TRACELINK UNIVERSITY

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Purchase order acknowledgments

Owners and their Partners search for, view, and create purchase order acknowledgments that are exchanged with Partners asynchronously. Purchase order acknowledgments allow suppliers to communicate with upstream and downstream Partners that they have received the purchase order, and inform them if there are any required changes. For example, a supplier who needs to respond to a purchase order can use the Web UI to show recently received purchased orders, filter to find the purchase order they need to respond to, and submit a purchase order acknowledgment from the received purchase order.

Create and submit purchase orders acknowledgments

Suppliers can create a purchase order acknowledgment from a received purchase order, add new and remove existing line items, edit the price and delivery information on existing line items, or adjust payment terms before submitting the purchase order acknowledgment to buyers. Additionally, suppliers can begin work on a purchase order acknowledgment and save it for completion at a later time.

Create and submit a new purchase order acknowledgment

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 if using the Owner's instance of Multienterprise Information Network Tower.

4. Select

   PO Acknowledgments

   .

5. Select the New + New button.
6. Enter the purchase order number in the PO Number field, and internal order number in the Internal Order Number field.

7. Select the Save button.

   The screen refreshes with the saved PO acknowledgment in the draft state and with the required sections populated.

8. Select the Edit 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 – An unique identifier for the purchase order number. This field auto populates the value entered in New Purchase Order Acknowledgment 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.
h. Internal Order Number field – A unique identifier assigned to track and manage orders.
i. Action drop-down – A brief description stating the purpose of the transaction.

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 purchasing the product. 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

group:

a. Location type-ahead field –The ship to location of the seller. 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

shipping address is not present in the Owner's master data then the ship to location details 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

    group:

    a. Location type-ahead field –The billing address 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 billing address is not present in the Owner's master data then the bill to location details 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 PO acknowledgment.
    b. In the New Line Items panel, fill in the following fields under Line 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 name is not present in the Owner's product master data then the product name must be entered manually.
        iii. Item Code Type drop-down – The product code type (e.g. IN-Product Code).
        iv. Item Code Value field – The product code.
        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 PO acknowledgment.

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

    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 

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 button.

    The PO acknowledgment is submitted.

Tips

- Select the Add + icon, to add a new line item, where available.
- Select the Delete − icon, to remove an individual line item, where available.
- New PO acknowledgments can also be created by selecting the New button on the PO Acknowledgments Details screen for an existing PO acknowledgment.

Submit a draft purchase order acknowledgment

Complete and submit a saved PO acknowledgment 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 if using the Owner's instance of Multienterprise Information Network Tower.
4. Select

   PO Acknowledgments

   .
5. Select the **Filter** button to find the purchase order acknowledgment in Draft state.
6. Select the PO 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. Confirm the purchase order acknowledgment details and select the Edit icon associated with that line item to modify the fields if required.
10. 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.

11. Select the Save button.

    The PO acknowledgment is submitted.

Tips

- Select the purchase order number row and then select the Delete icon on the top of the screen, to delete a purchase order acknowledgment in draft state.

A deleted transaction cannot be retrieved.

Create and submit a purchase order acknowledgment from an existing purchase order

Create a purchase order acknowledgment from an existing 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 - Supplier

from the left menu.

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

4. Select

   Purchase Orders

   .

5. Select the Filter Filter button to find the purchase order to create a purchase order acknowledgment from.
6. Select the PO Number link in the results table.
7. Select the PO Ack PO Ack button.
   A message is displayed stating that the purchase order acknowledgment is being created and will be available in the notification when it is ready.
8. Select the Notification icon on the top bar of the screen.
   The notification panel displays confirming that the purchase order acknowledgment is available.
9. Select View Details in the notification panel.
   The Purchase Order Acknowledgment Details screen opens in edit mode.
10. In the Transaction Information section, select Submitted from the Process Status drop drown.
11. In the Order Information section fill in one or more of the following fields:
    - Internal Order Number field – A unique identifier assigned to track and manage orders.
    - Payment Terms By Days field – The terms of payment (in days) agreed upon by the buyer and the supplier.
    - 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).

12. In the **Line Items** section:
    a. Select the Add + icon. At least one line item is required to submit a PO acknowledgment.
    b. In the New Line Items panel, fill in the following fields under Line 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 name is not present in the Owner's product master data then the product name must be entered manually.
        iii. Item Code Type drop-down – The product code type (e.g. IN-Product Code).
        iv. Item Code Value field – The product code.
        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 PO acknowledgment.

13. In the Notes section, enter any additional comments or instructions.
14. To submit the purchase order acknowledgment to a customer:

    To save the PO acknowledgment 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 button.

       The PO acknowledgment 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.

Search and view purchase order acknowledgments

Search for and view purchase order acknowledgments

Perform this task to search for and view the details of the purchase orders acknowledgments sent or received by suppliers or customers. Viewing the details of a purchase order acknowledgment enables suppliers or customers 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 if using the Owner's instance of Multienterprise Information Network Tower.

4. Select

   PO Acknowledgments

   .

5. Select the Filter button.
6. In the Filters panel, fill in one or more of the following fields to filter the results:

   a. State drop-down – The state of the PO acknowledgment:

      - 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.

b. Buyer field – Displays only if the menu item is

   Sent PO Acknowledgments

   . The name of the company the purchase order acknowledgment was sent to.
   If the name of the company is not present in the Owner's master data then the company's name must be entered manually.

c. Supplier type-ahead – Displays only if the menu item is

   Received PO Acknowledgments

   . The name of the company the purchase order acknowledgment was received from.
   If the name of the company is not present in the Owner's master data then the company's name must be entered manually.

d. Last Modified field – The period of time in which the PO acknowledgment 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 PO acknowledgments displays based on the filter results.

8. Select the link for the PO acknowledgment from the results table.

   The View PO Acknowledgments screen displays.

9. To view all fields for each line item, select the View icon on the

   Advance Shipment Notices

   Details screen.

Reprocess and resubmit purchase order acknowledgments

Reprocess purchased order acknowledgments

After the purchase order acknowledgment is submitted, the user might encounter an error and the processed status will be set to Paused With Error. Use the following procedure to resolve any error messages encountered while submitting purchase order acknowledgments.

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 if using the Owner's instance of Multienterprise Information Network Tower.

4. Select

   PO Acknowledgments

   .

5. Select the Filter button to find the purchase order acknowledgment in Processing, Processed, Preparing to Send, or Sending state
6. Select the PO Number link in the results table.
7. View the following fields for error in the Transaction Information section:
   - Process Status - Displays the status of the submitted transaction.
   - Last Transaction Error - Displays the error message.
8. Select the Edit Edit button..
9. In the Transaction Information section, select Submitted from the Process Status drop drown.
10. Select the Save button.
    The purchase order acknowledgments request is moved from Processing state to Sending state indicating that the purchase order acknowledgment is submitted successfully.

Do not select the Move To button, as it will cause the transaction to skip a workflow state, preventing successful delivery.

Resubmit purchase order acknowledgments

If a transaction is successfully sent to a partner but an issue occurs on the partner's side (e.g. in their ERP system), the sender can avoid re-entering all the details by rolling back to a previous workflow state and resending the transaction, thus saving time and effort for both parties.

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 if using the Owner's instance of Multienterprise Information Network Tower.

4. Select

   PO Acknowledgments

   .

5. Select a PO Acknowledgment Number in Sent state.
6. Select the Edit Edit button.

   The state of the purchase order acknowledgment 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 button.

   The PO acknowledgment is submitted.

The statues of the purchase order acknowledgment moves to Sent state.

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