Organizational Relationships

The Organizational Relationships transaction is a master data message used to share structured information about organizational hierarchies, relationships, and identifiers between trading partners. It defines how companies, business units, and locations relate to one another—such as parent–subsidiary, company–location, or owner–partner relationships—and includes key data such as names, addresses, contacts, and identifiers like GLNs, DUNS numbers, or internal codes.

For more information about Organizational Relationships guidelines, see Organizational Relationship

Create and submit organizational relationships

Perform this task to create and submit new organizational relationships. Additionally, client can begin work on a organizational relationship and save it for completion at a later time.

Create and submit a new organizational relationship

1. Select the Main Menu icon.
2. Select My Networks in the header.
3. Select a [MPL Network] from the Select your Network drop-down in the header.
4. Select a Partner or Location (e.g. your entire company or a Link to a specific

Partner or internal location) in the header.

5. Select the Go button.
6. Select Operational Messages from the left menu.

   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

7. Select Organizational Relationships - Sender.
8. Select the New 

button.
9. On the New Organizational Relationship screen, fill in the following fields:
   a. Organizational Relationship Number field – A unique identifier assigned to the organizational relationship for tracking and reference.
   b. Organizational Relationship Date field – The date on which the organizational relationship was created or issued.
10. Select the Save 

button.

    The screen refreshes with the saved organizational relationship in the draft state and with the required sections populated.

11. Select the Edit 

button.
12. In the Transaction Information section, select Submitted from the Process Status drop drown.
13. In the Organizational Relationship Information section fill in the following fields:
    a. Organizational Relationship Number field – A unique identifier assigned to the organizational relationship for tracking and reference.
       This field auto populates the value entered New Organizational Relationship screen.
    b. Organizational Relationship Date field – The date on which the

organizational relationship was created or issued.

This field auto populates the value entered New Organizational Relationship screen.

c. Hierarchy Structure Type drop-down – A code identifying the type of organizational hierarchy being defined.
d. Action drop-down – A brief description stating the purpose of the transaction.

14. In the Reference Transactions section, select the Add + icon.
    a. In the New Reference Transaction panel, fill in the following fields under Reference Transaction Information:
        i. Transaction Type drop-down – The type of transaction.
        ii. Transaction Value type-ahead field – The unique identifier of the transaction.

            If the value does not match the available options, the value must be entered manually.
        iii. Transaction Date field - The transaction date.
    b. Select Apply.

       The new reference transaction line item is added to the transaction reference table.

15. In the Reference Dates section, select the Add + icon.
    a. In the New Reference Date panel, fill in the following fields under Reference Date Information:
        i. Referenced Date Type drop-down – Identifies the business meaning of the date associated with the organizational relationship.
        ii. Referenced Date Value field - The actual calendar date corresponding to the selected referenced date type.
    b. Select Apply.

       The new reference date line item is added date reference table. .

16. In the Sender and Receiver section, fill in the following group in the Sender Entity group:
    a. Company type-ahead field – The name of the company sending the organizational relationships. This field pulls from the Owner's company and location master data.

       The remaining Sender fields are auto populated with the values from the company or location's master data entry. If the name of the company is not present in the Owners master data, the company name must be entered manually.

    b. Address 1 field – The address of the particular location.
    c. Address 2 field – Any additional address information.
    d. Country drop-down – The two-letter country code with country name for this location.
    e. State field – The state or region for this location.
    f. City field – The city for this location.
    g. Postal Code field – The postal code for this location's main address.
    h. Contact Telephone Number field – The company or location's phone number.
    i. Contact Fax Number field – The company or location's fax number
    j. Contact Type drop-down - The type of contact associated with the organizational relationship.
    k. Contact Name field - The name of the individual associated with the organizational relationship.
    l. Contact Phone field - The phone number of the contact for follow-up or clarification..
    m. Contact Email field - The email address of the contact associated with the organizational relationship.
    n. Party ID Type drop-down – The identifier type used for this company or

location.

o. Party ID Value field – The value associated with the identifier type.

17. In the Sender and Receiver section, fill in the following group in the Receiver Entity group:
    a. Company type-ahead field – The name of the company receiving the organizational relationships. This field pulls from the Owner's company and location master data.

       The remaining Receiver fields are auto populated with the values from the company or location's master data entry. If the name of the company is not present in the Owners master data, the company name must be entered manually.

    b. Address 1 field – The address of the particular location.
    c. Address 2 field – Any additional address information.
    d. Country drop-down – The two-letter country code with country name for this location.
    e. State field – The state or region for this location.
    f. City field – The city for this location.
    g. Postal Code field – The postal code for this location's main address.
    h. Contact Telephone Number field – The company or location's phone number.
    i. Contact Fax Number field – The company or location's fax number
    j. Contact Type drop-down - The type of contact associated with the organizational relationship.
    k. Contact Name field - The name of the individual associated with the organizational relationship.
    l. Contact Phone field - The phone number of the contact for follow-up or clarification.
    m. Contact Email field - The email address of the contact associated with the

organizational relationship.

n. Party ID Type drop-down – The identifier type used for this company or location.
o. Party ID Value field – The value associated with the identifier type.

18. In the Party Identification section, select the Add + icon and fill in the following fields in the Address Entity group:
    a. Company Entity Type drop-down – The type of business party (excluding Sender and Receiver) associated with the business name.
    b. Company type-ahead field – The company responsible for warehouse location identifiers and address information. This field pulls from the Owner's company and location master data.

       The remaining Receiver fields are auto populated with the values from the company or location's master data entry. If the name of the company is not present in the Owners master data, the company name must be entered manually.

    c. Address 1 field – The address of the particular location.
    d. Address 2 field – Any additional address information.
    e. Country drop-down – The two-letter country code with country name for this location.
    f. State field – The state or region for this location.
    g. City field – The city for this location.
    h. Postal Code field – The postal code for this location's main address.
    i. Contact Telephone Number field – The company or location's phone number.
    j. Contact Fax Number field – The company or location's fax number
    k. Contact Type drop-down - The type of contact associated with the organizational relationship.
    l. Contact Name field - The name of the individual associated with

organizational relationship.

m. Contact Phone field - The phone number of the contact for follow-up or clarification.
n. Contact Email field - The email address of the contact associated with the organizational relationship.
o. Party ID Type drop-down – The identifier type used for this company or location.
p. Party ID Value field – The value associated with the identifier type.

19. In the Line Items section:

    a. Select the Add + icon and fill in the following fields under Line Item Information.
        i. Line field – The number to identify the line item by (e.g. 50).
        ii. Hierarchical Identifier field – An unique identifier defining this entity's position within the organizational hierarchy.
        iii. Hierarchical Parent Identifier field – Identifier of the parent entity associated with this organizational entity.
        iv. Hierarchical Level Code drop-down – The code indicating the hierarchical level of the entity (e.g., company, division, location).
        v. Hierarchical Child Code field – The Code indicating whether the entity has child entities in the hierarchy.
        vi. Line Notes field – Additional information about the organizational relationship line.
    b. Select Apply.

       The line item information is added.
    c. Select a line item information row and then select the branch icon and fill in the following fields in the Organization Entity Information panel:
        i. Company Entity Type drop-down – The identifies the type of organizational entity.

ii. Company type-ahead field – The company participating in the relationship. This field pulls from the Owner's company and location master data.

    If the name of the company is not present in the Owners master data, the company name must be entered manually.

iii. Address 1 field – The address of the particular location.
iv. Address 2 field – Any additional address information.
v. Country drop-down – The two-letter country code with country name for this location.
vi. State field – The state or region for this location.
vii. City field – The city for this location.
viii. Postal Code field – The postal code for this location's main address.
ix. Telephone field – The company or location's phone number.
x. Contact Type drop-down - The type of contact associated with the organizational relationship.
xi. Contact Name field - The name of the individual associated with the organizational relationship.
xii. Contact Phone field - The phone number of the contact for follow-up or clarification.
xiii. Contact Email field - The email address of the contact associated with the organizational relationship.
xiv. Party ID Type drop-down – The identifier type used for this company or location.
xv. Party ID Value field – The value associated with the identifier type.
xvi. Location Type field - The code identifying the type or classification of the location (e.g., site, warehouse, office)
xvii. Location Identifier field - An unique identifier used to reference the specific location within the organizational structure.

        xviii. Country Sub Division Code field - The code identifying the state, province, or other country subdivision associated with the location.
        xix. Status Action Code drop-down - The code indicating the maintenance action for the relationship (add, change, delete).
        xx. Maintenance Scope Type drop-down - The code defining the scope at which the relationship maintenance applies.
        xxi. Transaction Status Reason Code drop-down - The code providing the reason for the relationship status or change.

    d. Select Apply.

       The organization entity information line item is added.

    e. Select the line item information row drop down to view the organization entity information in a table.

    f. Select a organization entity information row and then select the branch icon and fill in the following fields in the Entity Reference Information panel:

        i. Referenced Transaction Type drop-down – The code identifying the type of related transaction.
        ii. Referenced Transaction Number field – Identifier of the transaction related to the organizational relationship.
        iii. Referenced Transaction Date field – The date the referenced transaction was created or became effective.
        iv. Referenced Date Type drop-down – The code indicating the business meaning of the referenced date.
        v. Referenced Date field – The calendar date corresponding to the referenced date type.
        vi. Referenced Date Time Period Format drop-down – The code defining the format or range of the referenced date or time period.
        vii. Time Zone field – The code or identifier specifying the local time zone applicable to the organization or location.

    g. Select Apply.

The entity reference information line item is added.

h. Select the organization entity information row drop down to view the entity reference information in a table.

20. In the Notes section, select the Add + icon to enter any additional comments or instructions.
21. To submit the organizational relationship:

    To save the organizational relationship in a Draft state and finish it later, ensure the Move To button is not selected and then select the Save Save button in the draft state.

    a. Select the Move To button at the top of the screen.

       The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

    b. Select the Save Save button.

       The organizational relationship is submitted.

Tips

- Select the Add + icon, to add a new line item, where available.
- Select the Delete − icon, to remove an individual line item, where available.
- Select the branch icon, to add a new line item in the inserted table, where available.
- New organizational relationships can also be created by selecting the New + New button on the Organizational Relationships Details screen for an

existing organizational relationship.

- Complete and submit a saved organizational relationship in the draft state.

Submit a draft organizational relationships

1. Select the Main Menu icon.
2. Select My Networks in the header.
3. Select a [MPL Network] from the Select your Network drop-down in the header.
4. Select a Partner or Location (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
5. Select the Go button.
6. Select Operational Messages from the left menu.
   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Organizational Relationships - Sender.
8. Select the Filter Filter button to find the organizational relationships in Draft state.
9. Select the Organizational Relationship Number link in the results table.
10. Select the Edit Edit button.
11. In the Transaction Information section, select Submitted from the Process Status drop drown.
12. Confirm the organizational relationships details and select the Edit icon associated with that line item to modify the fields if required.
13. Select the Move To button at the top of the screen.

    The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

14. Select the Save [Save] button.

    The organizational relationship is submitted.

Tips

- Select the organizational relationships row and then select the Delete icon on the top of the Search Organizational Relationships screen, to delete the organizational relationships in draft state.

A deleted transaction cannot be retrieved.

Search and view organizational relationships

Search for and view organizational relationships

Perform this task to search for and view the details of the organizational relationships sent or received by receivers or senders. Viewing the details of a organizational relationship enable receivers and senders to quickly access order information (e.g. the quantity for each line item in an order) in TraceLink without having to search through the actual B2B message.

1. Select the Main Menu icon.
2. Select My Networks in the header.
3. Select a [MPL Network] from the Select your Network drop-down in the header.
4. Select a Partner or Location (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
5. Select the Go button.

6. Select Operational Messages from the left menu.

   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

7. Select Organizational Relationships - Sender or Organizational Relationships - Receiver from the left menu.
8. Select the Filter Filter button.
9. Fill in one or more of the following fields to filter the results:

   a. Organizational Relationship Number field – A unique identifier assigned to the organizational relationship for tracking and reference.

   b. Organizational Relationship Date field – The date on which the organizational relationship was created or issued.

   c. State drop-down – The state of the organizational relationship:

      - Draft – The transaction is in the draft state.
      - Submit – The transaction has been created.
      - Processing – The application is getting ready to handle incoming transactions by doing some initial tasks, such as copying the files it receives.
      - Processed – The application changes the standard information into a format that is easy to use and specific to your transaction.
      - Preparing to Send – The application is getting ready to send out a transaction and is doing some initial tasks, like copying the necessary information for the process.
      - Sending –The application sends out business transactions to the buyer or supplier.
      - Sent – The transaction is successfully completed and shared with the receiving party.

   d. Receiver type-ahead – Displays only if the menu item is Sent Organizational Relationships in Organizational Relationships - Sender. The name of the company the organizational relationship was sent to.
      If the name of the company is not present in the Owners master data then the company's name must be entered manually.
   e. Sender type-ahead – Displays only if the menu item is Received Organizational Relationships in Organizational Relationships - Receiver. The name of the company the organizational relationship was received from.
      If the name of the company is not present in the Owner's master data then the company's name must be entered manually.
   f. Last Modified drop-down – The period of time in which the organizational relationship was last updated:
      - Today – The transaction was modified within the last few hours.
      - Yesterday – The transaction was updated within the past 24 hours.
      - Last Week – The transaction was modified in the last 7 days.
      - Last Month – The transaction was modified in the last 30 days.
      - Last 3 Months – The transaction was modified in the last 90 days.
      - Last 6 Months – The transaction was modified in the last 180 days.
      - Custom Range – Select a specific period of time that the transaction was modified in from the calendar.

10. Select Apply.

    A list of organizational relationships displays based on the filter results.

11. Select the link for the organizational relationship from the results table.

    The View Organizational Relationships screen displays.

12. To view all fields for each line item, select the View icon on the

Organizational Relationships Details screen.

Reprocess and Resubmit organizational relationships

Reprocess organizational relationships

After the organizational relationship is submitted, the user might encounter an error and the processed status will be set to Paused With Error. Use the following procedure to resolve any error messages encountered while submitting a organizational relationship.

1. Select the Main Menu icon.
2. Select My Networks in the header.
3. Select a [MPL Network] from the Select your Network drop-down in the header.
4. Select a Partner or Location (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
5. Select the Go button.
6. Select Operational Messages from the left menu.

   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

7. Select Organizational Relationships - Sender.
8. Select the Filter Filter button to find the organizational relationship in Processing, Processed, Preparing to Send, or Sending state.
9. Select the Organizational Relationship Number link in the results table.
10. View the following fields for error in the Transaction Information section:
    - Process Status - Displays the status of the submitted transaction.
    - Last Transaction Error - Displays the error message.
11. Select the Edit Edit button..

12. In the Transaction Information section, select Submitted from the Process Status drop drown.
13. Select the Save [Save] button.
    The organizational relationship request is moved from Processing state to Sending state indicating that the organizational relationship is submitted successfully.

⚠ Do not select the Move To button, as it will cause the transaction to skip a workflow state, preventing successful delivery.

Resubmit organizational relationships

If a transaction is successfully sent to a partner but an issue occurs on the partner's side (e.g. in their ERP system), the sender can avoid re-entering all the details by rolling back to a previous workflow state and resending the transaction, thus saving time and effort for both parties.

1. Select the Main Menu icon.
2. Select My Networks in the header.
3. Select a [MPL Network] from the Select your Network drop-down in the header.
4. Select a Partner or Location (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
5. Select the Go button.
6. Select Operational Messages from the left menu.
   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
7. Select Organizational Relationships - Sender.
8. Select a Organizational Relationship Number in Sent state.

9. Select the Edit [Edit] button.

   The state of the organizational relationship is automatically moved to Sending state.

10. Select the Move To button at the top of the screen.

    The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

11. Select the Save [Save] button.

    The organizational relationship is submitted.

The statues of the organizational relationship moves to Sent state.

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Select the Help Center icon in the header to access the one-stop-shop help center for everything related to the network you are currently within (e.g.

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