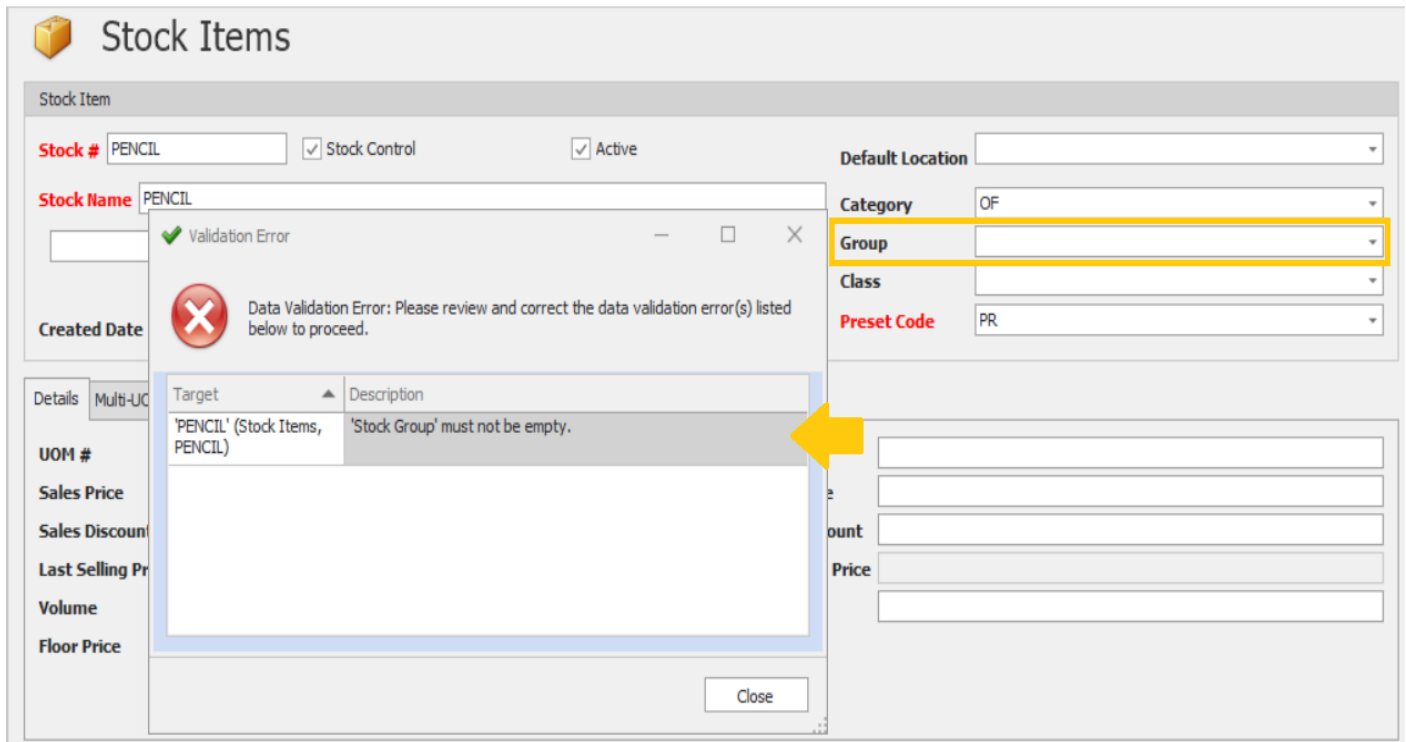
Per User

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

The screenshot shows the 'User Default Settings' window. The 'User' dropdown is set to 'MJ'. The 'Compulsory Select Group' checkbox is checked. The 'Save' button is highlighted in the top toolbar.

Application:

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



The screenshot shows the 'Stock Items' application window. The 'Stock #' is 'PENCIL' and 'Stock Name' is 'PENCIL'. The 'Group' dropdown menu is highlighted with a yellow box. A validation error dialog box is displayed in the center, with a red 'X' icon and the message: 'Data Validation Error: Please review and correct the data validation error(s) listed below to proceed.' The dialog box lists the error: 'PENCIL' (Stock Items, PENCIL) with the description: 'Stock Group' must not be empty. A yellow arrow points from the 'Group' dropdown menu to the error message. The dialog box has a 'Close' button at the bottom right.



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