

Company Definition

Reference Guide

Version 24.x

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Overview & Summary

Company Definition

The Company Definition frame is where you maintain your company identification information such as name, address, and phone. It also holds other relevant data that is used when printing reports, invoices and other company documents generated by your M5 system. The information is contained across five tabs: general, remit to, account template, tech spec template and fuel focus.

On the General tab and Remit to tabs enter all the fields completely. It is important to have all this information complete and verified. On the Account Template tab, the default option for account number storage is to Use Direct Account Table. Do not add segments if you are using the Direct Account Table. Leave the segment delimiter field empty. Having segments can affect the direct Account Table functionality. To use a template of your own design, remove the check from Use Direct Account Table and enter a delimiter that you want to separate the segments in your template. Net enter a default account description if desired.

Operation of the Account Template on the Company Definition frame is as follows:

- “Use Direct Account Table” – Default value is checked (Y). This checkbox is used to determine which LOV the users will get from the M5 frames that use Direct Accounts. If the checkbox is selected (Y), the user will get the original Direct Account LOV’s. If the checkbox is clear, the user will be shown a new frame that will allow data segments based on the template they created.



It is recommended that users use this frame when entering accounts using the template format. The LOV will immediately notify a user once they tab off a field if the value they have entered is acceptable or not. This should reduce the number of mistakes made when entering account numbers. The default record is controlled by the component and is not user editable. If a user adds segments to the template table the component will delete the DEFAULT record. If the user deletes all of the template records the component will create a DEFAULT record.

- Account Template Table – Default record:
 - Segment Name = DEFAULT
 - Minimum Length = 1
 - Maximum Length = 100
 - Is Required = Yes
 - Validate Against = None

If the users customize account numbers, they will need to set up the template for each segment that will be used for the account number. The maximum number of segments is set to 20. Each segment will be separated by a hyphen (-) automatically. The Maximum number of characters including the hyphens is 100. All of the M5 Database fields for the DIR_ACCT_NO have been increased to 100.

A template record is made up of six fields which can be modified and are used to evaluate each segment according to the settings.

The following fields make up a template record:

- Segment Name – User defined
- Position – Numeric value determines the segment position within the Account Number.
- Minimum Length – 1 to 100 (Sum of ALL segments cannot exceed 100).
- Maximum Length - 1 to 100 (Sum of ALL segments cannot exceed 100).
- Is Required – Determines if this segment must have a value and cannot be blank.
- Validate Against – Determines what validation is to occur for the given segment.

- The values in this field will consist of:
 - None – No Validation
 - Departments – Validated against DEPT_MAIN
 - General Locations – Validated against GEN_LOC
 - Organizational Hierarchy – These values will be dynamically loaded based upon the users ORG_HIER table.

Here are some of the common errors that a user will receive when creating a template:

- Maximum Length cannot be LESS than the minimum length.
- Segment Position must be a number from 1 to 20.
- The sum of all Segments max Length cannot be greater than 100.
- The number of segments created in the template MUST match the highest position number. If a user creates an Account Number with six segments, then there must be six positions also.

Here are some errors the user may get when trying to save a direct account:

- The number of segments created in the template does not match the number of segments in the Account Number Given. This error will occur if the user fails to enter a correct number of segments, if they forget a segment, or if they accidentally add an extra segment. This error can be avoided by using the template LOV when entering account numbers.
- Segment _____ is required but no segment has been found. User forgot to enter a value for a required segment.
- Segment _____ has a value of _____ which is not a valid (department/location etc..) on the (DEPT_MAIN, LOC_MAIN, etc...) table. – A value the user entered does not exist on the table that segment is being validated against.
- Segment ____ has a value of ____ which is shorter than the minimum field value of ____.
- Segment ____ has a value of ____ which is longer than the maximum field value of ____.



Please note that almost all these errors can be avoided by using the template LOV when entering direct account numbers.

On the Tech Spec Template tab:

Functionality was developed for the creation of Tech Spec numbers that is like the Account Template logic. This logic will force specific positions of the 13-character tech spec. In order to use this functionality, the System Flag 5268 - Use Tech Spec Templates? must be set to Y. When this system flag is set to "Y", this new tab for Tech Spec Templates will appear for you to define the various named segments of the Tech Spec template. A list of valid mfg/mk/model or user defined values may be defined for each segment by clicking the validate button on that row.

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.