LIMN LABS

PETAL

User Training Manual

LLPT 1.2 – Master Data1-

Trading Partner Management

V1.0

CONTENTS

- **Trading Partner Management.**
- **Third Party Charges**

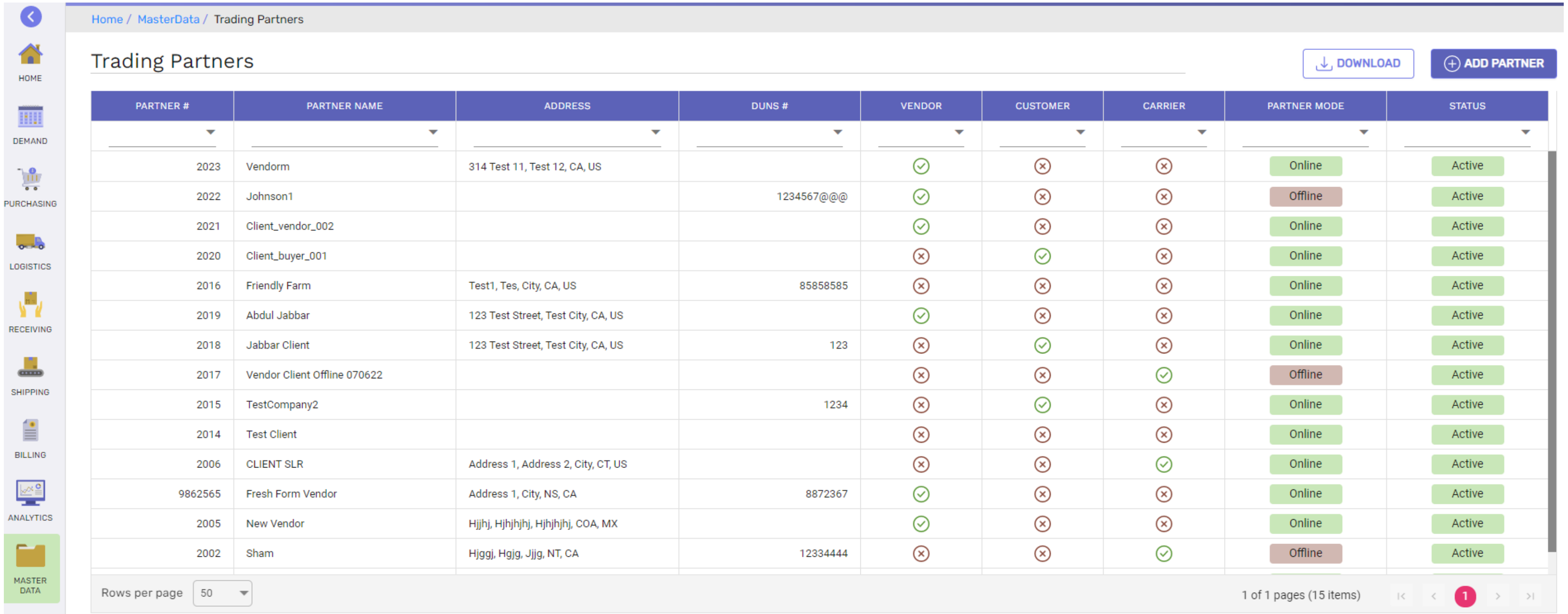
TRADING PARTNERS

- Trading Partners are the clients on-boarded into the PETAL network
- Trading partner can be online (who has access to application) or offline (who doesn’t have access to application)
- Every trading partner in the network should select and define the business relationship with their counter trading partners for gaining mutual access on transactions created

TRADING PARTNERS

LIMN LABS

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

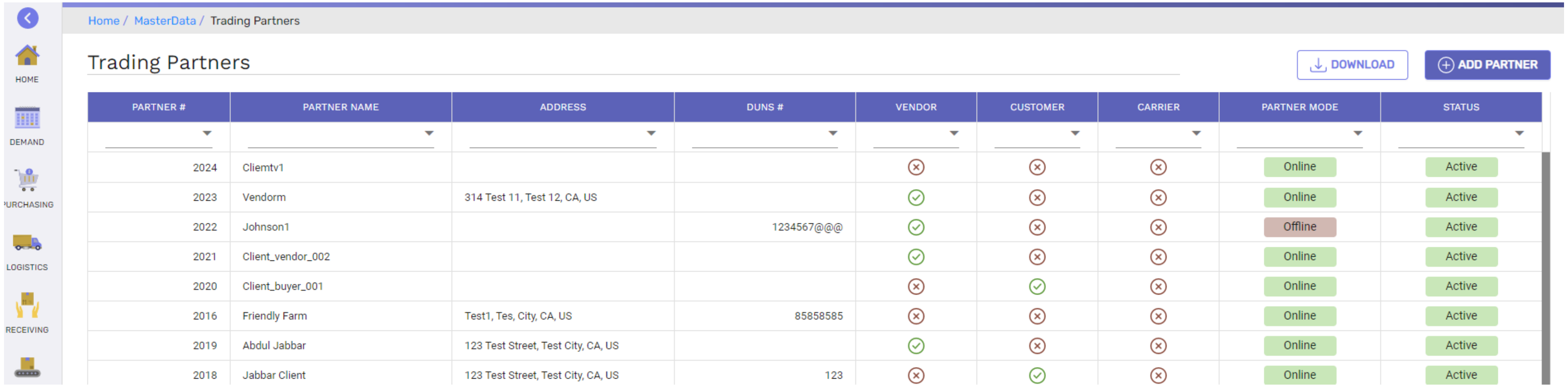
Rows per page 50

1 of 1 pages (15 items)

- 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

How to add a new partner and define trade relationship?



PARTNER #	PARTNER NAME	ADDRESS	DUNS #	VENDOR	CUSTOMER	CARRIER	PARTNER MODE	STATUS
2024	Climtv1			✗	✗	✗	Online	Active
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

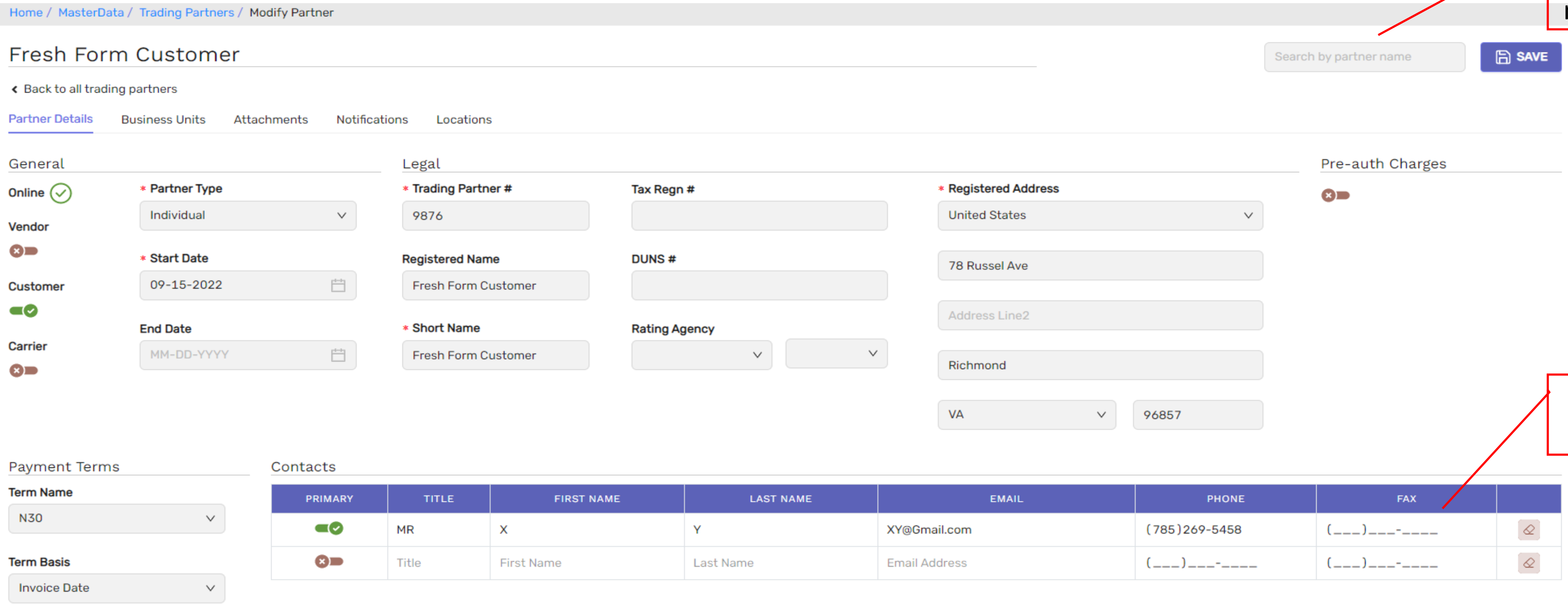
- New trading partners and their cross partner relationships are defined by Limn Labs based on the details provided by the client.

TRADING PARTNERS

How to update the details on added trading partner?

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 navigate to the modify/update screen

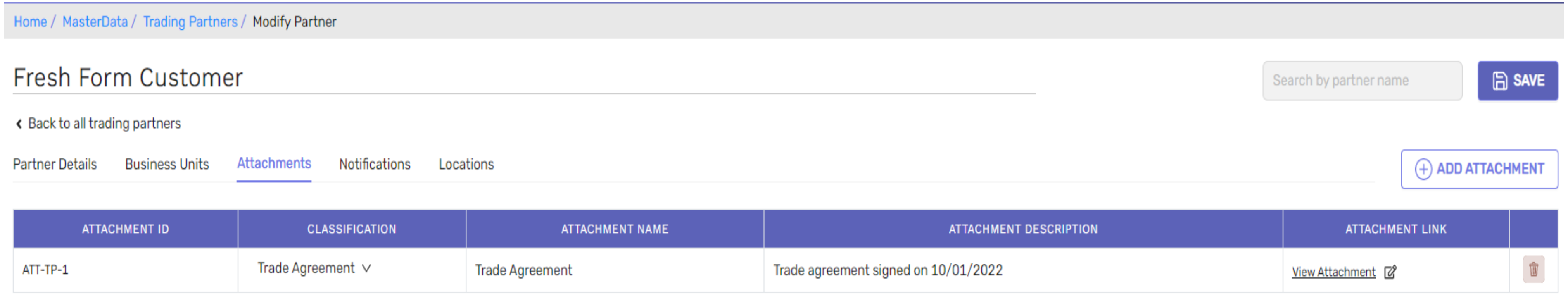
TRADING PARTNERS

Update Trading Partners

- “General” section contains the type and relationship with the partner
- All fields with (*) are mandatory
- Trading partner numbering criteria is configured in application set up whether to follow automatic or manual. This is the unique number assigned to the trading partner in that client environment
- 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

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

Home / MasterData / Trading Partners / Modify Partner

Fresh Form Customer

Search by partner name | SAVE

‹ Back to all trading partners

Partner Details | Business Units | Attachments | Notifications | Locations

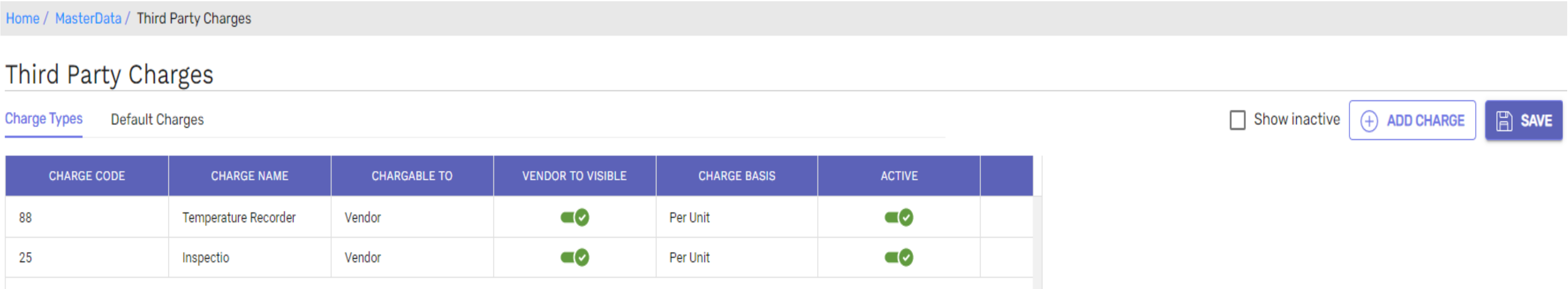
LOCATION NAME	SHORT NAME	CITY	STATE	CONTACT NAME	PHONE	TIME ZONE	STATUS	
Buffalo	BUFF	Buffalo	NY	R S	(758)-458-5485	United States - ...	Active	•••
North Hatfield	HAT	Keene	NH	A C	(785)-468-5785	United States - ...	Active	•••
New England	NEW_ENG	Keene	NH	X Y	(758)-458-5458	United States - ...	Active	•••

- Partner location information is visible from locations section
- Only online trading partner location information is shown.

THIRD PARTY CHARGES

LIMN LABS

Navigation: Master Data -> Third Party Charges



CHARGE CODE	CHARGE NAME	CHARGABLE TO	VENDOR TO VISIBLE	CHARGE BASIS	ACTIVE
88	Temperature Recorder	Vendor		Per Unit	
25	Inspectio	Vendor		Per Unit	

- Third party charges are additional overheads applied on purchase order along with item costs
- Charges can be added while creating PO and sometimes while generating billing
- All applicable charge codes in the client’s business process need to be selected under charge types
- Click on ‘Add Charge’ will open a blank row to select charge code and other information
- When ‘Show Inactive’ is enabled, screen will show the inactive charge types also but by default the screen will show the active charge types for that client
- Click save after updating the charges information

Thank You

For any questions, please contact support@limnlabs.com