



PETAL

User Training Manual

LLPT 1.2 – Master Data1Trading Partner Management
V1.0

CONTENTS



Trading Partners

- Modify Trading Partner
- Attachments
- Locations
- Third Party Charges



- Clients using PETAL network are called as Trading Partners
- > Trading partner list will be updated and accessible based the trading partner relationship provided by buyer during client onboarding process



Navigation: Master Data -> Trading Partner

Trading Partne	ers						⊥ DOWNLOA	(I) A
PARTNER #	PARTNER NAME	ADDRESS	DUNS#	VENDOR	CUSTOMER	CARRIER	PARTNER MODE	STAT
		<u> </u>						
2023	Vendorm	314 Test 11, Test 12, CA, US		\odot	\otimes	\otimes	Online	Acti
2022	Johnson1		1234567@@@	\odot	⊗	\otimes	Offline	Acti
2021	Client_vendor_002			\odot	\otimes	\otimes	Online	Acti
2020	Client_buyer_001			\otimes	\odot	\otimes	Online	Acti
2016	Friendly Farm	Test1, Tes, City, CA, US	85858585	\otimes	\otimes	\otimes	Online	Acti
2019	Abdul Jabbar	123 Test Street, Test City, CA, US		\odot	\otimes	\otimes	Online	Acti
2018	Jabbar Client	123 Test Street, Test City, CA, US	123	\otimes	\odot	\otimes	Online	Acti
2017	Vendor Client Offline 070622			\otimes	\otimes	\odot	Offline	Acti
2015	TestCompany2		1234	\otimes	\odot	\otimes	Online	Acti
2014	Test Client			\otimes	\otimes	\otimes	Online	Acti
2006	CLIENT SLR	Address 1, Address 2, City, CT, US		\otimes	\otimes	\odot	Online	Acti
9862565	Fresh Form Vendor	Address 1, City, NS, CA	8872367	\odot	\otimes	\otimes	Online	Acti
2005	New Vendor	Hjjhj, Hjhjhjhj, Hjhjhjhj, COA, MX		\odot	\otimes	\otimes	Online	Acti
2002	Sham	Hjggj, Hgjg, Jjjg, NT, CA	12334444	\otimes	\otimes	\odot	Offline	Acti

- > Trading Partners summary screen contains the information of all partners associated with the client along with their business relationship.
- > Column positions can be changed, Data can be filtered and downloaded to excel using the download option



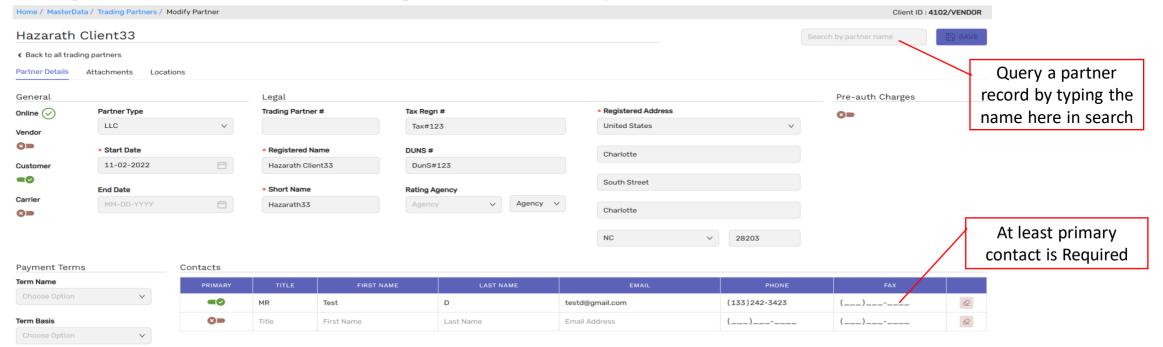
Trading Partners with business relationship:

/ MasterData / Trading	Partners						Client ID : 4102/VENDO
ding Partners	3					→ DOWNLOAD	+ ADD PARTNER
PARTNER # ₹	PARTNER NAME ₹	ADDRESS ₹	DUNS # ₹	VENDOR ₹	CUSTOMER ₹	CARRIER ₹	STATUS ₹
	PoBuyer	Address1, Address2, Charlotte, NC, US	1234	\otimes		\otimes	Active
	Hazarath Client33	Charlotte, South Street, Charlotte, NC, US	DunS#123	\otimes	\odot	\otimes	Active
	Rishi Organics Vendor	Address 1, Address 2, City, CO, US		\odot	\otimes	\otimes	Active
	Rishi Organics Buyer	Address 1, Address 2, City, LA, US		\otimes	\odot	⊗	Active
	Jan_buyer1	1 Test St, Test City, AK, US		\otimes	\odot	\otimes	Active
9876	Fresh Form Customer	78 Russel Ave, Richmond, VA, US		\otimes	\odot	\otimes	Active

- > Trading partner relationship will be defined when client onboarding process is completed
- All associated partner information can be seen with the relationship flag enabled i.e.
 customer or carrier or vendor



Navigation: Master Data -> Trading Partner -> Modify Partner



- Click on trading partner record from summary page to modify/update the details
- > Partner # is based on the configuration in application configuration.
- ➤ If it is set to be 'automatic', system will assign based on the sequence or if it is set to be manual then user should provide the number
- > At least one contact should be defined with first name, last name, email and phone

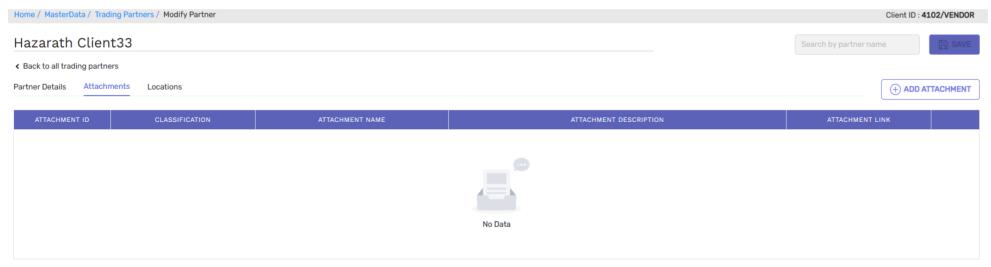


Update Trading Partners

- "General" section contains the type and relationship with the partner
- ➤ All fields with (*) are mandatory
- Payment terms dropdown allows to select the payment terms that are already defined in the application configuration by the user
- Payment terms information will be defaulted to the customer invoices on shipments made
- > To end the business relationship with a trading partner, end date information needs to be updated on the record
- Click on 'Save' to save the changes



How to attach documents?



- ➤ Attachments section under trading partners is provided to attach documents related to trade relationship, agreements etc.
- Click on 'Add attachment to open a blank row to update the attachment details and attach document
- > Attached documents can be deleted at any time



Locations



> Partner location information is visible from locations section

THIRD PARTY CHARGES



Navigation: Master Data -> Third Party Charges

Home / MasterData / 1	Third Party Charges			
Third Party C	Charges			
Charge Types				
CHARGE CODE	INTERNAL CODE	CHARGE NAME	ACTIVE	
88		Temperature Recorder	< ⊘	
457		Pre-Inspection	■ ⊘	
25		Inspectio	■ ⊘	

- > Third party charges are additional overheads applied on purchase order apart from item cost that includes temperature recorder, ice etc.
- > Charges that the vendor can add on to PO will be shown here and the same will be available to add in purchase order screen charges section
- > Charge code represents the industry standard charge code for the charge and If any client uses their internal charge code, it can be mapped in 'internal code' column
- ➤ When 'Show Inactive' checkbox is checked in, all inactivated charge codes by the client will be shown
- Click save after updating the charges information



Thank You