Settings

- PDF Account Settings
- Matrix Item

PDF Account Settings

Settings Module Guide

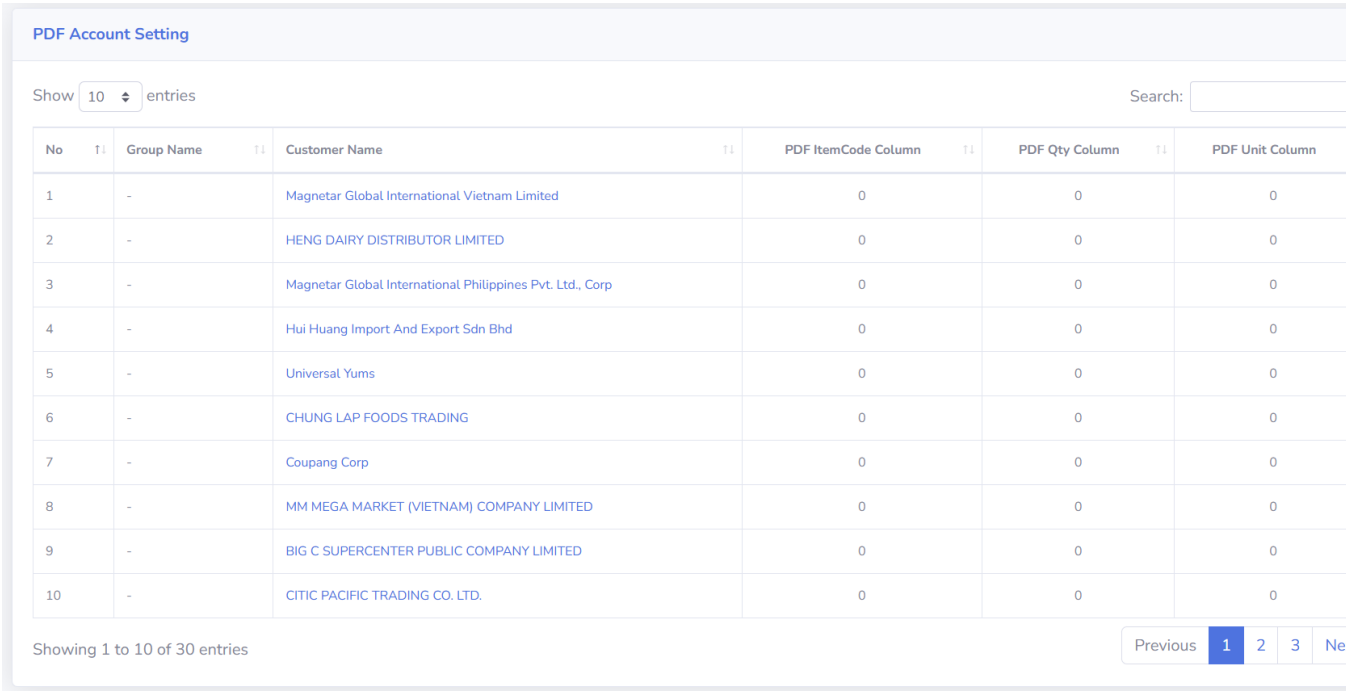
Module Location:

soApp > Settings > PDF Account Settings

The PDF Account Settings module is used to configure columns in PDF documents based on the customer. Available settings include the Item Code, Quantity, and Unit columns, allowing PDF configurations to be tailored to each customer’s document format.

1. ### PDF Account Settings Main View

   The PDF Account Settings page displays a list of customers along with their predefined PDF column configurations. Each customer can have different PDF column settings. Configuration information is displayed in a table format.



2. ### Column Descriptions

No	Displays the sequential number of the data in the table.

Group Name	Displays the customer’s group name if the customer belongs to a specific group. If there is no Group Name, the system may display a “-”.
Customer Name	Displays the name of the customer for whom a PDF configuration has been set up. Click Customer Name to open the customer settings details page.
PDF ItemCode Column	Displays the column configuration used to read or specify the Item Code in the customer’s PDF document.
PDF Qty Column	Displays the column configuration used to read or specify the Quantity in the customer’s PDF document.
PDF Unit Column	Displays the column configuration used to read or specify the Unit in the customer’s PDF document.

3. Tips & Important Notes

1. Make sure the selected customer is correct before making any configuration changes.
2. Double-check the Item Code, Qty, and Unit settings before saving your changes.
3. Use the Search function to find a specific customer more quickly.

Matrix Item

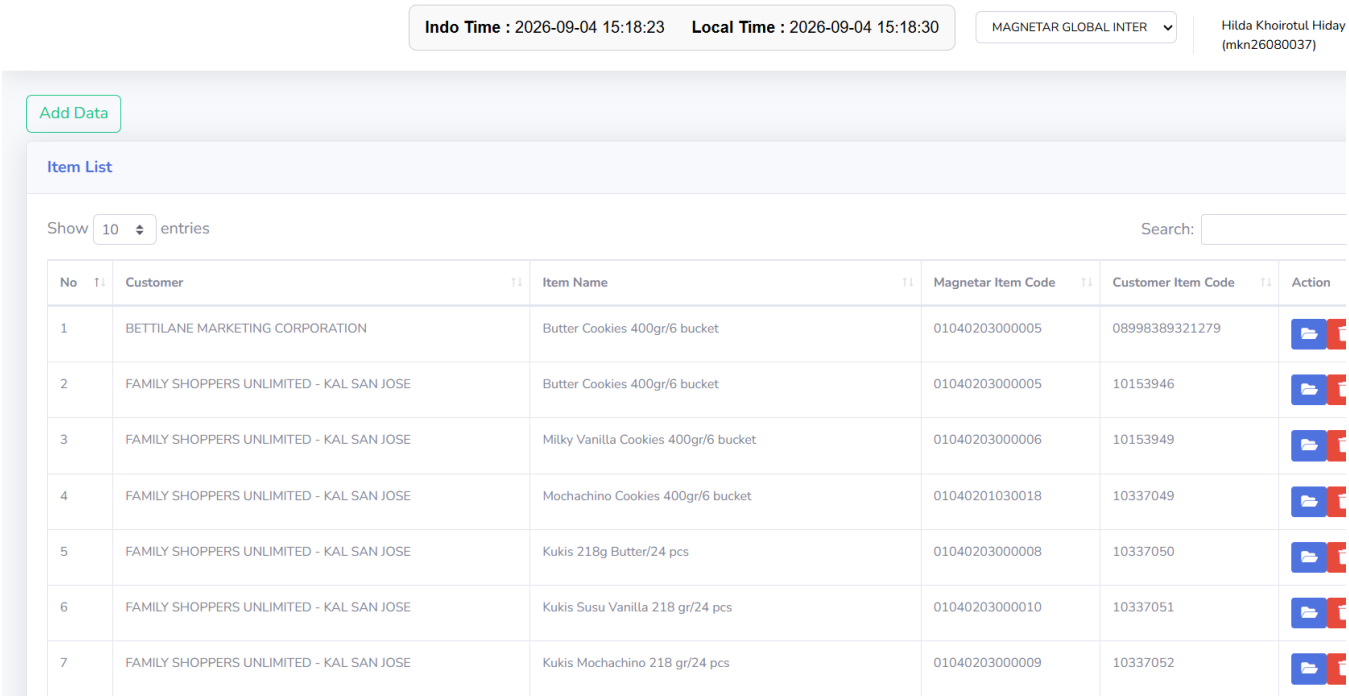
Settings Module Guide

Module Location:

`soApp` > `Settings` > `Matrix Item`

The Item List module is used to manage the relationship between items owned by the company and the item codes used by customers. The information stored includes the customer, item name, Magnetar Item Code, and Customer Item Code. This is important because the same product can have a company-internal code and a different code in the customer’s system.

1. **Matrix List page view**



The Item List page displays a list of items along with their internal codes and customer item codes. At the top, there is an Add Data button for adding new item mappings.

2. **Coloum Description**

No	Displays the sequential number of the data in the table.

Customer	Displays the name of the customer using that item.
Item Name	Displays the name or description of the product.
Magnetar Item Code	Displays the internal item code used in the Magnetar/KOKOLA system.
Customer Item Code	Displays the item code used by the customer for that product.

3. Tips & Important Notes

1. Make sure the selected customer is correct before adding or changing an item mapping.
2. Make sure the selected Item Name matches the product used by the customer.
3. Double-check the Magnetar Item Code to ensure it matches the internal item code used in the system.
4. Ensure the Customer Item Code matches the item code used by the customer for that product.
5. Avoid creating duplicate mappings for customers and items that have already been registered.
6. Double-check all information before saving the data to avoid item mapping errors.
7. Be aware of the difference between the Magnetar Item Code and the Customer Item Code, as a single product may use different codes in the internal system and the customer’s system.
8. If an item code mismatch occurs during a transaction, first check the mapping data in the Item Matrix.
9. Use “Add Data” only to add new item mappings that are not yet available.
10. Ensure that changes to item mappings are made carefully, as this data may be used as a reference in transactions involving the customer.
11. If a customer uses a new item code or experiences a code change, ensure that the Customer Item Code data is updated according to the latest information.
12. Double-check the customer, item, and both item codes after the data has been successfully saved.