



TRACELINK UNIVERSITY

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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 Master Data 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.

For more information, see [Master Data Roles](#) Master Data Roles.





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 in the main menu.
 3. Select Partner from the left menu.
 4. Select Partners from the left menu.
 5. Select the New  button.
 6. Fill in the following fields in the Partner 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.
1. Click the Add  icon in the Identifiers section and in the side panel, fill in the following fields:
 - a. Type drop-down - The identifier type used for this Partner.
 - b. Value field - The value associated with the identifier type.
 - c. Primary ID switch - The primary identifier used by the Partner. Each company must have at least one identifier type and value combination. One identifier must be designated as the primary identifier, and only one primary identifier is allowed per company. TraceLink uses the primary identifier to match future updates or imports to the correct entity in the TraceLink Network.
 - Yes - This identifier is the primary for this Partner.
 - No - This identifier is *not* the primary identifier for this Partner.
 - Select Apply.
 - d. Select the Add  icon to add another Type drop-down and Value field.
2. Select the Save  button.

The Search Partners screen displays a table with the newly added partner.

3. To add details for the new partner, Select the Company Name hyperlink in the results table.

4. Select the Edit  button.

5. Make sure your Status, and Partner Type is displayed in the General section.

6. Fill in the following fields in the Partner Information section:

See the information that displays on the Partner Information

- a. Name field - Required. The name of the Partner.
- b. Address 1 field - Required. The address of the Partner.
- c. Address 2 field - Any additional address information.
- d. City field - Required. The city for this Partner.
- e. District field - The district for this Partner.
- f. State field - The state or region for this Partner.
- g. Postal Code field - Conditionally required if the country requires a postal code.
The postal code of the Partner's main address.
- h. Country drop-down - Required. The two-letter country code where the Partner is located.
- i. Township field - The township where the Partner is located.
- j. Village field - The village where the Partner is located
- k. Building Number field - The Partner's building number.
- l. Floor Number field - The Partner's floor number.
- m. 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.
- n. Plant Number field - The Partner's plant number.
- o. 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.

- p. Fax field – The Partner's fax number.
- q. Company Email field – The Partner's main email address.
- r. Company Phone field – The Partner's phone number.
- 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).


7. Select the Add  icon in the Identifiers section and fill in the following fields:

- a. Type drop-down – The identifier type used for this Partner.
- b. Value field – The value associated with the identifier type.
- c. Select Apply.

The new identifier is added to the Identifiers table.

- d. Select the Add  icon to add another identifier Type drop-down and Value field.





8. Select the Add  icon in the Regulatory Licenses section and fill in the following fields:

- a. Agency field – 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.

9. Select the Save  button.

The partner information, regulatory contact, identifier, and regulatory license are saved to the Partner.

Tips


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- Select the Save and New  icon to save the new partner and add another.
 - One of the identifiers must be marked as the primary identifier. By default, the first identifier entered defaults to the primary identifier.
 - In the Identifiers and Regulatory Licenses sections, do one of the following:
 - Select the Add  icon to add the a new identifier or regulatory license.
 - Select the Remove  icon to delete an identifier or regulatory license.
 - Select the Edit  icon to edit an identifier or regulatory license.



Use the same icons available at the top of the screen to perform these actions.

Import Partners

Import Partners master data using a CSV file.

1. Select the Main Menu  icon.
2. Select Partner from the left menu.
3. Select Partners from the left menu.
4. Select the Import button on the top right corner of the screen to import the Partners master data.
5. Select a CSV format from the Input Format drop-down.
 - a. OPUS CSV Format – is the enhanced, modern format introduced with the OPUS platform.
 - b. TTS CSV Format – is the legacy format, originally used in the LSC/TTS platform.

6. In the Input File field, drag and drop the CSV file or select the browse link to search for the file. The element headers listed 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.

See the information that displays in the element headers of the CSV file.

- Primary Identifier Value field – The value associated with the selected Primary Identifier Type. Used to uniquely identify each partner record across all rows.
- Primary Identifier Type field – The type of identifier (e.g., GLN, DUNS) paired with the primary identifier value to form the unique partner record key.
- Company Name field – Required. The name of the partner company as shown in Master Data.
- Partner Type field – Classification of the partner’s role in the business relationship.
- Identifier Type field – Type of identifier assigned to the partner.
- Identifier Value field – Value corresponding to the specified identifier type.
- Is Primary field – Indicates whether the identifier is the primary identifier for the record. Values must be Yes or No. At least one identifier per record must be marked as primary.

- Identifier Action – Specifies whether the identifier entry for that record should be deleted; when set (for example, to Delete), it removes that specific identifier row from the record.
- Status field – Indicates the lifecycle status of the partner location.
Allowed values: Active or Inactive.
- Address 1 – Primary street address of the company.
- Address 2 – Additional address information such as suite or unit number.
- City – City where the company is situated.
- District – Administrative district or area.
- State or Region – State, province, or region.
- Postal Code – ZIP or postal code.
- Country – Country where the company operates.
- Building Number – Identifier for the building within the address.
- Plant Number – Unique identifier assigned to the plant or facility.
- Floor Number – Floor number within the building, if applicable.
- Company Phone – Primary contact phone number.
- Company Fax – Fax number associated.

- Company Email - General or official email address.
- Village - Village name.
- House Number - House or property number within the address.
- Township - Township or local administrative division.
- Premises Code - Code used to uniquely identify the premises.
- Tax Registration Code - Tax identification or registration number.
- Regulatory Contact Name - Name of the primary regulatory contact person.
- Regulatory Contact Title - Job title of the regulatory contact.
- Regulatory Contact Email - Email address of the regulatory contact.
- Regulatory Contact Phone - Phone number of the regulatory contact.
- Regulatory License Agency - Regulatory authority issuing the license.
- Regulatory License Country - Country where the regulatory license is issued.
- Regulatory License State or Region - State or region issuing the license.
- Regulatory License Number - Official regulatory license or permit

number.

- Regulatory License Action – Specifies whether the regulatory license entry for that record should be deleted; when set (for example, to Delete), it removes that specific regulatory license row from the record.



The root row is the first row of each record containing all parent-level fields, and all subsequent rows for that record are considered child rows containing array data.

CSV processing rules

- The first row of each Partner company in the CSV file must contain all required fields and the Primary Identifier Value.
- Each record for a Partner company can repeat over multiple lines in a CSV file. The Primary Identifier Value and Primary Identifier Type fields identify the looping element for the entire Partner master data record.
- In the first two columns, the Identifier Value and Identifier Type must match the Primary Identifier Value and Primary Identifier Type across the record.
- The Is Primary field identifies the Primary Identifier for the Partner record. The primary identifier can appear in any row of the Partner record. Exactly one identifier must be marked as primary for each Partner record (at least one and no more than one).
- Each additional row must have the same Primary Identifier Value and Primary Identifier Type as the first row of that Partner record.

7. Select Apply.

The updated Partners master data is imported to link Partners to the company's apps and networks in order to exchange master data.



For more information about master data import use cases and success or failure scenarios, see [FAQ's](#) page.



For CSV imports, if an error occurs in any row of the file, processing stops immediately. No subsequent records are processed after the first failure.

Export Partner master data

Export and download a CSV file with Partner master data.

1. Select the Main Menu  icon.
2. Select Master Data in the main menu.
3. Select Partner from the left menu.
4. Select Partners from the left menu.
5. Select the Export  button to generate and export the Partner master data file.

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

See the information that displays in the element headers of the 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 field – The value associated with the selected Primary

Identifier Type. Used to uniquely identify each partner record across all rows.

- Primary Identifier Type field – The type of identifier (e.g., GLN, DUNS) paired with the primary identifier value to form the unique partner record key.
- Company Name field – Required. The name of the partner company as shown in Master Data.
- Partner Type field – Classification of the partner’s role in the business relationship.
- Identifier Type field – Type of identifier assigned to the partner.
- Identifier Value field – Value corresponding to the specified identifier type.
- Is Primary field – Indicates whether the identifier is the primary identifier for the record. Values must be Yes or No. At least one identifier per record must be marked as primary.
- Identifier Action – Specifies whether the identifier entry for that record should be deleted; when set (for example, to Delete), it removes that specific identifier row from the record.
- Status field – Indicates the lifecycle status of the partner location. Allowed values: Active or Inactive.
- Address 1 – Primary street address of the company.
- Address 2 – Additional address information such as suite or unit number.

- City - City where the company is situated.
- District - Administrative district or area.
- State or Region - State, province, or region.
- Postal Code - ZIP or postal code.
- Country - Country where the company operates.
- Building Number - Identifier for the building within the address.
- Plant Number - Unique identifier assigned to the plant or facility.
- Floor Number - Floor number within the building, if applicable.
- Company Phone - Primary contact phone number.
- Company Fax - Fax number associated.
- Company Email - General or official email address.
- Village - Village name.
- House Number - House or property number within the address.
- Township - Township or local administrative division.
- Premises Code - Code used to uniquely identify the premises.

- Tax Registration Code - Tax identification or registration number.
- Regulatory Contact Name - Name of the primary regulatory contact person.
- Regulatory Contact Title - Job title of the regulatory contact.
- Regulatory Contact Email - Email address of the regulatory contact.
- Regulatory Contact Phone - Phone number of the regulatory contact.
- Regulatory License Agency - Regulatory authority issuing the license.
- Regulatory License Country - Country where the regulatory license is issued.
- Regulatory License State or Region - State or region issuing the license.
- Regulatory License Number - Official regulatory license or permit number.
- Regulatory License Action - Specifies whether the regulatory license entry for that record should be deleted; when set (for example, to Delete), it removes that specific regulatory license row from the record.



CSV processing rules

- The CSV file name format is Partner-MasterData__, where the export date is in YYYYMMDD format.
- The first row of each Partner company in the CSV file must contain all required fields and the Primary Identifier Value.
- Each record for a Partner company can repeat over multiple lines in a CSV file. The Primary Identifier and Primary Identifier Type fields identify the looping

element for the entire company Partner master data record.

- In the first column, the Identifier Type and Identifier Value must be the same as the Primary Identifier and Primary Identifier Type.
- The Primary Identifier Type and Primary Identifier Value must be Yes in the first row of the Partner record.
- Each additional row must have the same Primary Identifier and Primary Identifier Type values.

Filter, view, and edit the Partner Information

1. Select the Main Menu  icon.
2. Select Master Data in the main menu.
3. Select Partner from the left menu.
4. Select Partners from the left menu.
5. Select the Filter  button to find the partner.
6. Fill in one or more of the following fields to filter the results:
 - a. Name field - The name of this Partner.
 - b. Status drop-down - 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.
 - c. Identifiers field - The identifiers used by the Partner.
 - d. Licenses field - The licenses associated with the partner.
 - e. Last Updated - Specifies the date the transaction was last processed or updated.
7. Select Apply.

The results display in the table.

8. Select the Company Name hyperlink in the results table.

9. Select the Edit  button.

10. Ensure that your Status, and Partner Type are visible in the General section.

11. Fill in the following fields in the Partner Information section:

See the information that displays on the Partner Information

- a. Name field - Required. The name of the Partner.
- b. Address 1 field - Required. The address of the Partner.
- c. Address 2 field - Any additional address information.
- d. City field - Required. The city for this Partner.
- e. District field - The district for this Partner.
- f. State field - The state or region for this Partner.
- g. Postal Code field - Conditionally required if the country requires a postal code. The postal code of the Partner's main address.
- h. Country drop-down - Required. The two-letter country code where the Partner is located.
- i. Township field - The township where the Partner is located.
- j. Village field - The village where the Partner is located
- k. Building Number field - The Partner's building number.
- l. Floor Number field - The Partner's floor number.
- m. 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.
- n. Plant Number field - The Partner's plant number.
- o. 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.

- p. Fax field – The Partner's fax number.
- q. Company Email field – The Partner's main email address.
- r. Company Phone field – The Partner's phone number.
- 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).

12. Fill in the following fields in the Regulatory Contact section:

- a. Name field – The name of the regulatory contact.
- b. Title field – The regulatory contact's title.
- c. Email field – The regulatory contact's email address.
- d. Phone field – The regulatory contact's phone number.

13. Select the Add **+** icon in the Identifiers section and fill in the following fields:

- a. Type drop-down – The identifier type used for this Partner.
- b. Value field – The value associated with the identifier type.
- c. Primary ID switch – The primary identifier used by the partner. Each company must have at least one identifier type and value combination. One identifier must be designated as the primary identifier, and only one primary identifier is allowed per company. TraceLink uses the primary identifier to match future updates or imports to the correct entity in the TraceLink Network.
 - Yes – The identifier is the primary identifier for this company.
 - No – The identifier is *not* the primary identifier for this company.
- d. Select Apply.

The updated identifier is added to the Identifiers table.

- e. Select the Add **+** icon to add another identifier Type drop-down and Value field.

14. Select the Add **+** icon in the Licenses section and fill in the following fields:

- a. Agency field – 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 Apply.

The license is saved to the Partner.


- f. Select the Add **+** icon to add another regulatory license field.

15. Select the Save  button.

The partner information, regulatory contact, identifier, and regulatory license are saved to the Partner.

Tips

- Add your Partner Information to edit or view Partner master data on TraceLink.
- In the view details screen, select the View Locations button to navigate to the [Search Partner Locations](#) screen with the selected Partner applied as a filter.
- In the view details screen, select the New Location button to navigate to the [New Partner Location](#) screen with the selected Partner details prepopulated.
- One of the identifiers must be marked as the primary identifier.
- In the Identifiers and Regulatory Licenses sections, do one of the following:
 - Select the Add **+** icon to add the a new identifier or regulatory license.
 - Select the Remove **-** icon to delete an identifier or regulatory license.

- Select the Edit  icon to edit an identifier or regulatory license.



Use the same icons available at the top of the screen to perform these actions.



Find all the Partner and Partner Location exports

For information about viewing Partner and Partner location export files, go to the [View All Import and Export Files](#) page.

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 in the main menu.
3. Select Partner from the left menu.
4. Select Partner Locations from the left menu.
5. Select the New  button.
6. Fill in the following fields in the Location Information section:
 - a. Company field - The company name.
 - b. 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.

7. Select the Add  icon in the Identifiers section to add a new identifier.

8. Fill in the following fields in the Identifiers section:

- a. Type drop-down - The identifier type used for this Partner.
- b. Value field - The value associated with the identifier type.
- c. Select the Add  icon in the Identifiers section to add another Type drop-down and Value field.
- d. Select Apply.

The identifier is saved to the Partner Location.

9. Select the Save  button.

The Partner Locations screen displays a table with the newly added location.

10. To add details for the newly added partner location, select the Name hyperlink in the results table.

11. Select the Edit  button.

12. Ensure that your Company Name - Primary ID and Status are visible in the General section.

13. Fill in the following fields in the Location Information section:

See the information that displays on the Location Information

- a. Name field - Required. The location name.
- b. Address 1 field - Required. The address of the particular location.
- c. Address 2 field - Any additional address information.
- d. City field - Required. The city for this location.

- e. District field - The district for this location.
- f. State field - The state or region for this location.
- g. Postal Code field - Conditionally required if the country requires a postal code. The postal code for this location's main address.
- h. Country drop-down - Required. The two-letter country code for this location.
- i. Township field - The township for this location.
- j. Village field - The village for this location.
- k. Building Number field - The Partner location's building number.
- l. Floor Number field - The Partner location's floor number.
- m. 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.
- n. Plant Number field - The Partner location's plant number.
- o. 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.
- p. Fax field - The Partner location's fax number.
- q. Company Email field - The Partner location's main email address.
- r. Company Phone field - The Partner location's phone number.
- 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).

14. Fill in the following fields in the Regulatory contact section:

- a. Name field - The name of the regulatory contact.
- b. Title field - The regulatory contact's title.
- c. Email field - The regulatory contact's email address.
- d. Phone field - The regulatory contact's phone number.

15. Select the Add  icon in the Identifiers section and fill in the following fields:

- a. Type drop-down - The identifier type used for this Partner.
- b. Value field - The value associated with the identifier type.
- c. Primary ID switch - The primary identifier used by the company. Each company must have at least one identifier type and value combination. One identifier must be designated as the primary identifier, and only one primary identifier is allowed per company. TraceLink uses the primary identifier to match future updates or imports to the correct entity in the TraceLink Network.
 - Yes - The identifier is the primary identifier for this company.
 - No - The identifier is *not* the primary identifier for this company.
- d. Select Apply.

The new identifier is added to the Identifiers table.





- e. Select the Add **+** icon to add another identifier Type drop-down and Value field.
16. Select the Add **+** icon in the Licenses section and fill in the following fields:
- a. Agency field - The agency for the regulatory license.
 - b. State or Region field - The state or region for this regulatory license.
 - c. Country drop-down - Required. The two-letter country code for the regulatory license.
 - d. Number field - Required. The regulatory license's number.
 - e. Select Apply.


The license is saved to the Partner Location.

17. Select the Save  button.

The location information, regulatory contact, identifier, and license are saved to the Partner Location.


Tips

- Select the Save and New  icon to save the new partner and add another.
- One of the identifiers must be marked as the primary identifier. By default, the first identifier entered defaults to the primary identifier.
- In the Identifiers and Regulatory Licenses sections, do one of the following:
 - Select the Add  icon to add the a new identifier or license.
 - Select the Remove  icon to delete an identifier or license.
 - Select the Edit  icon to edit an identifier or license.

 Use the same icons available at the top of the screen to perform these actions.

Import Partner locations

Import Partner locations master data using a CSV file.

1. Select the Main Menu  icon.
2. Select Partner from the left menu.
3. Select Locations from the left menu.
4. Select the Import button on the top right corner of the screen to import the Partner locations master data.
5. Select a CSV format from the Input Format drop-down.
 - a. OPUS CSV Format – is the enhanced, modern format introduced with the OPUS platform.

- b. TTS CSV Format – is the legacy format, originally used in the LSC/TTS platform.
6. In the Input File field, drag and drop the CSV file or select the browse link to search for the file. The element headers listed 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.

See the information that displays in the element headers of the CSV file.

- Primary Location Identifier Value field – The value associated with the selected Primary Location Identifier Type. Used to uniquely identify each partner-location record across all rows.
- Primary Location Identifier Type field – The type of identifier (e.g., GLN, DUNS) paired with the value to form the unique partner-location record key.
- Primary Partner Identifier Value field – The value associated with the partner company’s primary identifier. Used to link the partner location to its parent partner record.
- Primary Partner Identifier Type field – The type of identifier for the parent partner company. Paired with Primary Partner Identifier Value to define the parent relationship.
- Location Identifier Value field – The value associated with the Location Identifier Type. Used with Location Identifier Type and Is Primary in the identifiers array.
- Location Identifier Type field – The type of identifier (e.g., SGLN, DUNS)

used for the partner location. Part of the identifiers array and required when identifier data is provided.

- Is Primary field - Indicates whether the location identifier is the primary one. Values must be Yes or No. At least one identifier per record must be marked as primary.
- Identifier Action - Specifies whether the identifier entry for that record should be deleted; when set (for example, to Delete), it removes that specific identifier row from the record.
- Partner Type field - Indicates the type of business operation associated with the company location.
- Status field - Indicates the lifecycle status of the partner location. Allowed values: Active or Inactive.
- Location Name field - The human-readable name of the partner location (e.g., site or plant name). Expected in the first row of each record.
- Address 1 - Primary street address of the company location.
- Address 2 - Additional address information such as suite or unit number.
- City - City where the company location is situated.
- District - Administrative district or area of the location.
- State or Region - State, province, or region of the location.
- Postal Code - ZIP or postal code of the location.

- Country - Country where the company location operates.
- Building Number - Identifier for the building within the address.
- Plant Number - Unique identifier assigned to the plant or facility.
- Floor Number - Floor number within the building, if applicable.
- Company Phone - Primary contact phone number for the location.
- Company Fax - Fax number associated with the location.
- Company Email - General or official email address for the location.
- Village - Village name where the location is based, if applicable.
- House Number - House or property number within the address.
- Township - Township or local administrative division of the location.
- Premises Code - Code used to uniquely identify the premises.
- Tax Registration Code - Tax identification or registration number for the location.
- Regulatory Contact Name - Name of the primary regulatory contact person.
- Regulatory Contact Title - Job title of the regulatory contact.

- Regulatory Contact Email - Email address of the regulatory contact.
- Regulatory Contact Phone - Phone number of the regulatory contact.
- Regulatory License Agency - Regulatory authority issuing the license.
- Regulatory License Country - Country where the regulatory license is issued.
- Regulatory License State or Region - State or region issuing the license.
- Regulatory License Number - Official regulatory license or permit number.
- Regulatory License Action - Specifies whether the regulatory license entry for that record should be deleted; when set (for example, to Delete), it removes that specific regulatory license row from the record.



The root row is the first row of each record containing all parent-level fields, and all subsequent rows for that record are considered child rows containing array data.

CSV processing rules

- The CSV file name format is PartnerLocation-MasterData__, where the export date is in YYYYMMDD format.
- The first row of each Partner company location in the CSV file must contain all required fields and the Primary Identifier Value.

- Each record for a Partner company can repeat over multiple lines in a CSV file. The Primary Identifier Value and Primary Identifier Type fields identify the looping element for the entire Partner master data record.
- In the first two columns, the Identifier Value and Identifier Type must match the Primary Identifier Value and Primary Identifier Type across the record.
- The Is Primary field identifies the Primary Identifier for the Partner record. The primary identifier can appear in any row of the Partner record. Exactly one identifier must be marked as primary for each Partner record (at least one and no more than one).
- Each additional row must have the same Primary Identifier Value and Primary Identifier Type as the first row of that Partner record.

1. Select Apply.

The updated Partner locations master data is imported to link Partner locations to the company's apps and networks in order to exchange master data.



For more information about master data import use cases and success or failure scenarios, see [FAQ's](#) page.



For CSV imports, if an error occurs in any row of the file, processing stops immediately. No subsequent records are processed after the first failure.

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 in the main menu.
3. Select Partner from the left menu.
4. Select Partner Locations from the left menu.
5. Select the Export  button to generate and export the Partner location master data file.

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

See the information that displays in the element headers of the CSV file.

- Primary Location Identifier Value field – The value associated with the selected Primary Location Identifier Type. Used to uniquely identify each partner-location record across all rows.
- Primary Location Identifier Type field – The type of identifier (e.g., GLN, DUNS) paired with the value to form the unique partner-location record key.
- Primary Partner Identifier Value field – The value associated with the partner company’s primary identifier. Used to link the partner location to its parent partner record.
- Primary Partner Identifier Type field – The type of identifier for the parent partner company. Paired with Primary Partner Identifier Value to define the parent relationship.


- Location Identifier Value field – The value associated with the Location Identifier Type. Used with Location Identifier Type and Is Primary in the identifiers array.
- Location Identifier Type field – The type of identifier (e.g., SGLN, DUNS) used for the partner location. Part of the identifiers array and required when identifier data is provided.
- Is Primary field – Indicates whether the location identifier is the primary one. Values must be Yes or No. At least one identifier per record must be marked as primary.
- Identifier Action – Specifies whether the identifier entry for that record should be deleted; when set (for example, to Delete), it removes that specific identifier row from the record.
- Partner Type field – Indicates the type of business operation associated with the company location.
- Status field – Indicates the lifecycle status of the partner location. Allowed values: Active or Inactive.
- Location Name field – The human-readable name of the partner location (e.g., site or plant name). Expected in the first row of each record.
- Address 1 – Primary street address of the company location.
- Address 2 – Additional address information such as suite or unit number.
- City – City where the company location is situated.

- District – Administrative district or area of the location.
- State or Region – State, province, or region of the location.
- Postal Code – ZIP or postal code of the location.
- Country – Country where the company location operates.
- Building Number – Identifier for the building within the address.
- Plant Number – Unique identifier assigned to the plant or facility.
- Floor Number – Floor number within the building, if applicable.
- Company Phone – Primary contact phone number for the location.
- Company Fax – Fax number associated with the location.
- Company Email – General or official email address for the location.
- Village – Village name where the location is based, if applicable.
- House Number – House or property number within the address.
- Township – Township or local administrative division of the location.
- Premises Code – Code used to uniquely identify the premises.
- Tax Registration Code – Tax identification or registration number for the

location.

- Regulatory Contact Name – Name of the primary regulatory contact person.
- Regulatory Contact Title – Job title of the regulatory contact.
- Regulatory Contact Email – Email address of the regulatory contact.
- Regulatory Contact Phone – Phone number of the regulatory contact.
- Regulatory License Agency – Regulatory authority issuing the license.
- Regulatory License Country – Country where the regulatory license is issued.
- Regulatory License State or Region – State or region issuing the license.
- Regulatory License Number – Official regulatory license or permit number.
- Regulatory License Action – Specifies whether the regulatory license entry for that record should be deleted; when set (for example, to Delete), it removes that specific regulatory license row from the record.

Filter, view, and edit to find the Partner location

1. Select the Main Menu  icon.
2. Select Master Data in the main menu.
3. Select Partner from the left menu.
4. Select Partner Locations from the left menu.

5. Select the Filter  button to find the partner location.

6. Fill in one or more of the following fields to filter the results:

- a. Company Name - Primary Identifier drop-down - The company name associated with the primary identifier.
- b. Name field - Required. The location name.
- c. Status drop-down - 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.
- d. Identifiers field - The identifiers used by the Partner location.
- e. Licenses field - The licenses associated with the partner location.
- f. Last Updated drop-down - Specifies the date the transaction was last processed or updated.

7. Select Apply.

The results display in the table.

8. Select the Name hyperlink in the results table.

9. Select the Edit  button.

10. Ensure that your Company Name - Primary ID and Status are visible in the General section.

11. Fill in the following fields in the Location Information section:

See the information that displays on the Location Information

- a. Name field - Required. The location name.

- b. Address 1 field - Required. The address of the particular location.
- c. Address 2 field - Any additional address information.
- d. City field - Required. The city for this location.
- e. District field - The district for this location.
- f. State field - The state or region for this location.
- g. Postal Code field - Conditionally required if the country requires a postal code. The postal code for this location's main address.
- h. Country drop-down - Required. The two-letter country code for this location.
- i. Township field - The township for this location.
- j. Village field - The village for this location.
- k. Building Number field - The Partner location's building number.
- l. Floor Number field - The Partner location's floor number.
- m. 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.
- n. Plant Number field - The Partner location's plant number.
- o. 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.
- p. Fax field - The Partner location's fax number.
- q. Company Email field - The Partner location's main email address.
- r. Company Phone field - The Partner location's phone number.
- 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).

12. Fill in the following fields in the Regulatory contact section:

- a. Name field - The name of the regulatory contact.
- b. Title field - The regulatory contact's title.
- c. Email field - The regulatory contact's email address.

d. Phone field - The regulatory contact's phone number.

13. Select the Add **+** icon in the Identifiers section and fill in the following fields:

- a. Type drop-down - The identifier type used for this Partner.
- b. Value field - The value associated with the identifier type.
- c. Primary ID switch - The primary identifier used by the company. Each company must have at least one identifier type and value combination. One identifier must be designated as the primary identifier, and only one primary identifier is allowed per company. TraceLink uses the primary identifier to match future updates or imports to the correct entity in the TraceLink Network.
 - Yes - The identifier is the primary identifier for this company.
 - No - The identifier is *not* the primary identifier for this company.
- d. Select Apply.

The updated identifier is added to the Identifiers table.

e. Select the Add **+** icon to add another identifier Type drop-down and Value field.

14. Select the Add **+** icon in the Licenses section and fill in the following fields:

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




The license is saved to the Partner Location.

15. Select the Save  button.

The location information, regulatory contact, identifier, and license are saved

to the Partner Location.

Tips

- One of the identifiers must be marked as the primary identifier.
- In the Identifiers and Regulatory Licenses sections, do one of the following:
 - Select the Add  icon to add the a new identifier or license.
 - Select the Remove  icon to delete an identifier or license.
 - Select the Edit  icon to edit an identifier or license.



Use the same icons available at the top of the screen to perform these actions.

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