



PETAL

User Training Manual

LLPT 1.1 - Application Setup V1.0

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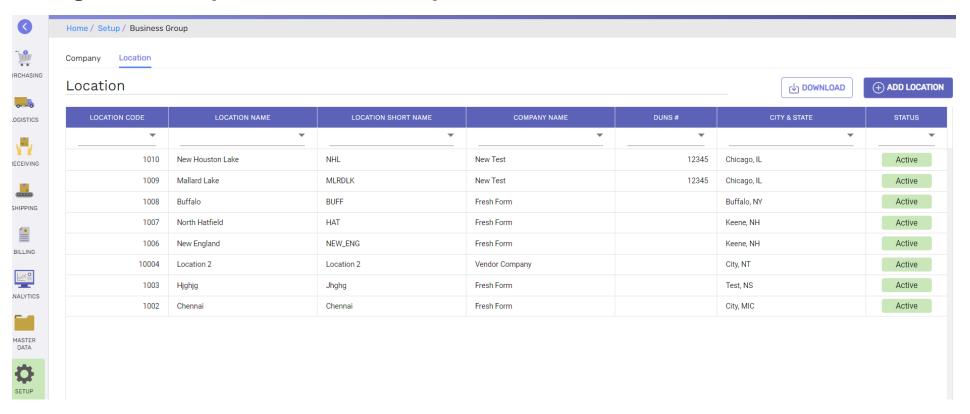


- Location
- Application Configuration
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LOCATION



Navigation: Setup -> Business Group -> Location

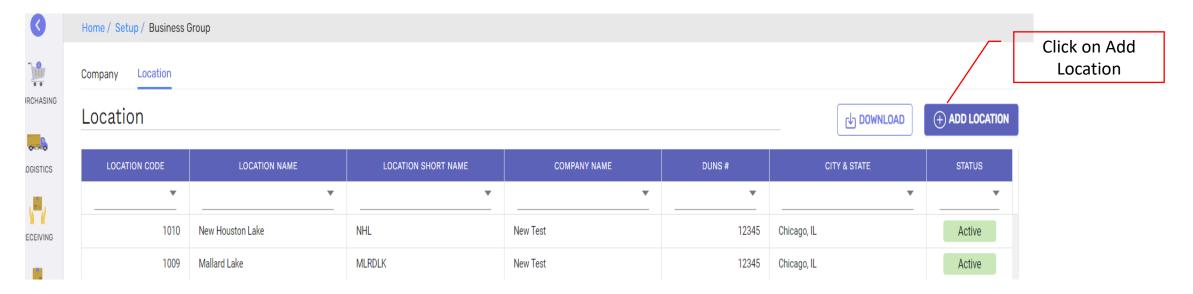


- ➤ Location section contains the summary information of all operating business locations defined for the client.
- Column positions can be changed, Data can be filtered and downloaded to excel using the download option

LOCATION

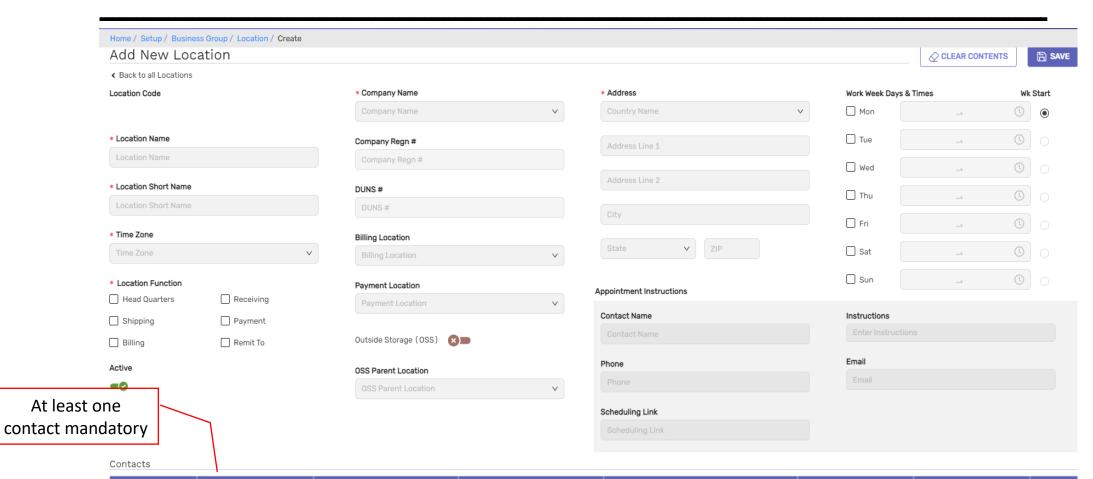


How to define a new location?



➤ New location can be defined by click on 'Add Location', which opens the location definition page

LOCATION



Email Address

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

Last Name

LAST NAME

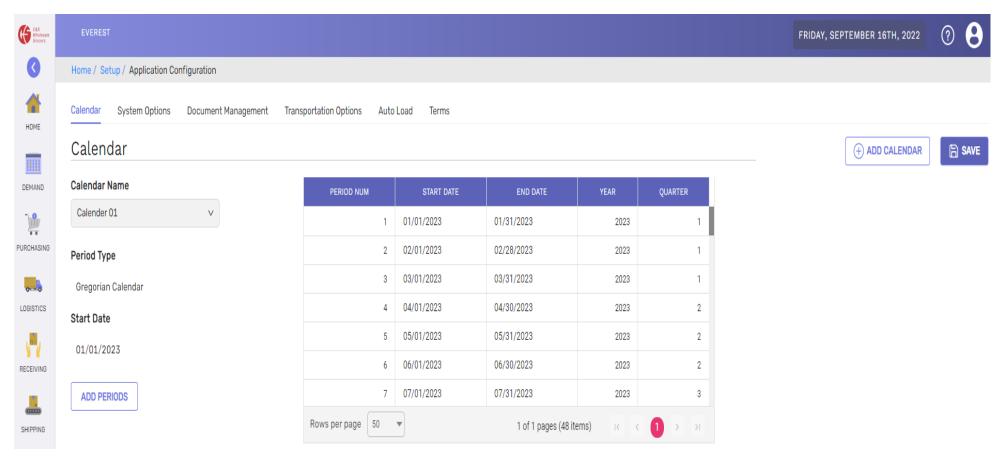
FIRST NAME

First Name





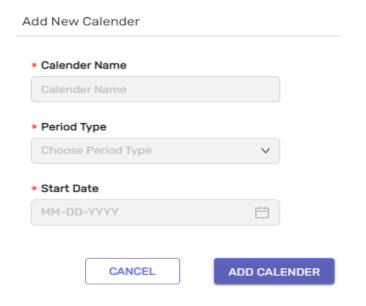
Navigation: Setup -> Application Configuration



LIMN LABS

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

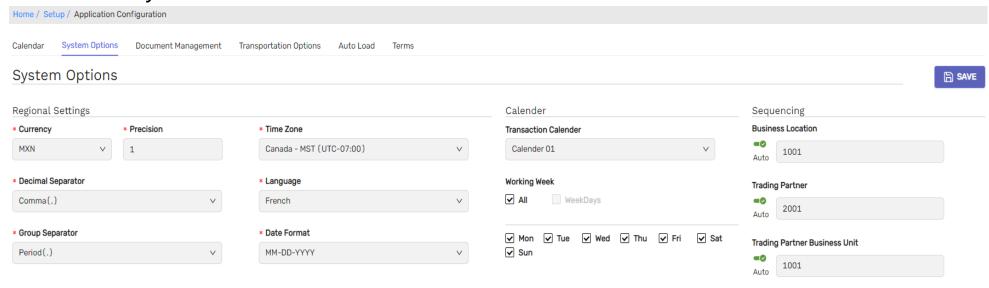
Then click on 'Add Calendar'

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	



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
- Sequencing: Sequencing is for numbering sequence of locations, trading partners and partner business/operating unit configurations.

Click on SAVE once the updates are done.



Document Management:

Click on document management tab to navigate and configure the transactional level

number sequence of the Calendar System Options Document Management	+ ADD ITEM		Click or Iter			
DOCUMENT TYPE	RECEIVING WAREHOUSE	NUMBERING	NUMERIC / ALPHANUMERIC	PREFIX	STARTING	
Claim	нат	Auto	Alpha Numeric	CL	1001	ı
Demand	NEW_ENG	Auto	Alpha Numeric	DEM	1001	ı
Vendor Invoice	BUFF	Auto	Numeric	INV	101	ı
Carrier Invoice	ТАТ	Auto	Numeric	CA	1001	1
Purchase Order	BUFF,HAT	Auto	Alpha Numeric	PO	60001	1
Vendor Invoice	BUFF	Auto	Alpha Numeric	PO	60001	i

➤ 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.



Transportation Options:

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

Home / Setup / Application Configuration	n										
Calendar System Options Docum	ent Management Tra	Insportation Options	Auto Load Ter	rms							
Transportation Options											
Load Defaults	Shipping Segme	Shipping Segments				Receiving Segments					
		SEGMENT#		NAME			SEGMENT#	NA	ME		
Freight Calculation	■ ⊘	1	Origin			■⊘	1	Destination			
Choose Carrier V	■ ⊘	2	Ship Zone			■ ②	2	Rcvg Zone			
Default Container Size	■ ②	3	Ship Group			■ ②	3	Rcvg Group			
Choose Container V	⊗ ∍	4	Shipping Test			*	4	Recieving Test			
PO Num as Load Num											
Shipping Containers									+ ADD CONTAINER		
CONTAINER SIZE	DEFAULT	PALLET CA	PACITY	THRESHOLD	WEIGHT CAPA	CITY(LBS)	THRESHOLD	CUBIC FEET ALLOWED (FT)	THRESHOLD		
					_						

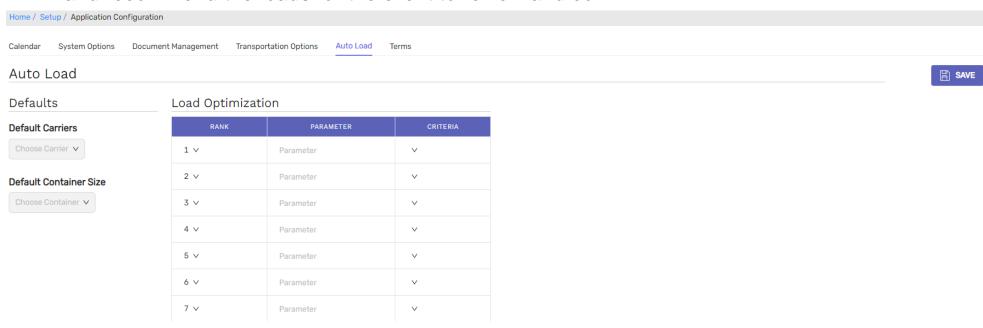
Transportation options controls the load management process of the customer as part of their transportation planning.

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



Auto Load:

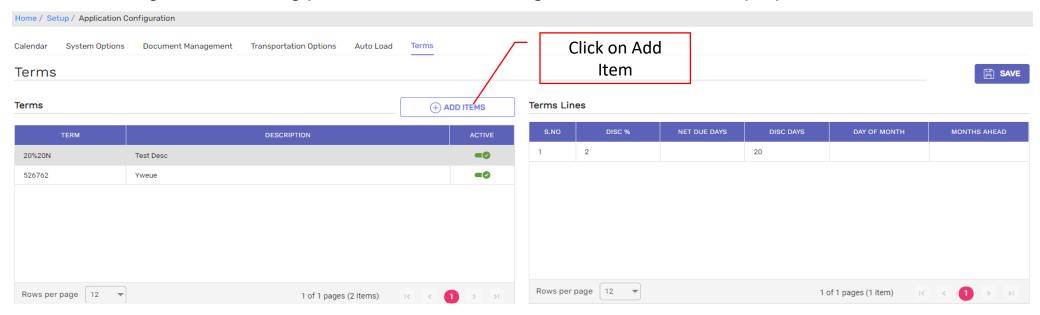
Click on Auto load tab to navigate and configure the options enables automatic load building and recommend the loads for the client to review and confirm.





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



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.



Thank You