TRACELINK UNIVERSITY

Purchase orders

Owners and their Partners search for and view, and create purchase orders (POs) that are exchanged with Partners asynchronously. Viewing the details of a purchase order that was sent or received asynchronously in the Web UI makes key information more consumable for users and enables companies to 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. Purchase orders allow buyers to communicate a request and commitment from the buyer to pay the seller for the sale of specific products or services to be delivered in the future. For example, a buyer who needs to review the latest send a purchase order sent to a supplier can use the Web UI to show the most recently modified purchased orders sent create a new purchase order and send it to the supplier and quickly find the one to review.

Create and submit purchase orders

Create and submit new purchase orders. Additionally, buyers can begin work on a purchase order and save it for completion at a later time.

Create and submit a new purchase order

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 from the left menu.

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

4. Select Purchase Order.
5. Select the New button.
6. Enter the purchase order number in the PO Number field.
7. Select the Save button.

   The screen refreshes with the saved purchase order 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 Order Information section fill in one or more of the following fields:
    a. PO Number field – The unique identifier of the purchase order.
       This field auto populates the value entered on the New Purchase Order screen.
    b. Order Date field – The date the order is placed on.
    c. Delivery Term Code field – The code or abbreviation for the terms of sale between the buyer and the supplier regarding the delivery of product.
    d. Delivery Term Description field – A description that outlines the terms of the sale regarding the delivery of product that are implied by the Delivery Term Code.
    e. Payment Terms By Days field – The terms of payment (in days) agreed upon by the buyer and the supplier.
    f. Payment Terms By Percentage field – The percent discount the buyer receives on the total price of the order if payment is received on time (numerical values only).
    g. Currency drop-down – The 3-letter ISO currency code that the line items

included in the purchase order are priced with.

11. In the **Customer and Supplier** section, fill in the following fields under Customer group:

    a. Company type-ahead field – The name of the company or location supplying. This field pulls from the Owner's company and location master data.

       The remaining Customer 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. Address 1 field – The address of the particular location.
    c. Address 2 field – Any additional address information.
    d. Country drop-down – The two-letter country code with country name for this location.
    e. State field – The state or region for this location.
    f. City field – The city for this location.
    g. Postal Code field – The postal code for this location's main address.
    h. Contact Telephone Number field – The company or location's phone number.
    i. Contact Fax Number field – The company or location's fax number
    j. Party ID Type drop-down – The identifier type used for this company or location.
    k. Party ID Value field – The value associated with the identifier type.

12. In the **Customer and Supplier** section, fill in the following fields under Supplier group:

    a. Company type-ahead field – The name of the company or location purchasing the product. This field pulls from the Owner's company and location master data.

The remaining Supplier 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. Address 1 field – The address of the particular location.
c. Address 2 field – Any additional address information.
d. Country drop-down – The two-letter country code with country name for this location.
e. State field – The state or region for this location.
f. City field – The city for this location.
g. Postal Code field – The postal code for this location's main address.
h. Contact Telephone Number field – The company or location's phone number.
i. Contact Fax Number field – The company or location's fax number
j. Party ID Type drop-down – The identifier type used for this company or location.
k. Party ID Value field – The value associated with the identifier type.

13. In the Ship to Location and Bill to Location section, fill in the following fields under Ship to Location:
    a. Location type-ahead field – The name of the company location where actual goods will be shipped by supplier. This field pulls from the Owner's company and location master data.
       The remaining Ship to Location fields in the section are auto populated with the values from the company or location's master data entry. If the company name is not present in the Owners master data, the company's name must be entered manually.
    b. Address 1 field – The address of the particular location.

c. Address 2 field – Any additional address information.
d. Country drop-down – The two-letter country code with country name for this location.
e. State field – The state or region for this location.
f. City field – The city for this location.
g. Postal Code field – The postal code for this location's main address.
h. Contact Telephone Number field – The company or location's phone number.
i. Contact Fax Number field – The company or location's fax number
j. Party ID Type drop-down – The identifier type used for this company or location.
k. Party ID Value field – The value associated with the identifier type.

14. In the Ship to Location and Bill to Location section, fill in the following fields under Bill to Location:
    a. Location type-ahead field – The billing address company name of the buyer. This field pulls from the Owner's company and location master data.

       The remaining Bill to Location fields in the section are auto populated with the values from the company or location's master data entry. If the company name is not present in the Owners master data, the company's name must be entered manually.
    b. Address 1 field – The address of the particular location.
    c. Address 2 field – Any additional address information.
    d. Country drop-down – The two-letter country code with country name for this location.
    e. State field – The state or region for this location.
    f. City field – The city for this location.
    g. Postal Code field – The postal code for this location's main address.
    h. Contact Telephone Number field – The company or location's phone number.

i. Contact Fax Number field – The company or location's fax number
j. Party ID Type drop-down – The identifier type used for this company or location.
k. Party ID Value field – The value associated with the identifier type.

15. 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. Line field – The number to identify the line item by (e.g. 50).
        ii. 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.
        iii. 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.
        iv. 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.
        v. 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.
        vi. Unit Price field – The price that each unit of the product sells for.
        vii. Net Price field – The total cost of the line item.
        viii. Quantity field – The quantity of item selected or provided.

ix. Unit of Measure drop-down – The unit in which the line item is measured.
x. Delivery Date field – The date that the quantity of product will be delivered on.
xi. Line Notes field – Additional information about the line item being added.

c. Select Apply.

The new line item is added to the purchase order.

16. In the Notes section, enter any additional comments or instructions.
17. To submit the purchase order:

To save the purchase order 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 purchase order is submitted.

Tips

- To edit the details of an individual line item, select the Edit icon in the Line Items section.
- To delete an individual line item, select the Delete icon in the Line Items section.

- To add additional comments, select the Add + icon in the Notes section.
- To delete comments, select the Delete − icon in the Notes section.

Submit a draft purchase order

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 - Customer from the left menu.
   Partners must have the correct roles assigned by using the owner's instance of Multienterprise Information Network Tower.
4. Select Purchase Order.
5. Filter to find the purchase order.
6. Select the PO Number link in the results table.
7. Select the 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 

   button.

   The purchase order is submitted.

Tips

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

A deleted transaction cannot be retrieved.

Search and view purchase orders

Perform this task to search for and view the sent purchase orders.

Search for and view purchase orders

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 Purchase Order.
5. Select the 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 purchase order:
     - 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.

    - Supplier type-ahead – The name of the company the purchase order was sent to.

      If the company name is not present in the Owners master data then the company’s name must be entered manually

    - Last Modified field – The period of time in which the purchase order 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 purchase order displays based on the filter results.

8. Select the link for the purchase order from the results table.

The View Purchase Order screen displays.

Tips

- To view the details of an individual line item in the purchase order, select the View icon for the line item in the **Line Items** section on the Purchase Order Details screen.

View the details of a received purchase order acknowledgment

Perform this task to view the details of a purchase order acknowledgment enables buyers 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.

All the fields within this screen are populated with read-only values.

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 (Undefined variable: local.mint_solution_name).
4. Select PO Acknowledgments.
5. Select Filter [Filter] button to search for and view the purchase order acknowledgment in Sent state.
6. Fill in one or more of the following fields to further filter the results:
   - State drop-down – The various states of the purchase order:
     - Draft – The transaction is in draft and can be can be modified as needed.

        - 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.
    - Supplier type-ahead – The name of the Partner the purchase order was sent to.
      If the name of the supplier is not present in the Owner's master data then the supplier name must be entered manually
    - Last Modified field – The period of time in which the purchase order 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 purchase order displays based on the filter results.

8. Select the link for the purchase order from the results table.

   The View Stock Transfer Shipment Advices screen displays.

Resubmit purchase order

Resubmit a purchase order

Perform this task if the user needs to resend a purchase order.

1. Select a [Customer-defined MPC 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 from the left menu.
   Partners must have the correct roles assigned by using the owner's instance of Multienterprise Information Network Tower.
4. Select Purchase Order.
5. Select PO Number in Sent state.
6. Select the Edit Edit button.

   The state of the purchase order 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 purchase order is submitted.

The statues of the purchase order moves to Sent state.

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