TRACELINK UNIVERSITY

Establish your company

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

Access to establishing your company

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 RolesMaster Data Roles.

Set up your headquarters

Set up your company profile for the first time by adding your company's master data. The company profile needs to be set up before adding or editing any other master data.

View and Edit your headquarters' information

1. Select the Main Menu icon.
2. Select Master Data in the main menu.
3. Select My Company from the left menu.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

4. Select Headquarters from the left menu.

5. On the Headquarter Details screen, view the following fields in the General section:

    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. The TraceLinkID cannot be changed once it is assigned by TraceLink.

    b. In the Business Type (The type of business that this company conducts) field, view the following fields:

See the information that displays on the Business Type

- 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 known 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).

© TraceLink Inc. 2009 - 2025 All Rights Reserved

- 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.

6. In the Headquarters Information section, view the following fields:

See the information that displays on the Headquarters Information

a. Name field – Required. The name of the company.
b. Address 1 field – Required. The address of the company.
c. Address 2 field – Any additional address information.
d. City field – Required. The city for this company.
e. District field – The district for this company.
f. State field – The state or region for this company.
g. Postal Code field – Conditionally required if the country requires a postal code. The postal code of the company's main address.
h. Country drop-down – Required. The two-letter country code where the company is located.
i. Township field – The township where the company is located.
j. Village field - The village where the company is located.
k. Building Number field – The company's building number.
l. Floor Number field – The company's floor number.
m. House Number field – The identifying number of the building, house, or unit (e.g. 14B) for the company. House numbers are only separated from the street address for addresses in China.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

n. Plant Number field – The company's plant number.
o. Premises Code field – The internal identifier associated with this company. For example, a company with 4 locations in the city of Mumbai that internally refers to the 4th location as MUM4.
p. Fax field – The company's fax number.
q. Company Email field – The company's main email address.
r. Company Phone field – The company's phone number.
s. Company URL field – The company's website.
t. 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).
u. Business Logo field – The company’s logo. Select the hyperlink or the download icon to download the logo.

7. In the Regulatory Contact section, view the following fields:

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.

8. In the Identifiers section, view the following fields:

a. Type drop-down – The identifier type used for this company.
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.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

9. Select the Edit  button to edit Headquarters Details.

10. On the Headquarter Details screen, edit the following fields in the General section:

    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. The TraceLinkID cannot be changed once it is assigned by TraceLink.

    b. The Business Type (The type of business that this company conducts) can be edited in the General section:

See the information that displays on the Business Type

- 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 known 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.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

- 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.

11. In the Headquarters Information section, edit the following fields:

See the information that displays on the Headquarters Information

a. Name field – Required. The name of the company.
b. Address 1 field – Required. The address of the company.
c. Address 2 field – Any additional address information.
d. City field – Required. The city for this company.
e. District field – The district for this company.
f. State field – The state or region for this company.
g. Postal Code field – Conditionally required if the country requires a postal code. The postal code of the company's main address.
h. Country drop-down – Required. The two-letter country code where the company is located.
i. Township field – The township where the company is located.
j. Village field – The village where the company is located.
k. Building Number field – The company's building number.
l. Floor Number field – The company's floor number.
m. House Number field – The identifying number of the building, house, or unit (e.g. 14B) for the company. House numbers are only separated from

© TraceLink Inc. 2009 - 2025 All Rights Reserved

the street address for addresses in China.

n. Plant Number field – The company's plant number.
o. Premises Code field – The internal identifier associated with this company. For example, a company with 4 locations in the city of Mumbai that internally refers to the 4th location as MUM4.
p. Fax field – The company's fax number.
q. Company Email field – The company's main email address.
r. Company Phone field – The company's phone number.
s. Company URL field – The company's website.
t. 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).
u. Business Logo field – The company’s logo. Select the hyperlink or download icon to download the logo. Drag and drop a file to upload or select the browse link to upload the image. Select the remove icon to remove the logo.

12. In the Regulatory Contact section, edit the following fields:

    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 identifier you want to edit in the Identifiers section.

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

    a. Type drop-down – The identifier type used for this company.
    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

© TraceLink Inc. 2009 - 2025 All Rights Reserved

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.

15. Select the Save  button.

The headquarters and identifiers information are saved to the Company. Continue to Manage company Locations to add the company locations where products are produced, shipped, or received. If a company location is not required, proceed to the Define Partners or Set up products to add Partner or product master data.

Tips

- To remove a business type, view the company master data and select the Remove ✕ icon to remove the business type.
- In the Identifiers section, do one of the following:
  - Select the Add + icon, to add the a new identifier.
  - Select the Remove − icon to delete identifier.
  - Select the Edit  icon to edit an identifier.

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

© TraceLink Inc. 2009 - 2025 All Rights Reserved

actions.

Manage company locations

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

Add company locations

1. Select the Main Menu icon.
2. . Select Master Data in the main menu.
3. Select My Company from the left menu.
4. Select Locations from the left menu.
5. Select the New + New button.
6. On the New Location screen, fill in the following fields in the Location Information section:
    a. Name field – Required. The location name.
    b. Status drop-down – Required. The company'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 and fill in the following fields:
    a. Type drop-down – The identifier type used for this company.
    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

© TraceLink Inc. 2009 - 2025 All Rights Reserved

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 in the Identifiers section to add another Type drop-down and Value field.

8. Select the Save button.

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

1. To add details for the new location, select the Name link in the results table.

1. Select the Edit button.

2. Ensure that Company Name - Primary ID, TraceLink ID - Linking Enabled, Status, and Business Type are visible in the General section.

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

See the information that displays on the Location Information

a. Location 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.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

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. Building Number field – The company location's building number.
k. Floor Number field – The company location's floor number.
l. 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.
m. Plant Number field – The company location's plant number.
n. Premises Code field – The internal identifier associated with this location. For example, a company with 4 locations in the city of Mumbai that internally refers to the 4th location as MUM4.
o. Fax field – The company location's fax number.
p. Company Email field – The company location's main email address.
q. Company Phone field – The company location's phone number.
r. Company URL field – The company location's website.
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. Business Logo field – The company’s logo. Select the hyperlink or download icon to download the logo. Drag and drop a file to upload or select the browse link to upload the image. Select the remove icon to remove the logo.

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

a. Name field – The name of the regulatory contact.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

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.

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

   Fill in the following fields in the New Identifier section:

   a. Type drop-down – The identifier type used for this company.
   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.

3. Select the Add + icon in the Regulatory Licenses section to add a new License.

   Fill in the following fields in the Regulatory Licenses section:

   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.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

d. Number field – Required. The regulatory license's number.

4. Select the Save  button.

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

Tips

- Select the Save and New  icon to save the new location and add another.
- In the Identifiers and Regulatory Licenses sections, do one of the following:
  - Select the Add + icon to add a new identifier or regulatory license.
  - Select the Remove − icon to delete an identifier or a regulatory license.
  - Select the Edit  icon to edit an identifier or a regulatory license.

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

Import company locations

Import company locations data using a CSV file.

1. Select the Main Menu icon.
2. Select My Company from the left menu.
3. Select Locations from the left menu.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

4. Select the Import button on the top right corner of the screen to import the Company Locations.

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 present 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 – Required. The value associated with the selected Primary Identifier Type. Used to uniquely identify the company location record.

    - Primary Identifier Type field – Required. The type of identifier (e.g., GLN, DUNS) paired with the value to form the unique location record key.

    - Location Name field – Required. The human-readable name of the company location. Required in the first row of each record.

    - Business Type field – Indicates the type of business operation associated with the company location.

    - Identifier Type field – Required. The type of identifier used for the location (e.g., GLN, DUNS). Part of the identifiers array and used along with Identifier Value and Is Primary. Required when any identifier data is

© TraceLink Inc. 2009 - 2025 All Rights Reserved

provided.

- Identifier Value field – Required. The value associated with the Identifier Type. Required when providing identifier data.
- Is Primary field – Required. Indicates whether the identifier is the primary one for the location. Values must be Yes or No.
- Identifier Action field – 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 – Required. Indicates the data status of the location. Allowed values: Active or Inactive.
- Address 1 field – Primary street address of the company location.
- Address 2 field – Additional address information such as suite or unit number.
- City field – City where the company location is situated.
- District field – Administrative district or area of the location.
- State or Region field – State, province, or region of the location.
- Postal Code field – ZIP or postal code of the location.
- Country field – Country where the company location operates.
- Building Number field – Identifier for the building within the address.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

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

© TraceLink Inc. 2009 - 2025 All Rights Reserved

- Regulatory Contact Email – Email address of the regulatory contact.
- Regulatory Contact Phone field – Phone number of the regulatory contact.
- Regulatory License Agency field – Regulatory authority issuing the license.
- Regulatory License Country field – Country where the regulatory license is issued.
- Regulatory License State or Region field – State or region issuing the license.
- Regulatory License Number field – Official regulatory license or permit number.
- Regulatory License Action field – 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.

1. Select Apply.

The company locations data is imported in order to exchange master data.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

For more information about master data import use cases and success or failure scenarios, see FAQ's 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 company locations master data

Export and download a CSV file with company location master data.

1. Select the Main Menu icon.
2. Select Master Data in the main menu.
3. Select My Company from the left menu.
4. Select Locations from the left menu.
5. Select the Export button to generate and export the company location master data file.

   A notification displays when the file is ready.

1. Select the notification icon.
2. In the notifications list, select the View Details Link of your import.
3. In the Switch Tabs dialog box, select the Switch to open the Imports and Exports tab.
4. In the **Export Details** screen, select the Import/Export File link or the Download icon to download the exported company locations.

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

- Primary Identifier Value field – Required. The value associated with the selected Primary Identifier Type. Used to uniquely identify the company location record.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

- Primary Identifier Type field – Required. The type of identifier (e.g., GLN, DUNS) paired with the value to form the unique location record key.
- Location Name field – Required. The human-readable name of the company location. Required in the first row of each record.
- Business Type field – Indicates the type of business operation associated with the company location.
- Identifier Type field – Required. The type of identifier used for the location (e.g., GLN, DUNS). Part of the identifiers array and used along with Identifier Value and Is Primary. Required when any identifier data is provided.
- Identifier Value field – Required. The value associated with the Identifier Type. Required when providing identifier data.
- Is Primary field – Required. Indicates whether the identifier is the primary one for the location. Values must be Yes or No.
- Identifier Action field – 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 – Required. Indicates the data status of the location. Allowed values: Active or Inactive.
- Address 1 field – Primary street address of the company location.
- Address 2 field – Additional address information such as suite or unit number.
- City field – City where the company location is situated.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

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

© TraceLink Inc. 2009 - 2025 All Rights Reserved

- Tax Registration Code field – Tax identification or registration number for the location.
- Regulatory Contact Name field – Name of the primary regulatory contact person.
- Regulatory Contact Title field– Job title of the regulatory contact.
- Regulatory Contact Email – Email address of the regulatory contact.
- Regulatory Contact Phone field – Phone number of the regulatory contact.
- Regulatory License Agency field – Regulatory authority issuing the license.
- Regulatory License Country field – Country where the regulatory license is issued.
- Regulatory License State or Region field – State or region issuing the license.
- Regulatory License Number field – Official regulatory license or permit number.
- Regulatory License Action field – 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.

Tips

- From the Main Menu icon, select View Imports and Exports to view the

© TraceLink Inc. 2009 - 2025 All Rights Reserved

company locations export details on a separate screen or download the exported files.

Allow linking

Master Data Administrator or Company Data Manager must allow linking for a location before Application Administrators can link those locations to a network or app. Master Data Administrator or Company Data Manager can link their internal location to another company location or a trade partner who owns a TraceLink Network can link to a specific location within the company. For example, a trade partner who also owns a TraceLink Network can link to a specific location within your company to set up recall locations.

1. Select the Main Menu icon.
2. Select Master Data in the main menu.
3. Select My Company from the left menu.
4. Select Locations from the left menu.
5. Filter to find your company's location record and the associated identifier and address.
6. Select the Allow Linking icon.

   A notification displays when the linking is completed.

Filter, view, and edit company location

1. Select the Main Menu icon.
2. Select Master Data in the main menu.
3. Select My Company from the left menu.
4. Select Locations from the left menu.
5. Select the Filter 

button to find the company location.
6. Fill in one or more of the following fields to filter the results:

© TraceLink Inc. 2009 - 2025 All Rights Reserved

a. Name – The location name.

b. Status – The status of the company’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.

c. Identifiers - The identifier type used for this company location.

d. Licenses - The regulatory license for the company.

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 Name hyperlink in the results table.

9. Select the Edit 

button.

10. Fill in one or more fields in the General section:

    a. Company Name - Primary Identifier - Name of the company.
    b. TraceLink ID - Linking Allowed - 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. The TraceLinkID cannot be changed once it is assigned by TraceLink.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

c. Status - Status of the location.
d. Business Type drop-down - Nature of company's operations.

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

See the information that displays on the Location Information

a. Location 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. Building Number field – The company location's building number.
k. Floor Number field – The company location's floor number.
l. 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.
m. Plant Number field – The company location's plant number.
n. Premises Code field – The internal identifier associated with this location. For example, a company with 4 locations in the city of Mumbai that internally refers to the 4th location as MUM4.
o. Fax field – The company location's fax number.
p. Company Email field – The company location's main email address.
q. Company Phone field – The company location's phone number.
r. Company URL field – The company location's website.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

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. Business Logo field – The company's logo. Select the hyperlink or download icon to download the logo. Drag and drop a file to upload or select the browse link to upload the image. Select the remove icon to remove the logo.

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 Identifiers section, select the identifier you want to edit.

14. Select the Edit icon in the Identifiers section to update:

    a. Type drop-down – The identifier type used for this company.
    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. The updated identifier is added to the Identifiers table.

15. In the Regulatory Licenses section, select the license you want to edit.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

16. Select the Edit icon in the Regulatory Licenses section to update:
    a. Agency field – The agency for the regulatory license.
    b. State or Region field – The state or region for the regulatory license.
    c. Country drop-down – The two-letter country code for the regulatory license.
    d. Number field – Required. The regulatory license's number.
17. Select the Save button.

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

Tips

- In the Identifiers and Regulatory Licenses sections, do one of the following:
    - Select the Add + icon to add a new identifier or regulatory license.
    - Select the Remove − icon to delete an identifier or a regulatory license.
    - Select the Edit icon to edit an identifier or a regulatory license.

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

- Add you company's location to edit or view your company's location master data on TraceLink.

© TraceLink Inc. 2009 - 2025 All Rights Reserved

Configure your company

Find my company's TraceLink ID

Every company and location within TraceLink has a unique TraceLink ID that can be used to link to apps and their networks instead of other identifiers (e.g. GLN, DEA, DUNS).

1. Select the Main Menu icon.
2. Select Master Data in the main menu.
3. Select My Company from the left menu.
4. Select Headquarters from the left menu.

The company's **TraceLink ID** displays in the General section.

Related Content



Modify your account

Modify your profile, define app settings, and enable inbox messages and notifications.
View More



Switch companies or environments

The OPUS Ensemble user experience allows you to switch between companies or environments that you have access to with the same user account (identified by an email) without logging into a separate URL.
View More



Navigate to help documentation and support

Select the Help Center icon in the header to access the one-stop-shop help center for

© TraceLink Inc. 2009 - 2025 All Rights Reserved

everything related to the network you are currently within (e.g.

View More

© TraceLink Inc. 2009 - 2025 All Rights Reserved