LIMN LABS

PETAL

User Training Manual

LLPT 1.1 - Application Setup

V1.0

CONTENTS

- Location
- Application Configuration
- Lookups

LOCATION

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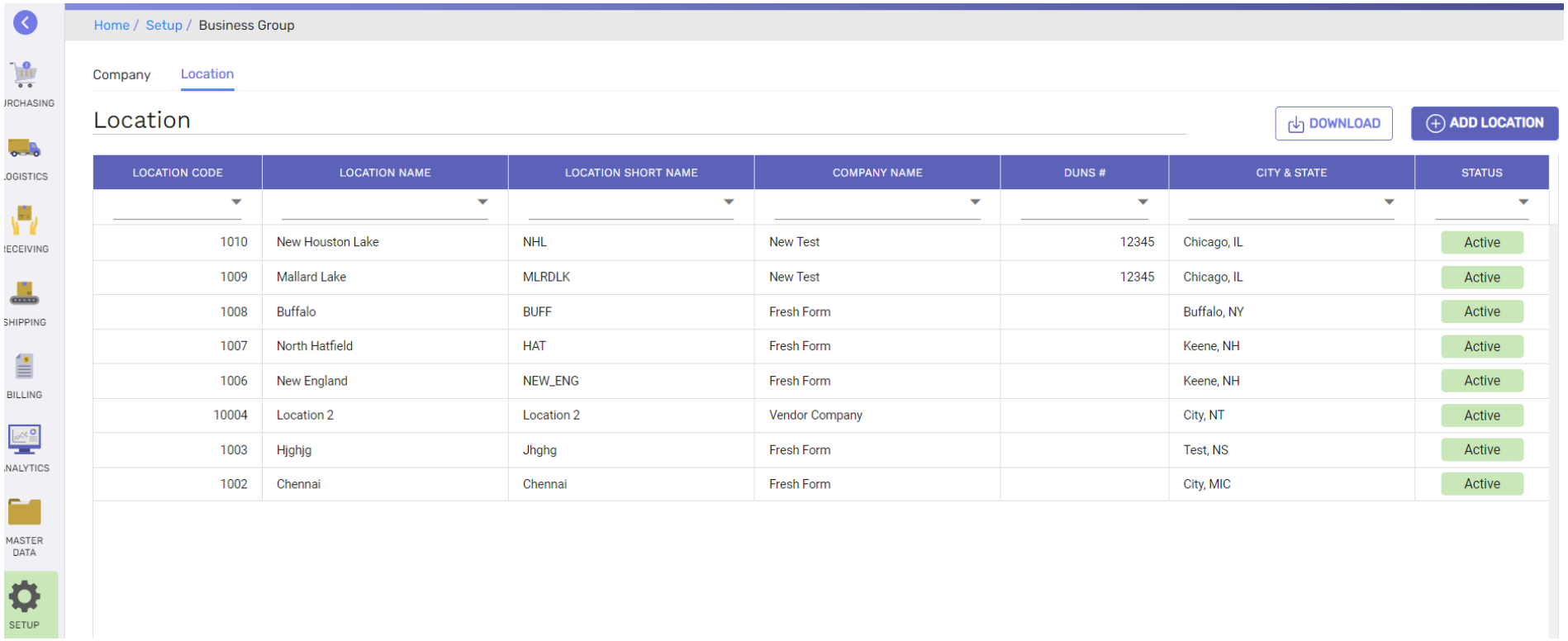
Navigation: Setup -> Business Group -> Location

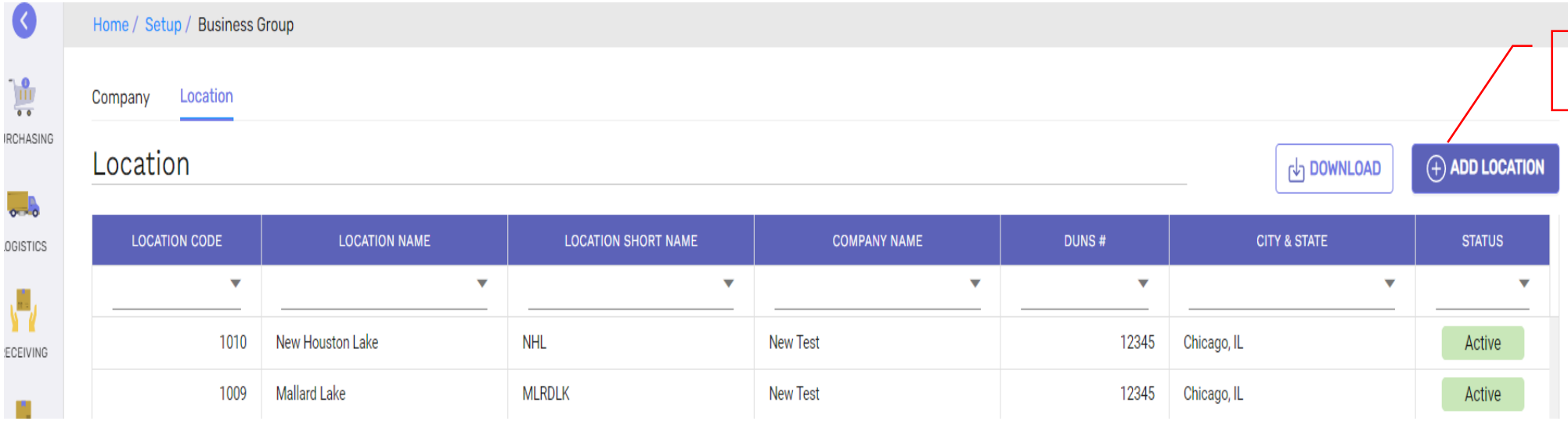


LOCATION CODE	LOCATION NAME	LOCATION SHORT NAME	COMPANY NAME	DUNS #	CITY & STATE	STATUS
1010	New Houston Lake	NHL	New Test	12345	Chicago, IL	Active
1009	Mallard Lake	MLRDLK	New Test	12345	Chicago, IL	Active
1008	Buffalo	BUFF	Fresh Form		Buffalo, NY	Active
1007	North Hatfield	HAT	Fresh Form		Keene, NH	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

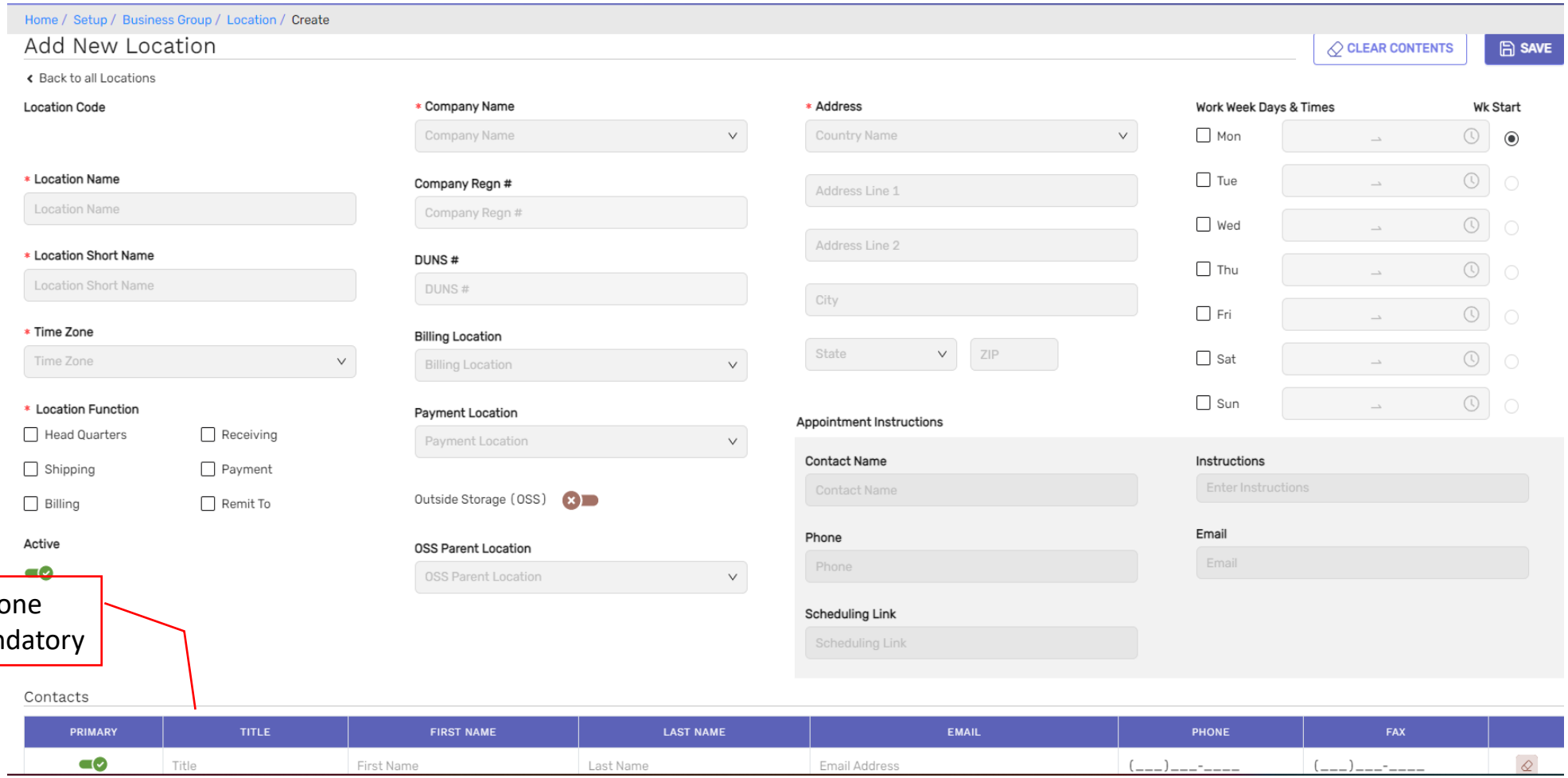
LOCATION

How to define a new location?



- New location can be defined by click on ‘Add Location’, which opens the location definition page

LOCATION



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

APPLICATION CONFIGURATION

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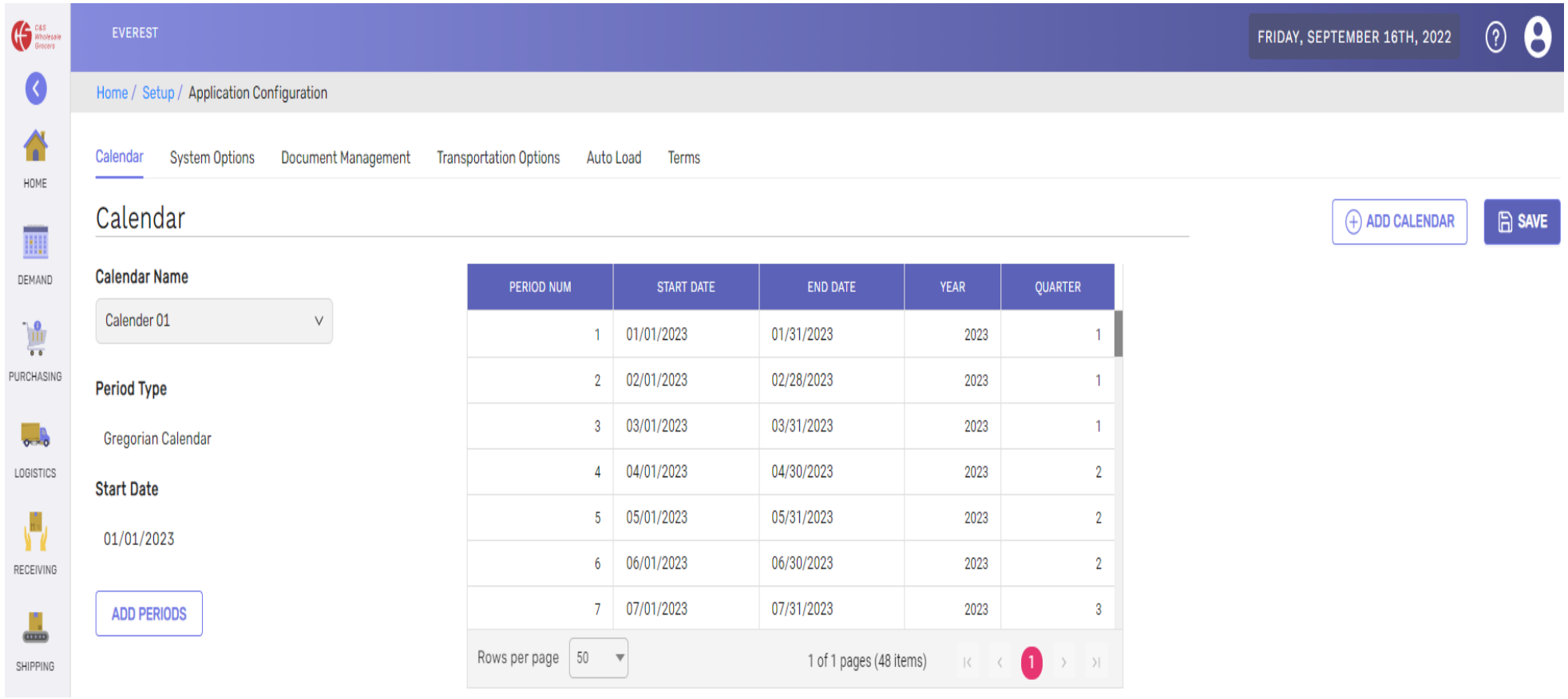
Navigation: Setup -> Application Configuration



APPLICATION CONFIGURATION

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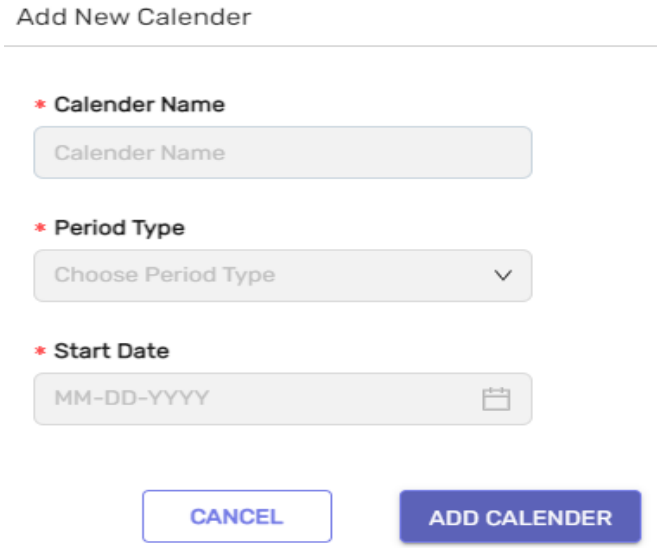
Calendar:

Click on Add calendar in 'calendar' tab.



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

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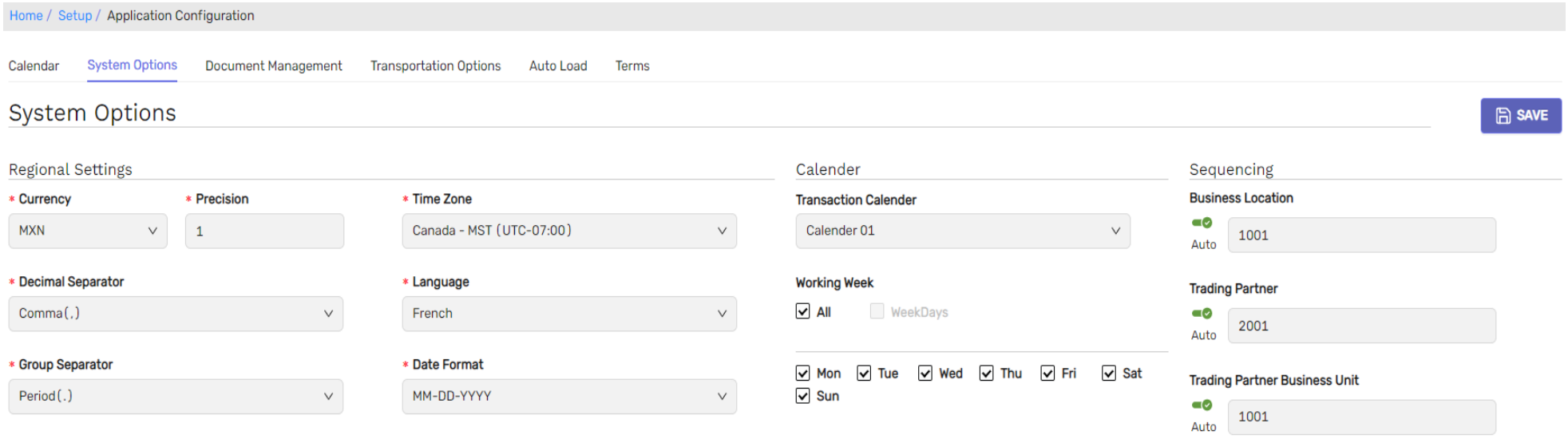
System options:

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



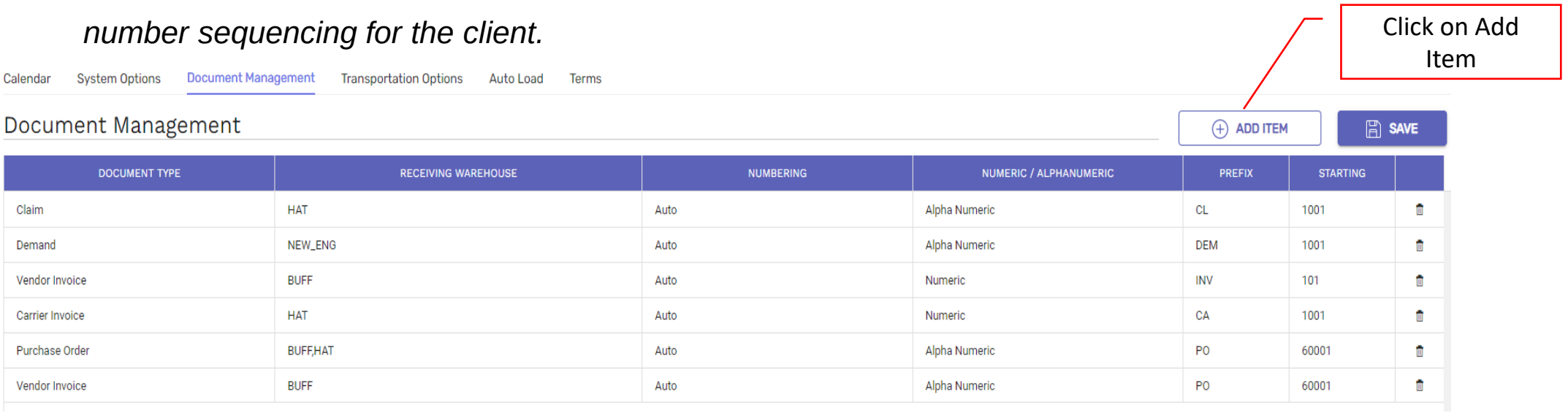
- All mandatory settings for this screen are marked and the labels are self explanatory
- <u>Sequencing:</u> Sequencing is for numbering sequence of locations, trading partners and partner business/operating unit configurations.

Click on SAVE once the updates are done.

APPLICATION CONFIGURATION

Document Management:

Click on document management tab to navigate and configure the transactional level number sequencing for the client.



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	

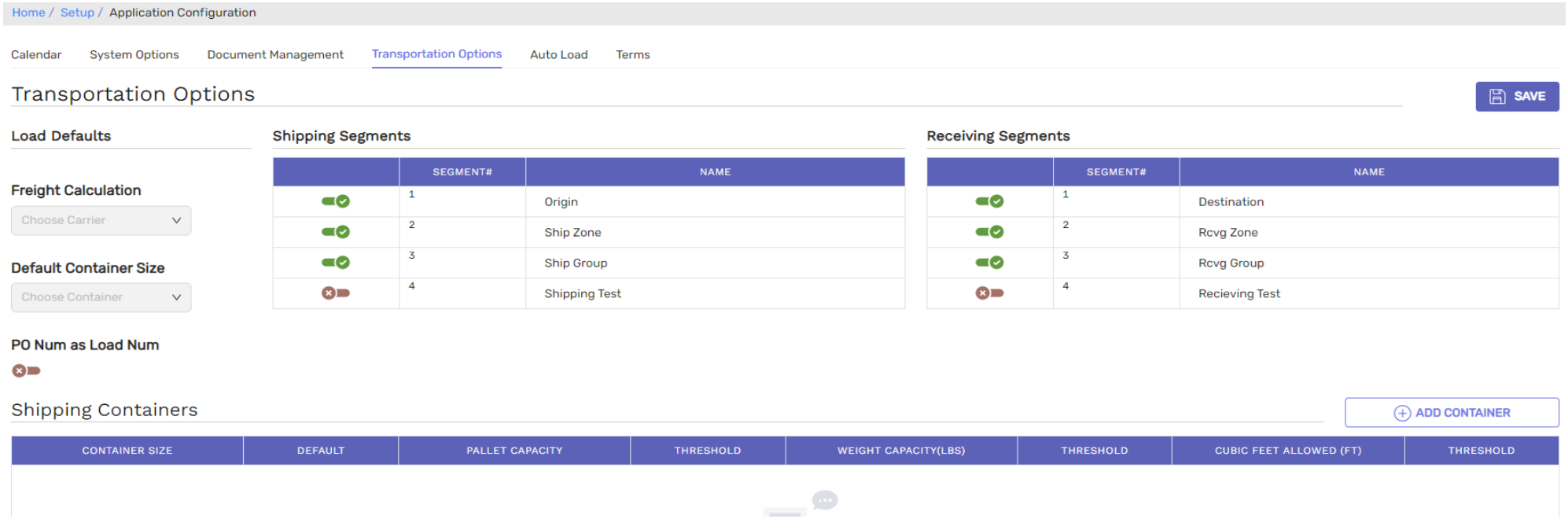
- Document management section contains the transaction numbering preferences of the client for each of the transaction type applicable as per the client's business type i.e. customer/vendor/carrier.

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.



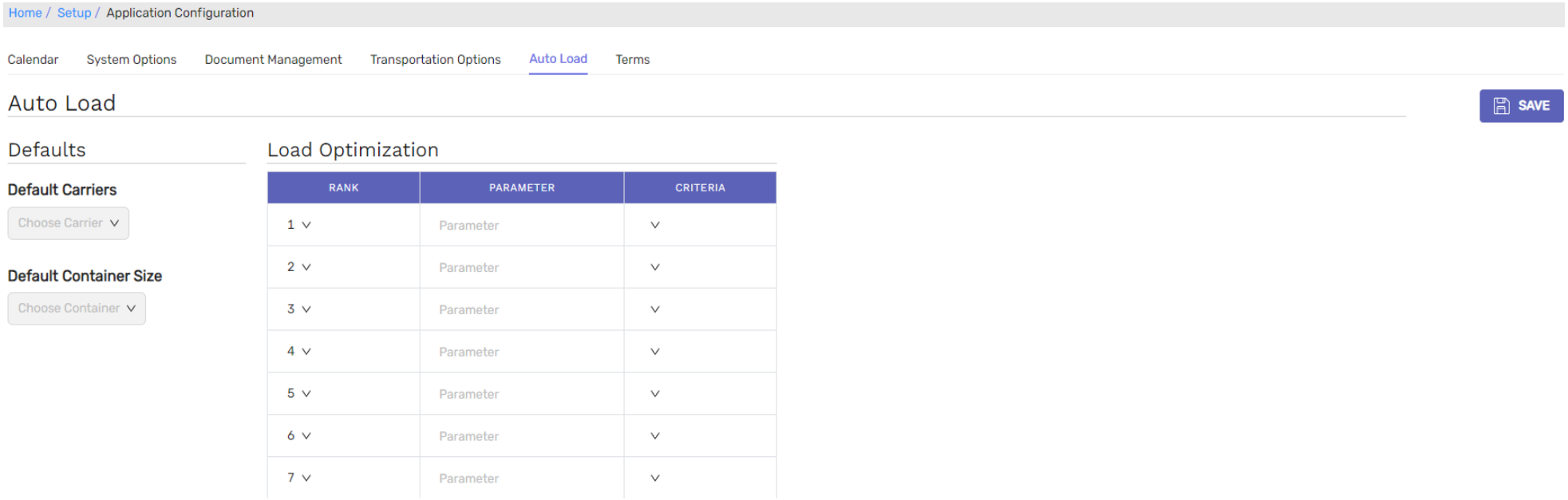
Transportation options controls the load management process of the customer as part of their transportation planning.

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.



APPLICATION CONFIGURATION

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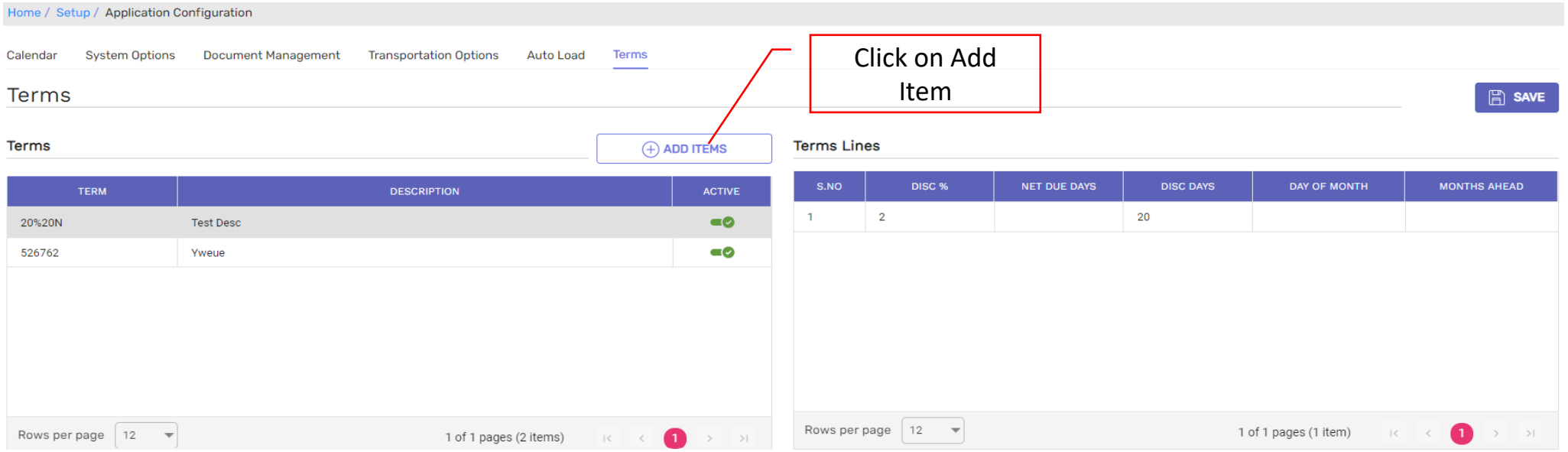
Terms:

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.



- 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.

LOOKUPS

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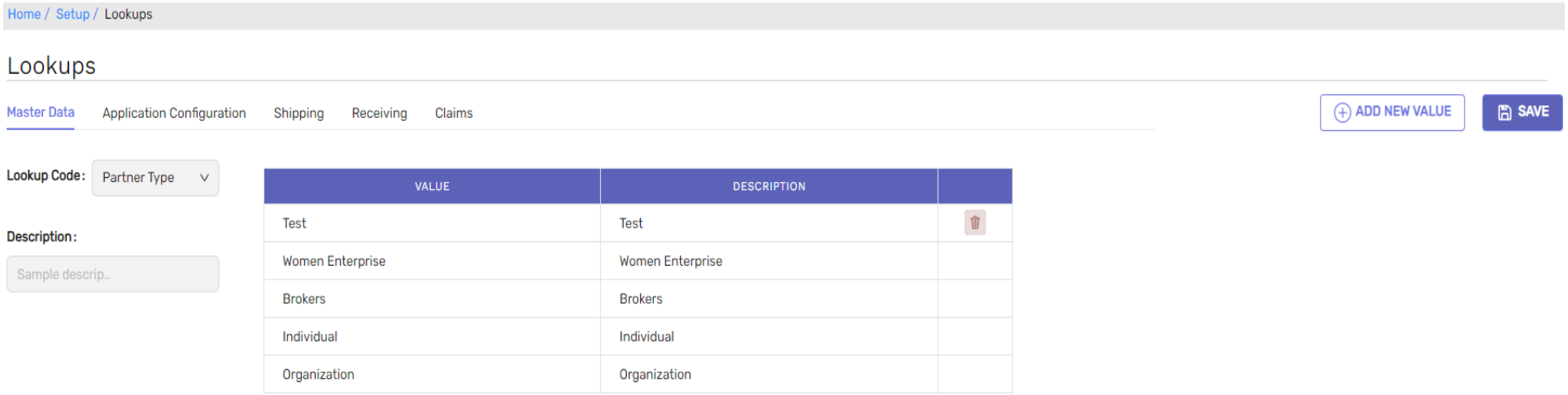
Navigation: Setup -> Lookups



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.

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Thank You

For any questions, please contact support@limnlabs.com