TRACELINK UNIVERSITY



# Add B2B connections

Application Administrators can create and update OPUS B2B connections using AS2, SFTP, and SMTP protocols. A B2B connection is a configured B2B gateway account associated with a company or location on the TraceLink network. It enables file exchange with an external system (e.g. an ERP system owned by a company on the TraceLink network) using the protocol associated with the B2B connection. B2B connections are uniquely identified by a username in SFTP and Connection name in AS2 and SMTP.

OPUS B2B connections do not affect existing Track & Trace Services (TTS) B2B connections. TTS apps that are available to OPUS Platform users via the OPUS iFrame can continue to use their existing TTS B2B connections. Apps built on the OPUS Platform cannot use TTS B2B connections and must create a new OPUS B2B connection.

Users can setup their B2B connections and associate it with Company or location. For more information, see Administration help center.

## Add and update B2B connections

### Add an AS2 B2B connection

1. Select the Main Menu icon.

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2. Select Extensible Tracelink Transfer.

3. Select B2B Connections in the side menu.

4. Select AS2.

5. Select the New button to add a new AS2 B2B connection.

   The New AS2 B2B Connection screen is displayed.

6. Fill in the following fields in the General section:

- B2B Connection Name field – Required. The name of the B2B connection. This field cannot be edited after the connection is successfully saved.
- AS2 ID field – Required. An identifier for the AS2 connection. This field cannot be edited after the connection is successfully saved.
- AS2 Server URL field – Required. The URL of the AS2 server.

  AS2 server URLs must not contain IPv4 addresses (`e.g. http://192.68.x.x/path`). Application Administrators must provide AS2 URLs that use full domain names instead.

  Valid examples:

  - `http://valvir-b2b-as2.us1.tracelink.com:5080`
  - `http://prod-b2b-as2.us1.tracelink.com:5080`

- Choreography Type drop-down – The sequence of events that occurs when a B2B message is transmitted:
  - OTHER (default) – The choreography is based on neither the X12 nor the EDIFACT standard. For more information about the format of the subject

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or header when the Choreography Type is Other, see **AS2 Header and Subject format.**

- X12 – The choreography is based on the X12 standard.
- EDIFACT – The choreography is based on the EDIFACT standard.

- Functional Acknowledgment Configuration drop-down – Defines how functional acknowledgments are received for X12 EDI messages.
  - Transaction Level : One 997 per transaction set. For existing connections, if the flag is absent, the system defaults to Transaction Level for backward compatibility.
  - Functional Group Level: One 997 per functional group. For new connections, the default value is Functional Group Level.
- AS2 Encryption Algorithm drop-down – Required. The algorithm that ensures secure data exchange between the AS2 server and TraceLink. The default value is AES256.
- AS2 Signing Algorithm drop-down – Required. The digital signatures that ensures sender's authencticity.
- AS2 Compression Algorithm drop-down – Required. Supports the use of compressing the size of data transmitted between the AS2 server and Tracelink.
- AS2 MDN Response drop-down – Required. The Message Disposition Notification is an acknowledgment sent by TraceLink to the AS2 server.
- AS2 MDN Signing Algorithm drop-down – Required. The Message Disposition Notification algorithm that ensure the authenticity of the recipient (TraceLink).

1. Select the Add + icon in the Encryption Certificates section.

2. Fill the following certificate details in the Add Encryption Certificate side panel:

   - Certificate – The structure of the encryption certificate. An encryption

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certificate is a digital certificate that contains a public key used to encrypt data. The receiving system uses its private key to decrypt the data. In AS2 communication, the sender uses the recipient's encryption certificate to securely transmit files.

- Certificate Description – A short description of the certificate.

3. Select Apply to apply the changes.
4. Select the Add + icon in the Signing Certificates section.
5. Fill the following certificate details in the Add Signing Certificate side panel:

Customers must send their signing and encryption certificates to the TraceLink before the B2B connection setup.

- Certificate – The structure of the signing certificate. A signing certificate is a digital certificate that contains a private key used to create a digital signature. In AS2 communication, the sender signs the payload with their private key, and the recipient uses the sender's public certificate to verify the signature and ensure data integrity.

- Certificate Description – A short description of the certificate.

6. Select Apply to apply the changes.
7. Select the Save button to save the changes.

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The new B2B connection is created and displays in the list of all B2B connections. Contact the TraceLink implementation team for assistance in associating a company or location with the B2B connection

**Tips**

- On the Search AS2 B2B Connections screen, selecting a Connection Name opens the AS2 Connection Details screen. From this screen, users can modify an AS2 Connection.
- Removing a signing certificate or encryption certificate will prevent any client that currently uses the certificate from connecting.

### Add an SFTP B2B connection

1. Select the Main Menu  icon.

2. Select Extensible Tracelink Transfer.

3. Select B2B Connections in the side menu.

4. Select SFTP

5. Select the New button to add a new SFTP B2B connection.

   The New SFTP B2B Connection screen is displayed.

6. Fill in the following fields in the General section:
   - SFTP Account User Name field – Required. Enter the name of the SFTP B2B connection. Use this same user name to connect to the TraceLink SFTP server. This field cannot be edited after the connection is successfully saved.
   - Choreography drop-down – The sequence of events that occurs when a B2B message is transmitted:

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- OTHER (default) – The choreography is based on neither the X12 nor the EDIFACT standard.
- X12 – The choreography is based on the X12 standard.
- EDIFACT – The choreography is based on the EDIFACT standard.

▪ Functional Acknowledgment Configuration drop-down – Defines how functional acknowledgments are received for X12 EDI messages.

- Transaction Level : One 997 per transaction set. For existing connections, if the flag is absent, the system defaults to Transaction Level for backward compatibility.
- Functional Group Level: One 997 per functional group. For new connections, the default value is Functional Group Level.

7. Select the Add + icon in the Public Keys section.

8. Fill the following details in the Add SSH Key side panel:

▪ SSH Key field – Required. The contents of the SSH public key.

Remove line feeds or carriage returns from the public key before pasting it.

9. Select the Save button to save the changes.

The new B2B connection is created and displays in the list of all B2B connections. Contact the TraceLink implementation team for assistance in associating a company or location with the B2B connection

**Tips**

◦ On the Search SFTP B2B Connections screen, selecting a SFTP Account

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User Name opens the View/Edit SFTP B2B Connection Details. Select the 

button to update an SFTP Connection.

- Removing an SSH public key will prevent any client that currently uses the certificate from connecting.

- To view details about the SFTP configurations required prior to an SFTP connection, see Configure TraceLink.

### Add an SMTP B2B connection

1. Select the Main Menu icon .

2. Select Extensible Tracelink Transfer.

3. Select B2B Connections in the side menu.

4. Select the SMTP (Email).
5. Select the New button to add a new SMTP B2B connection.

   The New SMTP Connection screen is displayed.

6. Fill in the following fields in the General section:

   - Connection Name field - Enter a unique name for the SMTP B2B connection. This name is a global identifier and serves as the email prefix (the part before the “@” sign) where messages are sent. This field cannot be edited after the connection is successfully saved. Use the following naming conventions:

     - Must be between 4 and 100 characters.

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- Must start with an uppercase letter or number.
- Can contain uppercase letters, numbers, hyphens (-), and underscores (_).
- The “@” character is not allowed (to avoid confusion with email addresses).

- DKIM Authentication switch – When the DomainKeys Identified Mail (DKIM) Authentication is set to Yes, all inbound emails to the SMTP (Email) B2B connection must successfully pass DKIM verification to be accepted and processed. Emails that pass authentication proceed to the next stage of processing. Emails that fail DKIM authentication are rejected and not processed and records a warning in the logs.
- DMARC Authentication switch – Domain-based Message Authentication, Reporting, and Conformance (DMARC) is an email authentication protocol that builds on SPF (Sender Policy Framework) and DKIM. It enables domain owners to define how email servers should manage messages that do not pass SPF or DKIM verification.
- SPF Authentication switch – Sender Policy Framework (SPF) authentication is an email authentication protocol that helps prevent email spoofing by allowing domain owners to specify which mail servers are authorized to send emails on behalf of their domain.
- Inbound Allowlist Domains – A list of domains from which the SMTP (Email) B2B connection will accept emails. Fill in the following fields in the Inbound Allowlist Domains group by selecting the Add + icon:
  - Allowed Domain – The name of the domain that will be allowed for an inbound B2B message.

7. The following fields in the Details section are auto-populated:
   - Created By User field – The name of the entity that created the B2B connection. This field is auto-populated when the connection is

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successfully saved and cannot be edited.

- Last Updated By User field – The name of the entity that recently updated the connection. This field is auto-populated when the connection is successfully saved and cannot be edited.
- Last Updated Date/Time field – The date and time when the B2B connection was last modified. This field is auto-populated when the connection is successfully saved and cannot be edited.
- Creation Date/Time field – The date and time when the B2B connection was initially created. This field is auto-populated when the connection is successfully saved and cannot be edited.

8. Select the Add + icon in the Inbound Configuration section. To send an inbound B2B message, configure the required message settings in the Add Inbound Email side panel, to send a message to the TraceLink-generated email address associated with the connection:
   - Base Email Address – Required. A descriptive name that is used to generate a unique email address for the specified B2B message. For example, purchase-orders.
   - B2B Message drop-down – Required. Select the type of business document or message to associate with the generated email address. When a Partner sends an email to that address, the selected message type determines the canonical schema and transformation logic applied to the inbound message.
   - Receiving Partner drop-down – Optional. Specifies which partner (company) within the TraceLink network should receive and process the inbound message.

    While selecting the Receiving Partner:

   - **Separate Email Addresses for Each Partner** - Configure a unique inbound email address for each partner. Each partner uses

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its assigned address to send B2B messages to the system.

- **Single Email Address for All Partners** - Set up one inbound email address for all partners to send B2B messages (e.g., compliance exceptions, purchase orders). This option simplifies configuration and reduces the number of email addresses to manage.

- Generated Email Address (Inbound) – A unique email address is automatically generated when the SMTP (Email) B2B connection is successfully saved. It determines which transaction type and (optionally) which Owner or Partner the inbound message is for. This ensures the message is routed to the correct business process and transformed using the right logic.

i. Select the Add + icon in the Allow Senders section to add a new sender:

- Allowed Sender – Enter the individual email addresses permitted to send inbound messages for this B2B Message and its Receiving Partner. To allow all senders from a specific domain, use the Inbound Allowlist Domain option.

9. Select Apply to save the changes.
10. Select the Add + icon in the Outbound Configuration section. The outbound configuration defines how outbound B2B messages are delivered through email. It specifies the Partner recipients, associates each recipient list with a Message type, identifies the reply-to address, and automates the exchange of business documents between members on the TraceLink network.
11. Fill the following details in the Add Outbound Configuration side panel:
    - B2B Message drop-down – Required. Select the business document or message type supported by TraceLink. This selection ensures that only outbound configurations for the specified message type are used when

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sending messages.

- Sending Partner drop-down – Optional. To send B2B messages to different recipients based on the Partner sending the message, select the specific Partner. Leave this field blank to send messages to the same recipients for all Partners.
- Include Sender Configured Recipients switch – Optional. A Boolean option that enables additional recipients configured by the sender. When enabled, any recipients specified by the sender at the time of sending are included in the distribution list.
- Select the Add + icon in the Recipients section to send email to the listed recipients.
    - Recipient field – Enter the email address of each recipient for the B2B message. All specified recipients receive a copy of the outbound B2B message.
- Select the Add + icon in the Actionable Emails section to set email address that will be set as the **Reply-To** in the outbound email.
- Reply-To Email Addresses field - Enables routing of recipient replies to a specific inbound email address. Use this field to support automated or manual response workflows. To allow recipients to respond to B2B messages, enter one or more reply-to addresses. For example, use a purchase order acknowledgment address for replies to purchase orders, or an exception address for replies that include comments. Use the generated inbound email address as the reply-to if responses must be processed automatically.

12. Select Apply to save the changes.
13. Select the Save button to save the changes.

The new B2B connection is created and displays in the list of all B2B

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connections.

# View B2B connections

### View a list of AS2 connections

1. Select the Main Menu icon .
2. Select Extensible Tracelink Transfer.
3. Select AS2.

### See the information that displays for each AS2 connection

- Connection Name – The name of the AS2 connection.
- AS2 ID – The ID of the AS2 connection.
- Choreography – The sequence of events that occurs when a B2B message is transmitted.
  - OTHER (default) – The choreography is based on neither the X12 nor the EDIFACT standard.
  - X12 – The choreography is based on the X12 standard.
  - EDIFACT – The choreography is based on the EDIFACT standard.
- Last Updated By – The name of the Application Administrator who updated the AS2 connection.
- Last Updated – The date and time the AS2 connection is updated.

### View an AS2 connection

1. Select the Main Menu icon .
2. Select Extensible Tracelink Transfer.

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3. Select AS2.
4. Select the link for the Connection Name from the results table.

   The View/Edit AS2 B2B connection screen displays.

**The following fields are editable while viewing in the General section:**

- B2B Connection Name field – Required. The name of the B2B connection.
- AS2 ID field – Required. An identifier for the AS2 connection.
- AS2 Server URL field – Required. The URL of the AS2 server.
- Choreography Type drop-down – The sequence of events that occurs when a B2B message is transmitted:
  - OTHER (default) – The choreography is based on neither the X12 nor the EDIFACT standard. For more information about the format of the subject or header when the Choreography Type is Other, see **AS2 Header and Subject format.**
  - X12 – The choreography is based on the X12 standard.
  - EDIFACT – The choreography is based on the EDIFACT standard.
- Functional Acknowledgment Configuration drop-down – Defines how functional acknowledgments are received for X12 EDI messages. A functional acknowledgment in Electronic Data Interchange (EDI) confirms the receipt and syntactic validity of an EDI transaction. For X12 EDI, it uses transaction 997; for EDIFACT, message CONTRL. If the selected Choreography Type is X12, select how functional acknowledgments are generated:
  - Transaction Level : One 997 per transaction set. For existing connections, if the flag is absent, the system defaults to Transaction Level for backward compatibility.
  - Functional Group Level: One 997 per functional group. For new

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connections, the default value is Functional Group Level.

- AS2 Encryption Algorithm drop-down – Required. The algorithm that ensures secure data exchange between the AS2 server and TraceLink.
- AS2 Signing Algorithm drop-down – Required. The digital signatures that ensures sender's authenticity.
- AS2 Compression Algorithm drop-down – Required. Supports the use of compressing the size of data transmitted between the AS2 server and TraceLink.
- AS2 MDN Response drop-down – Required. The Message Disposition Notification is an acknowledgment sent by TraceLink to the AS2 server.
- AS2 MDN Signing Algorithm drop-down – Required. The Message Disposition Notification algorithm that ensure the authenticity of the recipient (TraceLink).

**The following fields are editable while viewing the Encryption Certificates section:**

- Certificate – The structure of the encryption certificate.

- Certificate Description – The human-readable description of the certificate.

**The following fields are editable while viewing the Signing Certificates section:**

- Certificate – The structure of the signing certificate.

- Certificate Description – The human-readable description of the certificate.

**View a list of SFTP connections**

1. Select the Main Menu icon .

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2. Select Extensible Tracelink Transfer.

3. Select SFTP.

**See the information that displays for each SFTP connection**

- SFTP Account User Name – The name of the SFTP B2B connection.
- Chreography – The sequence of events that occurs when a B2B message is transmitted.
  - OTHER (default) – The choreography is based on neither the X12 nor the EDIFACT standard.
  - X12 – The choreography is based on the X12 standard.
  - EDIFACT – The choreography is based on the EDIFACT standard.
- Last Updated By – The name of the entity that recently updated the SFTP connection.
- Last Updated – The date and time the SFTP connection is updated.

**View an SFTP connection**

1. Select the Main Menu icon .

2. Select Extensible Tracelink Transfer.

3. Select SFTP.

4. Select the link for the SFTP Account User Name from the results table.

   The View/Edit SFTP B2B connection screen displays.

**The following fields are editable while viewing the General section:**

- SFTP Account User Name field – Required. The name of the SFTP B2B connection.

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- Choreography drop-down – The sequence of events that occurs when a B2B message is transmitted:
  - OTHER (default) – The choreography is based on neither the X12 nor the EDIFACT standard.
  - X12 – The choreography is based on the X12 standard.
  - EDIFACT – The choreography is based on the EDIFACT standard.
- Functional Acknowledgment Configuration drop-down – Defines how functional acknowledgments are received for X12 EDI messages. A functional acknowledgment in Electronic Data Interchange (EDI) confirms the receipt and syntactic validity of an EDI transaction. For X12 EDI, it uses transaction 997; for EDIFACT, message CONTRL. If the selected Choreography Type is X12, select how functional acknowledgments are generated:
  - Transaction Level : One 997 per transaction set. For existing connections, if the flag is absent, the system defaults to Transaction Level for backward compatibility.
  - Functional Group Level: One 997 per functional group. For new connections, the default value is Functional Group Level.
- Created By User field – The name of the Application Administrator who created the SFTP connection.
- Creation Date/Time field – The date and time the SFTP connection is created.
- Last Updated By User field – The name of the Application Administrator who updated the SFTP connection.
- Last Updated Date/Time field – The date and time the SFTP connection is updated.

**The following fields are editable while viewing the Public Keys section:**

- SSH Key ID field – Required. The contents of the SSH public key.

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- SSH Key field – Required. The contents of the SSH public key.

Remove line feeds or carriage returns from the public key before pasting it.

### View a list of SMTP connections

1. Select the Main Menu icon .
2. Select Extensible Tracelink Transfer.
3. Select SMTP (Email).

### See the information that displays for each SMTP (Email) connection

- Connection Name – The name of the SMTP B2B connection.
- Last Updated By – The name of the entity who updated the SMTP connection.
- Last Updated – The date and time when the B2B connection was last modified.

### View an SMTP connection

1. Select the Main Menu icon .
2. Select Extensible Tracelink Transfer.
3. Select SMTP (Email).
4. Select the link for the Connection Name from the results table.

   The View/Edit SMTP B2B connection screen displays.

### The following fields are displayed in the General section:

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- Connection Name field - A unique name for the SMTP B2B connection. After a SMTP connection is sucessfully saved, the Connection Name cannot be edited.
- DKIM Authentication switch – When the DomainKeys Identified Mail (DKIM) Authentication is set to Yes, all inbound emails to the SMTP (Email) B2B connection must successfully pass DKIM verification to be accepted and processed.
- DMARC Authentication switch – Domain-based Message Authentication, Reporting, and Conformance (DMARC) is an email authentication protocol that builds on SPF (Sender Policy Framework) and DKIM.
- SPF Authentication switch – Sender Policy Framework (SPF) authentication is an email authentication protocol that helps prevent email spoofing by allowing domain owners to specify which mail servers are authorized to send emails on behalf of their domain.
- Inbound Allowlist Domains – A list of domains from which the SMTP (Email) B2B connection will accept emails.
  - Allowed Domain – The name of the domain that will be allowed for an inbound B2B message.

**The following fields are displayed in the Details section:**

- Created By User – The name of the entity that created the B2B connection.
- Last Updated By User – The name of the entity that recently updated the connection.
- Last Updated Date/Time – The date and time when the B2B connection was last modified.
- Creation Date/Time – The date and time when the B2B connection was initially created.

**The following fields are displayed in the Inbound Configuration section:**

- Message Type – The type of business document or message to associate with the generated email address. When a Partner sends an email to that address, the selected message type determines the canonical schema and

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transformation logic applied to the inbound message.

- Receiving Partner – Specifies which partner (company) within the TraceLink network should receive and process the inbound message.
- Base Email Address – A descriptive name that is used to generate a unique email address for the specified B2B message. For example, purchase-orders.
- Generated Email Address– A unique email address is automatically generated when the SMTP (Email) B2B connection is successfully saved. It determines which transaction type and (optionally) which Owner or Partner the inbound message is for. This ensures the message is routed to the correct business process and transformed using the right logic.

**The following fields are displayed in the Outbound Configuration section:**

- Message Type – The business document or message type supported by TraceLink. This selection ensures that only outbound configurations for the specified message type are used when sending messages.
- Sending Partner – Sends B2B messages to different recipients based on the Partner sending the message
- Include Sender Configured Recipients – A Boolean option that enables additional recipients configured by the sender.

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