



How to Restrict Users from Canceling and/or Closing Transactions

Overview:

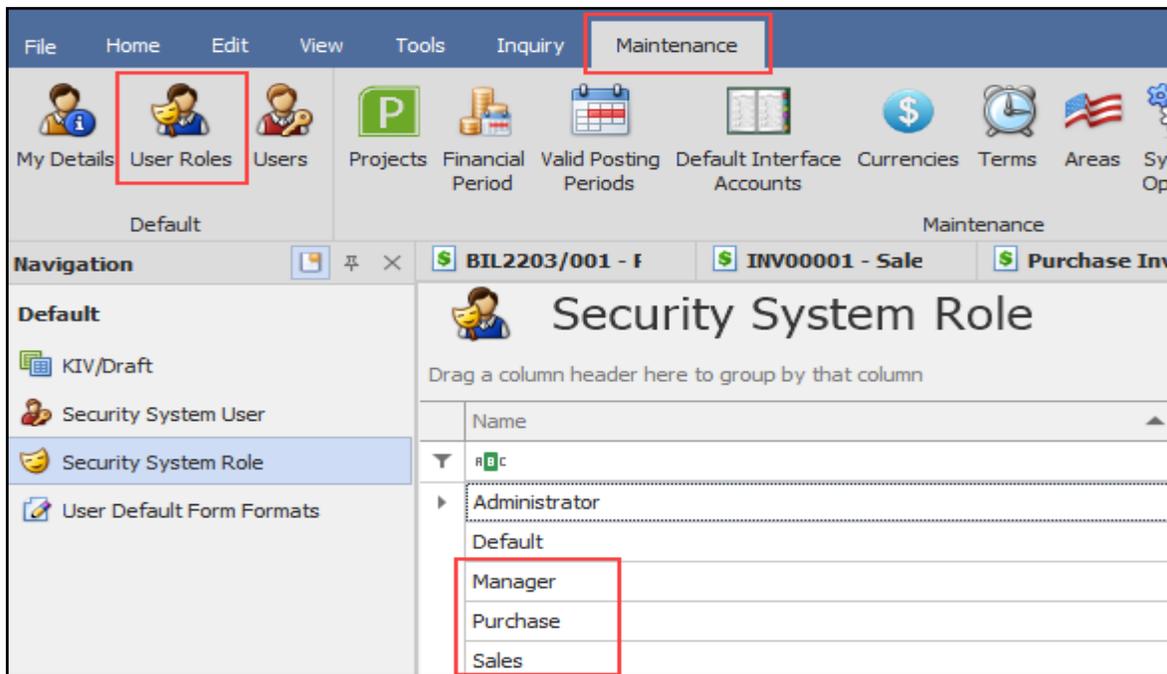
The QNE system allows cancellation and/or closing of documents. These can also be restricted to specific user(s) only who is authorized to cancel and/or close transactions.

Scenario:

Restrict non-authorized users from canceling and/or closing transactions.

Procedure:

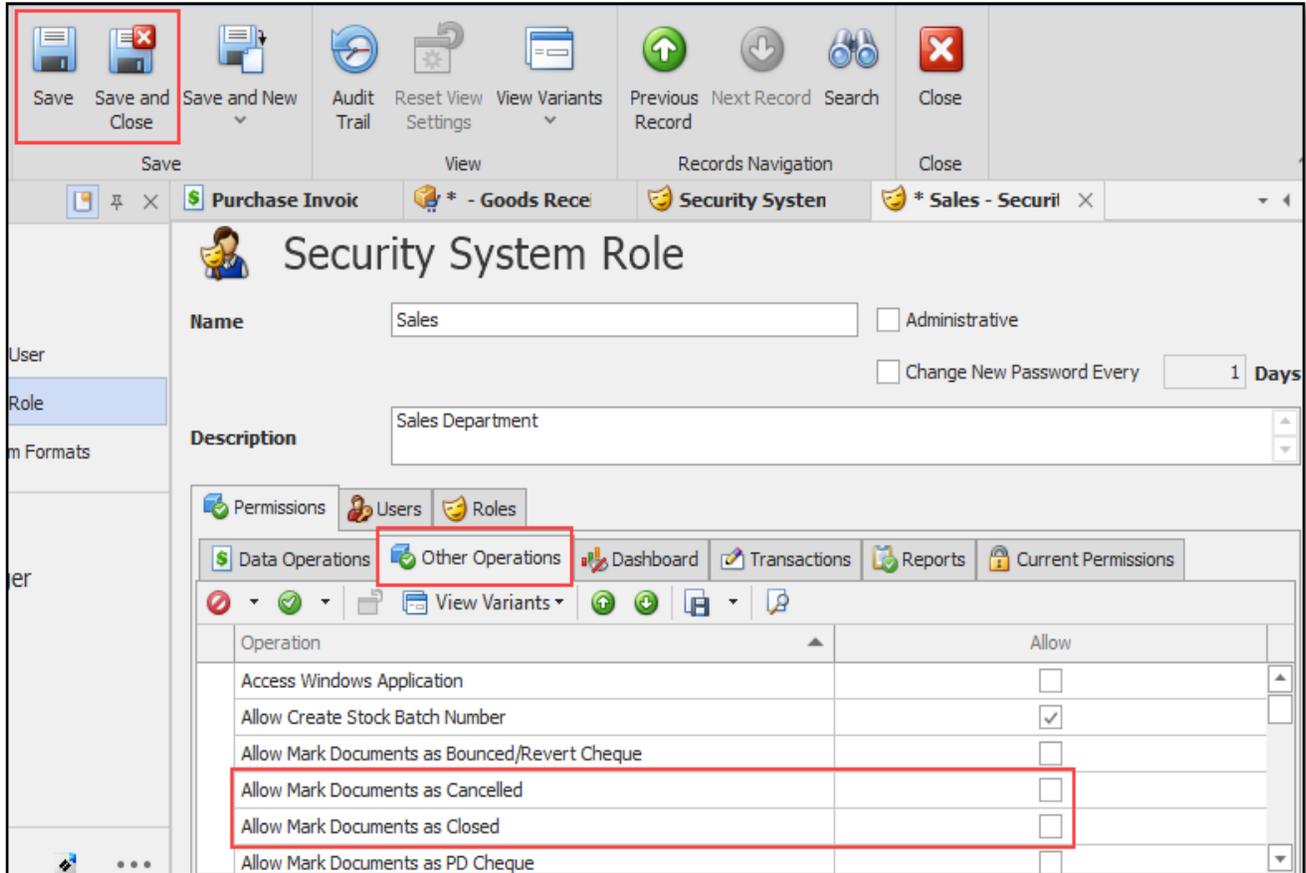
1. Go to *Maintenance > User Roles*. Double-click the System Role that the non-authorized users belong to or are assigned to.



The screenshot shows the QNE software interface. The 'Maintenance' menu is highlighted in red. The 'User Roles' menu item is also highlighted in red. The 'Security System Role' configuration screen is displayed, showing a list of roles: Administrator, Default, Manager, Purchase, and Sales. The 'Manager', 'Purchase', and 'Sales' roles are highlighted in red.

Name
Administrator
Default
Manager
Purchase
Sales

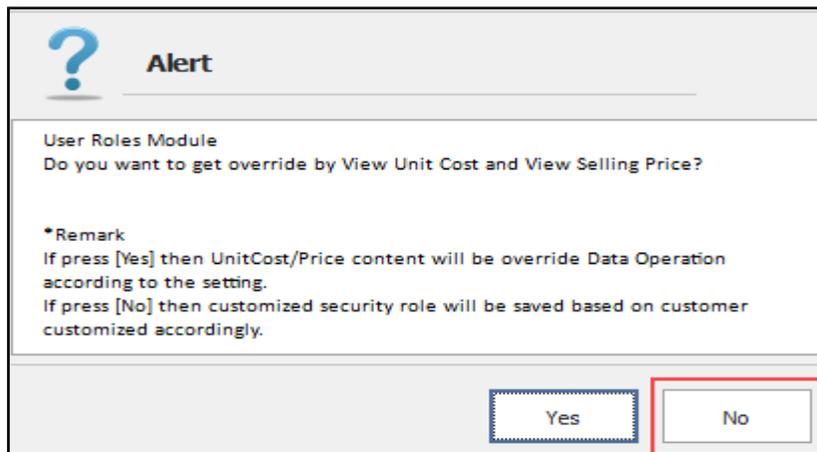
- Under the 'Other Operations' tab, untick the check boxes for *Allow Mark Documents as Cancelled* and/or *Allow Mark Documents as Closed* and click Save.



The screenshot shows the 'Security System Role' configuration window. The 'Name' field is 'Sales' and the 'Description' is 'Sales Department'. The 'Other Operations' tab is active, displaying a table of permissions. The 'Allow Mark Documents as Cancelled' and 'Allow Mark Documents as Closed' checkboxes are unchecked and highlighted with a red box.

Operation	Allow
Access Windows Application	<input type="checkbox"/>
Allow Create Stock Batch Number	<input checked="" type="checkbox"/>
Allow Mark Documents as Bounced/Revert Cheque	<input type="checkbox"/>
Allow Mark Documents as Cancelled	<input type="checkbox"/>
Allow Mark Documents as Closed	<input type="checkbox"/>
Allow Mark Documents as PD Cheque	<input type="checkbox"/>

- Click 'No' on this dialog box.



The dialog box is titled 'Alert' and contains the following text:

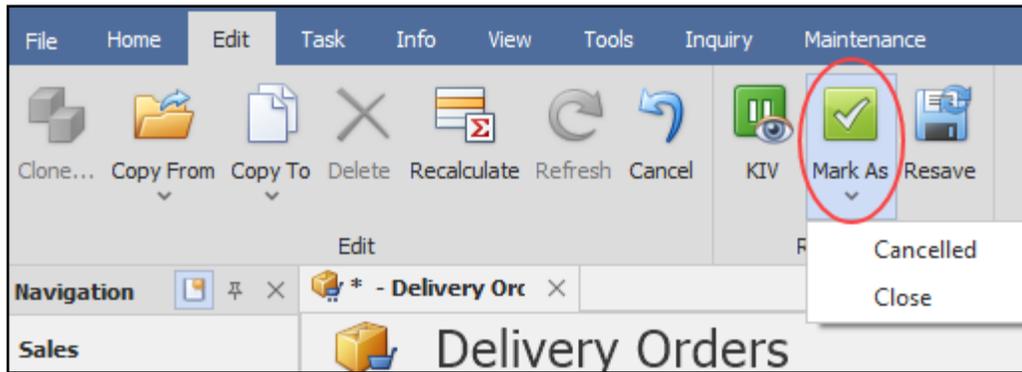
User Roles Module
Do you want to get override by View Unit Cost and View Selling Price?

• Remark
If press [Yes] then UnitCost/Price content will be override Data Operation according to the setting.
If press [No] then customized security role will be saved based on customer customized accordingly.

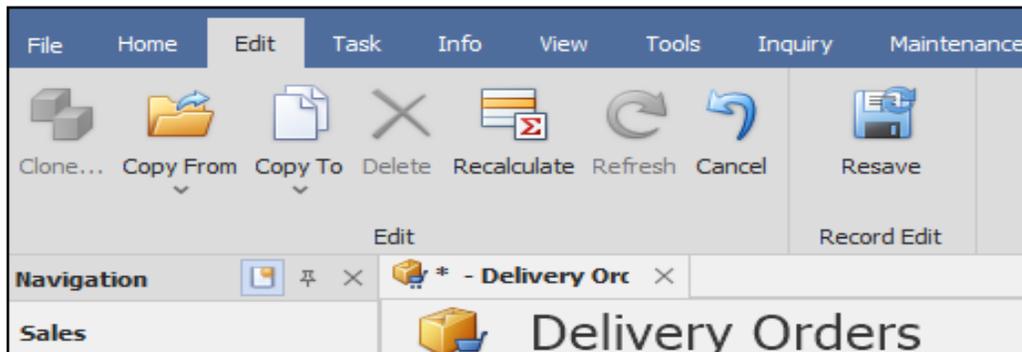
Buttons: Yes, No (highlighted with a red box)

4. For the changes to take effect, get the users to log out and log back in.
5. The 'Mark As' button is no longer available under the Edit menu.

Before



After



Note:

- System Role settings apply to all users that are assigned to it
- It is recommended to have a separate System Role for the specific users authorized to cancel and/or close transactions



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