TRACELINK UNIVERSITY

Process orders

A process order is used in process manufacturing industries (e.g., pharmaceuticals, chemicals, food and beverage) to manage and control production by transforming raw materials through actions like mixing or blending. Unlike discrete manufacturing, it focuses on continuous processes rather than part assembly. In an ERP system, a process order serves as a digital blueprint, outlining instructions, timelines, and resource planning throughout the production cycle.

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

Create and submit process orders

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

Create and submit a new process order

Perform this task to create new process 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 - Supplier from the left menu.
   Partners must have the correct rolesroles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Process Orders.
8. Select the New button.
9. On the New Process Order screen, fill in the following fields:
   i. Process Order Number field – A unique identifier assigned to a process order.
   ii. Process Order Date drop-down – The start date of process order.
10. Select the Save button.

    The screen refreshes with the saved process 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 Process Order Information section fill in the following fields:
    i. Process Order Number field – A unique identifier assigned to a process order.
       This field auto populates the value entered on the New Process Order screen.
    ii. Process Order Date field – The start date of process order.
       This field auto populates the value entered on the New Process Order screen.

iii. Process Order Type drop-down – The type of process order transaction
iv. Process Order Category drop-down – The classification that defines the type of process order.
v. Plant Number field – The code for the plant where the product will be made.
vi. Schedule Start Date field – The start date of process order.
vii. Schedule Finish Date field – The end date of process order.
viii. Material Number field – The material number for which process order is created.
ix. Inspection Lot Number field - The inspection lot number of finished goods.
x. MRP Controller Identifier field – An unique identifier assigned to a person tasked with managing Material Requirements Planning (MRP) activities for designated materials.
xi. Production Supervisor field – Group responsible for calculating capacity needs during scheduling.
xii. Production Version field – A key that defines the production method by controlling BOM explosion and selecting the task list type, group, and counter for manufacturing.
xiii. Production Line field – Department where manufacturing occurs, followed by Quality Assurance (QA)and inspection.
xiv. Object Status drop-down – The different states of process orders.
xv. Bill Of Materials Identifier field – BOM item identifier used in the production of finished good.
xvi. Bill Of Material Status drop-down – The different states of bill of material.
xvii. Action drop-down – A brief description stating the purpose of the transaction.

14. In the Processing Quantity section:
    a. Select the Add + icon
    b. In the New Processing Quantity panel fill in the following fields under

Processing Quantity Information section:

i. Organization Value field - The unique identifier of an organization.
ii. Processing Quantity Type drop-down– The type of quantity recorded. If the value does not match the available options, the value must be entered manually
iii. Processing Quantity Value field - The total quantity of produced good expected in inventory.
iv. Processing Quantity Unit Of Measure drop-down - The unit in which the line item is measured.

c. Select Apply.

A new processing quantity line is added.

15. In the Reference Transactions section:
    a. Select the Add + icon and fill in the following fields:
    b. In the New Reference Transaction panel, fill in the following fields under Reference Transaction Information section:
        i. Reference Transaction Identifier Type drop-down – The type of transaction.
        ii. Transaction Identifier 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.
        iii. Reference Transaction Date field - The transaction date.
    c. Select Apply.

    The new reference transaction line item is added to the transaction reference table.

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

    i. Company type-ahead field – The name of the company sending process 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.

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.

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

    i. Company type-ahead field – The name of the company receiving the process 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.

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.

18. In the Operations section:
    a. Select the Add + icon.
    b. In the New Operations Sequence panel fill in the following fields under Operations Sequence Information section:
        i. Line Item Number field - The number to identify the line item.
        ii. Sequence Identifier field – An unique code or number assigned to an item, event, transaction, or record in a sequential order.
    c. Select Apply.

       A new operations sequence information line is added.
    d. Select a operations sequence information line row and then select the branch icon and fill in the following fields under Components List Information section:
        i. Operations field – The order of operations within a sequence.
        ii. Work Center drop-down – The work center identifier where operation will be performed.
        iii. Operations Description field – A brief description of operation.
        iv. Operations Control Key drop-down – Indicates which of the business

transactions list should be executed in work center as part of work center activities.

e. Select Apply.

   A new components list information line is added.

f. Select a components list information line row and then select the branch icon and fill in the following fields under Operations Work Activity Information section:

   i. Activity Department field – The department responsible for performing the activity.
   ii. Activity Name field – The name of the activity being performed.
   iii. Activity Type drop-down – The type of work for the activity
   iv. Activity Value field – The amount of work needed to perform the activity.
   v. Line Item Number field - The number to identify the line item.
   vi. Capacity Requirement Identifier field - A unique code or reference used to represent a specific capacity requirement.
   vii. Capacity Requirement Counter field - An unique value used to identify or track individual capacity requirements.

g. Select Apply.

   A new operations work activity information line is added.

h. Select the components list information line row drop down to view the operations work activity information in a table.

19. In the Components section:
   a. Select the Add + icon.
   b. In the New Components List panel fill in the following fields under Components List Information section:
      i. Operations field - The number to identify the line item.
      ii. Operations Control Key field – An unique code or number assigned to an item, event, transaction, or record in a sequential order.
   c. Select Apply.

A new components list information line is added.

d. Select a components list information line row and then select the branch icon and fill in the following fields under Reservation Items Information section:
    i. Component Item Number field – The line item number for the reserved material or component.
    ii. Reservation ID field – The reservation or dependent requirements identifier.
    iii. Reservation Position field – The reservation or dependent requirements position.
    iv. Component Type field – The classification or category of a component or part used in manufacturing.
    v. Plant Number field – The code for the plant where the product will be made.
    vi. Storage Location Code field - The storage location for issuing components or receiving materials.
    vii. Component ID field - The product identifier for the component.
    viii. Batch Number field - The batch number associated with the material.
    ix. Component Name field - The name of the product.
    x. Component Code field - The product code identifier value.
e. Select Apply.

   A new reservation Items information line is added.
f. Select the components list information line row drop down to view the reservation Items information in a table.
g. Select a reservation Items information line row and then select the branch icon and fill in the following fields under SubLine Process Order Reservations Information section:
    i. Reservation Quantity Type drop-down – The classification or category of a reserved quantity.

ii. Reservations Quantity Value field – The total quantity of a material or resource that has been reserved.
iii. Reservation Unit of Measure drop-down – The unit in which a quantity of material or resource is reserved or allocated.

h. Select Apply.

A new subline process order reservation information line is added.

i. Select the reservation Items information line row drop down to view the subline process order reservation information in a table.

20. In the Process Order Item Information section:
    a. Select the Add + icon.
    b. In the New Item Information panel fill in the following fields under Item Information section:
        i. Line field - The number to identify the line item.
        ii. Plant Number field – The code for the plant where the product will be made.
        iii. Product Identifier field – The material number of finished goods.
        iv. Is Order Released switch – Indicates whether process order is released against the process order received in the system.
        v. Alt UOM Numerator field – The relationship between an alternate unit and a product's base unit of measure.
        vi. Alt UOM Denominator field – The conversion ratios between an item's alternate unit and its base unit of measure.
    c. Select Apply.

    A new item information line is added.

    d. Select a item information line row and then select the branch icon and fill in the following fields under Item Quantity Information section:
        i. Quantity Type drop-down – The category of quantity recorded.
        ii. Quantity Value drop-down – The total quantity of produced good expected in inventory.
        iii. Unit of Measure drop-down – The unit in which the line item is

measured.

e. Select Apply.

   A new components list information line is added.

f. Select the item information line row drop down to view the components list information in a table.

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

    To save the process 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 process 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 process orders can also be created by selecting the New + New button on the Process Orders Details screen for an existing process order.

Submit a draft process order

Complete and submit a saved process 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 - Supplier from the left menu.
   Partners must have the correct rolesroles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Process Orders.
8. Select the Filter Filter button to find process orders in Draft state.
9. Select the Process 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 process order details and select the Edit icon associated with that line item to modify the fields if required. See **Create and submit a new process order** for detailed field description of process orders.
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 process order is submitted.

Tips

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

A deleted transaction cannot be retrieved.

Search and view process orders

Search for and view process orders

Perform this task to search for and view the details of the process orders sent or received by suppliers or customers. Viewing the details of a process order enables suppliers or customers to quickly access process 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 rolesroles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Process 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. Process Order Number field – A unique identifier assigned to a process order.

   b. State drop-down – The state of the process 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. Customer type-ahead – Displays only if the menu item is Sent Process Orders in Manufacturing - Supplier. The name of the company the process 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. Supplier type-ahead – Displays only if the menu item is Received Process Orders in Manufacturing - Customer. The name of the company the process 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. Process Order Date drop-down – The start date of process order.

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

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

    The View Process Orders screen displays.

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

Reprocess and resubmit process orders

Reprocess process orders

After the process 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 process 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 - Supplier from the left menu.
   Partners must have the correct rolesroles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Process Orders.
8. Select the Filter Filter button to find process orders in Processing, Processed, Preparing to Send, or Sending state.
9. Select a Process 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 process orders request is moved from Processing state to Sending state

indicating that the process 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 process 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 - Supplier from the left menu.
   Partners must have the correct rolesroles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Process Orders.
8. Select a Process Order Number in Sent state.
9. Select the Edit Edit button.

   The state of the process 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 process order is submitted.

The statues of the process 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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