



# PETAL

## User Training Manual

### LLPT 1.2 – Master Data1- Trading Partner Management V1.0

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# TRADING PARTNERS

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- 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

Home / MasterData / Trading Partners

Trading Partners

DOWNLOAD ADD 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, Hjjhj, Hjjhj, COA, MX		✓	✗	✗	Online	Active
2002	Sham	Hjggj, Hggjg, Jjg, 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 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

[Home](#) / [MasterData](#) / [Trading Partners](#) / [Modify Partner](#)

Client ID : 4102/VENDOR

Hazarath Client33

Search by partner name

SAVE

Query a partner record by typing the name here in search

[Back to all trading partners](#)

[Partner Details](#)

[Attachments](#)

[Locations](#)

### General

Online ☒

Vendor ☒

Customer ☒

Carrier ☒

Partner Type

LLC

\* Start Date

11-02-2022

End Date

MM-DD-YYYY

### Legal

Trading Partner #

\* Registered Name

Hazarath Client33

\* Short Name

Hazarath33

Tax Regn #

Tax#123

DUNS #

DunS#123

Rating Agency

Agency

Agency

\* Registered Address

United States

Charlotte

South Street

Charlotte

NC

28203

### Pre-auth Charges

☒

### Payment Terms

Term Name

Choose Option

Term Basis

Choose Option

### Contacts

PRIMARY	TITLE	FIRST NAME	LAST NAME	EMAIL	PHONE	FAX	
<input checked="" type="checkbox"/>	MR	Test	D	testd@gmail.com	(133)242-3423	( )- - - - -	
<input checked="" type="checkbox"/>	Title	First Name	Last Name	Email Address	( )- - - - -	( )- - - - -	

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

## 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?

Home / MasterData / Trading Partners / Modify Partner Client ID : 4102/VENDOR

Hazarath Client33 Search by partner name SAVE

[Back to all trading partners](#)

Partner Details Attachments Locations + ADD ATTACHMENT

ATTACHMENT ID	CLASSIFICATION	ATTACHMENT NAME	ATTACHMENT DESCRIPTION	ATTACHMENT LINK
 No Data				

- 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

[Home](#) / [MasterData](#) / [Trading Partners](#) / [Modify Partner](#)

Client ID : 4102/VENDOR

Jan\_buyer1

Search by partner name

 SAVE

[← Back to all trading partners](#)

[Partner Details](#) [Attachments](#) [Locations](#)

LOCATION NAME	SHORT NAME	CITY	STATE	CONTACT NAME	PHONE	TIME ZONE	STATUS	
North Hatfield	HAT	Test City	DE			United States - EST...	Active	...
Dubois	DBS	Test City	AZ	A B	(859)-748-5964	United States - EST...	Active	...

➤ Partner location information is visible from locations section

# THIRD PARTY CHARGES

## Navigation: Master Data -> Third Party Charges

[Home](#) / [MasterData](#) / Third Party Charges




Client ID : 4102/VENDOR

### Third Party Charges

[Charge Types](#)

☐ Show inactive

 SAVE

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