



PETAL

User Training Manual

LLPT 1.1 - Application Setup

V1.0

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

Navigation: Setup -> Business Group -> Location

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PROCHASING

LOGISTICS

RECEIVING

SHIPPING

BILLING

ANALYTICS

MASTER DATA

SETUP

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



LIMN LABS

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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



* 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	(---)---"-----	(---)---"-----	

At least one contact mandatory

➤ All New location screen is to define operating business locations of the client

APPLICATION CONFIGURATION



LIMN LABS

Navigation: Setup -> Application Configuration

CAS Wholesale Grocers

EVEREST

FRIDAY, SEPTEMBER 16TH, 2022

?

8

Home / Setup / Application Configuration

Calendar

System Options

Document Management

Transportation Options

Auto Load

Terms

Calendar

ADD CALENDAR

SAVE

Calendar Name

Calendar 01

Period Type

Gregorian Calendar

Start Date

01/01/2023

ADD PERIODS

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
6	06/01/2023	06/30/2023	2023	2
7	07/01/2023	07/31/2023	2023	3

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HOME

DEMAND

PURCHASING

LOGISTICS

RECEIVING

SHIPPING

APPLICATION CONFIGURATION



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*
Forex: '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:

Click on system options tab to navigate and configure the system options that control the overall system for the client.

Home / Setup / Application Configuration

Calendar **System Options** Document Management Transportation Options Auto Load Terms

System Options

[SAVE](#)

Regional Settings

* Currency	* Precision	* Time Zone
MXN	1	Canada - MST (UTC-07:00)
* Decimal Separator	* Language	
Comma (,)	French	
* Group Separator	* Date Format	
Period (.)	MM-DD-YYYY	

Calendar

Transaction Calendar

Calendar 01

Working Week

☒ All ☐ WeekDays

☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

Sequencing

Business Location

Auto 1001

Trading Partner

Auto 2001

Trading Partner Business Unit

Auto 1001

- All mandatory settings for this screen are marked and the labels are self explanatory
- Sequencing: Sequencing is for numbering sequence of locations, trading partners and partner business/operating unit configurations.

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.

Calendar System Options Document Management Transportation Options Auto Load Terms

Document Management

+ ADD ITEM

SAVE

DOCUMENT TYPE	RECEIVING WAREHOUSE	NUMBERING	NUMERIC / ALPHANUMERIC	PREFIX	STARTING	
Claim	HAT	Auto	Alpha Numeric	CL	1001	
Demand	NEW_ENG	Auto	Alpha Numeric	DEM	1001	
Vendor Invoice	BUFF	Auto	Numeric	INV	101	
Carrier Invoice	HAT	Auto	Numeric	CA	1001	
Purchase Order	BUFF,HAT	Auto	Alpha Numeric	PO	60001	
Vendor Invoice	BUFF	Auto	Alpha Numeric	PO	60001	

Click on Add Item

- 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



Transportation Options:

Click on Transportation options tab to navigate and configure the transportation shipping and receiving segments, container information.

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[Calendar](#) [System Options](#) [Document Management](#) [Transportation Options](#) [Auto Load](#) [Terms](#)

Transportation Options

Load Defaults

Freight Calculation

Choose Carrier

Default Container Size

Choose Container

PO Num as Load Num

Shipping Segments

	SEGMENT#	NAME
<input checked="" type="checkbox"/>	1	Origin
<input checked="" type="checkbox"/>	2	Ship Zone
<input checked="" type="checkbox"/>	3	Ship Group
<input checked="" type="checkbox"/>	4	Shipping Test

Receiving Segments

	SEGMENT#	NAME
<input checked="" type="checkbox"/>	1	Destination
<input checked="" type="checkbox"/>	2	Rcvg Zone
<input checked="" type="checkbox"/>	3	Rcvg Group
<input checked="" type="checkbox"/>	4	Recieving Test

Shipping Containers

CONTAINER SIZE

DEFAULT

PALLET CAPACITY

THRESHOLD

WEIGHT CAPACITY(LBS)

THRESHOLD

CUBIC FEET ALLOWED (FT)

THRESHOLD

SAVE

ADD CONTAINER

Transportation options controls the load management process of the customer as part of their transportation planning.

Up to 4 Shipping and receiving segments can be defined based on the client's geographic operations for transportation purposes.

APPLICATION CONFIGURATION



Auto Load:

Click on Auto load tab to navigate and configure the options enables automatic load building and recommend the loads for the client to review and confirm.

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Auto Load

SAVE

Defaults

Default Carriers

Choose Carrier ▾

Default Container Size

Choose Container ▾

Load Optimization

RANK	PARAMETER	CRITERIA
1 ▾	Parameter	▾
2 ▾	Parameter	▾
3 ▾	Parameter	▾
4 ▾	Parameter	▾
5 ▾	Parameter	▾
6 ▾	Parameter	▾
7 ▾	Parameter	▾

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.

Home / Setup / Application Configuration

Calendar System Options Document Management Transportation Options Auto Load Terms

Terms SAVE

Terms + ADD ITEMS

TERM	DESCRIPTION	ACTIVE
20%20N	Test Desc	
526762	Yweue	

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Terms Lines

S.NO	DISC %	NET DUE DAYS	DISC DAYS	DAY OF MONTH	MONTHS AHEAD
1	2		20		

Rows per page 12 1 of 1 pages (1 item) < < 1 > >

- 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.



Navigation: Setup -> Lookups

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Lookups

[Master Data](#)

[Application Configuration](#)

[Shipping](#)

[Receiving](#)

[Claims](#)

[+ ADD NEW VALUE](#)

[SAVE](#)

Lookup Code:

Partner Type

Description:

Sample descrip..

VALUE	DESCRIPTION	
Test	Test	
Women Enterprise	Women Enterprise	
Brokers	Brokers	
Individual	Individual	
Organization	Organization	

Lookups, as the name suggests they are values that are common at multiple places. These lookup values are referred at multiple master data or transactional data screens so that they appear as dropdown list of values to choose from.

Also for some of these lookups, there is a flexibility of extending the list of values by client as needed.

Thank You