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.

In Logistics Orchestration, a Purchase Order (PO) communicates order information between the logistics provider and the client. In a 4PL model, the logistics provider sends PO information to the client, providing visibility into order details, products, quantities, delivery locations, and requested dates. The PO provides the business context for downstream logistics activities, including related Advance Ship Notices (ASNs), supporting coordinated fulfillment and end-to-end shipment visibility.

For more information about Purchase orders guidelines, see Purchase order transactions.

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Create and submit purchase orders

Perform this task to create and submit new purchase orders. Additionally, customers 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 the Main Menu icon.
2. Select My Networks in the header.
3. Select a [MPL Network] from the Select your Network drop-down in the header.
4. Select a Partner or Location (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
5. Select the Go button.
6. Select one of the following menu items depending on the orchestration used:
   - Select Manufacturing - Customer from the left menu.
   - Select Commerce - Customer from the left menu.
   - Select Logistics - Provider from the left menu.

   Partners must have the correct **roles** assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Purchase Orders.
8. Select the New button.
9. Enter the purchase order number in the PO Number field.
10. Select the Save button.

    The screen refreshes with the saved purchase order in the draft state and with the required sections populated.
11. Select the Edit button.

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12. In the Transaction Information section, select Submitted from the Process Status drop drown.
13. In the Order Information section fill in one or more of the following fields:
    i. PO Number field – The unique identifier of the purchase order.
    This field auto populates the value entered on the New Purchase Order screen.
    ii. Order Date field – The date the order is placed on.
    iii. Purchase Order Type drop-down – The category of a purchase order, based on its purpose, content, or the business process it supports.
    This field auto populates the value entered on the New Purchase Order screen.
    iv. Delivery Term Code field – The code or abbreviation for the terms of sale between the buyer and the supplier regarding the delivery of product.
    v. 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.
    vi. Payment Terms By Days field – The terms of payment (in days) agreed upon by the buyer and the supplier.
    vii. 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).
    viii. Currency drop-down – The 3-letter ISO currency code that the line items included in the purchase order are priced with.
    ix. Action drop-down – A brief description stating the purpose of the transaction.
    x. Is Acknowledgment Required switch – Indicates whether the receiving party must send an acknowledgment after receiving a purchase order.
14. If the menu item selected is Manufacturing - Customer or Commerce - Customer, in the Customer and Supplier section, fill in the following fields under Customer group:

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or

If the menu item selected is Logistics - Provider, in the Client and Provider section, fill in the following fields under Client group:

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

   The remaining Customer or 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.

ii. Address 1 field – The address of the particular location.
iii. Address 2 field – Any additional address information.
iv. Country drop-down – The two-letter country code with country name for this location.
v. State field – The state or region for this location.
vi. City field – The city for this location.
vii. Postal Code field – The postal code for this location's main address.
viii. Contact Telephone Number field – The company or location's phone number.
ix. Contact Fax Number field – The company or location's fax number
x. Party ID Type drop-down – The identifier type used for this company or location. For more information, see Identifier and Item Code Types.
xi. Party ID Value field – The value associated with the identifier type.

15. If the menu item selected is Manufacturing - Customer or Commerce - Customer, in the Customer and Supplier section, fill in the following fields under Supplier group:

    or

    If the menu item selected is Logistics - Provider, in the Client and Provider section, fill in the following fields under Provider group:

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i. 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 or Provider 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.

ii. Address 1 field – The address of the particular location.
iii. Address 2 field – Any additional address information.
iv. Country drop-down – The two-letter country code with country name for this location.
v. State field – The state or region for this location.
vi. City field – The city for this location.
vii. Postal Code field – The postal code for this location's main address.
viii. Contact Telephone Number field – The company or location's phone number.
ix. Contact Fax Number field – The company or location's fax number
x. Party ID Type drop-down – The identifier type used for this company or location. For more information, see Identifier and Item Code Types.
xi. Party ID Value field – The value associated with the identifier type.

16. In the Ship to Location and Bill to Location section, fill in the following fields under Ship to Location group:
    i. 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.

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ii. Address 1 field – The address of the particular location.
iii. Address 2 field – Any additional address information.
iv. Country drop-down – The two-letter country code with country name for this location.
v. State field – The state or region for this location.
vi. City field – The city for this location.
vii. Postal Code field – The postal code for this location's main address.
viii. Contact Telephone Number field – The company or location's phone number.
ix. Contact Fax Number field – The company or location's fax number
x. Party ID Type drop-down – The identifier type used for this company or location. For more information, see Identifier and Item Code Types.
xi. Party ID Value field – The value associated with the identifier type.

17. In the Ship to Location and Bill to Location section, fill in the following fields under Bill to Location group:
    i. 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.
    ii. Address 1 field – The address of the particular location.
    iii. Address 2 field – Any additional address information.
    iv. Country drop-down – The two-letter country code with country name for this location.
    v. State field – The state or region for this location.
    vi. City field – The city for this location.
    vii. Postal Code field – The postal code for this location's main address.
    viii. Contact Telephone Number field – The company or location's phone

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number.

ix. Contact Fax Number field – The company or location's fax number

x. Party ID Type drop-down – The identifier type used for this company or location. For more information, see Identifier and Item Code Types.

xi. Party ID Value field – The value associated with the identifier type.

18. 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 Line Item Information section:

        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 field – 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.

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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.

19. In the Notes section, select the Add + icon to enter any additional comments or instructions.
20. 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 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 purchase order 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 purchase orders can also be created by selecting the New button on the Purchase Orders Details screen for an existing purchase order.

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Submit a draft purchase order

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

1. Select the Main Menu icon.
2. Select My Networks in the header.
3. Select a [MPL Network] from the Select your Network drop-down in the header.
4. Select a Partner or Location (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
5. Select the Go button.
6. Select one of the following menu items depending on the orchestration used:
   - Select Manufacturing - Customer from the left menu.
   - Select Commerce - Customer from the left menu.
   - Select Logistics - Provider from the left menu.

   Partners must have the correct **roles** assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Purchase Orders.
8. Select the Filter button to find the purchase order in Draft state.
9. Select the PO Number link in the results table.
10. Select the Edit button.
11. In the Transaction Information section, select Submitted from the Process Status drop drown.
12. Confirm the purchase order details and select the Edit icon associated with that line item to modify the fields if required.
13. 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.

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14. Select the Save button.

    The purchase order is submitted.

Tips

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

 A deleted transaction cannot be retrieved.

Create new discussions and add comments to existing discussions

Owner and Partner can start discussions or add comments directly from a subtype view page. This allows authorized users from owner and partner companies to collaborate in the context of the transaction they are viewing.

Start a Discussion from a Subtype View Page

Perform this task to add new discussion directly from the subtype record being viewed.

1. Select the Main Menu  icon.
2. Select My Networks in the header.
3. Select a [MPL Network] from the Select your Network drop-down in the header.
4. Select a Partner or Location (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
5. Select the Go button.
6. Navigate to the subtype record you want to discuss.

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7. Open the subtype record to display its view page.

8. Select the Add Discussion button.
   The new discussion page opens in a new tab.

9. Start the discussion using one of the following options:

   i. In the Transaction section, select the transaction ID link to review and update the related transaction automatically referenced from the subtype record.

   ii. Select the New button to initiate a new discussion for the transaction, if required.
   This creates a new, independent discussion thread for the transaction. The new discussion will not be a continuation of any existing discussion associated with the subtype record, and prior discussion details from the subtype record will not automatically carry forward into the new thread.

10. Enter the discussion details. For detailed field descriptions, see Create and Submit a Discussion.

11. Select the Save button.
    The new discussion is now associated with the transaction from the originating subtype view page.

Add a Comment from a Subtype View Page

Perform this task to add a comment to an existing discussion associated with transaction being viewed.

1. Select the Main Menu icon.

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2. Select My Networks in the header.
3. Select a [MPL Network] from the Select your Network drop-down in the header.
4. Select a Partner or Location (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
5. Select the Go button.
6. Navigate to the subtype record related to the discussion you want to comment on.
7. Open the subtype record to display its view page.
8. Select the Add Comment button.
   The Discussion Search page opens in a new tab within the context of the selected transaction.
9. Find the discussion to update using one of the following options.

    i. Review and update the discussions already associated with the transaction.

    ii. Select the Filter button, enter the search criteria, and apply the filter. From the filtered results, select the discussion to review and update. For detailed field descriptions, see Search and View All Discussions.

    iii. If the existing discussion is not appropriate, select the New button to start a new discussion for the associated transaction. For detailed field descriptions, see Create and Submit a Discussion.

10. Select the discussion to update.
11. Enter comment.
12. Select the Save button.

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The comment is added to the selected discussion and remains associated with the related transaction.

Search and view purchase orders

Perform this task to search for and view the details of the purchase orders sent or received by suppliers or customers. Viewing the details of a prices sales catalogs 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.

Search for and view purchase orders

1. Select the Main Menu icon.
2. Select My Networks in the header.
3. Select a [MPL Network] from the Select your Network drop-down in the header.
4. Select a Partner or Location (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
5. Select the Go button.
6. Select one of the following menu items depending on the orchestration used:
   - Select Manufacturing - Customer or Manufacturing - Supplier from the left menu.
   - Select Commerce - Customer or Commerce - Supplier from the left menu.
   - Select Logistics - Client or Logistics - Provider from the left menu.

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

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7. Select Purchase Orders.
8. Select the Filter button.
9. In the Filters panel, fill in one or more of the following fields to filter the results:
    i. Multi Field Search field - Searches across multiple indexed fields using a single keyword, including Text, Text Area, Email, URL, and Lookup fields.

    ii. 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.

    iii. PO Number field – The unique identifier of the purchase order.

    iv. Supplier type-ahead – Displays only if the menu item is Sent Purchase Orders in Manufacturing - and Commerce. 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.

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v. Buyer type-ahead – Displays only if the menu item is Received Purchase Orders for Manufacturing and Commerce. The name of the company the purchase order 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.

vi. Client type-ahead – Displays only if the menu item is Sent Purchase Orders for Logistics - Provider. The name of the company the purchase order 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.

vii. Provider type-ahead – Displays only if the menu item is Received Purchase Orders for Logistics - Client. The name of the company the purchase order 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.

viii. Last Modified drop-down – 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.

10. Select Apply.

    A list of purchase orders displays based on the filter results.

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

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The View Purchase Orders screen displays.

12. To view all fields for each line item, select the View icon on the Purchase Orders Details screen. .

Reprocess and resubmit purchase orders

Reprocess purchase orders

After the purchase order 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 orders.

1. Select the Main Menu icon.
2. Select My Networks in the header.
3. Select a [MPL Network] from the Select your Network drop-down in the header.
4. Select a Partner or Location (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
5. Select the Go button.
6. Select one of the following menu items depending on the orchestration used:
   - Select Manufacturing - Customer from the left menu.
   - Select Commerce - Customer from the left menu.
   - Select Logistics - Provider from the left menu.

   Partners must have the correct **roles** assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Purchase Orders.
8. Select the Filter button to find the purchase order in Processing, Processed, Preparing to Send, or Sending state.
9. Select the PO Number link in the results table.
10. View the following fields for error in the Transaction Information section:

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- Process Status - Displays the status of the submitted transaction.
- Last Transaction Error - Displays the error message.

11. Select the Edit button..
12. In the Transaction Information section, select Submitted from the Process Status drop drown.
13. Select the Save button.
    The purchase orders request is moved from Processing state to Sending state indicating that the purchase order 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 orders

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 the Main Menu icon.
2. Select My Networks in the header.
3. Select a [MPL Network] from the Select your Network drop-down in the header.
4. Select a Partner or Location (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
5. Select the Go button.
6. Select one of the following menu items depending on the orchestration used:
   - Select Manufacturing - Customer from the left menu.
   - Select Commerce - Customer from the left menu.
   - Select Logistics - Provider from the left menu.

   Partners must have the correct **roles** assigned if using the Owner's

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instance of Multienterprise Information Network Tower.

7. Select Purchase Orders.
8. Select PO Number in Sent state.
9. Select the Edit button.

   The state of the purchase order is automatically moved to Sending state.

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 purchase order is submitted.

The statues of the purchase order moves to Sent state.

Related Content

Extensible TraceLink Transfer, version 2024.3

To learn more about what's new in the Extensible TraceLink Transfer, solution version 5.0 that provides the user interface for this app, see What's new in the user interface.

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Extensible TraceLink Transfer, solution version 5.0

Explore what's new in the Extensible TraceLink Transfer, solution version 5.0 release.

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