PETAL

User Training Manual

LLPT 1.4 – Manage PO

V1.0

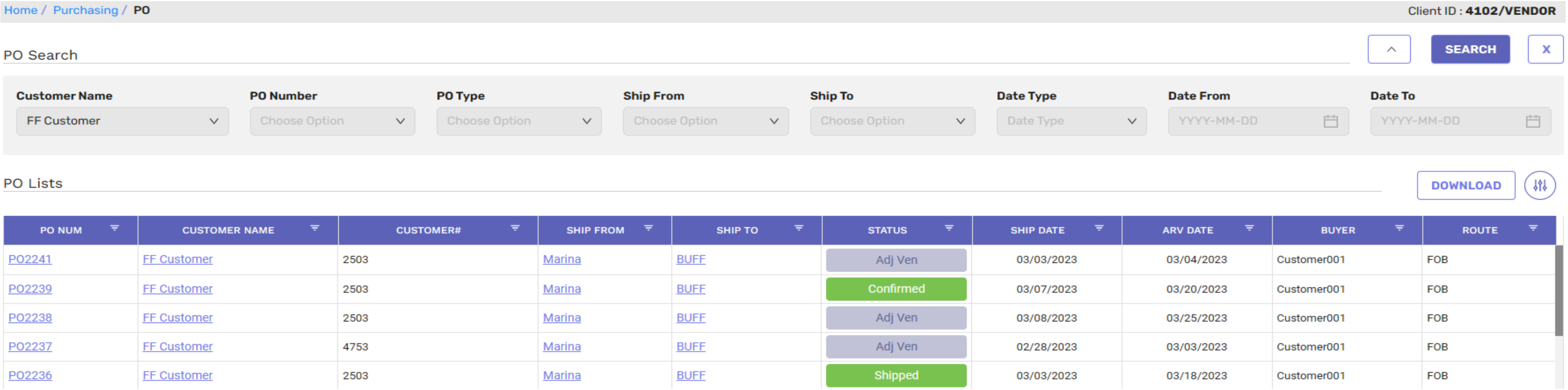
CONTENTS

- Search customer purchase orders
- Open Purchase Order
- Request updates on purchase order
- Buyer updates on Purchase order
- Add charge on purchase order
- To-Do & FYI Notifications

SEARCH CUSTOMER PURCHASE ORDERS

LIMN LABS

Navigation: Purchasing -> Purchase Order Management -> PO Search

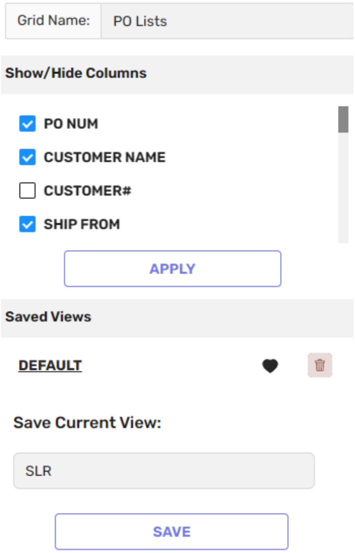


- Multi criteria search grid provided to query the PO details of a customer.
  - Search can be done with one or more parameters at a time and all the transactions matched with that criteria comes into the results
  - Every time a search is performed, the criteria will be saved in the database and when users logs back in, the same criteria remains unless changed by the user
  - PO number is an exception for search criteria saving and primarily used for an ad-hoc search on a specific purchase order

SEARCH CUSTOMER PURCHASE ORDERS

- PO results grid allows user to change the column positions, apply filters, add or remove selected columns from grid and sort the data based on their preferences and save it as their personalized view.
- Click on PO number hyperlink field to open the purchase order details screen
- Personalized views can be saved from icon

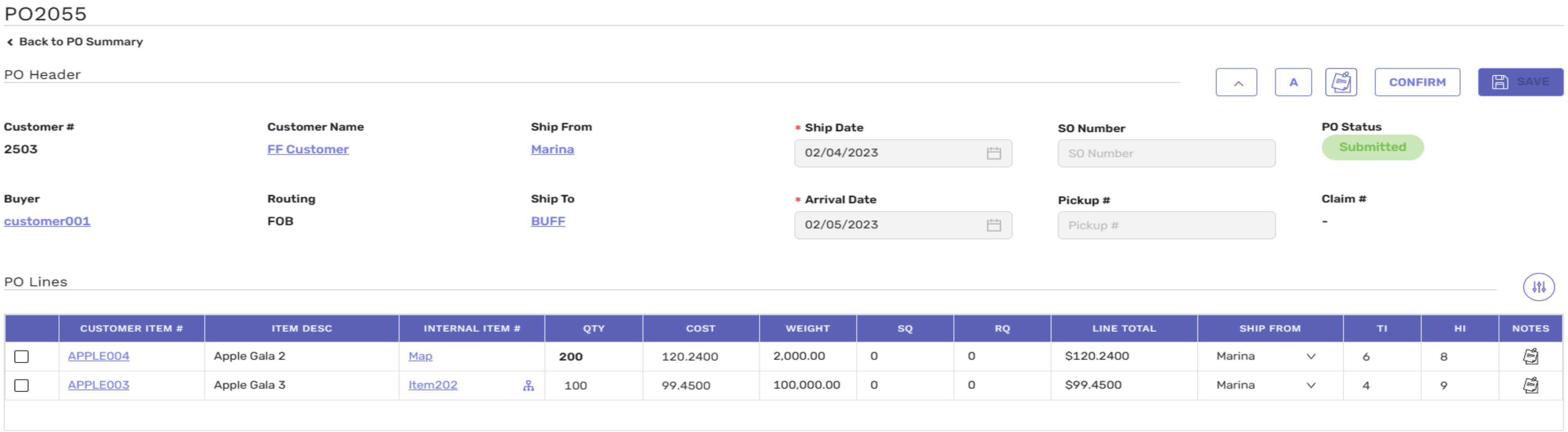
  For ex: If a user do not want certain columns or do want to add additional columns to the default PO summary screen view, it can be done through ‘view’ functionality.



In this example user wants to hide the ‘customer #’ field from default view. Once the changes are done, click apply and those changes should be saved with a name as you see here ‘SLR’.

OPEN PURCHASE ORDERS

LIMN LABS


PO2055

‹ Back to PO Summary

PO Header

A | CONFIRM | SAVE

Customer #	Customer Name	Ship From	* Ship Date	SO Number	PO Status
2503	FF Customer	Marina	02/04/2023	SO Number	Submitted
Buyer	**Routing**	**Ship To**	*** Arrival Date**	**Pickup #**	**Claim #**
customer001	FOB	BUFF	02/05/2023	Pickup #	-

PO Lines

	CUSTOMER ITEM #	ITEM DESC	INTERNAL ITEM #	QTY	COST	WEIGHT	SQ	RQ	LINE TOTAL	SHIP FROM	TI	HI	NOTES
☐	APPLE004	Apple Gala 2	Map	200	120.2400	2,000.00	0	0	$120.2400	Marina	6	8	
☐	APPLE003	Apple Gala 3	Item202	100	99.4500	100,000.00	0	0	$99.4500	Marina	4	9	

- Purchase order details screen contains the location details, schedule information and item details to be shipped
- Supplier can review and click on 'Confirm' if everything looks OK or they can update quantity/price/schedule and save, which places a request to buyer for review and approve
- PO audit information can be accessed by clicking the A icon, where the audit log is provided for all updates happened on the purchase order
- Notes option is provided at PO header and line level to capture any appropriate notes
- Claims processed by customer against the PO are visible as hyperlinks under claim # field

OPEN PURCHASE ORDERS

LIMN LABS

- Supplier can update pickup number information either from the purchase order screen or from shipping screen whenever it is available
- PO line section, Internal item code (supplier item code) gets automatically populated if supplier already defined the cross-item mapping between customer and supplier. Incase if the mapping is not available, a hyperlinked field Map is provided to click and access the item map section for supplier to complete mapping between items
- Item level ship from location can be updated by supplier based on the item availability
- Notes option is provided at each item level to enter the notes related to that specific item. When notes is entered, the icon color will change and highlight in yellow.
- Attachments section allows the suppliers to attach any documents that supports the purchase order. Attachments made by supplier on the PO can be accessed by buyer.

OPEN PURCHASE ORDERS

LIMN LABS

- Item Ti - Hi is populated based on the supplier's mapped item, if mapping is not available then customer item Ti - Hi is populated on PO.
- Incase if unmapped items, eventually when supplier update mapping, system will take the Ti-Hi from supplier mapped item and overwrites the existing Ti-Hi Information of the item on PO
- When supplier is updating Ti-Hi information of an item on PO, system will ask for confirmation whether all unreceived PO's with that item should be updated or only this PO.

PO Lines

	CUSTOMER ITEM #	ITEM DESC	INTERNAL ITEM #	QTY	COST	WEIGHT	SQ	RQ	LINE TOTAL	SHIP FROM	TI	HI	NOTES
☐	APPLE004	Apple Gala 2	Map	100	25.00	1,000.00	0	0	$2,500.00	Marina	9	8	
☐	APPLE007	Apple Gala 1	Map	150	25.00	1,500.00	0	0	$37,500.00	Marina	~~6~~ 8	9	
☐	BANANA001	banana	Map	200	88.00	13,200.00	0	0	$17,600.00	Marina	4	4	

Based on the confirmation, system will update the item Ti-Hi and recalculate the pallets on that item

Do you wish to update Ti/Hi on all Open POs ?

- Click Yes for all PO's
- Click No for current PO

NO YES

REQUEST UPDATES ON PURCHASE ORDER

- When supplier changed the quantity or price or arrival date, system will update the PO status as 'Adj Ven (adjusted by vendor)' and place the request to buyer for review and approve
- Once Buyer approves, the quantity column will get updated with the requested changed quantity by supplier otherwise the old quantity will remain
- As long as the requested changes are not actioned by buyer, the changed fields will be shown in purple color and display the old and new values upon mouse hover.

BUYER UPDATES ON PURCHASE ORDER

LIMN LABS

PO2211

‹ Back to PO Summary

PO Header

A ACTION

Customer #	Customer Name	Ship From	Ship Date	SO Number	PO Status
2503	FF Customer	Marina	02/23/2024	-	Adj Buy
Buyer	**Routing**	**Ship To**	**Arrival Date**	**Pickup #**	**Claim #**
customer001	FOB	BUFF	02/24/2024	-	-

PO Lines

CUSTOMER ITEM #	ITEM DESC	INTERNAL ITEM #	QTY	COST	WEIGHT	SQ	RQ	LINE TOTAL	SHIP FROM	TI	HI	NOTES
APPLE004	Apple Gala 2	Item202	250	6.00	2,500.00	0	0	$6.00	Marina	6	8	

- When buyer updates the purchase orders, the changes will be communicated to vendor on the portal, email or both
- When PO is in 'Adj Buy (Adjusted Buyer) ' status, no changes are allowed by vendor until he confirm the changes made by buyer.
- Changes made by buyer can be seen from the 'Action' button on the top right-hand corner. Upon click, below screen will open for supplier to review and confirm. PO status will change as 'Confirmed'

PO2211

CONFIRM

	ITEM #	DESCRIPTION	VND ITEM #	CHANGE TYPE	OLD	NEW	TRX DATE	ACTION
	APPLE004	Apple Gala 2		Qty Change	145	250	02/28/2023	CONFIRM

ADD CHARGE ON PURCHASE ORDER

LIMN LABS

Charges

ADD LINE

CHARGE NAME	CHARGE TYPE	CHARGE BASIS	ITEM NUMBER	AMOUNT	

- Charges section is provided to add extra service charges on a purchase order
- Charges added during PO creation will be shown on the purchase order under charges section
- Supplier can add additional charges if anything is missing on PO by clicking on ‘Add Line’ button

CHARGE NAME	CHARGE TYPE	CHARGE BASIS	ITEM NUMBER	AMOUNT	
Name	Header	Basis	N/A	0.00	

- Charges enabled under master data, third party charges section by supplier will be visible under charge name dropdown unless they are not added by buyer already on purchase order

CHARGE NAME
Temp Recorder
Tectrol
Pallets & Ice
Air Bags

TO-DO & FYI NOTIFICATIONS

Home / Home

Task List

Change Type : Choose Option

User Name : Choose Option

• To-Do 57 • FYI 22

PURGE ALL

	TYPE	DATE	TRX TYPE	TRX #	DESCRIPTION	
☐	FYI	03/07/23 21:50	PO	PO2055	PO PO2055 Updated By Ajabbar	
☐	FYI	03/03/23 17:56	Transportat...	LD6184	Load LD6184 Action Taken By Customer001	
☐	FYI	03/03/23 16:08	PO	PO2236	PO PO2236 Action Taken By Customer001	
☐	FYI	03/03/23 15:48	PO	PO2233	PO PO2233 Action Taken By Customer001	
☐	FYI	03/03/23 15:48	PO	PO2233	PO PO2233 Action Taken By Customer001	
☐	FYI	03/03/23 15:48	PO	PO2233	PO PO2233 Action Taken By Customer001	
☐	FYI	03/03/23 15:42	PO	PO2203	PO PO2203 Action Taken By Customer001	
☐	FYI	03/03/23 15:38	PO	PO2203	PO PO2203 Action Taken By Customer001	
☐	To-Do	03/03/23 15:22	PO	PO2152	PO PO2152 Updated By Customer001	
☐	To-Do	03/03/23 14:42	PO	PO2129	PO PO2129 Updated By Customer001	

- Notification events are predefined and configurable by buyer as appropriate
- Notification event can be configured as either ‘To-Do’ or ‘FYI’ or ‘Email’ or in combinations
- Change type is a filter criteria to filter notification data from the whole list of notifications
- To-Do or FYI with record count are quick links to filter respective type of records
- Delete icon is provided next to each notification to selectively purge specific FYI notification from queue whereas Purge all is for performing mass purge

TO-DO & FYI NOTIFICATIONS

- Purge option is provided to either individually purge or mass purge on all FYI notifications
- To-Do notifications can only get removed after taking action on them
- User can click on ‘To-Do’ hyperlink to access the actionable items and take action from there

PO - PO2152 CONFIRM

	ITEM #	DESCRIPTION	VND ITEM #	CHANGE TYPE	OLD	NEW	TRX DATE	ACTION
☐	APPLE003	Apple Gala 3	Item202	Qty Change	120	12	03/03/2023	CONFIRM
☐	APPLE003	Apple Gala 3	Item202	Price Change	99.45	9.45	03/03/2023	CONFIRM

- Click on PO number hyperlink to access the PO details screen to review and action
- Notifications of other user from same client can be searched by selecting username above
- Refresh icon on notification grid can bring in the latest notifications not yet show up in the list

Thank You

For any questions, please contact support@limnlabs.com