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.

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8. Select the New button.
9. Enter the batch closure number in theBatch 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 drown.
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.

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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. 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.

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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 **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.

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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

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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

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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 drown.
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.

Create new discussions and add comments to existing

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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 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.

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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 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. 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 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.

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- 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. 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.

iv. 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.

v. 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

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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 drown.

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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.

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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 statues of the batch closure 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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