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 Administer menu item, which displays in the side menu of the Opus Platform. The company functionality available to users depends on the role they are assigned.

Master data roles

Role	Description
Full Access	Allows users to administer the Master Data solution that their company owns to edit the company profile, identifiers, and add and edit company locations information using the your company APIs. This user can enable linking to individual locations and view locations with the APIs.
Member - Expanded UI Access	Allows users to administer the Master Data solution that their company owns to filter and view the company profile, identifiers, and company locations information.

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

Set up your company profile

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.

Set up your profile information

1. Select Administration in the main menu.
2. Select My Company.
3. Fill in the following fields in the Company Information section:
    a. Name field – Required. The name of the company.
    b. 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.
4. Fill in the following fields in the Headquarters section:
    a. Address 1 field – Required. The address of the company.
    b. Address 2 field – Any additional address information.
    c. City field – Required. The city for this company.
    d. District field – The district for this company.
    e. Village field – The village where the company is located.
    f. 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.
    g. Township field – The township where the company is located.
    h. State or Region field – The state or region for this company.
    i. Postal Code field – Conditionally required if the country requires a postal code. The postal code of the company's main address.
    j. Country drop-down – Required. The two-letter country code where the

company is located.

k. Company Email field – The company's main email address.
l. Company URL field – The company's website.
m. Building Number field – The company's building number.
n. Plant Number field – The company's plant number.
o. Floor Number field – The company's floor number.
p. 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).
q. Address Object GUID field – The global identifier for the company's entire physical location assigned by the Russian Federation Information Address System (FIAS) (36 characters maximum using digits 0-9 and letters A-F).
r. 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.
s. Company Fax field – The company's fax number.
t. Company Phone field – The company's phone number.
u. Business Logo field – The image file with the company's logo which displays on the View Company Details screen. The maximum file size is 2 KB and it must be a .bmp, .jpg, .gif, or .png file.

5. Select the appropriate fields in the Business Type section:

   a. Business Type field – The type of business that this company conducts:
      - Carrying and Forwarding Agent – (CFA) The company facilitates the movement and transfer of goods. In India, CFAs are often involved in moving goods as interstate stock transfers.
      - Chemist – The company specializes in the composition of substances, may mix substances in preparation for dispensation, and has a shop selling medicines and cosmetics. Also 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).
- 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.

b. Select the Add ⊕ icon to add another Business Type drop-down.

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

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

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

    a. Type drop-down – Required. The identifier type used for this company.
    b. Value field – Required. The value associated with the identifier type.

c. Primary ID switch – Required. The primary identifier used by the company. One of the identifiers must be marked as the primary identifier and only one primary identifier is allowed. TraceLink uses the primary identifier to match any future updates or imports to the correct entity in the TraceLink Network. By default, the first identifier entered defaults to the primary identifier.
    - Yes – The identifier is the primary identifier for this company.
    - No – The identifier is *not* the primary identifier for this company.

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

8. Select Add.

   The headquarters, regulatory contact, and identifiers information is 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.

Manage company locations

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

Add company locations

1. Select Administration in the main menu.
2. Select My Company.
3. Select the Locations tab.
4. Select the Add ⊕ icon.

5. Make sure your Company Name, Primary ID, and TraceLink ID is displayed in the Add Company Location section.
6. Fill in the following fields in the Location Information section:
    a. Location 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.
    c. Address 1 field – Required. The address of the particular location.
    d. Address 2 field – Any additional address information.
    e. City field – Required. The city for this location.
    f. District field – The district for this location.
    g. Village field – The village for this location.
    h. House Number field – The identifying number of the building, house, or unit (e.g. 14B) for the location. House numbers are only separated from the street address for addresses in China.
    i. Township field – The township for this location.
    j. State or Region field – The state or region for this location.
    k. Postal Code field – Conditionally required if the country requires a postal code. The postal code for this location's main address.
    l. Country drop-down – Required. The two-letter country code for this location.
    m. Company Email field – The company location's main email address.
    n. Company URL field – The company location's website.
    o. Building Number field – The company location's building number.
    p. Plant Number field – The company location's plant number.
    q. Floor Number field – The company location's floor number.
    r. 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).

s. Address Object GUID field – The global identifier for the company's entire physical location assigned by the Russian Federation Information Address System (FIAS) (36 characters maximum using digits 0-9 and letters A-F).
t. 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.
u. Company Fax field – The company location's fax number.
v. Company Phone field – The company location's phone number.
w. Business Logo field – The image file with the company location's logo which displays on the View Location screen. The maximum file size is 2 KB and it must be a .bmp, .jpg, .gif, or .png file.

7. Select the appropriate fields in the Business Type section:

    a. Business Type field – The type of business that this company conducts:
        - Carrying and Forwarding Agent – (CFA) The company facilitates the movement and transfer of goods. In India, CFAs are often involved in moving goods as interstate stock transfers.
        - Chemist – The company specializes in the composition of substances, may mix substances in preparation for dispensation, and has a shop selling medicines and cosmetics. Also 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).
    - 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.
  b. Select the Add ⊕ icon to add another Business Type drop-down.

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

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

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

  a. Type drop-down – Required. The identifier type used for this company.
  b. Value field – Required. The value associated with the identifier type.
  c. Primary ID switch – Required. The primary identifier used by the company. One of the identifiers must be marked as the primary identifier and only one primary identifier is allowed. TraceLink uses the primary identifier to match any future updates or imports to the correct entity in the TraceLink Network. By default, the first identifier entered defaults to the primary identifier.
    - Yes – The identifier is the primary identifier for this company.

- No – The identifier is *not* the primary identifier for this company.

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

10. Fill in the following fields in the Regulatory Licenses section:
    a. Agency drop-down – The agency for the regulatory license.
    b. State or Region field – The state or region for this regulatory license.
    c. Country drop-down – The two-letter country code for the regulatory license.
    d. Number field – Required. The regulatory license's number.
    e. Select the Add icon to add another regulatory license field.
11. Select Add.

Tips

- To remove a business type, view the company location master data and select the Remove icon to remove the business type.

Allow linking

System Administrators must allow linking for a location before Application Administrators can link those locations to a network or app. A System Administrator 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 Administration in the main menu.
2. Select My Company.
3. Make sure the Locations tab is selected.
4. Filter to find your company's location record and the associated identifier and address.
5. Select the Allow Linking icon in the row for the location.
6. Select Allow.

The dialog closes and the company location can link to networks.

Export company locations master data

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

1. Select Administration in the main menu.
2. Select My Company.
3. Make sure the Locations tab is selected.
4. Select the Export icon to generate and export the company location master data file.

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

Tips

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

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

The element headers below are all required in the CSV file, in order, and separated by commas. The data in the individual cells can be empty.

- **Primary Identifier Value** – The primary value associated with the identifier type.
- **Primary Identifier Type** – The primary identifier type used for this company location.
- **Location Name** – The location name.
- **Business Type** – The type of business that this company's location conducts.
- **Identifier Type** – The identifier type used for this company.
- **Identifier Value** – The value associated with the identifier type.

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

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

Filter and view to find the company location

1. Select Administration in the main menu.
2. Select My Company.
3. Fill in one or more of the following fields on the Locations tab to filter the results:
    a. Location ID Type drop-down – Required. The identifier type used for this company location.
    b. Location ID Value field – Required. The value associated with the identifier type.
    c. Location Name field – Required. The location name.
4. Select Show Additional Filters and fill in one or more of the following fields to further filter the results:
    a. Regulatory Licenses field – The regulatory license for the company. It is possible to filter by multiple regulatory license values in a specific order (i.e. Agency, Country, Start or Region, Number).
        - Agency drop-down – The agency for the regulatory license.

- State or Region field – The state or region for this regulatory license.
- Country drop-down – The two-letter country code for the regulatory license.
- Number field – Required. The regulatory license's number.

b. Linking field – Specifies if a location can link to a network or an app.

c. Status field – The company location's building number.

5. Select Apply.

   The results display in the table.

   See the information that displays in the table

   - 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.
   - Location Name and ID – The location name and the identifier type used for this company location.
   - Address – The address of the company.
   - TraceLink ID – The company's TraceLink ID. After setting up the company profile and enabling locations, TraceLink automatically creates and adds the unique TraceLink ID for the company.
   - Linking – Specifies if a location can link to a network or an app.
     - Enabled – The company location can be linked to a network or an app.
     - Disabled – The company location cannot be linked to a network or an app.

6. Select the Location Name and ID hyperlink to open a specific location.

   The View Location screen displays.

Tips

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

Filter and view to find company location exports

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

   The results display in the table.

   #### See the information that displays in the table
   - Status – The status of the exported file.
   - Date Exported – The date the company location master data was exported from TraceLink.
   - Expires On – The date the company location master data expires.
   - Document – The link of the exported company location master data.
8. Select the exported document link to download the document.

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 Administration in the main menu.
2. Select My Company.

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

Related Content

Add B2B connections

Application Administrators can create and update Opus B2B connections using AS2, SFTP, and SMTP protocols.
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Application Administrators and members with standard access can filter and view the B2B messages for AS2 , SFTP and SMTP connection types.
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Configure TraceLink for Multienterprise Information Network Tower

Unlike other Opus apps, Multienterprise Information Network Tower must be configured on Track & Trace Services because Multienterprise Information Network Tower supports asynchronous messages, which are not yet available on the Opus Platform.
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