



# **PETAL**

**User Training Manual** 

LLPT 1.2 – Master Data1Trading Partner Management
V1.0

## **CONTENTS**



# Trading Partners

- Modify Trading Partner
- Attachments
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- Third Party Charges



- 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**

Trading Partne	ers						<b>⊥</b> DOWNLOA	(I) A
PARTNER #	PARTNER NAME	ADDRESS	DUNS#	VENDOR	CUSTOMER	CARRIER	PARTNER MODE	STAT
		<u> </u>						
2023	Vendorm	314 Test 11, Test 12, CA, US		$\odot$	$\otimes$	$\otimes$	Online	Acti
2022	Johnson1		1234567@@@	$\odot$	⊗	$\otimes$	Offline	Acti
2021	Client_vendor_002			$\odot$	$\otimes$	$\otimes$	Online	Acti
2020	Client_buyer_001			$\otimes$	$\odot$	$\otimes$	Online	Acti
2016	Friendly Farm	Test1, Tes, City, CA, US	85858585	$\otimes$	$\otimes$	$\otimes$	Online	Acti
2019	Abdul Jabbar	123 Test Street, Test City, CA, US		$\odot$	$\otimes$	$\otimes$	Online	Acti
2018	Jabbar Client	123 Test Street, Test City, CA, US	123	$\otimes$	$\odot$	$\otimes$	Online	Acti
2017	Vendor Client Offline 070622			$\otimes$	$\otimes$	$\odot$	Offline	Acti
2015	TestCompany2		1234	$\otimes$	$\odot$	$\otimes$	Online	Acti
2014	Test Client			$\otimes$	$\otimes$	$\otimes$	Online	Acti
2006	CLIENT SLR	Address 1, Address 2, City, CT, US		$\otimes$	$\otimes$	$\odot$	Online	Acti
9862565	Fresh Form Vendor	Address 1, City, NS, CA	8872367	$\odot$	$\otimes$	$\otimes$	Online	Acti
2005	New Vendor	Hjjhj, Hjhjhjhj, Hjhjhjhj, COA, MX		$\odot$	$\otimes$	$\otimes$	Online	Acti
2002	Sham	Hjggj, Hgjg, Jjjg, NT, CA	12334444	$\otimes$	$\otimes$	$\odot$	Offline	Acti

- > 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



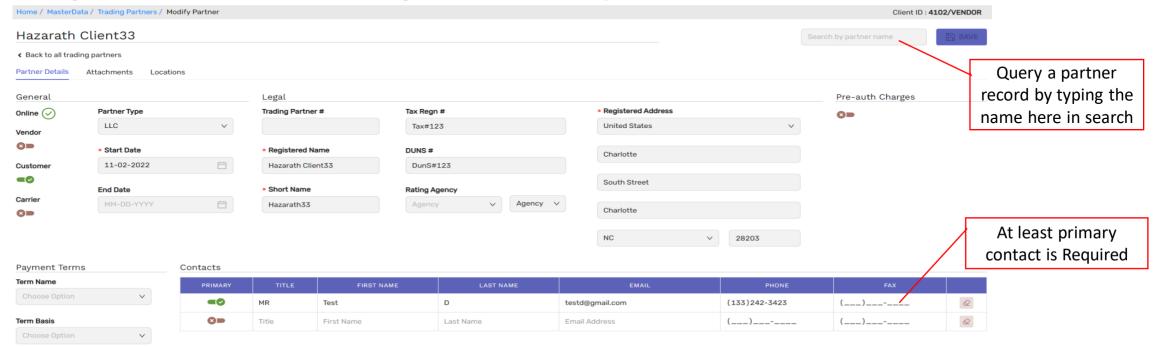
#### **Trading Partners with business relationship:**

/ MasterData / Trading	Partners						Client ID : 4102/VENDO
ding Partners	3					<b>→</b> DOWNLOAD	+ ADD PARTNER
PARTNER # ₹	PARTNER NAME ₹	ADDRESS ₹	DUNS # ₹	VENDOR ₹	CUSTOMER ₹	CARRIER ₹	STATUS ₹
	PoBuyer	Address1, Address2, Charlotte, NC, US	1234	$\otimes$		$\otimes$	Active
	Hazarath Client33	Charlotte, South Street, Charlotte, NC, US	DunS#123	$\otimes$	$\odot$	$\otimes$	Active
	Rishi Organics Vendor	Address 1, Address 2, City, CO, US		$\odot$	$\otimes$	$\otimes$	Active
	Rishi Organics Buyer	Address 1, Address 2, City, LA, US		$\otimes$	$\odot$	⊗	Active
	Jan_buyer1	1 Test St, Test City, AK, US		$\otimes$	$\odot$	$\otimes$	Active
9876	Fresh Form Customer	78 Russel Ave, Richmond, VA, US		$\otimes$	$\odot$	$\otimes$	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



#### **Navigation: Master Data -> Trading Partner -> Modify Partner**



- 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

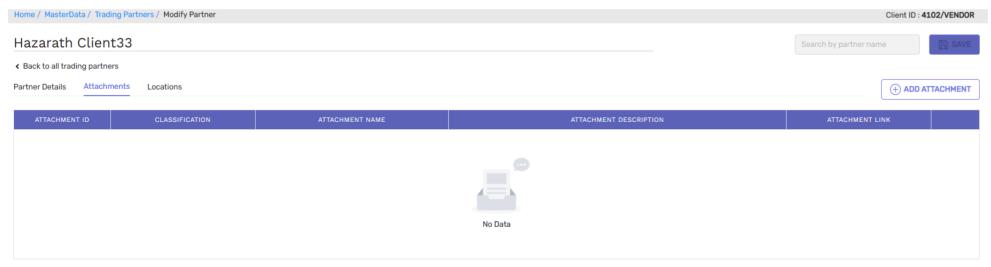


#### **Update Trading Partners**

- "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?



- ➤ 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



> Partner location information is visible from locations section

## **THIRD PARTY CHARGES**



#### **Navigation: Master Data -> Third Party Charges**

Home / MasterData / 1	Third Party Charges			
Third Party C	Charges			
Charge Types				
CHARGE CODE	INTERNAL CODE	CHARGE NAME	ACTIVE	
88		Temperature Recorder	<b>&lt;</b> ⊘	
457		Pre-Inspection	<b>■</b> ⊘	
25		Inspectio	<b>■</b> ⊘	

- > 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**