PETAL

User Training Manual

LLPT 1.2 – Master Data1-

Trading Partner Management

V1.0

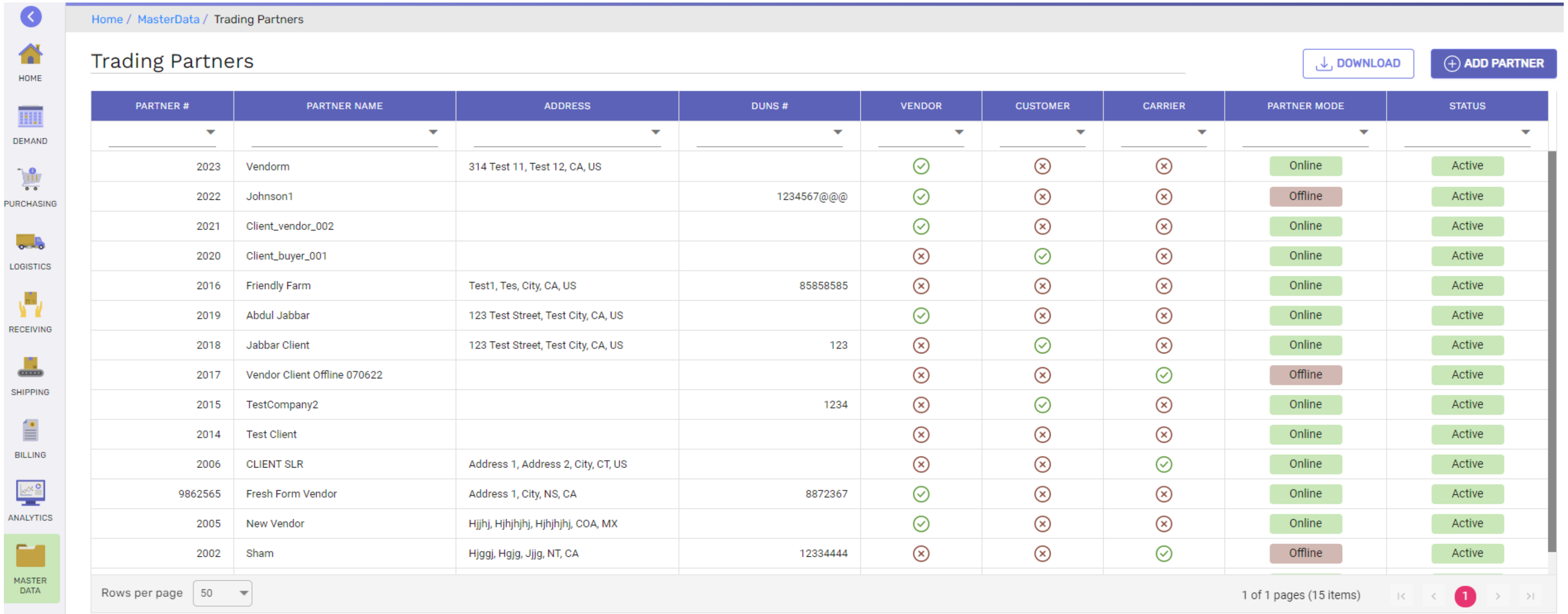
CONTENTS

TRADING PARTNERS

- 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

TRADING PARTNERS

Navigation: Master Data -> Trading Partner



PARTNER #	PARTNER NAME	ADDRESS	DUNS #	VENDOR	CUSTOMER	CARRIER	PARTNER MODE	STATUS
2023	Vendorm	314 Test 11, Test 12, CA, US		✓	✗	✗	Online	Active
2022	Johnson1		1234567@@@	✓	✗	✗	Offline	Active
2021	Client_vendor_002			✓	✗	✗	Online	Active
2020	Client_buyer_001			✗	✓	✗	Online	Active
2016	Friendly Farm	Test1, Tes, City, CA, US	85858585	✗	✗	✗	Online	Active
2019	Abdul Jabbar	123 Test Street, Test City, CA, US		✓	✗	✗	Online	Active
2018	Jabbar Client	123 Test Street, Test City, CA, US	123	✗	✓	✗	Online	Active
2017	Vendor Client Offline 070622			✗	✗	✓	Offline	Active
2015	TestCompany2		1234	✗	✓	✗	Online	Active
2014	Test Client			✗	✗	✗	Online	Active
2006	CLIENT SLR	Address 1, Address 2, City, CT, US		✗	✗	✓	Online	Active
9862565	Fresh Form Vendor	Address 1, City, NS, CA	8872367	✓	✗	✗	Online	Active
2005	New Vendor	Hjjhj, Hjhjhjhj, Hjhjhjhj, COA, MX		✓	✗	✗	Online	Active
2002	Sham	Hjggj, Hgjg, Jjjg, NT, CA	12334444	✗	✗	✓	Offline	Active

- ➢ 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

Trading Partners with business relationship:

Home / MasterData / Trading Partners Client ID : **4102/VENDOR**

Trading Partners

DOWNLOAD ADD PARTNER

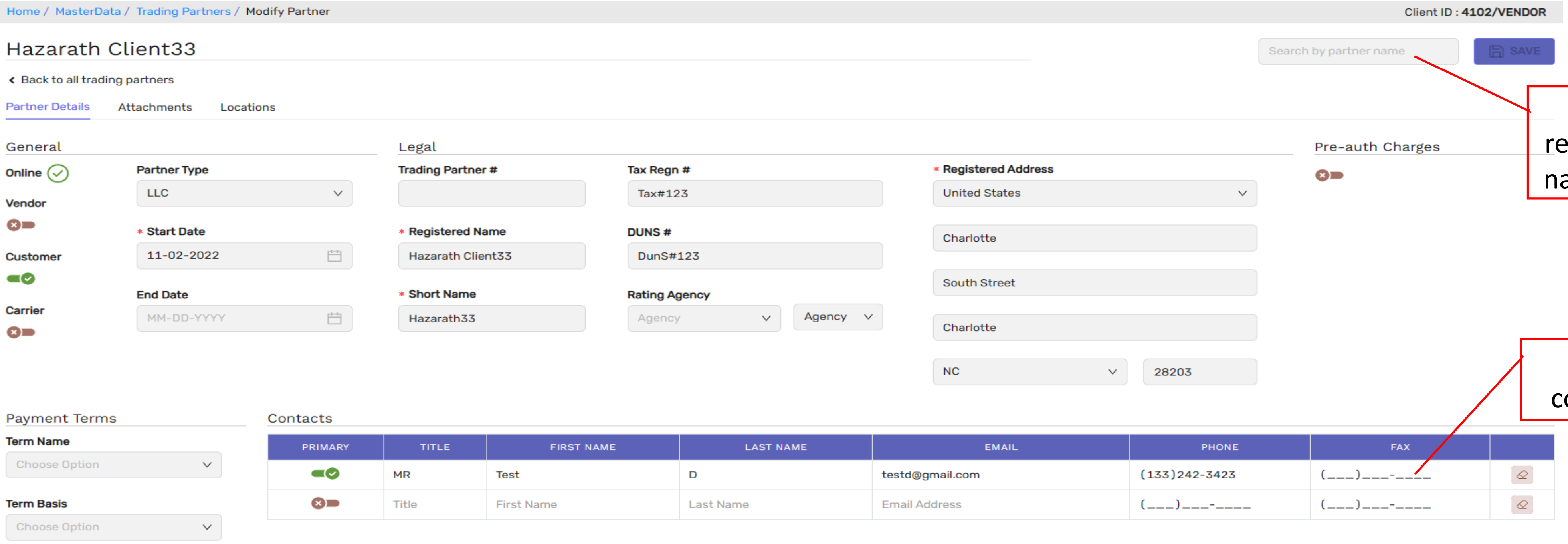
PARTNER #	PARTNER NAME	ADDRESS	DUNS #	VENDOR	CUSTOMER	CARRIER	STATUS
	PoBuyer	Address1, Address2, Charlotte, NC, US	1234	✗	✓	✗	Active
	Hazarath Client33	Charlotte, South Street, Charlotte, NC, US	DunS#123	✗	✓	✗	Active
	Rishi Organics Vendor	Address 1, Address 2, City, CO, US		✓	✗	✗	Active
	Rishi Organics Buyer	Address1, Address 2, City, LA, US		✗	✓	✗	Active
	Jan_buyer1	1 Test St, Test City, AK, US		✗	✓	✗	Active
9876	Fresh Form Customer	78 Russel Ave, Richmond, VA, US		✗	✓	✗	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

TRADING PARTNERS

LIMN LABS

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



Query a partner record by typing the name here in search

At least primary contact is Required

- 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

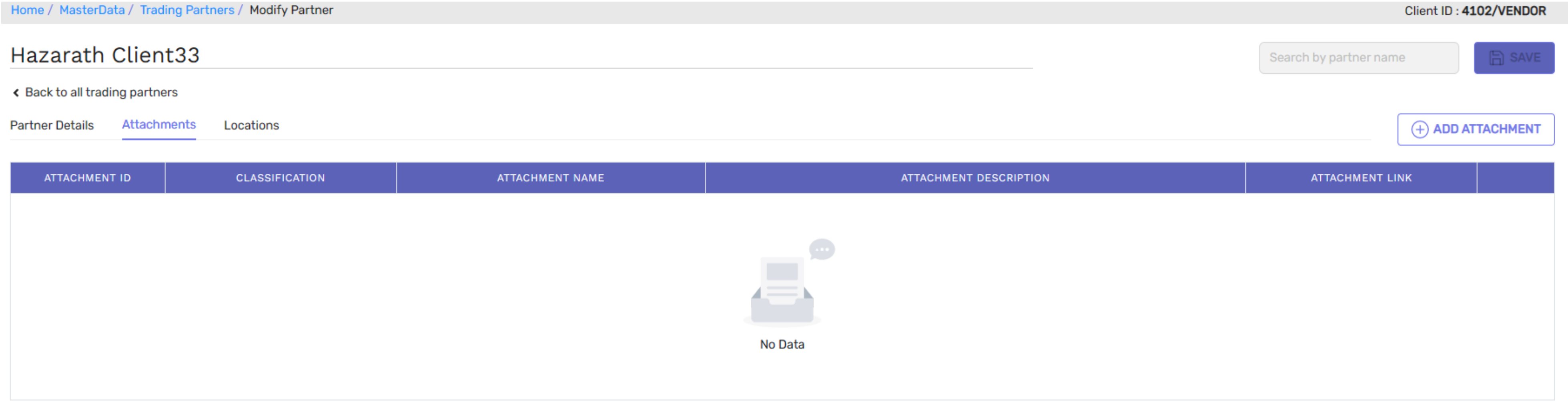
TRADING PARTNERS

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

TRADING PARTNERS

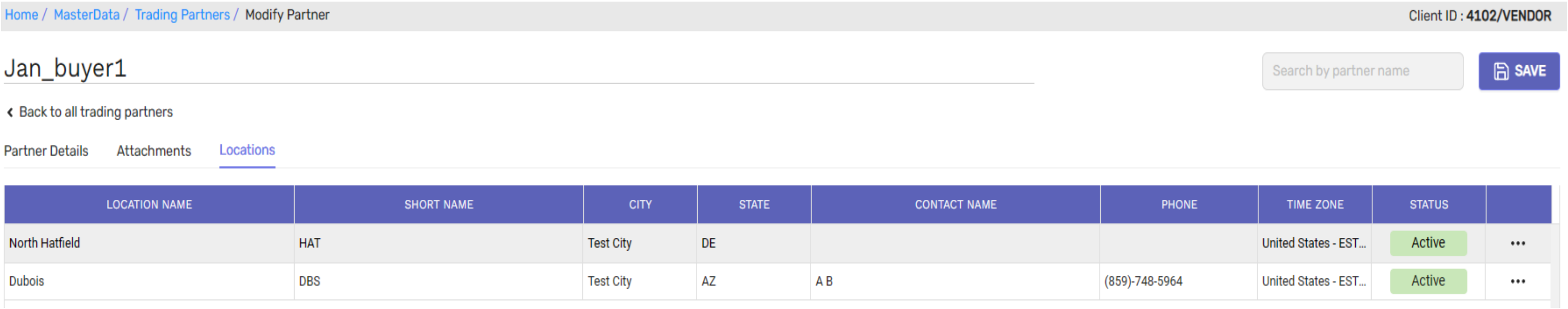
How to attach documents?



- 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

TRADING PARTNERS

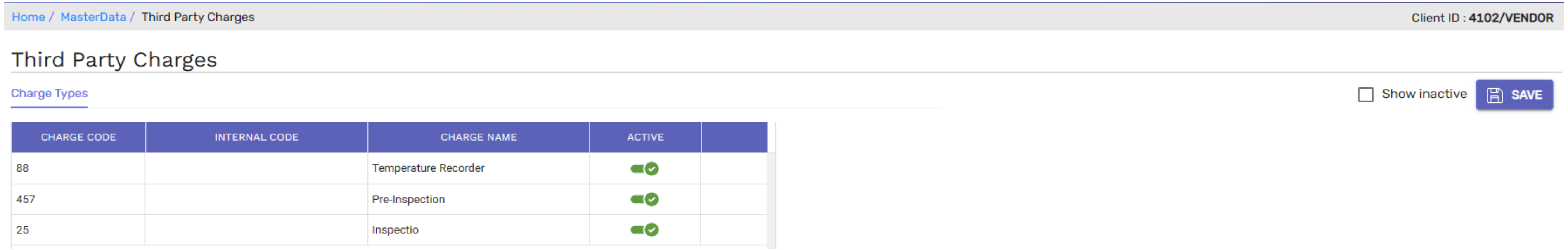
Locations



- Partner location information is visible from locations section

THIRD PARTY CHARGES

Navigation: Master Data -> Third Party Charges



- ➢ 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

For any questions, please contact support@limnlabs.com