TRACELINK UNIVERSITY

Home
Resources
TraceLink University

Define Partners

Companies can set up their master data record, which includes the Partner headquarters information, Partner identifiers, and Partner location master data on TraceLink. Companies can search for, view, and edit master data records for Partner companies and Partner locations.

Access to defining Partners

Companies that own or link to Opus apps have access to the Administration menu item, which displays in the side menu of the Opus Platform. The Partners functionality available to users depends on the role they are assigned.

Master data roles

Role	Description
Full Access	Allows users to administer the Master Data solution that the company owns to add and edit the Partner's company profile, identifiers, and add Partner company locations information using the Partner APIs.
Member - Expanded UI Access	Allows users to administer the Master Data solution that their company owns to filter and view the Partner's company profile, identifiers, and Partner company locations information.

At this time, a user needs to be assigned the **Full Access** role and the **Member - Expanded UI Access** role to add and edit the Partner's company profile, identifiers, and Partner company locations information in the Administer UI.

Add a Partner company

Add a Partner company to link partners to the company's apps and networks in order to exchange data (e.g. shipments, receipts, serials number updates, etc).

The trade partner identifier must exist as members of the TraceLink Network before they can be linked to an app.

Add Partner information

1. Select the Main Menu icon.
2. Select Master Data from the drop-down.
3. Select Partners.
4. Select the Partners tab.
5. Select the Add icon.
6. Fill in the following fields in the Company Information section:
    a. Name field – The name of this Partner.
    b. Status drop-down – Required. The Partner's information is either active or inactive within TraceLink:
    - Active – The data can be used in messages and UI functions, and TraceLink leverages the data when necessary.
    - Inactive – The data cannot be used for other functions within TraceLink.
7. Partner Type field - This type of the Partner.
8. Address 1 field – Required. The address of the Partner.
9. Address 2 field – Any additional address information.
10. City field – Required. The city for this Partner.
11. District field – The district for this Partner.
12. Village field – The village where the Partner is located
13. House Number field – The identifying number of the building, house, or unit (e.g. 14B) for the Partner. House numbers are only separated from the street address for addresses in China.
14. Township field – The township where the Partner is located.

15. State or Region field – The state or region for this Partner.
16. Postal Code field – Conditionally required if the country requires a postal code. The postal code of the Partner's main address.
17. Country drop-down – Required. The two-letter country code where the Partner is located.
18. Company Email field – The Partner's main email address.
19. Building Number field – The Partner's building number.
20. Plant Number field – The Partner's plant number.
21. Floor Number field – The Partner's floor number.
22. Address Object GUID field – The global identifier for the Partner's entire physical location assigned by the Russian Federation Information Address System (FIAS) (36 characters maximum using digits 0-9 and letters A-F).
23. Tax Registration Code field – The code used to identify this entity for tax or other legal reporting purposes (e.g. a Russia KPP Registration Code).
24. Premises Code field – The internal identifier associated with this Partner. For example, a Partner with 4 locations in the city of Mumbai that internally refers to the 4th location as MUM4.
25. Company Fax field – The Partner's fax number.
26. Company Phone field – The Partner's phone number.
27. Business Logo field – The image file with the Partner's logo which displays on the View Partner Details screen. The maximum file size is 2 KB and it must be a .bmp, .jpg, .gif, or .png file.

1. Fill in the following fields in the Regulatory Contact section:
    a. Name field – The name of the regulatory contact.
    b. Email field – The regulatory contact's email address.
    c. Title field – The regulatory contact's title.
    d. Phone field – The regulatory contact's phone number.
2. Fill in the following fields in the Identifiers section:
    a. Type drop-down – Required. The identifier type used for this Partner.

   b. Value field – Required. The value associated with the identifier type.
   c. Primary ID switch – Required. The primary identifier used by the Partner. One of the identifiers must be marked as the primary identifier and only one primary identifier is allowed. TraceLink uses the primary identifier to match any future updates or imports to the correct entity in the TraceLink Network. By default, the first identifier entered defaults to the primary identifier.
      - Yes – This identifier is the primary for this Partner.
      - No – This identifier is *not* the primary identifier for this Partner.
   d. Select the Add ⊕ icon to add another Type drop-down and Value field.

3. Fill in the following fields in the Regulatory Licenses section:

   a. Agency drop-down – The agency for the regulatory license.
   b. State or Region field – The state or region for this regulatory license.
   c. Country drop-down – The two-letter country code for the regulatory license.
   d. Number field – Required. The regulatory license's number.
   e. Select the Add ⊕ icon to add another regulatory license field.

4. Select Add.

The company information, regulatory contact, identifier, and regulatory license is saved to the Partner.

Tips

- One of the identifiers must be marked as the primary identifier. By default, the first identifier entered defaults to the primary identifier.

Export Partner master data

Export and download a CSV file with Partner master data.

1. Select the Main Menu icon.
2. Select Master Data from the drop-down.

3. Select Partners.
4. Make sure the Partners tab is selected.
5. Select the Export icon to generate and export the Partner master data file.

   A notification displays when the file is ready, and the file downloads automatically.

Tips

- Select View Imports and Exports to view the Partner export details on a separate screen.

See the columns that display in the Partner master data CSV file

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.

- **Primary Identifier Value** – The primary value associated with the identifier type.
- **Primary Identifier Type** – The primary identifier type used for this Partner.
- **Business Name** – The name of this Partner.
- **Partner Type** – This type of the Partner.
- **Identifier Type** – The identifier type used for this company.
- **Identifier Value** – The value associated with the identifier type.
- **Is Primary** – The primary identifier used by the Partner. One of the identifiers must be marked as the primary identifier and only one primary identifier is allowed. TraceLink uses the primary identifier to match any future updates or imports to the correct entity in the TraceLink Network. By default, the first identifier entered defaults to the primary identifier.
- **Status** – Specifies whether the Partner company information is active or inactive within TraceLink.
- **Address 1** – The address of the Partner.
- **Address 2** – Any additional address information.

- **City** – The city for the Partner.
- **District** – The district for the Partner.
- **State or Region** – The state or region for the Partner.
- **Postal Code** – The postal code of the Partner’s main address.
- **Country** – The two-letter country code where the Partner is located.
- **Building Number** – The Partner's building number.
- **Plant Number** – The Partner's plant number.
- **Floor Number** – The Partner's floor number.
- **Company Phone** – The Partner's phone number.
- **Company Fax** – The Partner's fax number.
- **Company Email** – The Partner’s main email address.
- **Company URL** – The Partner's website.
- **Village** – The village where the Partner is located.
- **House Number** – The identifying number of the building, house, or unit (e.g. 14B) for the location. House numbers are only separated from the street address for addresses in China.
- **Township** – The township where the Partner is located.
- **Premises Code** – The internal identifier associated with this the Partner (e.g. a Partner company with 4 locations in the city of Mumbai may internally refer to the 4th location as MUM4).
- **Regulatory Contact Name** – The name of the regulatory contact.
- **Regulatory Contact Title** – The regulatory contact's title.
- **Regulatory Contact Email** – The regulatory contact's email address.
- **Regulatory Contact Phone** – The regulatory contact's phone number.
- **Regulatory License Agency** – The agency for the regulatory license.
- **Regulatory License Country** – The two-letter country code for the regulatory license.
- **Regulatory License State or Region** – The state or region for the regulatory license.
- **Regulatory License Number** – The regulatory license's number.

- **Tax Registration Code** – The code used to identify the Partner for tax or other legal reporting purposes (e.g. a Russia KPP Registration Code).

Filter and view to find the Partner

1. Select the Main Menu icon.
2. Select Master Data from the drop-down.
3. Select Partners.
4. Make sure the Partners tab is selected.
5. Fill in one or more of the following fields on the Partners tab to filter the results:
    a. Identifiers drop-down – The identifiers used by the Partner
    b. Name field – The name of this Partner.
6. Select Show Additional Filters and fill in the following field to further filter the results:
    a. Regulatory Licenses field – The regulatory license for the company.
7. Select Apply.

   The results display in the table.

See the information that displays in the table

- Status – The status of the Partner's information:
    - Active – The data can be used in messages and UI functions, and TraceLink leverages the data when necessary.
    - Inactive – The data cannot be used for other functions within TraceLink.
- Partner Type – This type of the Partner.
- Company Name – The name of the company.
- Company ID – The ID of the company.

- Address – The address of the company.

Tips

- Add your Partner Information to edit or view Partner master data on TraceLink.
- Select the Action ⋮ icon in the identifier row and select Remove to remove an identifier.

Filter and view to find the Partner exports

1. Select the Main Menu icon.
2. Select Master Data from the drop-down.
3. Select Partners.
4. Make sure the Partners tab is selected.
5. Select the View Imports and Exports icon to view the exported Partner master data.
6. Make sure the My Exports tab is selected.
7. Fill in the following fields on the My Exports tab to filter the results:
   a. Status drop-down – Required. The status of the exported file.
   b. Document Name field – Required. The name of the exported file.
   c. Date Exported field – Required. The date the Partner master data was exported from TraceLink.
8. Select Apply.

   The results display in the table.

See the information that displays in the table

- Status – The status of the exported file.
- Date Exported – The date the Partner master data was exported from TraceLink.

- Expires On – The date the Partner master data expires.
- Document – The link of the exported Partner master data.

9. Select the exported document link to download the document.

Manage Partner locations

Partner locations are the physical locations (i.e. sites) where products are produced, shipped, or received.

Add Partner locations

1. Select the Main Menu icon.
2. Select Master Data from the drop-down.
3. Select Partners.
4. Select the Locations tab.
5. Select the Add icon.
6. Make sure your Company Name, Primary ID, and TraceLink ID is displayed in the Add Location section.
7. Fill in the following fields in the Location Information section:
   a. Location Name field – Required. The location name.
   b. Status drop-down – Required. The Partner's location information is either active or inactive within TraceLink:
      - Active – The data can be used in messages and UI functions, and TraceLink leverages the data when necessary.
      - Inactive – The data cannot be used for other functions within TraceLink.

   c. Address 1 field – Required. The address of the particular location.
   d. Address 2 field – Any additional address information.
   e. City field – Required. The city for this location.
   f. District field – The district for this location.
   g. Village field – The village for this location.
   h. House Number field – The identifying number of the building, house, or

unit (e.g. 14B) for the location. House numbers are only separated from the street address for addresses in China.

i. Township field – The township for this location.
j. State or Region field – The state or region for this location.
k. Postal Code field – Conditionally required if the country requires a postal code. The postal code for this location's main address.
l. Country drop-down – Required. The two-letter country code for this location.
m. Company Email field – The Partner location's main email address.
n. Company URL field – The Partner location's website.
o. Building Number field – The Partner location's building number.
p. Plant Number field – The Partner location's plant number.
q. Floor Number field – The Partner location's floor number.
r. Address Object GUID field – The global identifier for the Partner's entire physical location assigned by the Russian Federation Information Address System (FIAS) (36 characters maximum using digits 0-9 and letters A-F).
s. Tax Registration Code field – The code used to identify this entity for tax or other legal reporting purposes (e.g. a Russia KPP Registration Code).
t. Premises Code field – The internal identifier associated with this location. For example, a Partner with 4 locations in the city of Mumbai that internally refers to the 4th location as MUM4.
u. Affiliate field – Specifies if the location is another business entity or a subsidiary of the company.
    - True – The company is another business entity or a subsidiary of the company.
    - False – The company is not another business entity of subsidiary of the company.
v. Business Type field – The type of business that this Partner's location conducts.
    - Carrying and Forwarding Agent – (CFA) The company facilitates the

movement and transfer of goods. In India, CFAs are often involved in moving goods as interstate stock transfers.

- Chemist – The company specializes in the composition of substances, may mix substances in preparation for dispensation, and has a shop selling medicines and cosmetics. Also know as a compounding facility.
- Distributor – The company distributes pharmaceuticals.
- Exporter – The company exports products. For customs purposes, this company makes the export declaration and sells the products to a company in another country, known as the importer.
- Healthcare Facility – The company dispenses pharmaceuticals as a healthcare facility.
- Importer – The company imports products. For customs purposes, this company makes the import declaration, the shipping document names the company as consignee, and the exporter's invoice names the company as buyer.
- Logistics – The company provides logistics services (e.g. LSP, 3PL).
- Manufacturer – The license holder of the pharmaceutical product (e.g. Pharmaceutical Manufacturer, Brand Owners, Generics, MAHs, Specialty Companies).
- Packager – The company packages products.
- Pharmacy – The company sells product directly to patients.
- Returns Processor – The company processes returns.
- Stockist (Regional Distributor) – The company stocks the products, and then distributes them.
- Wholesaler – The company is a wholesaler of pharmaceuticals.

w. Company Fax field – The Partner location's fax number.

x. Company Phone field – The Partner location's phone number.

y. Business Logo field – The image file with the Partner location's logo which displays on the View Location screen. The maximum file size is 2 KB and it must be a .bmp, .jpg, .gif, or .png file.

8. Fill in the following fields in the Regulatory contact section:
    a. Name field – The name of the regulatory contact.
    b. Email field – The regulatory contact's email address.
    c. Title field – The regulatory contact's title.
    d. Phone field – The regulatory contact's phone number.
9. Fill in the following fields in the Identifiers section:
    a. Type drop-down – Required. The identifier type used for this Partner.
    b. Value field – Required. The value associated with the identifier type.
    c. Select the Add ⊕ icon to add another Type drop-down and Value field.
10. Fill in the following fields in the Regulatory Licenses section:
    a. Agency drop-down – The agency for the regulatory license.
    b. State or Region field – The state or region for this regulatory license.
    c. Country drop-down – The two-letter country code for the regulatory license.
    d. Number field – Required. The regulatory license's number.
    e. Select the Add ⊕ icon to add another regulatory license field.
11. Select Add.

    The location information, regulatory contact, and regulatory license information is saved to the Partner location.

Tips

- One of the identifiers must be marked as the primary identifier. By default, the first identifier entered defaults to the primary identifier.

Export Partner locations master data

Export and download a CSV file with Partner location data for the entire set of locations for a Partner.

1. Select the Main Menu icon.
2. Select Master Data from the drop-down.
3. Select Partners.
4. Make sure the Locations tab is selected.
5. Select the Export icon to generate and export the Partner location master data file.

   A notification displays when the file is ready, and the file downloads automatically.

Tips

- Select View Imports and Exports to view the Partner locations export details on a separate screen.

See the columns that display in the Partner location master data CSV file

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.

- **Primary Location Identifier Value** – The primary location value associated with the identifier type.
- **Primary Location Identifier Type** – The primary Partner identifier type used for this Partner location.
- **Primary Partner Identifier Value** – The primary Partner value associated with the identifier type.
- **Primary Partner Identifier Type** – The primary Partner identifier type used for this Partner location.
- **Location Identifier Value** – The value associated with the location identifier type.
- **Location Identifier Type** – The identifier type used for this location.

- **Is Primary** – The primary identifier used by the company. One of the identifiers must be marked as the primary identifier and only one primary identifier is allowed. TraceLink uses the primary identifier to match any future updates or imports to the correct entity in the TraceLink Network. By default, the first identifier entered defaults to the primary identifier.
- **Business Type** – The type of business that this Partner's location conducts.
- **Status** – The status of the Partner’s location information.
- **Location Name** – The location name.
- **Address 1** – The address of the particular location.
- **Address 2** – Any additional address information.
- **City** – The city for this location.
- **District** – The district for this location.
- **State or Region** – The state or region for this location.
- **Postal Code** – The postal code for this location's main address.
- **Country** – The two-letter country code for this location.
- **Building Number** – The Partner location's building number.
- **Plant Number** – The Partner location's plant number.
- **Floor Number** – The Partner location's floor number.
- **Company Phone** – The Partner location's phone number.
- **Company Fax** – The Partner location's fax number.
- **Company Email** – The Partner location's main email address.
- **Company URL** – The Partner location's website.
- **Village** – The village for this location.
- **House Number** – The identifying number of the building, house, or unit (e.g. 14B) for the location. House numbers are only separated from the street address for addresses in China.
- **Township** – The township for this location.
- **Premises Code** – The internal identifier associated with this location (e.g. a Partner company with 4 locations in the city of Mumbai may internally refer to the 4th location as MUM4).

- **Tax Registration Code** – The code used to identify this entity for tax or other legal reporting purposes (e.g. a Russia KPP Registration Code).
- **Regulatory Contact Name** – The name of the regulatory contact.
- **Regulatory Contact Title** – The regulatory contact's title.
- **Regulatory Contact Email** – The regulatory contact's email address.
- **Regulatory Contact Phone** – The regulatory contact's phone number.
- **Regulatory License Agency** – The agency for the regulatory license.
- **Regulatory License Country** – The two-letter country code for the regulatory license.
- **Regulatory License State or Region** – The state or region for the regulatory license.
- **Regulatory License Number** – The regulatory license's number.

Filter and view to find the Partner location

1. Select the Main Menu icon.
2. Select Master Data from the drop-down.
3. Select Partners.
4. Select the Locations tab.
5. Fill in one or more of the following fields on the Locations tab to filter the results:
    a. Location ID Type drop-down – Required. The identifier type used for this company location.
    b. Location Name field – Required. The location name.
    c. Status drop-down – Required. The Partner's location information is either active or inactive within TraceLink:
        - Active – The data can be used in messages and UI functions, and TraceLink leverages the data when necessary.
        - Inactive – The data cannot be used for other functions within

TraceLink.

6. Select Show Additional Filters and fill in one or more of the following fields to further filter the results:
    a. TraceLink ID field – The company's TraceLink ID. After setting up the company profile and enabling locations, TraceLink automatically creates and adds the unique TraceLink ID for the company.
    b. Status field – The Partner company location's building number.
    c. Linking field – Specifies if a location can link to a network or an app.
7. Select Apply.

    The results display in the table.

    See the information that displays in the table

    - Status – The status of the Partner's information:
        - Active – The data can be used in messages and UI functions, and TraceLink leverages the data when necessary.
        - Inactive – The data cannot be used for other functions within TraceLink.
    - Location Name and ID – The Partner location name and the identifier type.
    - Address – The address of the Partner company.
    - TraceLink ID – The company's TraceLink ID. After setting up the company profile and enabling locations, TraceLink automatically creates and adds the unique TraceLink ID for the company.
    - Linking – Specifies if a location can link to a network or an app.
        - Enabled – The company location can be linked to a network or an app.
        - Disabled – The company location cannot be linked to a network or an app.
8. Select the Location Name and ID hyperlink to open a specific location.

The View Location screen displays.

Tips

- Add your Partner locations to edit or view Partner's location master data on TraceLink.
- Select the Action ⋮ icon in the identifier row and select Remove to remove an identifier.

If a user's identifier is actively linked with another location, then a user should not remove the identifier.

Filter and view to find the Partner location exports

1. Select the Main Menu icon.
2. Select Master Data from the drop-down.
3. Select Partners.
4. Make sure the Locations tab is selected.
5. Make sure the My Exports tab is selected.
6. Select the View Imports and Exports icon to view the exported Partner location master data.
7. Fill in the following fields on the My Exports tab to filter the results:
    a. Status drop-down – Required. The status of the exported file.
    b. Document Name field – Required. The name of the exported file.
    c. Date Exported field – Required. The date the Partner location master data was exported from TraceLink.
8. Select Apply.

The results display in the table.

See the information that displays in the table

- Status – The status of the exported file.
- Date Exported – The date the Partner location master data was exported from TraceLink.
- Expires On – The date the Partner location master data expires.
- Document – The link of the exported Partner location master data.

9. Select the exported document link to download the document.

Related Content

Material Consumed Updates

Suppliers use material consumed to communicate information about changes in inventory ensuring the inventory records accurately reflect the stock on hands with their remote or third-party warehouses or MAHs.

View More

Material Issued Updates

Suppliers use material issued transaction to communicate information about changes in inventory levels when materials are withdrawn or issued for different processes or activities.

View More

Material Produced Updates

Manufacturers use material produced to communicate information about changes in inventory levels when materials are produced for different processes or activities.

View More