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Home

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TraceLink University



Batch closures

Batch closure is the formal completion of all production activities for a specific batch, including final manufacturing steps, quality testing, and documentation approval. After closed, the batch is finalized, no further changes allowed and is cleared for packaging, shipping, or distribution.

Create and submit batch closures

Perform this task to create and submit new batch closures. Additionally, suppliers can begin work on a batch closures and save it for completion at a later time.

Create and submit a new batch closure

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 Manufacturing - Supplier from the left menu.
 Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Batch Closures.

8. Select the New  button.

9. Enter the batch closure number in the Batch Closure Number.

10. Select the Save  button.

The screen refreshes with the saved batch closure 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 down.

13. In the Batch Closure Information section, fill in the following fields:

- i. Batch Closure Number field – The unique identifier of batch closures. This field auto populates the value entered New Batch Closure screen.
- ii. Batch Closure Date field – The specific date when the batch closures records were last modified or updated.
- iii. Action drop-down – A brief description stating the purpose of the transaction.

14. In the Reporter and Client section, fill in the following fields under Reporter group:

- i. Reporting Location type-ahead field – The name of the warehouse sending the batch closure. 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 the warehouse is not present in the Owner's master data, the warehouse 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.
- xi. Party ID Value field – The value associated with the identifier type.

15. In the Reporter and Client section, fill in the following fields under Client group:

- i. Company type-ahead field – The name of the customer receiving the batch closure. 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.

- 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.

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

16. In the **Line Items** section:

a. Select the Add **+** icon. At least one line item is required to submit a batch closure.

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

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 name 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).

iii. Item Code Value field - The product code.

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. Quantity field - The quantity of item selected or provided.

vi. Unit of Measure drop-down - The unit in which the line item is measured.

vii. Plant Identifier field -A unique code or number used to designate a specific manufacturing, production, or storage facility.


viii. Storage Location field - A specific area within a warehouse, plant, or

facility designated for storing materials.

- ix. Customer Lot Number field - A customer-defined code used to identify and manage product batches.
- x. Supplier Lot Number field - A vital batch-level identifier assigned during production
- xi. Sales Order Number field - A unique identifier assigned to a sales order.
- xii. Sales Order Line Number field - A unique identifier assigned to each individual item line.
- xiii. PO Number field - A unique identifier assigned to a purchase order.
- xiv. PO Line Number drop-down - A unique identifier assigned to each individual purchase order item line.
- xv. Process Order Number field - A unique identifier assigned to a process order.
- xvi. Process Order Line Number field - A unique identifier assigned to each individual process order item line.
- xvii. Status Code drop-down - The code to indicate the current status a line item.
- xviii. Manufactured Date field - The manufacturing date of a line item.
- xix. Expiration Date field - The expiry date of the line item.
- xx. Line Notes field - Additional information about the line item being added.

c. Select Apply.


The new line item is added to the batch closure.

17. In the Notes section, select the Add  icon to enter any additional comments or instructions.

18. To submit the batch closure:



To save the batch closure 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 batch closure 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 batch closures can also be created by selecting the New  button on the Batch Closures Details screen for an existing batch closure.

Submit a draft batch closure

Complete and submit a saved batch closure 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 Manufacturing - Supplier from the left menu.



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


7. Select Batch Closures.

8. Select the Filter  button to find the batch closures in Draft state.

9. Select the Batch Closure Number link in the results table.

10. Select the Edit  button.

11. In the Transaction Information section, select Submitted from the Process Status drop down.

12. Confirm the batch closure 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 batch closure is submitted.

Tips

- Select the batch closures number row and then select the Delete  icon on the top of the Search Batch Closures screen, to delete a batch closure in draft state.





A deleted transaction cannot be retrieved.

Search and view batch closures

Search for and view batch closures

Perform this task to search for and view the details of the batch closure sent or received by suppliers or customers. Viewing the details of a batch closure 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 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 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.

7. Select Batch Closures.

8. Select the Filter  button.

9. In the Filters panel, fill in one or more of the following fields to filter the results:

i. State drop-down – The state of the batch closure:

- 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.

ii. Client type-ahead – Displays only if the menu item is Sent Batch Closures
The name of the company the batch closure 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.

iii. Reporter type-ahead – Displays only if the menu item is Received Batch Closures
The name of the company the batch closure 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.

iv. Last Modified drop-down – The period of time in which the batch closure 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 batch closures displays based on the filter results.

11. Select the link for the batch closure from the results table.




The View Batch Closures screen displays.

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

Reprocess and resubmit batch closures

Reprocess batch closure

After the batch closure 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 a batch closure.

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 Manufacturing - Supplier from the left menu.
 Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Batch Closures.
8. Select the Filter  button to find the batch closures in Processing, Processed, Preparing to Send, or Sending state.
9. Select Batch Closure Number link in the results table.


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..

12. In the Transaction Information section, select Submitted from the Process Status drop down.



13. Select the Save  button.

The batch closure request is moved from Processing state to Sending state indicating that the batch closure 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 batch closures

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 Manufacturing - Supplier from the left menu.
 -  Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Batch Closures.

8. Select a Batch Closure Number row in Sent state.

9. Select the Edit  button.

 The state of the batch closure 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 batch closure is submitted.

The statuses of the batch closure 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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