TRACELINK UNIVERSITY

Planned orders

A Planned Order is a system-generated recommendation created within Enterprise Resource Planning (ERP) systems like SAP, or Advanced Planning Systems (APS), to indicate the projected requirement to produce or purchase a specific quantity of a pharmaceutical product or raw material at a designated time.

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

Create and submit planned orders

Perform this task to create and submit new planned order. Additionally, buyers can begin work on a planned order and save it for completion at a later time.

Create and submit a new planned order

Perform this task to create new planned order and submit them to suppliers.

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 from the left menu.

   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Planned Orders.
8. Select the New button.
9. On the New Planned Order screen, fill in the following fields:
   a. Planned Order Number field – A unique identifier assigned to a planned order.
   b. Planned Order Type drop-down – The type of planned order transaction.
   c. Planned Order Start Date field – The start date of planned order.
   d. Planned Order End Date field – The end date of planned order.
10. Select the Save button.

    The screen refreshes with the saved planned 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 Planned Order Information section fill in the following fields:
    a. Planned Order Number field – A unique identifier assigned to a planned order.
       This field auto populates the value entered on the New Planned Order screen.
    b. Planned Order Type drop-down – The type of planned order transaction.
       This field auto populates the value entered on the New Planned Order screen.

c. Planned Order Start Date field – The start date of planned order. This field auto populates the value entered on the New Planned Order screen.
d. Planned Order End Date field – The end date of planned order. This field auto populates the value entered on the New Planned Order screen.
e. Product Identifier field – The finished product number associated with the planned order.
f. Material Description field – Name of the finished product.
g. Procurement Type drop-down – The indicator specifies the procurement type of the material and how it is sourced.
h. Special Procurement Type drop-down – The indicator defines the material's procurement type and the method by which it is sourced.
i. Availability Confirmation drop-down -Indicates the availability status of the planned order by confirming whether the necessary materials, resources, or capacities are accessible at the time of planning.
j. Special Stock Indicator drop-down – Tracks and manages materials that fall outside of regular inventory, such as consignment stock, project stock, and returnable packaging, which require separate tracking.
k. Bills Of Materials Identifier drop-down – Identifier of the Bill of Materials (BOM) item used in manufacturing the finished product.
l. Alternative BOM Identifier field – A two-digit code used to identify an alternative Bill of Materials (BOM) within a BOM group.
m. Inco 1 Code field – Code representing the applicable Incoterms.
n. Inco 1 Term Description field – Description of the applicable Incoterms.
o. Manufacturer Company Name field – The name of the supplier company.
p. Action drop-down – A brief description stating the purpose of the transaction.

14. In the Reference Transactions section, select the Add + icon to add reference and fill in the following fields:

   a. Transaction Type drop-down - The type of transaction to reference.
   b. Transaction Value type-ahead field – The unique identifier of the transaction.

      If the value does not match the available options, the value must be entered manually.
   c. Transaction Date field - The date of the transaction being referenced.
   d. Select Apply.

      A new reference transaction line is added.

15. In the Planning Quantities and Planned Order Dates section, select the Add + icon to add quantity and date information and fill in the following fields:
    a. Organization Type drop-down - The type of organization to reference.
    b. Organization Value field – The unique identifier of the organization.

       If the value does not match the available options, the value must be entered manually..
    c. Planned Order Date Type drop-down - The category of date being referenced.
    d. Planned Order Date Value field - The specific date to be referenced.
    e. Reported Quantity Type drop-down - The category of quantity to be recorded.
    f. Reported Quantity field - Reported quantity of the product in inventory.
    g. Unit of Measure drop-down – The unit in which the recorded quantity is measured.
    h. Select Apply.

       A new reference transaction line is added.

16. In the Customer and Supplier section, fill in the following fields under Customer group:

    a. Company type-ahead field – The name of the company sending planned order. This company is customer of goods. 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.

17. In the Customer and Supplier section, fill in the following fields under Supplier group:

    a. Company type-ahead field – The name of the company receiving the planned order. This company is supplier of goods. 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.

18. In the Reservation Items section:
    a. Select the Add + icon to add reservation line item information and fill in the following fields:
        i. Line field – The number to identify the line item by (e.g. 50).
        ii. Reservation Identifier field – Reservation or dependent requirements alphanumeric identifier.
        iii. Reservation Position field – The number that uniquely identifies an item in a reservation or a dependent requirement.
        iv. Component Identifier field – Component bill of material item identifier used in the production of finished good.
        v. Component Type field – Type of the product such as Finished, semi-finished, Drug product
        vi. Component Description field – Component name of bill of material item used in the production of finished good.
        vii. Item Category field – Classifies BOM items based on criteria like object reference (e.g., material or document) or stock status. It controls field selection, default values, and system activities for BOM maintenance

viii. Lot Number field - The batch number of the line number.

ix. Plant Number field – A unique Customer plant identifier for planning.

x. Storage Location field – The storage location for issuing components (backflush posting) or receiving produced materials (receipt posting) in planned or production orders.

xi. Is Quantity Fixed switch – The quantity of an item remains constant, regardless of changes in the related system or finished product quantity.

xii. Supplier Company Name field – The name of the supplier company.

xiii. Supplier’s Address field – The supplier company is physically located.

xiv. Supplier’s Address - City field – The city where a supplier's company is physically located.

xv. Supplier’s Address - State field – The state within a country where the supplier's company is located.

xvi. Supplier’s Address - Country field – The nation in which the supplier’s company is physically situated.

xvii. Supplier’s Address - Postal Code field – The numeric or alphanumeric code assigned to the supplier’s company address.

xviii. Referenced Bill Of Materials field – The referenced document identifier.

xix. Referenced Bill of Materials Date field – The referenced BOM document date.

xx. Line Notes field – Additional information about the line item being added.

b. Select Apply.

The new reservation line item is added.

c. Select a reservation item line row and then select the branch icon and fill in the following fields under Reservation Schedule Line

Information:

   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 and Item Code Value 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. Date Type drop-down – The type of date being referenced..
   v. Date Value field – The referenced date value.
   vi. Quantity Type drop-down – The type of quantity recorded.
   vii. Quantity field – The quantity of product required for planning.
   viii. Unit of Measure drop-down – The unit in which the line item is measured.

d. Select Apply.

   The new reservation schedule line information is added.
e. Select the reservation item line drop down to view the reservation schedule line information in a table.

19. In the Planned Order Operations and Sub Operations section:
   a. Select the Add + icon to add planning order operation information and fill in the following fields:
      i. Planning Order Operations Activity Identifier field – The type of packaging identifier used at the delivery line level.
      ii. Operations Sequence field – The packaging identifier value specified at the delivery line level.
      iii. Operations Description field – The brief description of the operation.
      iv. Operations Control Key field – Displays which business transactions

from the list are to be executed at the work center as part of its activities.

v. Operations Work Center identifier field – The identifier of the work center where the operation will take place.
vi. Sub Operations Activity Identifier field – The sequence in which the sub-operations of an operation are listed.
vii. Line Notes field – Additional information about the line item being added.

b. Select Apply.

The new planning order operation information line item is added.

c. Select a planning order operation information line row and then select the branch icon and fill in the following fields under Planning Order Sub Operation Information:
    i. Operations Line Item Number field – The line item identifier for the capacity requirements record.
    ii. Operations Activity Type drop-down – The type of work involved in performing the activity.
    iii. Operations Activity Value field – The amount of work involved in performing the activity.
    iv. Operations Date Type drop-down – The date type at item detail level for sales forecast.
    v. Date Value field – The date value at item detail level for sales forecast.
    vi. Operations Capacity Identifierfield – Work center resource ID where capacity is needed for production.
    vii. Operations Capacity Category field – Work center resource identifier where production capacity is required.
    viii. Sub Operations Activity Identifier field – Defines the sequence in which the operations are executed.

    ix. Sub Operations Control Key field – Specifies which business transactions from the list are to be carried out at the work center as part of its activities.
    x. Sub Operations Sequence field – The identifier key that specifies a sequence of operations within a routing.
    xi. Sub Operations Description field – The brief description of the sub operation.
    xii. Sub Operations Work Center identifier field – Identifier of the work center where the operation is to be executed.
    xiii. Operations Capacity Requirements Identifier field – Activity posting identifier.
    xiv. Operations Capacity Requirement Counter field – Counters for capacity requirements record multiple capacities, including individual capacity values.

d. Select Apply.

   The new planning order sub operation information line item is added.

e. Select the planning order operation information line row drop down to view the planning order sub operation information in a table.

f. Select a planning order sub operation line row and then select the branch icon and fill in the following fields under Sub Operation Detail Information:

    i. Sub Operations Line Item Number field – The line item identifier for the capacity requirements record
    ii. Sub Operations Activity Type drop-down – The sequence in which the operations within a routing are performed.
    iii. Sub Operation Activity Value field – The order in which the sub-operations of an operation are arranged.
    iv. Sub Operations Capacity Identifier drop-down – Identifier of the work center resource where production capacity is needed.
    v. Sub Operations Capacity Category field – The capacity category

(e.g., machine, labor, etc.) associated with a specific operation or activity within a work center.

vi. Planned Order Capacity Earliest Start Datefield – The planned order capacity earliest start date.

vii. Planned Order Capacity Earliest Finish Date field – The planned order capacity earliest finish date.

viii. Planned Order Sub Capacity Earliest Start Date field – The planned order sub capacity earliest start date.

ix. Planned Order Sub Capacity Earliest Finish Date field – The planned order sub capacity earliest finish date.

x. Planning Operation Item Quantity field – Quantity of items specified in the planned order.

xi. Planning Order Operations Quantity Unit Of Measure drop-down – The unit of measure for the planned order item quantity.

xii. Planning Sub Operation Item Quantity field – The planned sub operation item quantity.

xiii. Sub Operations Quantity Unit Of Measure drop-down – The unit of measure for the planned sub operation item quantity.

xiv. Sub Operations Capacity Requirements Identifier field – Activity posting identifier.

xv. Sub Operation Capacity Requirement Counter field – Counters for capacity requirements record multiple capacities, including individual capacity values.

g. Select Apply.

The new sub operation detail information line item is added.

h. Select the planning order sub operation line row drop down to view the sub operation detail information in a table.

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

To save the planned 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 planned 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.
- Select the branch icon, to add a new line item in the inserted table, where available.
- New planned orders can also be created by selecting the New button on the Planned Orders Details screen for an existing planned order.

Submit a draft planned order

Complete and submit a saved planned 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 Manufacturing - Customer from the left menu.
   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Planned Orders.
8. Select the Filter Filter button to find planned orders in Draft state.
9. Select the Planned Order Number link in the results table.
10. Select the Edit Edit button.
11. In the Transaction Information section, select Submitted from the Process Status drop drown.
12. Confirm the planned 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 Save button.

    The planned order is submitted.

Tips

- To delete a planned order in a draft state, select the planned order number row and then select the Delete icon on the top of the Search Planned Orders screen.

A deleted transaction cannot be retrieved.

Search and view planned orders

Search for and view planned orders

Perform this task to search for and view the details of the planned orders sent by customers and received by suppliers. Viewing the details of a planned order enables suppliers or customers to quickly access planned 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 Planned Orders.
8. Select the Filter Filter button.
9. In the Filters panel, fill in one or more of the following fields to filter the results:

a. Planned Order Number field – A unique identifier assigned to a planned order.

b. State drop-down – The state of the planned 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.

c. Receiver type-ahead – Displays only if the menu item is Sent Planned Orders The name of the company the planned 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.
d. Customer type-ahead – Displays only if the menu item is Received Planned Orders The name of the company the planned 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
e. Planned Order Type drop-down – The type of planned order transaction.
f. Procurement Type drop-down – The indicator specifies the procurement type of the material and how it is sourced.

g. Availability Confirmation drop-down -Indicates the availability status of the planned order by confirming whether the necessary materials, resources, or capacities are accessible at the time of planning.
h. Last Modified drop-down – The period of time in which the planned 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 planned orders displays based on the filter results.

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

    The View Planned Orders screen displays.

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

Reprocess and resubmit planned orders

Reprocess planned orders

After the planned 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 a planned 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 Manufacturing - Customer from the left menu.
   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Planned Orders.
8. Select the Filter Filter button to find planned orders in Processing, Processed, Preparing to Send, or Sending state.
9. Select Planned Order 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 Edit button..
12. In the Transaction Information section, select Submitted from the Process Status drop drown.
13. Select the Save Save button.
    The planned orders request is moved from Processing state to Sending state indicating that the planned 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 planned 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 Manufacturing - Customer from the left menu.

   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Planned Orders.
8. Select a Planned Order Number in Sent state.
9. Select the Edit button.

   The state of the planned 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 planned order is submitted.

The statues of the planned 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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