TRACELINK UNIVERSITY

Shipping orders

Warehouse shipping orders can be used to request that products in a given purchase order be shipped to a buyer's location from a supplier's remote or third-party warehouses and confirm that the supplier's remote warehouses or third-party warehouses has shipped the requested product via a warehouse shipping advice.

For more information about Warehouse shipping orders guidelines, see Warehouse shipping order transactions.

Create and submit shipping orders

Perform this task to create and submit shipping orders. Additionally, clients can begin work on a shipping orders and save it for completion at a later time.

Create and submit a new shipping 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 Logistics - Client from the left menu.

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

7. Select Shipping Orders.
8. Select the New button.
9. Enter the shipping order number in the Shipping Order Number field.
10. Select the Save button.

    The screen refreshes with the saved shipping order in the draft state and with the required sections populated.

11. Select the Edit button.
12. In the Transaction Information section, select Submitted from the Process Status drop drown.
13. In the Shipping Order Information section fill in the following fields:
    i. Shipping Order Number field – A unique identifier of the shipping order. This field auto populates the value entered in New Shipping Order screen.
    ii. Delivery Priority drop-down – The level of urgency assigned for a delivery.
    iii. Shipping Order Date field – The date the shipping order was initiated.
    iv. Carrier Name drop-down – The name of the transportation company.
    v. Purchase Order Number field – The unique identifier of the purchase order number.
    vi. Delivery Type field – The delivery type as defined in sender's ERP system.
    vii. Requested Ship Date/Time field – The date and time the goods are requested to shipped.
    viii. FOB Transfer Location field – Code indicating the type of location where the risk of loss for the shipment is transferred.

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ix. Requested Delivery Date/Time field – The date and time the goods are requested to be delivered.
x. Payment Method field – The method that was used to make the payment.
xi. Export switch – Indicates whether the order is exported.
xii. Drop Shipment switch – Indicates whether the shipment is dropped.
xiii. Action drop-down – A brief description stating the purpose of the transaction.

14. In the Shipping Order Instructions section, fill in the following fields:
    i. Delivery Term Code field – The code or abbreviation for the terms of sale between the buyer and the supplier regarding the delivery of product..
    ii. Shipping Receiving Point field – The location where the shipped order is received.
    iii. 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.
    iv. Shipping Conditions field – The terms and requirements agreed upon for the shipping of goods.
    v. Shipping Route field – The shipment routing code.
    vi. Transportation Group field – The categorization used to group together goods or products that share similar transportation requirements.
    vii. Delivery Route field – The delivery routing code.
    viii. Transportation Method drop-down – The transportation method used
    ix. Routing Description field – A brief description of the transportation route and methods used to move goods.
    x. SCAC field – A carrier identifier code for the routing stage.
15. In the Client and Provider section, fill in the following fields under Client group:
    i. Company type-ahead field – The name of the company sending the shipping order. This company is owner of goods. This field pulls from the Owner's company and location master data.

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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.

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 Client and Provider section, fill in the following fields under Provider group:
    i. Company type-ahead field – The name of the company receiving the shipping order. This company is supplier of goods. This field pulls from the Owner's company and location master data.

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

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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 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.

    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

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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 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 of the owner or buyer, based on the payment terms. 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 Owners master data, the billing address 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.
19. In the Line Items section:
    a. Select the Add + icon. At least one line item is required to submit a shipping order.

    b. In the New Line Items panel, fill in the following fields underLine Item Information section:

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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. Lot Number field – The lot number of the line number.
vii. Expiration Date field – The expiry date of the line item.
viii. Quantity Ordered field – The number of units ordered.
ix. Unit of Measure drop-down – The unit in which the line item is measured.
x. Line Notes field – Additional information about the line item being added.

c. Select Apply.

The new line item is added to the shipping order.

20. In the Notes section, select the Add + icon to enter any additional comments or instructions.
21. To submit the shipping order:

To save the shipping order in a Draft state and finish it later, ensure the

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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 shipping 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 shipping orders can also be created by selecting the New button on the Shipping Orders Details screen for an existing shipping order.

Submit a draft shipping order

Complete and submit a saved shipping 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 Logistics - Client from the left menu.

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

7. Select Shipping Orders.
8. Select the Filter button to find shipping order in Draft state.
9. Select Shipping Order Number from the filter results.
10. Select the Edit button.
11. In the Transaction Information section, select Submitted from the Process Status drop drown.
12. Confirm the shipping 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.

14. Select the Save button.

    The shipping order is submitted.

Tips

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

A deleted transaction cannot be retrieved.

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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.
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.

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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.
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.

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

Search and view shipping orders

Search for and view shipping orders

Perform this task to search for shipping order sent or received by buyers or sellers to view their details. Viewing the details of a shipping order enables buyers or sellers 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.

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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 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.
7. Select Shipping Orders.
8. Select the Filter button.
9. In the Filters panel, fill in 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 shipping 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.

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- Sent – The transaction is successfully completed and shared with the receiving party.

iii. Provider type-ahead – Displays only if the menu item is Sent Shipping Orders in Logistics - Client. The name of the company the shipping order was sent to.

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

iv. Client type-ahead – Displays only if the menu item is Received Batch Creations in Logistics - Provider. The name of the company the shipping advice was received from.

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

v. Shipping Order Number field – A unique identifier of the shipping order.

vi. Shipping Oder Date/Time field – The date and time of the shipping order.

vii. Requested Delivery Date/Time field – The date and time the delivery is requested.

viii. Last Modified drop-down – The period of time in which the shipping 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 shipping orders displays based on the filter results.

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

    The View Shipping Orders screen displays.

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

Reprocess and resubmit shipping orders

Reprocess shipping order

After the shipping 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 shipping 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 Logistics - Client from the left menu.

   Partners must have the correct **roles** assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Shipping Orders.
8. Select the Filter button to find shipping order in Processing, Processed, Preparing to Send, or Sending state.
9. Select Shipping Order Number from the filter results.
10. 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.
11. Select the Edit button..

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12. In the Transaction Information section, select Submitted from the Process Status drop drown.
13. Select the Save button.
    The shipping orders request is moved from Processing state to Sending state indicating that the shipping orders 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 shipping 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 Logistics - Client from the left menu.
   Partners must have the correct **roles** assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Shipping Orders.
8. Select a Shipping Order Number in **Sent** state.
9. Select the Edit button.

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

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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 shipping order is submitted.

The statues of the shipping order moves to Sent state.

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Navigate to help documentation and support

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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