



# PETAL

## User Training Manual

### LLPT 1.1 - Application Setup V1.0

# CONTENTS

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- **Location**
- **Application Configuration**
- **Lookups**

## Navigation: Setup -> Business Group -> Location

Home / Setup / Business Group

Company Location

Location DOWNLOAD + ADD LOCATION

LOCATION CODE	LOCATION NAME	LOCATION SHORT NAME	COMPANY NAME	DUNS #	CITY & STATE	STATUS
1010	New Houston Lake	NHL	New Test	12345	Chicago, IL	Active
1009	Mallard Lake	MLRDLK	New Test	12345	Chicago, IL	Active
1008	Buffalo	BUFF	Fresh Form		Buffalo, NY	Active
1007	North Hatfield	HAT	Fresh Form		Keene, NH	Active
1006	New England	NEW_ENG	Fresh Form		Keene, NH	Active
10004	Location 2	Location 2	Vendor Company		City, NT	Active
1003	Hjghjg	Jhghg	Fresh Form		Test, NS	Active
1002	Chennai	Chennai	Fresh Form		City, MIC	Active

- Location section contains the summary information of all operating business locations defined for the client.
- Column positions can be changed, Data can be filtered and downloaded to excel using the download option

## How to define a new location?



Home / Setup / Business Group

Company Location

Location

DOWNLOAD ADD LOCATION

LOCATION CODE	LOCATION NAME	LOCATION SHORT NAME	COMPANY NAME	DUNS #	CITY & STATE	STATUS
1010	New Houston Lake	NHL	New Test	12345	Chicago, IL	Active
1009	Mallard Lake	MLRDLK	New Test	12345	Chicago, IL	Active

Click on Add Location

- New location can be defined by click on 'Add Location', which opens the location definition page
- Location information of the vendor gets defaulted to purchase order screen for buyer while creating the PO's

# LOCATION



LIMN LABS

[Home](#) / [Setup](#) / [Business Group](#) / [Location](#) / [Create](#)

## Add New Location

[CLEAR CONTENTS](#)

[SAVE](#)

[Back to all Locations](#)

### Location Code

#### \* Location Name

Location Name

#### \* Location Short Name

Location Short Name

#### \* Time Zone

Time Zone

#### \* Location Function

☐ Head Quarters

☐ Receiving

☐ Shipping

☐ Payment

☐ Billing

☐ Remit To

#### Active

☒

At least one contact mandatory

#### \* Company Name

Company Name

#### Company Regn #

Company Regn #

#### DUNS #

DUNS #

#### Billing Location

Billing Location

#### Payment Location

Payment Location

Outside Storage (OSS) ☒

#### OSS Parent Location

OSS Parent Location

#### \* Address

Country Name

Address Line 1

Address Line 2

City

State

ZIP

#### Work Week Days & Times

☐ Mon

☐ Tue

☐ Wed

☐ Thu

☐ Fri

☐ Sat

☐ Sun

#### Wk Start

☒

☐

☐

☐

☐

☐

☐

#### Appointment Instructions

##### Contact Name

Contact Name

##### Phone

Phone

##### Scheduling Link

Scheduling Link

##### Instructions

Enter Instructions

##### Email

Email

### Contacts

PRIMARY	TITLE	FIRST NAME	LAST NAME	EMAIL	PHONE	FAX	
<input checked="" type="checkbox"/>	Title	First Name	Last Name	Email Address	(---)---"-----	(---)---"-----	<a href="#">Add</a>

- Location screen is provided to define the business location information in the system
- All Mandatory fields are marked (\*)
- Location code is optional
- Location short name is visible on transactions like Purchase order, Invoice, loads etc.
- Location function indicates the type of operations performed from that location. Location enabled for 'Shipping' is visible under ship from drop down of the purchase order
- Work week schedule helps buyers to know the operational window of the location for planning their transportation loads from that location
- Appointment instructions helps buyer to reach out to the person in charge of that location for any questions to be clarified
- Contact information of the location is an optional field

## Navigation: Setup -> Application Configuration

Application Configuration contains the system setups that facilities, controls and regulates the transactional processing of functionalities.

This section contains 5 sub sections, i.e.:

- I. Calendar** – Transactional / Reporting calendar that is followed by business.
- II. System Options** – These are system level parameters that are interlinked with overall processing like currency, decimal separator, group separator, time zone client is in, language, date format for transactions and master data sequencing options
- III. Document Management** – This section controls the transactional numbering sequencing preferences of the client
- IV. Terms** – Terms are relevant for vendors and carriers to configure and assign to their customers for billing purposes.

# APPLICATION CONFIGURATION



LIMN LABS

## Navigation: Setup -> Application Configuration

[Home](#) / [Setup](#) / Application Configuration

Client ID : 4102/VENDOR

[Calendar](#)   System Options   Document Management   Terms

### Calendar

[+ ADD CALENDAR](#)

#### Calendar Name

jabbar\_acc\_cal ▼

#### Period Type

Gregorian Calendar

#### Start Date

01/01/2022

[ADD PERIODS](#)

PERIOD NUM	START DATE	END DATE	YEAR	QUARTER
1	01/01/2022	01/31/2022	2022	1
2	02/01/2022	02/28/2022	2022	1
3	03/01/2022	03/31/2022	2022	1
4	04/01/2022	04/30/2022	2022	2
5	05/01/2022	05/31/2022	2022	2
6	06/01/2022	06/30/2022	2022	2
7	07/01/2022	07/31/2022	2022	3

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➤ Calendar is an optional set up



# APPLICATION CONFIGURATION



LIMN LABS

## Calendar:

Click on Add calendar in 'calendar' tab.

Add New Calendar

\* Calendar Name

Calendar Name

\* Period Type

Choose Period Type



\* Start Date

MM-DD-YYYY



CANCEL

ADD CALENDER

a. Provide the name for calendar

For ex: 'XYZ Transaction Calendar'

b. Choose period type. It has 2 default types 4-4-5 calendar and Gregorian (regular) calendar

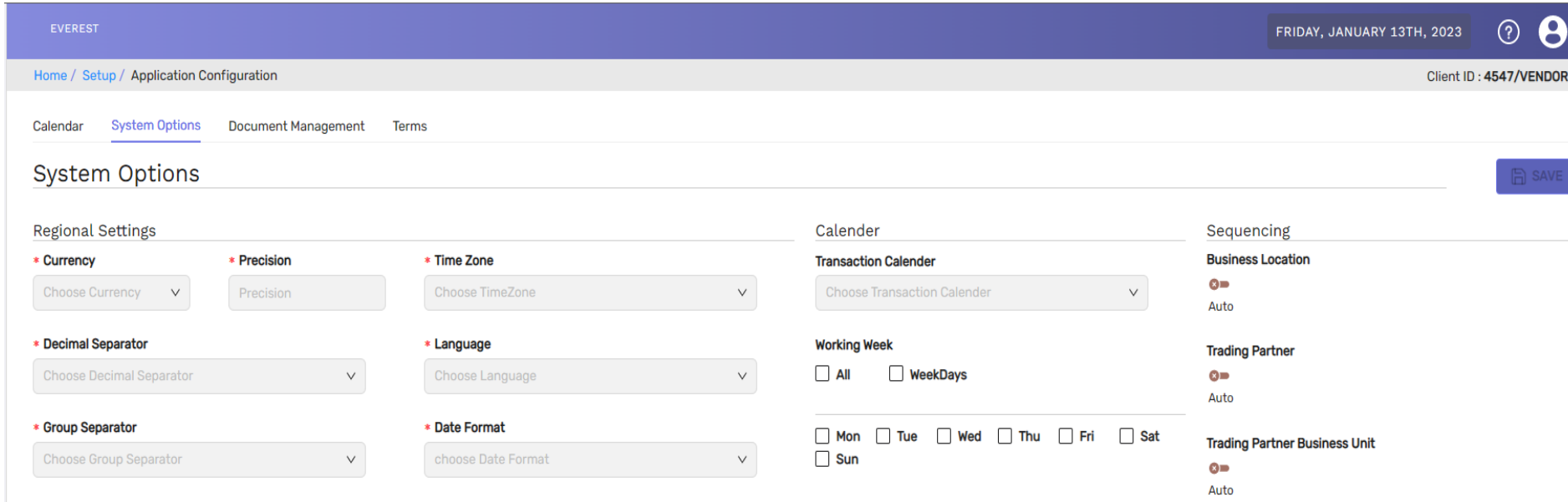
c. Start date for the calendar

Then click on 'Add Calendar'

PERIOD NUM	START DATE	END DATE	YEAR	QUARTER
1	01/01/2023	01/31/2023	2023	1
2	02/01/2023	02/28/2023	2023	1
3	03/01/2023	03/31/2023	2023	1
4	04/01/2023	04/30/2023	2023	2
5	05/01/2023	05/31/2023	2023	2

# APPLICATION CONFIGURATION

## System options:



The screenshot displays the 'System Options' configuration page in the Everest application. The page is divided into three main sections: Regional Settings, Calendar, and Sequencing. The top navigation bar shows the user is logged in as 'Client ID : 4547/VENDOR' on 'FRIDAY, JANUARY 13TH, 2023'. The breadcrumb trail indicates the path: Home / Setup / Application Configuration. The 'System Options' section is active, and a 'SAVE' button is visible in the top right corner.

**Regional Settings**

- Currency:** Choose Currency (dropdown)
- Precision:** Precision (input field)
- Time Zone:** Choose TimeZone (dropdown)
- Decimal Separator:** Choose Decimal Separator (dropdown)
- Language:** Choose Language (dropdown)
- Group Separator:** Choose Group Separator (dropdown)
- Date Format:** choose Date Format (dropdown)

**Calendar**

- Transaction Calendar:** Choose Transaction Calendar (dropdown)
- Working Week:**
  - ☐ All ☐ WeekDays
  - ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun

**Sequencing**

- Business Location:** Auto (dropdown)
- Trading Partner:** Auto (dropdown)
- Trading Partner Business Unit:** Auto (dropdown)

- System options are the controls being defined for the system with that client
- Currency, Currency precision whether 2 or 4 decimals, decimal separator, Language, Amount group separator, date format to represent the date on transactions and time zone are some of the basic application level configurations that can be completed here

# APPLICATION CONFIGURATION

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## System options:

- Calendar drop down is provided with list of values only when a calendar is defined in previous step
- Working week is an optional set up and indicative only
- **Sequencing:** Sequencing configuration is for generating numbering sequence on locations, trading partners and partner business units. If client set this toggle to automatic, system will generate the number and assign it to the new trading partner or partner site or location defined. If this is set to be 'Manual' then every record defined by the user should be provided with a unique number.

Click on SAVE once the updates are done.

# APPLICATION CONFIGURATION



LIMN LABS

## Document Management:

*Click on document management tab to navigate and configure the transactional level number sequencing for the client.*

The screenshot shows the Everest application configuration interface. At the top, there's a header bar with 'EVEREST' on the left, the date 'FRIDAY, JANUARY 13TH, 2023' in the center, and user icons on the right. Below the header is a breadcrumb trail: 'Home / Setup / Application Configuration'. On the right side of this bar, it says 'Client ID : 4547/VENDOR'. Below the breadcrumb is a navigation menu with 'Calendar', 'System Options', 'Document Management' (which is highlighted), and 'Terms'. The main content area is titled 'Document Management'. On the right side of this area, there are two buttons: '+ ADD ITEM' and 'SAVE'. A red box highlights the '+ ADD ITEM' button with the text 'Click on Add Item' and a red arrow pointing to it. Below the buttons is a table with the following columns: 'DOCUMENT TYPE', 'NUMBERING', 'NUMERIC / ALPHANUMERIC', 'PREFIX', and 'STARTING'. The table has one row with the following data: 'Vendor Invoice', 'Auto', 'Numeric', an empty 'PREFIX' cell, and '8001'.

DOCUMENT TYPE	NUMBERING	NUMERIC / ALPHANUMERIC	PREFIX	STARTING
Vendor Invoice	Auto	Numeric		8001

- Document management section contains the transaction numbering preferences of the client for each of the transaction type applicable as per the client's business type i.e. customer/vendor/carrier.

Click on SAVE once numbering sequence is defined.

# APPLICATION CONFIGURATION



LIMN LABS

## Terms:

*Click on terms tab to navigate and configure the payment term information which eventually can assign to the trading partner records for billing due date calculation purposes.*

The screenshot shows the 'Terms' configuration page in the Everest system. At the top, a blue header bar contains the text 'EVEREST', a green notification box stating 'Record saved successfully', the date 'FRIDAY, JANUARY 13TH, 2023', and user icons. Below the header, a breadcrumb trail reads 'Home / Setup / Application Configuration'. The main navigation bar includes 'Calendar', 'System Options', 'Document Management', and 'Terms' (which is highlighted). The 'Terms' section has a '+ ADD ITEMS' button. A red box with the text 'Click on Add Item' points to this button. To the right of the 'Terms' section is a 'SAVE' button. The 'Terms Lines' section contains a table with columns: 'TERM', 'DESCRIPTION', 'ACTIVE', 'DISC %', 'NET DUE DAYS', 'DISC DAYS', and 'DAY OF MONTH'. The 'Terms' table has one row with 'N30' as the term and 'Net 30 Days' as the description, with an active status icon. The 'Terms Lines' table is currently empty.

EVEREST

Record saved successfully

FRIDAY, JANUARY 13TH, 2023

Home / Setup / Application Configuration

Client ID : 4547/VENDOR

Calendar System Options Document Management **Terms**

Terms

+ ADD ITEMS

SAVE

Terms Lines

TERM	DESCRIPTION	ACTIVE	DISC %	NET DUE DAYS	DISC DAYS	DAY OF MONTH
N30	Net 30 Days					

- Terms section contains 2 parts, i.e.
  - Term Definition – contains the name and description of the term
  - Term lines definition – Select the term definition to see the details of the term lines

Click on SAVE once the term is defined.

### Lookups

Master Data Application Configuration

+ ADD NEW VALUE

SAVE

#### Lookup Code

Business Type

#### Description

Sample descrip..

VALUE	DESCRIPTION	
Grocery Distributor	Grocery Distributor	
Farm Grower	Farm Grower	
Retailer	Retailer	

Lookups, as the name suggests they are values that are common at multiple places.

Look ups that are allowed to add with additional values by clients are accessible and allowed to add values by clicking on 'Add New Value' button.

All the available lookup codes are grouped as Master data lookups and Application configuration lookups. Relevant codes can be seen from the drop down in each of the tab.



# Thank You