



## How to set Compulsory Select Location or Detail Location

### Problem Scenario:

End-users may forget to select a location in the transaction which will affect the reporting related to Stock Location.

### Resolution:

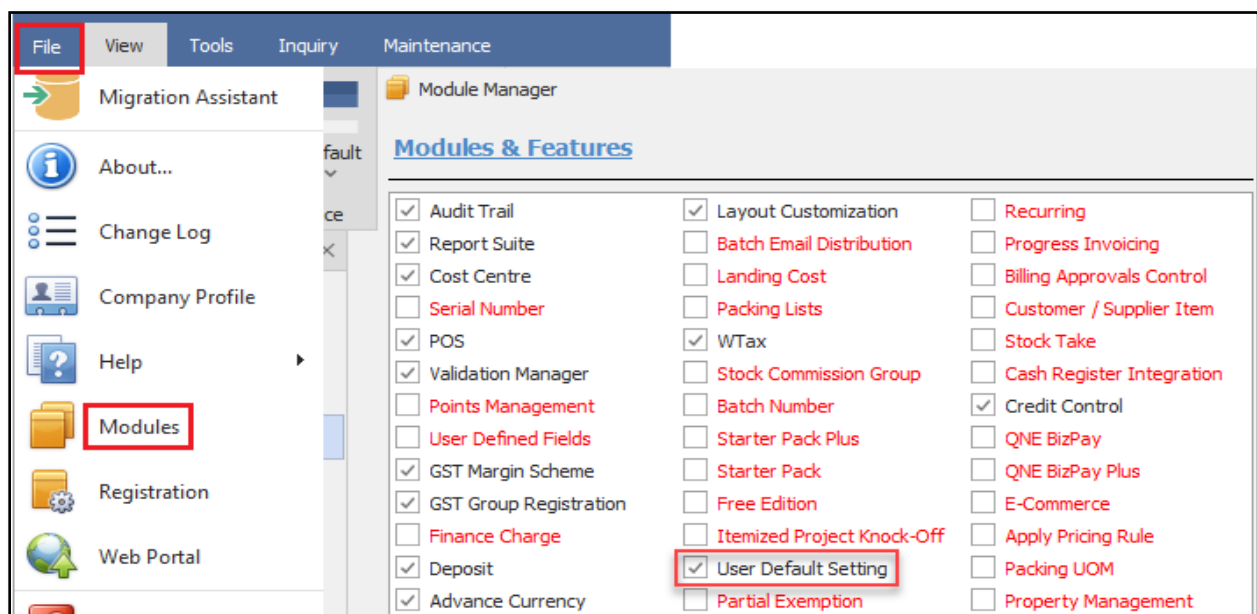
Set Compulsory Select Location or Compulsory Select Detail Location in User Default Settings.

### Note:

This is only applicable to the following Optimum Packages:

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

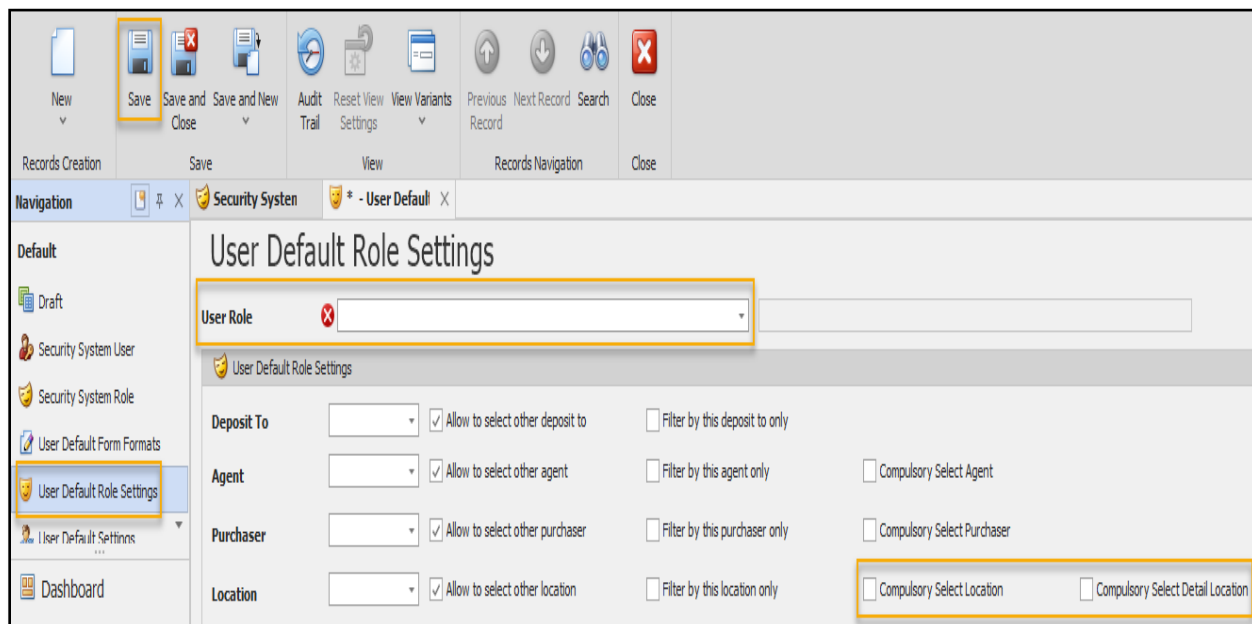
Make sure that the **User Default Setting** is enabled in Module Manager. Go to *File > Modules*.



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

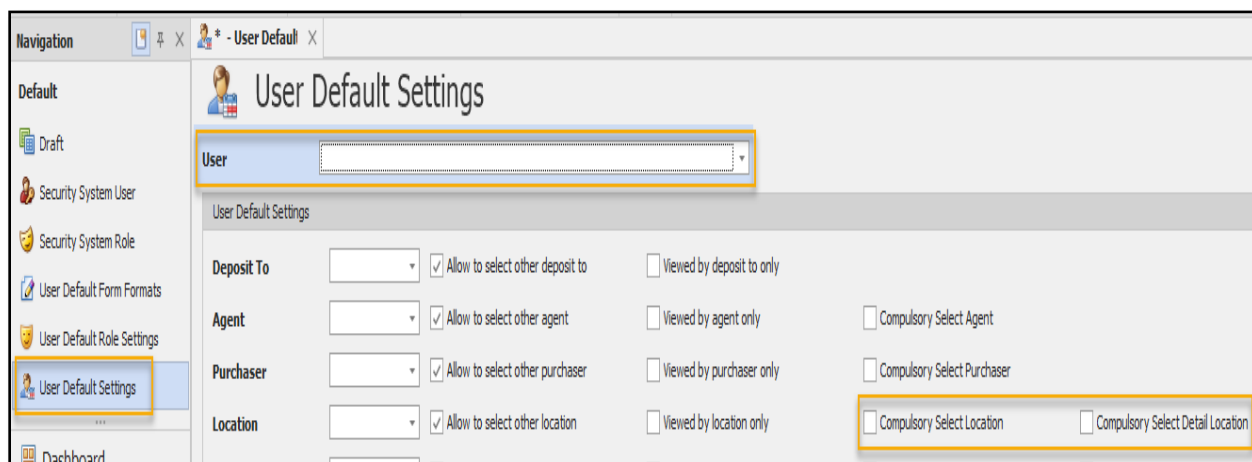
### Per User Role

Go to **Maintenance > User Roles > User Default Role Settings**. Select a particular User Role and tick 'either' **Compulsory Select Location** or **Compulsory Select Detail Location** then click **Save**.



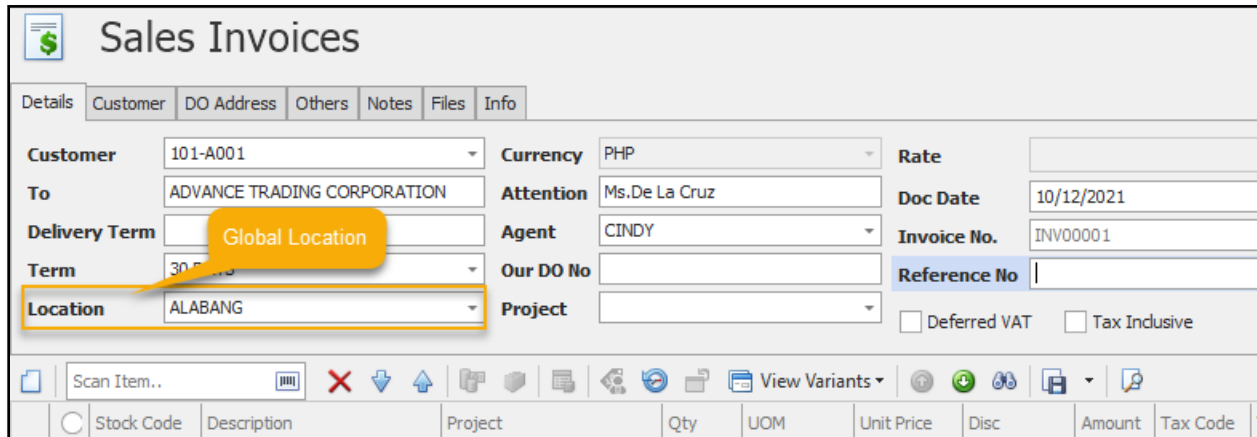
### Per User

Go to **Maintenance > User Roles > User Default Settings**. Select a particular User and tick 'either' **Compulsory Select Location** or **Compulsory Select Detail Location** then click **Save**.



Please note that *Compulsory Select Location* and *Compulsory Select Detail Location* cannot be set at the same time for the same User(s) and User Role(s). Please see below for the difference between the two.

This pertains to Global Location (*Compulsory Select Location*) which means all the stock items in the transaction will be added to (Purchases) or deducted from (Sales) the selected Location.



**Sales Invoices**

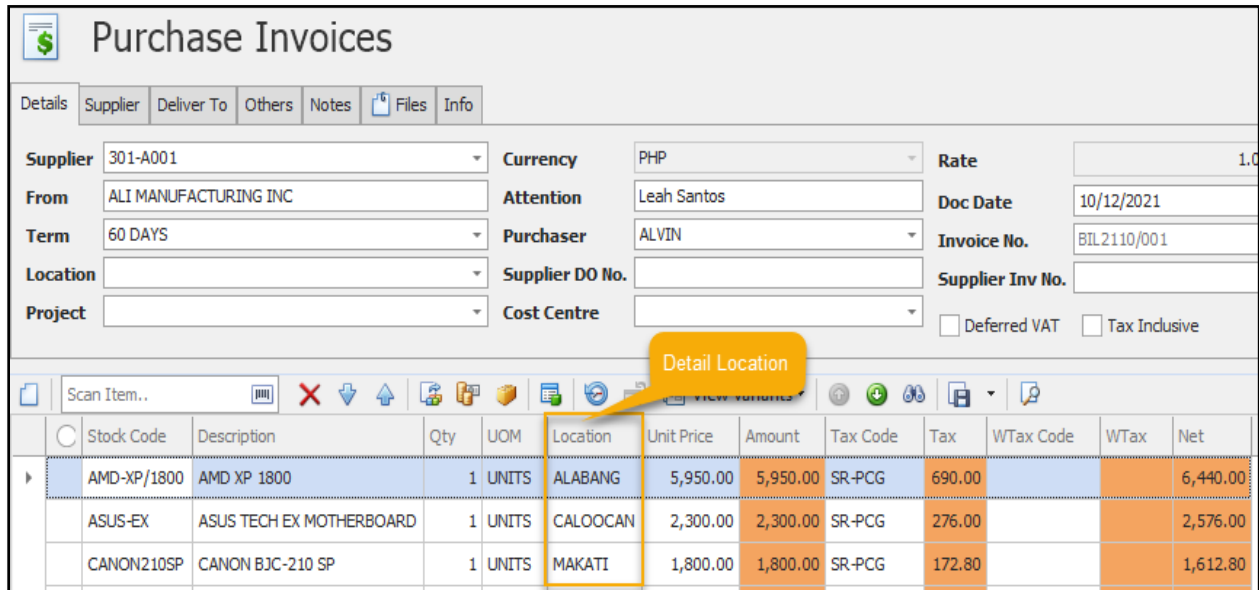
Details Customer DO Address Others Notes Files Info

Customer: 101-A001 Currency: PHP Rate:   
 To: ADVANCE TRADING CORPORATION Attention: Ms.De La Cruz Doc Date: 10/12/2021   
 Delivery Term: Global Location Agent: CINDY Invoice No.: INV00001   
 Term: 30 DAYS Our DO No.: Reference No.:   
 Location: ALABANG Project:   
☐ Deferred VAT ☐ Tax Inclusive

Scan Item.. View Variants

Stock Code	Description	Project	Qty	UOM	Unit Price	Disc	Amount	Tax Code
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While this one pertains to Detail Location (*Compulsory Select Detail Location*) and it allows multiple Locations in a single transaction.



**Purchase Invoices**

Details Supplier Deliver To Others Notes Files Info

Supplier: 301-A001 Currency: PHP Rate: 1.0   
 From: ALI MANUFACTURING INC Attention: Leah Santos Doc Date: 10/12/2021   
 Term: 60 DAYS Purchaser: ALVIN Invoice No.: BIL2110/001   
 Location: Supplier DO No.: Supplier Inv No.:   
 Project: Cost Centre:   
☐ Deferred VAT ☐ Tax Inclusive

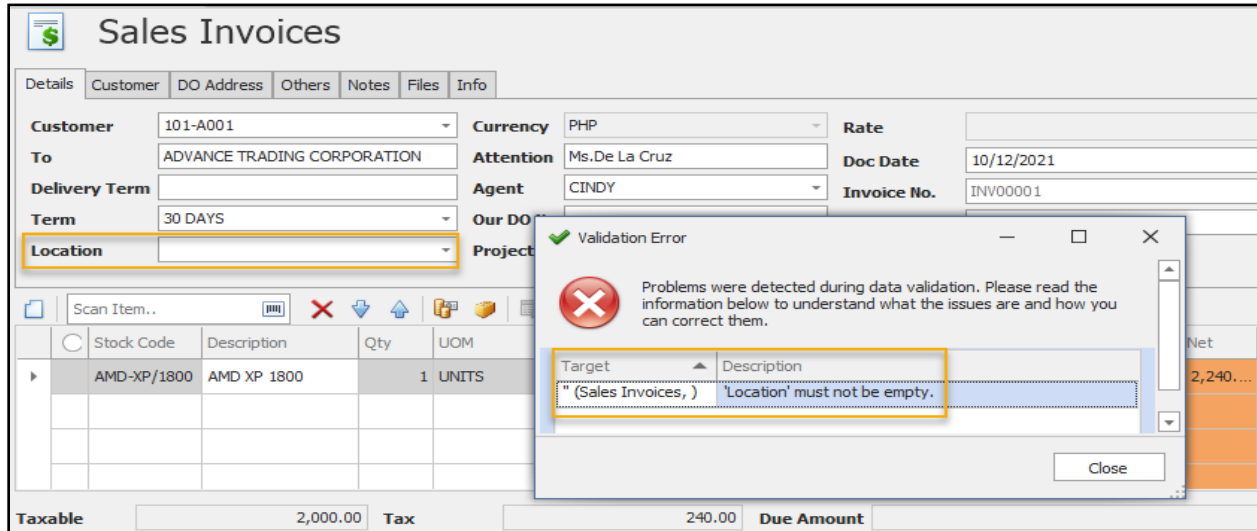
Scan Item.. Detail Location

Stock Code	Description	Qty	UOM	Location	Unit Price	Amount	Tax Code	Tax	WTax Code	WTax	Net
AMD-XP/1800	AMD XP 1800	1	UNITS	ALABANG	5,950.00	5,950.00	SR-PCG	690.00			6,440.00
ASUS-EX	ASUS TECH EX MOTHERBOARD	1	UNITS	CALOOCAN	2,300.00	2,300.00	SR-PCG	276.00			2,576.00
CANON210SP	CANON BJC-210 SP	1	UNITS	MAKATI	1,800.00	1,800.00	SR-PCG	172.80			1,612.80

### How does it work?

If the user forgot to select a Location or Detail Location(s), a validation error will appear to remind the user to select a Location upon saving the transaction.

### Compulsory Select Location

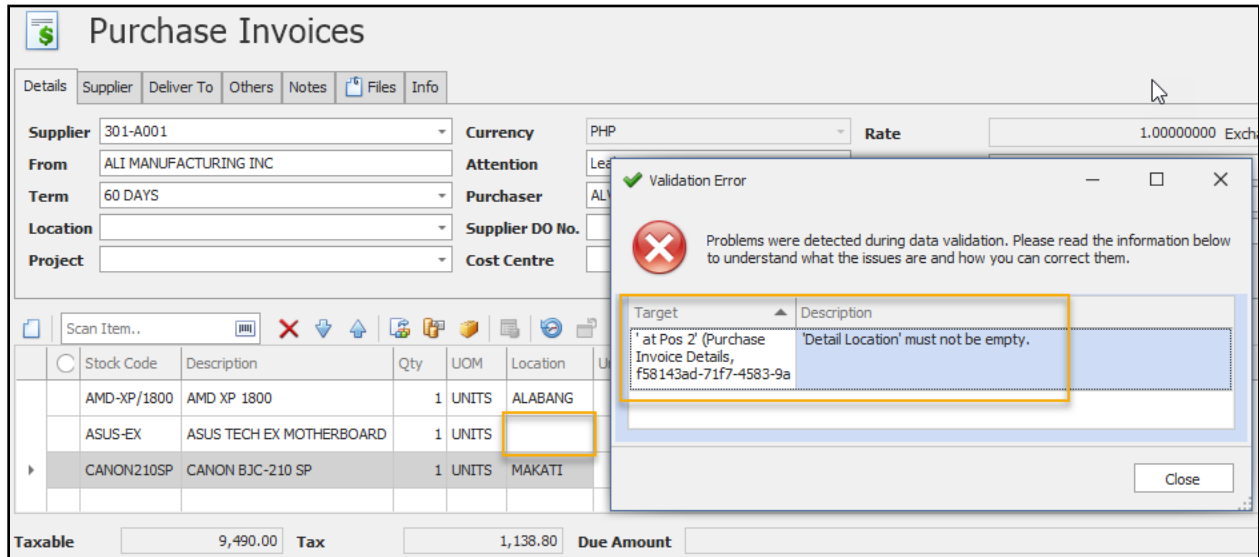


The screenshot shows the 'Sales Invoices' form. The 'Location' field is empty and highlighted with a yellow box. A 'Validation Error' dialog box is open, displaying the message: "Problems were detected during data validation. Please read the information below to understand what the issues are and how you can correct them." The dialog box contains a table with the following data:

Target	Description
" (Sales Invoices, )	'Location' must not be empty.

The dialog box has a 'Close' button at the bottom right.

### Compulsory Select Detail Location



The screenshot shows the 'Purchase Invoices' form. The 'Location' field is empty and highlighted with a yellow box. A 'Validation Error' dialog box is open, displaying the message: "Problems were detected during data validation. Please read the information below to understand what the issues are and how you can correct them." The dialog box contains a table with the following data:

Target	Description
'at Pos 2' (Purchase Invoice Details, f58143ad-71f7-4583-9a	'Detail Location' must not be empty.

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>**