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Configure B2B connections

System Administrators can now configure various settings in the Opus Platform that enable network Owners and their Partners to exchange B2B messages using the Administration solution. After creating a B2B connection, IT system administrators must create a B2B connection using AS2, SFTP, or SMTP protocols in the Extensible TraceLink Transfer Help Center app. Owners can also update, search and view the details of an exchanged B2B message in the Extensible TraceLink Transfer (XTT). For more information about creating B2B connections, see the Extensible TraceLink Transfer Help Center.

A B2B connection is a configured B2B gateway account associated with a company or location on the TraceLink network to enable 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, and also include the security information (e.g. certificates, public keys) required to establish a connection.

Access to B2B configurations

System Administrators can configure B2B settings if they are assigned the role rights to the applications they are configuring.

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Create integration principals

System Administrators can create or edit an integration principal to enable communication between TraceLink's apps. The integration principal enables multiple users to send and receive B2B messages from one app to another without needing each individual user to be a member of both sending and receiving apps.

Create integration principals

Prior to enabling companies and Partners to exchange B2B messages, System Administrators must create or edit an integration principal to enable communication between TraceLink's apps. The integration principal enables multiple users to send and receive B2B messages from one app to another without needing each individual user to be a member of both the sending and receiving apps.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select B2B Integration.
4. Select the Integration Principals tab.
5. Select the Add icon.
6. Fill in the following field in the General section:
    - Name field – Required. The unique user name for the Integration Principal user. If the name already exists for the company, an error will display while adding the user.
7. Select the Add icon.
8. Fill in the following fields in the Add Integration Access section:
    a. Application field – Required. The applications licensed to the company and the apps for which users company has been added as a Partner.
    b. Network field – Required. The networks that are created for the selected multienterprise app. If the selected app does not support network creation, this field will be empty. For single network apps, only the

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networks available for that app are visible.

c. Team field – The Link to assign the integration principal to.
d. Role field – Required. The roles that are available based on the selected app and network.

Select the Add icon to add another Application field, Network field, and Role field.

9. Select Apply

The integration principal is created.

Activate integration principals

System Administrators can activate an integration principal to enable secure system-to-system communication with integration specific access to an app or network they are assigned.

1. Select Administration in the main menu.
2. Select B2B Integration.
3. Select the Integration Principals tab.
4. Select the Activate icon in the row for the integration principal.
5. Select Activate to activate an integration principal.

The integration principal is activated.

Select the Deactivate icon in the integration principal row and select Deactivate to deactivate an integration principal.

Create and enable transform sets

System Administrators can create a transform set which is a collection of transforms that can be used to send or receive different B2B messages. A

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transform is a map used to convert data from one format to another (e.g. CSV file to JSON file). A company can have one or multiple transform sets and each set can have many B2B message type collections such as purchase orders, invoices, etc.

Once a transform set is created, it can be associated with a B2B connection, a company, or an internal location of the company. After a System Administrator associates a transform set to a B2B connection, all the messages flowing from the specific B2B connection use this transform set. A company can have multiple B2B connections and use different transform sets for those connections.

- If a transform set is associated at the company level, all the messages being exchanged use the same transform set regardless of the location.
- If a transform set is associated at the location level, all the messages being exchanged from that internal location use the same transform set.

Add transform sets

System Administrators can create a transform set, which is a collection of maps used to convert data from one format to another (e.g. CSV file to JSON file).

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select B2B Integration.
4. Select the Transform Sets tab.
5. Select the Add icon.
6. Fill in the following fields in the Add Transform Set section:
    a. Name field – Required. The unique name for the new transform set.
    b. Transform CSV File field – Drag and drop a file to import a CSV file containing transforms to add to the set. The element headers below are all required in the CSV file, in order, and separated by commas. The data in the individual cells can be empty if a value is not required:
        - **Application** – The app that is licensed to the company.
        - **Message Type** – The type of B2B message defined in the app.

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- **Direction** – The direction of the message.
  - Inbound – A B2B message that TraceLink receives from outside of the organization.
  - Outbound – A B2B message that TraceLink sends outside of the organization.
- **Catalog** – The type of transform that has been associated to this transform set.
  - Private – The private transform catalog for a specific company.
  - Public – The transform catalog is available to all companies and Partners.
- **Transform Name** – The name of the transform that is being mapped to the new transform set.
- **Transform Version** – The version of the transform that is associated to the B2B message. By default, the transform version is 1.

7. Select Add.

   The transform set is added.

Tips

- Select the Action icon in the row for the transform set. Select Remove to remove the transform set association.
- Select the Add icon to add another Transform Set.
- Updating a transform set has no impact on the transform set association.

Enable transform sets

Once a transform set is added, a System Administrator can associate it with a B2B connection, a company, or an internal location of the company. Then, all the messages flowing from the specific B2B connection use this transform set. A

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company can have multiple B2B connections and use different transform sets for those connections. If a transform set is associated at the company level, all the messages being exchanged use the same transform set regardless of the location. If a transform set is associated at the location level, all the messages being exchanged from that internal location use the same transform set.

A transform set must be created prior to associating the transform set with a B2B connection, a company, or a company location.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select B2B Integration.
4. Select the Transform Sets tab.
5. Select the Action icon in the row for the transform set.
6. Select Configure Associations to associate the transform set with your company, specific internal location, or B2B connection that uses these transforms for processing B2B messages.
7. Select the appropriate radio button in the Configure Associations section:
    - Locations – Associate the transform set with a specific location.
    - B2B Connections – Associate the transform set with specific B2B connections.
8. If you selected the Locations radio button, fill in the following fields in the Locations section:
    a. Set the Associated with Company switch to Yes to associate a specific location with your company.
        - Yes – The specific location is associated with your company.
        - No – The specific location is not associated with your company.
    b. Location drop-down – Associate the transform set with a specific location. Select the Add icon to add another Location drop-down.
9. If you selected the B2B Connections radio button, fill in the following fields in

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the B2B Connections section:

a. B2B Connection drop-down – Associate the transform set with a specific B2B connection. Select the Add icon to add another B2B Connection drop-down.

10. Select Save.

The transform set is associated with your company, specific internal location, or B2B connection.

Tips

- Select the Remove Association icon to remove the location or B2B connection association with a transform set. You must remove each association individually.
- Updating the transform set association has no impact on the transform set.

Associate B2B connections

A B2B connection must be associated with a company for inbound or outbound messages. A B2B connection for outbound messages can be associated with a company which includes a company, an internal location, an app, or a B2B message to enable two parties to send messages for an existing B2B connection.

A B2B connection must be created before it can be associated with a company, internal location, app or B2B message.

Associate inbound B2B connections

System Administrators can associate a B2B connection to a company, a specific internal location, a specific app, or a B2B message for inbound messages.

1. Select the Main Menu icon.
2. Select Administration in the main menu.

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3. Select B2B Integration.
4. Select the Connection Associations tab.
5. Select the Add Inbound Association icon.
6. Fill in the following fields in the B2B Connection section:
    a. Select B2B Connection field – The B2B connection created in the XTT app.
7. Fill in the following fields in the Location section:
    a. Company radio button – The B2B connection is associated with a company.
        - Yes – (default) The B2B connection is associated with a company.
        - No – The B2B connection is not associated with a company.
8. Select Add.

The inbound B2B association is added.

Associate outbound B2B connections

System Administrators can associate a B2B connection to a company, a specific internal location, a specific app, or a B2B message for outbound messages.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select B2B Integration.
4. Select the Connection Associations tab.
5. Select the Add Outbound Association icon.
6. Fill in the following fields in the B2B Connection section:
    a. Select B2B Connection field – The B2B connection created in the XTT app.
7. Fill in the following fields in the Location section:
    a. Associate Internal Locations radio button – The B2B connection is associated with an internal location.
        - Yes – (default) The B2B connection is associated with an internal

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location.

- No – The B2B connection is not associated with an internal location.

8. In the Message Types section, select the Add icon.
9. Fill in the following fields in the Associate Message section:
   a. Application field – Required. The app for which this association has been established between the B2B connection and the entity.
   b. All Messages field – The message type for the associated app.
   c. Select Apply.
10. Select Add.

The outbound B2B association is added.

Configure B2B connections

System administrators cancreate and view B2B connections, which is a configured B2B gateway account that is uniquely identified by a B2B connection name using Applicability Statement 2 (AS2) protocols , Secure File Transfer Protocol (SFTP) and Simple Mail Transfer Protocol (SMTP) in the XTT app. After creating a B2B connection, System Administrators can configure a B2B connection in the Administration app so the appropriate Link Identifier, SAP Configuration, and EDI Configuration settings can be used for the app or network. System Administrators can add X12, EDIFACT, or IDoc location settings information to complete adding a B2B connection. System Administrators must configure an inbound or outbound message prior to adding the connection type information.

Configure inbound B2B messages

System Administrators can set up inbound B2B connections so that inbound messages can be sent to the correct company or location.

1. Select the Main Menu icon.

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2. Select Administration in the main menu.
3. Select B2B Integration.
4. Select the Message Settings tab.
5. Select the Configure Inbound B2B Messages icon.
6. Fill in the following fields in the Link section:
    a. Application (Owner) drop-down – Required. The applications licensed to the company and the apps for which users company has been added as a Partner.
    b. Company or Location field – Required. The specific company or location for which the configuration has been added (e.g. owner company, company location, Partner company, or Partner location, Partnered company, or Partnered Location).
    c. Routing Transform Set field – The transform sets that are linked to the inbound configuration.
    d. Linked Identifier field – The identifier for the company or location, in the format [App Abbreviation].[My Company ID Value], (e.g. MPC.GLN.111111111111.GLN.222222222222). Select the Add icon to add another Linked Identifier field.
7. Select Save.

The B2B connection is set so inbound messages can be routed to the correct company or location.

Tips

- Select the Action icon in the B2B connection row and select the Edit icon to edit an inbound B2B connection.
- Partners can edit the Message Settings configurations for their partnered links by editing the Link Identifier under the Link section and updating the Message Delivery Rules section

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Configure outbound B2B messages

System Administrators can set up outbound B2B connections so that outbound messages can be delivered to the receiver.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select B2B Integration.
4. Select the Message Settings tab.
5. Select the Configure Outbound Connection icon.

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

    a. Application drop-down – Required. The applications licensed to the company and the apps for which users company has been added as a Partner.
    b. Company or Location field – Required. The specific company or location for which the configuration has been added (e.g. owner company, company location, Partner company, or Partner location, Partnered company, or Partnered Location).
7. Fill in the following fields in the Message Delivery Rules section:
    a. Owner to Owner switch – Indicates whether the sender and the receiver both own the same app (e.g. both Kendall Pharma and Watson Distributors own Multienterprise Process Connect and are linked to each others' networks):
        - Yes – (default) The sender and receiver both own the same app.
        - No – The sender and receiver do not own the same app.
    b. Delivery Option drop-down – Required. The method of delivery for the message from the sender to the receiver:
        - Transform – The B2B message transforms the outbound file and the requester responds back without any errors.
        - Transform and Deliver – The B2B message is delivered to the to XTT

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app for outbound delivery.
    - No Processing – A response is sent back to the requesting app without transforming the file or attempting to deliver the file.
  c. Message Type drop-down – Required. The message type for the selected app.
  d. Select the Add icon to add another Delivery option drop-down and Message Type drop-down.
8. Select Save.

The B2B connection is set so outbound messages can be delivered to the receiver.

Tips

- Select the Action icon in the B2B connection row and select the Edit icon to edit an outbound B2B connection.
- Partners can edit the Message Settings configurations for their partnered links by editing the Link Identifier under the Link section and updating the Message Delivery Rules section

Configure linked setting for a B2B connection

System Administrators can add X12, EDIFACT, or OTHER linked settings information to complete adding a B2B connection. System Administrators must configure an inbound or outbound message prior to adding the connection type information. For more information on the message connection types, see the Tips section.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select B2B Integration.
4. Select the Linked Settings tab.
5. Select the icon.

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6. Fill in the following fields in the Company or Location section:
    a. B2B Connection drop-down – Required. The list of B2B connections created for the company in the XTT app.
    b. Company or Location field – Required. The specific company or location for which the configuration has been added (e.g. owner company, company location, Partner company, or Partner location, Partnered company, or Partnered Location).
    c. Company or Location ID field – Required. The identifier type and values for the specific company or location for which the configuration has been added.

7. Fill in the following fields in one of the Choreography Type Information sections:

    For an X12 connection

    - EDI Version drop-down – The EDI version indicates the standards version you are using for your EDI messages. Different versions might have slight variations in how data is structured. Determine and specify the version of the X12 standard that you will be using and ensure that both trading Partners agree on the same version (e.g. common versions include 4010 and 5010).

      Valid Values

      - 001000
      - 002000
      - 002001
      - 002002
      - 002003
      - 002031
      - 002040
      - 002041

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- 002042
- 003000
- 003010
- 003011
- 003012
- 003020
- 003021
- 003022
- 003030
- 003031
- 003032
- 003040
- 003041
- 003042
- 003050
- 003051
- 003052
- 003060
- 003061
- 003062
- 003070
- 003071
- 003072
- 004000
- 004010
- 004011
- 004012
- 004020
- 004021
- 004022

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- 004030
- 004031
- 004032
- 004040
- 004041
- 004042
- 004050
- 004051
- 004052
- 004060
- 004061
- 004062
- 005000
- 005010
- 005011
- 005012
- 005020
- 005021
- 005022
- 005030
- 005031
- 005032
- 005040
- 005041
- 005042
- 005050
- 005051
- 005052
- 006000
- 006010

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- 006011
- 006012
- 006020
- 006021
- 006022
- 006030
- 006031
- 006032
- 006040
- 006041
- 006042
- 006050
- 006051
- 006052
- 007000
- 007010
- 007011
- 007012
- 007020
- 007021
- 007022
- 007030
- 007031
- 007032
- 007040
- 007041
- 007042
- 007050
- 007051
- 007052

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        - 007060
        - 007061
        - 007062
        - 008000
        - 008010
        - 008020
        - 008030
        - 008040
        - 008050
    - Sender Receiver Code field – The sender code and receiver code are unique identifiers for the entities involved in the EDI message. The sender code identifies the entity sending the EDI document, while the receiver code identifies the entity receiving it. These codes are typically assigned by the organization and may be DUNS numbers, Global Location Numbers (GLNs), or custom codes agreed upon by the trading partners.
    - EDI Envelop Party Type drop-down – Indicates the role of the party in the EDI envelope. Specify if you what are providing is for the sender or the receiver of the EDI.

    Valid Values

        - 1
        - 2
        - 3
        - 4
        - 5
        - 6
        - 7
        - 8
        - 9

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- 10
- 11
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- 24
- 25
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- 31
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- 33
- 34
- 35
- 36
- 37
- 38
- AM

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- NR
- SA
- SN
- ZZ

- EDI Interchange Party Value field – These values, for both the sender and receiver, are used within the interchange envelope (ISA segment in X12) to identify the sender and receiver. They are often the same as the sender or receiver code but can also include additional qualifiers. These values ensure that the EDI interchange is correctly routed between the parties.

For an EDIFACT connection

- EDI Version drop-down – Indicates the standards version that you are using for your EDIFACT messages. Each version corresponds to a specific set of rules and message definitions. EDIFACT versions are released periodically and include updates and enhancements.

  - D96A
  - D96B
  - D97A
  - D97B
  - D98A
  - D98B
  - D99A
  - D99B
  - D00A
  - D00B
  - D01A
  - D01B
  - D01C
  - D02A

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- D02B
- D03A
- D03B
- D04A
- D04B
- D05A
- D05B
- D06A
- D06B
- D07A
- D07B
- D08A
- D08B
- D09A
- D09B
- D10A
- D10B
- D11A
- D11B
- D12A
- D12B
- D13A
- D13B
- D14A
- D14B
- D15A
- D15B
- D16A
- D16B
- D17A

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        - D17B
        - D18A
        - D18B
        - D19A
        - D19B
        - D20A
        - D20B
        - D21A

    - EDI Envelop Party Typefield – The EDI envelop party type indicates the role of the party involved in the EDI communication (e.g UNB.2.1: Interchange sender, UNB.3.1: Interchange recipient).

        - 1
        - 4
        - 5
        - 8
        - 9
        - 12
        - 14
        - 18
        - 22
        - 18
        - 30
        - 31
        - 33
        - 34
        - 51
        - 52
        - 53
        - 54

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- 57
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- 90
- 91
- 92
- 103
- 128
- 129
- 144
- 145
- 146
- 147
- 148
- 500
- 501
- 502
- Z01
- ZZZ

- EDI Interchange Party Value field – The EDI Envelope Party Value is the

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identifier of the party involved in the EDI interchange. This value uniquely identifies the sender or recipient of the message and is used for routing and processing purposes.

- Syntax Identifier drop-down – Required. Identifies the syntax and version of the EDIFACT syntax rules being used. It ensures that the receiving system understands the syntax format of the message. For EDIFACT, the syntax identifier usually appears in the UNB segment:
  - UNOA
  - UNOB
  - UNOC
  - UNOD
  - UNOE
  - UNOF
- Syntax Version Number drop-down – Required. Indicates the version of the syntax rules that the message adheres to. This helps the receiving system to parse the message correctly according to the specific version of the syntax being used:
  - 1
  - 2
  - 3
- Populated switch – Populated in the context of EDIFACT typically means that the specific field has been filled with the required data. If a field is not populated, it has been left empty. The values are:
  - Yes – The specific EDIFACT fields are filled with the required data.
  - No – The specific EDIFACT fields are not filled with the required data.
- Service String Advice Populated switch – Indicates whether the UNA segment is included in the message to define the delimiters used in the interchange.
  - Yes – The UNA segment is included in the message to define the delimiters used in the interchange.

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- No – The UNA segment is not included in the message to define the delimiters used in the interchange.

For an OTHER connection

- Sender Port field – A unique identifier that defines the source of the IDoc. It indicates if the system or app from which the IDoc is being sent. The sender port is specified in the Partner profiles in SAP and helps in identifying and routing the IDoc correctly.
- Partner Number field – Identifies the business Partner involved in the IDoc exchange. It can represent a customer, vendor, or any other entity that is part of the business process. The partner number is used to distinguish different Partners and is necessary to ensure that the IDoc reaches the correct recipient.
- Partner Function field – Indicates the role of the Partner in the IDoc message. Each Partner function defines the specific role and responsibilities of the Partner within the context of the business transaction:
  - LI – Vendor
  - AG – Ordering party
  - RE – Payee
  - WE – Goods recipient
- Partner Type field – Indicates the type of business Partner involved in the IDoc exchange. The partner type helps in determining the nature of the Partner and the type of data exchange:
  - KU – Customer
  - LI – Vendor
  - LS – Logical system is used for internal SAP system communications.

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        - AG – Agent
        - LF – Delivery
    - Client Number field – A unique identifier for the client within the SAP system. In SAP, a client is an independent business unit with its own data and configuration. The client number helps in ensuring that the IDoc is processed within the correct client environment.
    - Receiver Port field – A unique identifier that defines the destination of the IDoc. It identifies the system or app to which the IDoc is being sent. The receiver port is specified in the Partner profiles and is crucial for routing the IDoc to the correct destination.
    - Message Type drop-down - The type of message, e.g. Purchase order, Shipment notice.
    - Message Code field - The SAP Message Code (MESCOD).
    - Message Function field - The SAP Message Function Code (MESFCT).
8. Select Save.

   The connection type is added.

Tips

- X12 is a standard developed by the American National Standards Institute (ANSI) for electronic data interchange (EDI). It is primarily used in North America to facilitate the automated exchange of business documents between different computer systems, particularly in industries such as healthcare, supply chain management, finance, and government.

- EDIFACT is an international standard developed by the United Nations for the electronic exchange of business documents between different systems and

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organizations. It is widely used in global trade to facilitate the seamless exchange of structured data, reducing the need for manual intervention and improving the efficiency of business transactions.

- IDoc is a standard data structure used in SAP applications for exchanging information between systems. It is primarily used in SAP's EDI (Electronic Data Interchange) processes and ALE (Application Link Enabling) scenarios.

Filter and view B2B connections

Filter and view transform sets

If you add a transform set with no associations, then it will not appear on this Filter and View screen.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select B2B Integration.
4. Select the Transform Sets tab.
5. Fill in the required Name field, which is the unique name for the new transform set, to filter the results.
6. Select Apply.

The results display in the table.

See the information that displays in the table

- Name field – The unique name for the new transform set.
- Application – The app that is licensed to the company.
- Message Type – The B2B message type that the application has registered with.
- Direction – The direction of the message.
- Catalog – The type of transform that has been associated to this transform

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set.

- Transform Name – The name of the transform that is being mapped to the new transform set.
- Transform Version – The version of the transform that is associated to the B2B message. By default, the transform version is 1.

Filter and view B2B connections

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select B2B Integration.
4. Select the Connection Associations tab.
5. Fill in one or more of the following fields to filter the results:
   - B2B Connection – The B2B connection created in the XTT app.
   - Associated entity – The B2B connection is associated with an internal location.
   - Message Type – The message type for the associated app.
   - Application – Required. The app for which this association has been established between the B2B connection and the entity.
6. Select Apply.

   The results display in the table.

See the information that displays in the table

- B2B Connection – The B2B connection created in the XTT app.
- Associated Entity – The B2B connection is associated with an internal location.
- Application – The B2B connection is associated with an internal location.

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