TRACELINK UNIVERSITY

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TraceLink University

Inventory Updates

Suppliers use inventory updates to communicate information about changes in inventory quantity or status to customers.

Create and submit an inventory updates

Perform this task to create and submit new inventory updates.

Create and submit a new inventory update

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select Manufacturing - Supplier from the left menu.
   Partners must have the correct roles assigned by using the owner's instance of Multienterprise Information Network Tower.
4. Select Inventory Updates.
5. Select the New + New button.
6. Enter the Inventory Update Number.
7. Select the Save Save button.

   The screen refreshes with the saved inventory update in the draft state.

8. Select the Edit 

button.

9. In the Transaction Information section, select Submitted from the Process Status drop drown.
10. In the Inventory Update Information section, fill in the following fields:
    a. Inventory Update Number field – The unique identifier for the inventory update number.
       This field auto populates the value entered New Inventory Update screen.
    b. Inventory Update Date field – The specific date when the inventory records were last modified or updated. Fill this field only when the inventory update date is same for all inventory updates.
    c. Action field – A brief description stating the purpose of the transaction.
11. In the Reporter and Client section, fill in the following fields under Reporter group:
    a. Reporter Location type-ahead field – The name of the warehouse sending the inventory update. This field pulls from the Owner's company and location master data.

       The remaining Reporter fields are auto populated with the values from the company or location's master data entry. If the name of thewarehouse is not present in the Owner's master data, the warehouse name must be entered manually.

    b. Country drop-down – The two-letter country code with country name for this location.
    c. State field – The state or region for this location.
    d. Location ID Type drop-down – The identifier type used for this company or location.
    e. Location ID Value field – The value associated with the identifier type.
12. In the Reporter and Client section, fill in the following fields under Client

group:

a. Company type-ahead field – The name of the customer receiving the inventory update. This field pulls from the Owner's company and location master data.

   The remaining Client fields are auto populated with the values from the company or location's master data entry. If the name of the company is not present in the Owners master data, the company name must be entered manually.

b. Party ID Type drop-down – The identifier type used for this company or location.
c. Party ID Value field – The value associated with the identifier type.

13. In the **Line Items** section:
    a. Select the Add + icon. At least one line item is required to submit a purchase order.
    b. In the New Line Items panel, fill in the following fields under Item Information:
       i. Item field – The name of the product. If the user enters an item code instead, the field automatically displays the corresponding item name.
          The Item Code Type, Item Code Value and Description fields are auto populated with the values from the Owner's product master data entry for the product. If the product is not present in the Owner's product master data then the product name must be entered manually.
       ii. Item Code Type field – The product code type (e.g. IN-Product Code). If the item code type is not present in the Owner's product master data then the item code type must be entered manually.
       iii. Item Code Value field – The product code. If the item code number is not present in the Owner's product master data then the item code

value must be entered manually.

iv. Description field – A brief description of the product. If the description is not present in the Owners product master data then the description must be entered manually.
v. Lot Number field - The lot number of the line number.
vi. Quantity field – The quantity of item selected or provided.
vii. Unit of Measure drop-down – The unit in which the line item is measured.
viii. Status Code drop-down – The code used to identify the status of the inventory.
ix. Reporting Location field - The name of the reporting location.
x. Transaction Type drop-down - The type of transaction.
xi. Reason Code drop-down – The reason code for the return of items.
xii. Stock Type drop-down – The classification of inventory based on its condition, purpose, or status.
xiii. Material Type field - The production material state (e.g. FINISHEDGOODS).
xiv. Special Stock Indicator field – A indicator used in to identify stock that is managed separately from regular inventory.
xv. Manufactured Date field – The date of manufacture.
xvi. Inventory Update Date drop-down – The date when the inventory is updated. Fill this field only when all the inventory updates have different inventory update date. In this case, the header inventory update date should not be filled.
xvii. Expiration Date field - The expiry date of the line item.
xviii. Line Notes field – Additional information about the line item being added.

c. Select Apply.

   The new line item is added to the inventory update.

14. In the Notes section, enter any additional comments or instructions.
15. To submit the inventory update:

    To save the inventory update in a Draft state and finish it later, ensure the Move To button is not selected and then select the Save Save button in the draft state.

    a. Select the Move To button at the top of the screen.

       The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

    b. Select the Save Save button.

       The inventory update is submitted.

Tips

- In the Line Items section, do one of the following:
  - Select the Edit icon, to edit the details of an individual line item.
  - Select the Delete icon, to remove an individual line item.
- In the Notes section, do one of the following:
  - Select the Add + icon, to add comments or instructions.
  - Select the Delete icon, to remove comments or instructions.

Submit a draft inventory update

Complete and submit a saved purchase order in the draft state.

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select Manufacturing - Supplier from the left menu.

Partners must have the correct roles assigned by using the owner's instance of Multienterprise Information Network Tower.

4. Select Inventory Updates.
5. Select the Filter [Filter] button to find the inventory updates in Draft state.
6. Select the Inventory Update Number link in the results table.
7. Select the Edit [Edit] button.
8. In the Transaction Information section, select Submitted from the Process Status drop drown.
9. Select the Move To button at the top of the screen.

   The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

10. Select the Save [Save] button.

    The inventory update is submitted.

Tips

- To edit the details of an individual line item in the inventory update, select the Edit icon for the line item, in the **Line Item** section.
- To delete a inventory balance in draft state, select the inventory balance number row and then select the Delete icon on the top of the screen.

A deleted transaction cannot be retrieved.

Search and view inventory updates

Search for and view inventory updates

Search for inventory update sent or received by suppliers to view their details. Viewing the details of a inventory update enables suppliers to quickly access order information (e.g. the quantity for each line item in an order) in TraceLink without having to search through the actual B2B message.

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select Manufacturing - Customer or Manufacturing - Supplier from the left menu.
   Partners must have the correct roles assigned by using the owner's instance of Multienterprise Information Network Tower.
4. Select Inventory Updates.
5. Select the Filter Filter button.
6. In the Filters panel, fill in one or more of the following fields to filter the results:
   - State drop-down – The state of the inventory update:
     - Draft – The transaction is in the draft state.
     - Submit – The transaction has been created.
     - Processing – The application is getting ready to handle incoming transactions by doing some initial tasks, such as copying the files it receives.
     - Processed – The application changes the standard information into a format that is easy to use and specific to your transaction.
     - Preparing to Send – The application is getting ready to send out a

transaction and is doing some initial tasks, like copying the necessary information for the process.
    - Sending –The application sends out business transactions to the buyer or supplier.
    - Sent – The transaction is successfully completed and shared with the receiving party.
  - Client type-ahead – The name of the customer the inventory update was sent to.

    If the name of the customer is not present in the Owners master data then the customer's name must be entered manually
  - Last Modified field – The period of time in which the inventory update was last updated:
    - Today – The transaction was modified within the last few hours.
    - Yesterday – The transaction was updated within the past 24 hours.
    - Last Week – The transaction was modified in the last 7 days.
    - Last Month – The transaction was modified in the last 30 days.
    - Last 3 Months – The transaction was modified in the last 90 days.
    - Last 6 Months – The transaction was modified in the last 180 days.
    - Custom Range – Select a specific period of time that the transaction was modified in from the calendar.

7. Select Apply.

   A list of inventory update displays based on the filter results.

8. Select the link for the inventory update from the results table.

   The View Inventory Updates screen displays.

9. View all the fields in the Transaction Information, Inventory Update Information, Reporter and Client, Line Items, and Notes sections.

Tips

- To view the details of an individual line item in the inventory updates, select the View icon for the line item in the **Line Items** section on the Inventory Updates Details screen. User can select Previous or Next to view more line items.
- To clear the filter criteria in the filter, select Reset.

Resubmit inventory updates

Resubmit inventory update

Use this procedure if the user needs to resend a submitted inventory updates.

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select Manufacturing - Supplier from the left menu.
   Partners must have the correct **roles** assigned by using the owner's instance of Multienterprise Information Network Tower.
4. Select Inventory Updates.
5. Select the Inventory Updates Number row in Sent state.
6. Select the Edit Edit button.
   The state of the inventory update is automatically moved to Sending state.
7. Select the Move To button at the top of the screen.
   The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.
8. Select the Save Save button.

The advance shipment notice is submitted.

The statues of the inventory updates moves to Sent state.

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Select the Help Center icon in the header to access the one-stop-shop help center for everything related to the network you are currently within (e.g.
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