

# Oracle® Customers Online

Concepts and Procedures

Release 11*i*

February 25, 2002

Part No. A96178-01

**ORACLE®**

Part No. A96178-01

Copyright © 2002, Oracle Corporation. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information of Oracle Corporation; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent and other intellectual and industrial property laws. Reverse engineering, disassembly or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. Oracle Corporation does not warrant that this document is error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Oracle Corporation.

If the Programs are delivered to the U.S. Government or anyone licensing or using the programs on behalf of the U.S. Government, the following notice is applicable:

**Restricted Rights Notice** Programs delivered subject to the DOD FAR Supplement are "commercial computer software" and use, duplication, and disclosure of the Programs, including documentation, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement. Otherwise, Programs delivered subject to the Federal Acquisition Regulations are "restricted computer software" and use, duplication, and disclosure of the Programs shall be subject to the restrictions in FAR 52.227-19, Commercial Computer Software - Restricted Rights (June, 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and Oracle Corporation disclaims liability for any damages caused by such use of the Programs.

Oracle is a registered trademark, and *OracleMetaLink* is a trademark or registered trademark of Oracle Corporation. Other names may be trademarks of their respective owners.

---

---

# Contents

<b>Send Us Your Comments .....</b>	<b>vii</b>
<b>Preface.....</b>	<b>ix</b>
Intended Audience .....	ix
How To Use This Guide .....	ix
Documentation Accessibility .....	x
Other Information Sources.....	x
Do Not Use Database Tools to Modify Oracle Applications Data .....	xv
About Oracle .....	xvi
<b>1 Introduction to Oracle Customers Online</b>	
1.1 Overview .....	1-1
1.2 Understanding Trading Community Architecture .....	1-2
<b>2 The Home Tab</b>	
2.1 Overview of the Home Tab.....	2-1
2.2 Customer Search.....	2-2
2.3 Employee Search .....	2-3
2.4 Bookmarked Customers.....	2-3
2.5 Recent Customers.....	2-4
<b>3 The Customer Tab</b>	
3.1 Overview of the Customer Tab.....	3-1

3.2	Customer Home Page .....	3-1
3.3	Organization Page .....	3-2
3.4	Contact Page.....	3-3
3.5	Person Page .....	3-3

## 4 Using the Organization Overview

4.1	Organization Overview .....	4-1
4.2	Create Organization .....	4-3
4.3	Organization Details .....	4-6
4.3.1	Create an Address .....	4-8
4.4	Organization Contacts and Relationships .....	4-9
4.5	Organization Notes .....	4-9
4.6	Organization Interactions.....	4-10
4.7	Organization Attachments .....	4-10

## 5 Using the Person Overview

5.1	Person Overview .....	5-1
5.2	Create Person .....	5-2
5.3	Person Details.....	5-3
5.4	Person Relationships.....	5-5
5.5	Person Notes.....	5-5
5.6	Person Interactions .....	5-5
5.7	Person Attachments .....	5-6

## 6 Relationships

6.1	Contact Overview.....	6-1
6.2	Relationship Notes .....	6-2
6.3	Relationship Interactions.....	6-3
6.4	Relationship Attachments .....	6-4
6.5	Add Organization to Organization Relationship .....	6-4
6.6	Add Organization to Person Relationship.....	6-5
6.7	Add Person to Organization Relationship.....	6-6
6.8	Add Person to Person Relationship .....	6-7
6.9	Person to Organization Relationship Details .....	6-8

6.10	Organization to Organization Relationship Details .....	6-8
6.11	Person to Person Relationship Details .....	6-9

## 7 Reports

7.1	Overview of Reports .....	7-1
7.2	Customers by Industry Report .....	7-2
7.3	Customer Growth Report .....	7-2
7.4	Customers by Country Reports .....	7-2
7.5	Customers by State or Province Reports .....	7-2
7.6	Duplicate Organizations Report .....	7-2
7.7	Duplicate People Report .....	7-3



---

---

# Send Us Your Comments

**Oracle Customers Online Concepts and Procedures, Release 11*i***

**Part No. A96178-01**

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us via postal service:

Oracle Corporation  
CRM Content Development Manager  
500 Oracle Parkway  
Redwood Shores, CA 94065  
U.S.A.

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.



---

---

# Preface

## Intended Audience

Welcome to Release 11*i* of the Oracle Customers Online Concepts and Procedures.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Customers Online

If you have never used Oracle Customers Online, Oracle suggests you attend one or more of the Oracle Customers Online training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

## How To Use This Guide

This document contains the information you need to understand and use Oracle Customers Online.

- Chapter 1 provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

## Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Customers Online.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

### Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

### Related Documentation

Oracle Customers Online shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Customers Online.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

## **Documents Related to All Products**

### **Oracle Applications User's Guide**

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Customers Online (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

## **Documents Related to This Product**

### **Oracle Customers Online Implementation Guide**

Follow this guide to implement the application.

### **Oracle CRM Application Foundation Concepts and Procedures**

This document covers how to use components you can see from Oracle Customers Online pages such as notes and tasks.

### **Oracle Marketing Online Implementation Guide**

This guide provides more information on how to use the features available on the Data Manager tab.

### **Oracle Sales Online Implementation Guide**

This guide provides more information on how to use the features available on the Administration tab.

## **Installation and System Administration**

### **Oracle Applications Concepts**

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

## **Installing Oracle Applications**

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

## **Oracle Applications Supplemental CRM Installation Steps**

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

## **Upgrading Oracle Applications**

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

## **Maintaining Oracle Applications**

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

## **Oracle Applications System Administrator's Guide**

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

## **Oracle Alert User's Guide**

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

## **Oracle Applications Developer's Guide**

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

## **Oracle Applications User Interface Standards for Forms-Based Products**

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

## **Other Implementation Documentation**

### **Multiple Reporting Currencies in Oracle Applications**

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Customers Online. This manual details additional steps and setup considerations for implementing Oracle Customers Online with this feature.

### **Multiple Organizations in Oracle Applications**

This guide describes how to set up and use Oracle Customers Online with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Customers Online.

### **Oracle Workflow Guide**

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

### **Oracle Applications Flexfields Guide**

This guide provides flexfields planning, setup and reference information for the Oracle Customers Online implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

## **Oracle eTechnical Reference Manuals**

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

## **Oracle Manufacturing APIs and Open Interfaces Manual**

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

## **Oracle Order Management Suite APIs and Open Interfaces Manual**

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

## **Oracle Applications Message Reference Manual**

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

## **Oracle CRM Application Foundation Implementation Guide**

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

## **Training and Support**

### **Training**

Oracle offers training courses to help you and your staff master Oracle Customers Online and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want

to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

### **Support**

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Customers Online working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle*8i* server, and your hardware and software environment.

### **OracleMetaLink**

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

**Alerts:** You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

**Self-Service Toolkit:** You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

## **Do Not Use Database Tools to Modify Oracle Applications Data**

***Oracle STRONGLY RECOMMENDS that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.***

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL\*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you

may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL\*Plus and other database tools do not keep a record of changes.

## About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

---

---

# Introduction to Oracle Customers Online

This chapter discusses the key features of Oracle Customers Online. Sections in this chapter include:

- [Section 1.1, "Overview"](#)
- [Section 1.2, "Understanding Trading Community Architecture"](#)

## 1.1 Overview

Oracle Customers Online solves the 3 C's of customer data management: 1) customer data consolidation, 2) customer data cleanliness, and 3) customer data completeness. OCO is the first step to transforming any company into a true eBusiness, helping you to make real-time decisions with the confidence that the supporting data is accurate, timely, and complete.

Oracle Customers Online contains the following tabs:

- Home: Use the Home tab to quickly find and review the highlights of critical customer information.
- Customer: View your most important customer information on a single tab.
- Employee (See the *Oracle CRM Application Foundation Concepts and Procedures* for more information.)
- Calendar (See the *Oracle CRM Application Foundation Concepts and Procedures* for more information.)
- Reports
- Data Manager: Import customer information from a list. (See the *Oracle Marketing Online Implementation Guide* for more information.)

- **Administration:** Maintain classifications and relationships. (See the *Oracle Sales Online Implementation Guide* for more information.)

## 1.2 Understanding Trading Community Architecture

Oracle's Trading Community Architecture includes a database schema, API's, and data quality management utilities that allow you to capture and exploit valuable information about your commercial community: organizations, people, places, and the network of relationships that bring them together.

The Oracle Customers Online customer data model is based on the Trading Community Architecture, also referred to as TCA. Trading Community Architecture is an architecture designed to support complex trading communities. The goal of TCA is to provide the foundation for Oracle Enterprise Resource Planning (ERP), Customer Relationship Management (CRM), and eBusiness applications, (i.e., the entire eBusiness Suite). To do this, TCA strives to model all relationships within a "trading community". For example, the trading community of an appliance manufacturer may include suppliers, distributors, resellers, retailers, service providers, individual consumers, and business consumers. The appliance manufacturer not only wants to track relationships between itself and other entities within the trading community, it is also interested in relationships that other community members have with each other. The appliance manufacturer may not even have direct relationships with all the members of its trading community. However, it is important that the appliance manufacturer know about these entities and how they relate to others within the trading community.

Within Oracle Customers Online, all business entities are treated equally. This allows Business to Business, Business to Consumer, and mixed business models to be supported equally. People are both customers and business contacts. The definition of a business contact is a person who has a relationship (usually an employee/employer relationship) with the organization with which you are selling. The definition of an organization is a business entity that has attributes similar to an organization, e.g., an SIC (Standard Industry Code), DUNS (Dun & Bradstreet) number, or tax identification number.

The key entities in the Oracle Trading Community data model are listed below:

- **Party:** an entity that can enter into business relationships
  - Organization
  - Person
  - Group

- **Location:** a point in geographical space described by a street address
- **Party Site:** links a party with a location, indicating that party's usage of the location
- **Contact:** a person in the context of an organization, modeled as a relationship between an organization and a person
- **Party Relationship:** a binary relationship between two parties such as a partnership. For example, John Smith is a distinct person party and Oracle is a distinct organization party. John Smith at Oracle is also treated as a party of the type *relationship*.
- **Contact Point:** a means of contacting a party, for example, a phone number, e-mail address, or fax number
- **Customer Account:** models a customer relationship between the company deploying Oracle Applications and a party
- **Customer Account Site:** a party site that is used within the context of a customer account, for example, for billing or shipping purposes
- **Customer Account Contacts:** a party contact that is used within the context of a customer account



---

---

# The Home Tab

This chapter describes how to use the Home Tab. Sections in this chapter include:

- [Section 2.1, "Overview of the Home Tab"](#)
- [Section 2.2, "Customer Search"](#)
- [Section 2.3, "Employee Search"](#)
- [Section 2.4, "Bookmarked Customers"](#)
- [Section 2.5, "Recent Customers"](#)

## 2.1 Overview of the Home Tab

Use the Home tab to quickly find and review the highlights of critical customer information. The Home tab includes the following areas:

- Customer Search
- Employee Search
- Recent Items

The Recent Items bin displays a list of the last few customers you viewed in the application. The number of customers displayed depends on the profile option IMC: Maximum Number of "Recent Items" Displayed.

- Calendar
- Appointments
- Tasks
- Bookmarked Customers report
- Recent Customers report

- Actions

In the actions bin you can perform the following:

- Use Quick Note to enter a note for the customer.
- Use Territory Lookup to find the sales or service representatives assigned to the customer who matches the search criteria.

## 2.2 Customer Search

From the Home page you can quickly find a customer using one of the following parameters:

- Name: You can search for an organization or a person by name. The search for a person uses last name only.
- Primary e-mail address
- Phone number: Be sure to enter the number or partial number using the same format as that used in your database. For example, 1234567 will not match with 123-4567.
- Tax ID or Social Security Number
- Customer number: This is the number assigned to prospects or customers as the system-generated party number in Oracle's Trading Community Architecture.
- Account number: The old Accounts Receivable customer number is now the new Trading Community Architecture account number.
- System number: This number applies to data imported from legacy systems. It is the old ID number used in the legacy system.

Enter three or more characters in your chosen search parameter and click Go to obtain the search results. You can use the symbol % as a wild card, but it is automatically appended to the end of your entry. The search is not case sensitive.

The search results page appears with customers listed in alphanumeric order by the field used as a search parameter. If you select an e-mail address, then your e-mail application opens a new message window to send to the selected address. If you select a name, then the overview page opens for the selected name. If you select a location, then a map appears showing the location.

## 2.3 Employee Search

From the Home page you can search for an employee using any one of the following parameters:

- Name: You can enter a first name, last name, or the full name.
- Primary e-mail address
- Employee number

Enter three or more characters in your chosen search parameter and click Go to obtain the search results. You can use the symbol % as a wild card, but it is automatically appended to the end of your entry. The search is not case sensitive.

## 2.4 Bookmarked Customers

The Home page displays customers that you have manually bookmarked on the Organization, Person, and Contact Overview pages. The information appears in the following columns:

- Customer: Person names appear last name first. The column displays the complete organization names. Contacts appear last name, first name and then the organization name. Click the customer name to see the record in the relevant overview page.
- Location: The full identifying address of the party appears. Double-click an address to view a map of the location.
- Phone: This is the primary phone number for the party.

Click Edit to configure the number of records shown at a time in your report.

### Related Profile Options

The following profile options affect the Bookmarked Customers report:

- IMC: Maximum Number of Organization Bookmarks  
You can set this profile option at the site, application, and user levels. Default at the site level is ten. This profile option limits the total number of organizations a user can bookmark.
- IMC: Maximum Number of Contact Bookmarks  
You can set this profile option at the site, application, and user levels. Default at the site level is ten. This profile option limits the total number of contacts a user can bookmark.

- IMC: Maximum Number of People Bookmarks

You can set this profile option at the site, application, and user levels. Default at the site level is ten. This profile option limits the total number of people a user can bookmark.

## 2.5 Recent Customers

The Home page displays recently customers recently created by the logged in user. The information is displayed in the following columns:

- Customer: Person names appear last name first. The column displays the complete organization names. Contacts appear last name, first name and then the organization name. Click the customer name to see the record in the relevant overview page.
- Location: The full identifying address of the party appears. Double-click an address to view a map of the location.
- Phone: This is the primary phone number for the party.

The most recently created customer appears first in the list. Click Edit to configure the number of records shown at a time in your report.

### Related Profile Options

The following profile options affect the Recent Customers report:

- IMC: Method for Defining "Recently Created"

You can set this profile option at both the site level and the user level. If you want to define recent customers as those created since a certain number of days ago, then set this profile option to *date*. Set this profile option to *number* if you want to define a certain number of customers at a time as *recent*. Default at the site level is *number*.

- IMC: "Recently Created" Value Definition

You can set this profile option at the site, application, and user levels. If the profile option IMC: Method for Defining "Recently Created" has been set to *number*, then this profile means the total number of recent records to display. If the date method has been selected, then this profile specifies the number of days to go back from the system date. ("Recently Created" = System Date - Number of Days). This profile further defines recent creation for customers, organizations, contacts, and people.

- **IMC: Limit on Number of Recently Created Records to show by Date**

You can set this profile option at the site, application, and user levels. If the date method is being used, then this profile option limits the records displayed to the first X number. The default is 25 records.



---

---

## The Customer Tab

This chapter describes how to use the Customer Tab. Sections in this chapter include:

- [Section 3.1, "Overview of the Customer Tab"](#)
- [Section 3.2, "Customer Home Page"](#)
- [Section 3.3, "Organization Page"](#)
- [Section 3.4, "Contact Page"](#)
- [Section 3.5, "Person Page"](#)

### 3.1 Overview of the Customer Tab

View your most important customer information on a single tab. The Customer tab includes the following pages available from the menu:

- [Section 3.2, "Customer Home Page"](#)
- [Section 3.3, "Organization Page"](#)
- [Section 3.4, "Contact Page"](#)
- [Section 3.5, "Person Page"](#)

### 3.2 Customer Home Page

View your bookmarked organizations, persons, and contacts as well as your most recent customers on a single page. The Customer Home page displays the following:

- Customer Search

- Bookmarked Customers report
- Recent Customers report
- Customer Search
- Recent Items

The Recent Items bin displays a list of the last few customers you viewed in the application. The number of customers displayed depends on the profile option IMC: Maximum Number of "Percent Items" Displayed.

- Actions

In the actions bin you can perform the following:

- Use Quick Note to enter a note for the customer.
- Use Territory Lookup to find the sales or service representatives assigned to the customer who matches the search criteria.

### 3.3 Organization Page

Use the Organization page to view your bookmarked organizations as well as the most recently added organizations. Selecting a name on this page or in the search results opens the Organization Overview page. The Organization page displays the following:

- Organization Search

The search is the same as the Customer Search except that it is restricted to organizations.

- Bookmarked Organizations report

This report is the same as the Bookmarked Customers report except that it is restricted to organizations.

- Recent Organizations report

This report is the same as the Recent Customers report except that it is restricted to organizations.

- Organization Search

- Actions

In the actions bin you can perform the following:

- Use Quick Note to enter a note for the organization.

- Use Territory Lookup to find the sales or service representatives assigned to the customer who matches the search criteria.

## 3.4 Contact Page

Use the Contact page to view your bookmarked contacts as well as the most recently added contacts. Selecting a name on this page or in the search results opens the Contact Overview page. The Contact page displays the following:

- Contact Search

The search is the same as the Customer Search except that it is restricted to contacts and fields related to contacts.
- Bookmarked Contacts report

This report is the same as the Bookmarked Customers report except that it is restricted to contacts.
- Recent Contacts report

This report is the same as the Recent Customers report except that it is restricted to contacts.
- Contact Search
- Actions
  - In the actions bin you can use Quick Note to enter a note for the contact.

## 3.5 Person Page

Use the Person page to view your bookmarked people as well as the most recently added people. Selecting a name on this page or in the search results opens the Person Overview page. The Person page displays the following:

- Person Search

The search is the same as the Customer Search except that it is restricted to people and fields related to people.
- Bookmarked People report

This report is the same as the Bookmarked Customers report except that it is restricted to people.
- Recent People report

This report is the same as the Recent Customers report except that it is restricted to people.

- Person Search
- Actions

In the actions bin you can perform the following:

- Use Quick Note to enter a note for the person.

---

---

## Using the Organization Overview

This chapter describes how to view and update information about organizations. Sections in this chapter include:

- [Section 4.1, "Organization Overview"](#)
- [Section 4.2, "Create Organization"](#)
- [Section 4.3, "Organization Details"](#)
- [Section 4.4, "Organization Contacts and Relationships"](#)
- [Section 4.5, "Organization Notes"](#)
- [Section 4.6, "Organization Interactions"](#)
- [Section 4.7, "Organization Attachments"](#)

### 4.1 Organization Overview

The Organization Overview page displays detailed information about the organization you selected from a report or from search results. This page displays the following:

- **Bookmark this Organization:** Select if you want this organization to appear in your Bookmarked Customers and Bookmarked Organizations reports. Click Update to save your changes.
- **Overview Information:** Information includes address and high-level information such as total number of employees and annual revenue. Select the address to view a map of the location. Select the website to view the organization's website in a new browser window. Select the e-mail address to send an e-mail.

- **Contacts and Relationships:** Displays organizations and persons related to the currently displayed organization. Click Edit to customize the order of the columns. Select an address to view a map of the location. Select a party name to view the relevant overview page for the party. Select a relationship to go to view the organization to organization or person to organization relationship detail.
- **Notes:** Notes for the organization appear in chronological order, the latest note first. Click Edit to customize the order of the columns. Select the note to view the full text. Select the name of the person who created the note to see the Employee Overview page for that person.
- **Interactions:** Displays active interactions with the organization, the most recent interaction listed first. An interaction is any contact between the customer and a human or automated agent. Click Edit to customize the order of the columns. Select the customer name to view the related overview page. Select the employee name in the Created By column to see the Employee Overview page for that person.
- **Menu:** The menu includes the following options:
  - **Overview:** Opens the Overview page.
  - **Details:** Opens the Details page for the organization where you can update organization information and add addresses.
  - **Contacts and Relationships:** Opens the Contacts and Relationship page to show organizations, contacts, and persons related to the organization being viewed.
  - **Notes:** Opens the Organization Notes page displaying a list of all notes relating to the organization.
  - **Tasks:** Opens the Organization Tasks page displaying a list of tasks relating to the organization.
  - **Interactions:** Opens the Organization Interactions page displaying a list of interactions such as phone calls and orders placed.
  - **Attachments:** Opens the Organization Attachments page displaying a list of attachments relating to the organization.
  - **360 View:** You can view orders, invoices, service requests, installed base, campaigns, and events for the organization.

## 4.2 Create Organization

While you are adding relationships you can create the organization that you want to relate to the currently displayed person or organization. Use this procedure to create a new organization.

### Steps

1. From the Add Organization to Organization Relationship page or the Add Person to Organization Relationship page click **Create Organization**.
2. Enter the required information and optional information. See the table below for detailed descriptions of each field.

The following table describes the Create Organization fields. The page includes the flexfield *Party Information*.

**Table 4-1 Create Organization Fields**

Field	Required Field	Description
Organization	Yes	The organization name is a required field.
Organization Name Pronunciation	No	You can enter the organization name pronunciation.
Tax ID	No	Enter the tax identification code.
Email Addressbook	No	Enter the email address here or click the email address book to select another address.
Customer Category	No	Select customer category from the drop down list.
Annual Revenue	No	Select the currency from the drop down list. Enter the annual company revenue into the next field.
Fiscal Year End	No	Select the fiscal year end from the drop down list.
Web Site Address Book	No	Enter the organization's web site or click the web address book icon to select another party web address to display.
External/Internal	No	By default External is selected. Use Internal only if you are creating your organization.
Alias	No	Enter an organization alias.
Phonebook	No	Click the phonebook link to select another party phone number to display.

**Table 4-1 Create Organization Fields**

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Business Line	No	Enter a business line, if applicable.
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year the organization was established.

The following table describes fields in the Address section of Create Organization.

**Table 4-2 Address Fields**

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
Address Type	No	Select an address type from the list of values.
Address Line 1	Yes	Enter the organization address.
Address Line 2	No	Enter additional organization address information.
Address Line 3	No	Enter additional organization address information.
Address Line 4	No	Enter additional organization address information.
County	No	Enter in the county field.
Start Date	No	Select a start date by clicking the calendar icon and choosing a date.
Do Not Mail	No	Select the do not mail check box so that mail will not be sent to the address.
City	No	Enter in the city field.
State	No	Select from the drop down list.
Province	No	Select from the drop down list.
Postal Code	No	Enter in the postal code field.
Country	Yes	Select country from the drop down list.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

If you want to enter person relationships for the organization you just created, then you can add an existing person by entering the last name in the Add a Person field and clicking **Go**. You can create a relationship with a person, who does not exist in the database yet, by entering the required information directly into the fields. When you click Update, the person is automatically created in the database.

The following table describes fields in the Person Relationship section of Create Organization.

**Table 4-3 Person Relationship Fields**

Field	Required Field	Description
Add a Person	Yes	If you are going to add a person relationship, enter the full or partial name and click the <b>Go</b> button to see if the person record already exists.
Erase	No	To erase a relationship from the summary table, click the erase icon.
Title	No	Select a title from the drop down list.
First Name	No	Enter the first name.
Last Name	Yes	Enter the last name.
Relationship	Yes	Select a relationship from the drop down list.
Phonebook	No	Select a phone number from the list of phone numbers by clicking the phonebook icon.
Email Addressbook	No	Select an email address by clicking the email address book icon.
Job Title	No	Enter a job title.
Decision Maker	No	Select the decision maker check box if the person is a decision maker.

The following table describes Organization Relationship fields in Create Organization.

**Table 4-4 Organization Relationship Fields**

Field	Required Field	Description
Add an Organization	Yes	If you are going to add an organization relationship, enter the full or partial name and click <b>Go</b> to see if the organization already exists.
Erase	No	To erase a relationship from the summary table, click the erase icon.
Relationship	Yes	Select a relationship from the drop down list.
Related Organization	Yes	This field holds the name of the related organization.
Start Date	Yes	Select a start date by clicking the calendar icon and choosing a date.
End Date	No	Select an end date by clicking the calendar icon and choosing a date.

- After you have completed entering the information, scroll to the bottom of the page, click **Create**.

You have successfully created an organization when the Organization Detail page opens. The organization number is generated by the system.

## 4.3 Organization Details

You can view and update information for the organization in the Organization Details page reached by selecting Details from the menu while you are on the Organization Overview page.

The following table describes the Organization Detail fields. The page also includes the flexfield *Party Information*.

Field	Required Field	Description
Organization	Yes	The organization name is a required field.
Organization Name Pronunciation	No	You can enter the organization name pronunciation.

<b>Field</b>	<b>Required Field</b>	<b>Description</b>
SIC Code Type	No	Select the Standard Industry Code Version from the drop down list.
DUNS Number	No	Dun & Bradstreet Number can be entered by users.
Tax ID	No	Enter the tax identification code.
Email Addressbook	No	Enter the email address here or click the email address book to select another address.
Customer Category	No	Select customer category from the drop down list.
Annual Revenue	No	Select the currency from the drop down list. Enter the annual company revenue into the next field.
Fiscal Year End	No	Select the fiscal year end from the drop down list.
Last Order Date	No	View the last order date.
Web Site Address Book	No	Click the link to view the organization's web site. Click the icon to add or edit web site addresses.
External/Internal	No	By default External is selected. Use Internal only if you are creating your organization.
Number	No	View the number assigned to the organization.
Alias	No	Enter an organization alias.
SIC Code	No	Select an SIC code by entering a partial four-digit code and clicking <b>Go</b> . Select from the search results which are a subset of the SIC codes.
External System Number	No	If so configured, this number comes from a legacy system. Click the External System Number link to view details in the legacy system.
Phonebook	No	Click the phonebook link to select another party phone number to display.
Business Line	No	Enter a business line, if applicable.
Total Employees	No	Enter the total number of employees.
Year Established	No	Enter the year the organization was established.

Field	Required Field	Description
Lifetime Value	No	View the sum of all the orders placed by the customer. This is a read only field.
Status	No	Select a status from the drop down list.

In the Addresses section you can edit information such as:

- Identifying Address: Main address used to identify the organization
- Address History: A history of all organizations and parties that have been at this address
- Map It: Map the address by clicking the icon
- Phonebook: Change the phone number by clicking the phone icon and selecting the correct phone number, click OK
- Type: Displays the address type indicated in the details
- Primary: Used to indicate primary address type across physical addresses

To select an existing address, enter a full or partial address in the Select an Existing Address field and click **Go**.

### 4.3.1 Create an Address

Follow these steps:

1. Click **Create Address**.
2. Select the country from the drop down list; this is a required field.  
The page will display fields according to the country that you have chosen.
3. Enter the appropriate address lines as they appear. This includes city, state, province, postal code, etc.
4. Select a start date by clicking the calendar icon, if you do not enter a date, the default is the current date.
5. Select an end date by clicking the calendar icon.
6. Optionally, select **Do Not Mail** and a reason for the contact restriction.
7. Select a status from the drop down list.
8. In the Address Types section, select Address Type from the drop down list.

9. Select the Primary check box to select the primary by usage type. For example, if the type is *Bill to* and it is marked as primary, it will be the primary *Bill to* address across all *Bill to* addresses that exist for this organization.
10. Select start and end dates for the address usage type.
11. Select a Status from the drop down list.
12. Click **Create**.

The Organization Detail page opens.

13. Click **Update**.

This page contains the flexfield *Party Site Information*.

## 4.4 Organization Contacts and Relationships

You can view people and organization relationships to the organization you view in the Organization Overview page by choosing Contacts and Relationships from the menu.

The page lists existing organization to organization relationships and person to organization relationships. Click the name of the organization or person to go to the related detail page.

Click the relationship name to view the Organization to organization or person to organization relationship detail.

In the Organization to Organization Relationship section, click Add Relationship to add an organization relationship.

In the Person to Organization Relationships section, click Add Relationship to add an organization to person relationship.

## 4.5 Organization Notes

To view all notes that relate to an organization, view the organization in the Overview page and choose Notes from the menu. You can filter the search for notes by selecting a note type or asking for notes for the last number of days or both and then click Apply. Click the Note to view details for the note. Click Create to create a new note. Click All Notes to view the text of all related notes.

### See Also

*Oracle CRM Application Foundation Concepts and Procedures*

## 4.6 Organization Interactions

View interactions that relate to an organization. An interaction is a contact between a customer, customer system or potential customer and a single human or automated agent. An interaction can be timed and has an outcome and result that can be tracked. Multiple interaction activities can occur during an interaction. A single interaction can include multiple forms of communication (media items) between the customer and agent.

View the organization in the Overview page and choose Interactions from the menu. All interactions appear. You can use any or all of the search criteria to filter the list by media type, source, activity type, start date, and end date.

The list of interactions includes the following fields:

- Customer: The organization, relationship, or person interacted with
- Created By: The internal employee or service agent that is interacting with a customer
- Date: The date that the interaction ended or was completed
- Source: The Oracle application which is the source for a particular interaction record
- Activity Type: An act performed by a human or automated agent as part of an Interaction such as answering a call, transferring a call, performing a balance inquiry, providing product information, providing pricing on a product, or upselling a product
- Media Type: A media type describes the broad classification that a media item can be grouped into. Media that fall into a single media type typically have the same media provider, queuing, and media controller. Examples of media types are e-mail, inbound telephone call, outbound telephone call, and faxes.

### See Also

*Oracle CRM Application Foundation Concepts and Procedures*

## 4.7 Organization Attachments

To view attachments that relate to an organization, view the organization in the Overview page and choose Attachments from the menu. A list of attachments appears. Select the attachment to view it. Select the description to view or update the attachment details. Click Create to create a new attachment for the organization.

**See Also**

*Oracle CRM Application Foundation Concepts and Procedures*



---

---

## Using the Person Overview

This chapter describes how to view and update person information. Sections in this chapter include:

- [Section 5.1, "Person Overview"](#)
- [Section 5.2, "Create Person"](#)
- [Section 5.3, "Person Details"](#)
- [Section 5.4, "Person Relationships"](#)
- [Section 5.5, "Person Notes"](#)
- [Section 5.6, "Person Interactions"](#)
- [Section 5.7, "Person Attachments"](#)

### 5.1 Person Overview

The Person Overview page displays detailed information about the person you selected from a report or from search results. This page displays the following:

- **Bookmark this Person:** Select if you want this contact to appear in your Bookmarked Customers and Bookmarked Persons reports. Click Update to save your changes.
- **Overview Information:** Information includes address and other information such as name pronunciation. Select the address to view a map of the location. Select the e-mail address to send an e-mail. Select the website to view the person's website in a new browser window.
- **Contacts and Relationships:** Displays organizations and persons related to the currently displayed person. Click Edit to customize the order of the columns. Select a party name to view the relevant overview page for the party. Select a

relationship to view Person to Organization Relationship Details or Person to Person Relationship Details. Select an address to view a map of the location.

- **Notes:** Notes for the person appear in chronological order, the latest note first. Click Edit to customize the order of the columns. Select the note to view the full text. Select the name of the person who created the note to see the Employee Overview page for that person.
- **Interactions:** Displays active interactions with the person, the most recent interaction listed first. An interaction is any contact point between the customer and a human or automated agent. Click Edit to customize the order of the columns. Select the customer name to view the related overview page. Select the employee name in the Created By column to see the Employee Overview page for that person.
- **Menu:** The menu includes the following options:
  - **Overview:** Opens the Overview page.
  - **Details:** Opens the Person Details page.
  - **Contacts and Relationships:** Opens the Relationships page for the person.
  - **Notes:** Opens the Notes page for the person.
  - **Tasks:** Opens the Person Tasks page.
  - **Interactions:** Opens the Interactions page for the person.
  - **Attachments:** Opens the Attachments page for the person.
  - **360 View:** You can view orders, invoices, service requests, installed base, campaigns, and events for the person.

## 5.2 Create Person

While you are adding relationships you can create the organization that you want to relate to the currently displayed person or organization. From the Add Organization to Person Relationship or the Add Person to Person Relationship page, click Create Person.

First and last name, address, and state are required. You can also enter address and phone information, active start and end dates, and any mailing restrictions.

This page includes the flexfield *Party Information*.

## 5.3 Person Details

You can reach the Person Details page by selecting Details from the menu while you are viewing either the Contact Overview page or the Person Overview page. You can view and update detailed information about a person.

The following table describes the Person Details fields.

Field	Required Field	Description
Last Name	Yes	Enter the last name.
First Name	Yes	Enter the first name.
Preferred Name	No	Enter the preferred name.
Title	No	Select a title from the drop down list.
Suffix	No	Enter a suffix, such as Mr., Mrs., Ms., Dr.
Gender	No	Select gender from the drop down list.
Personal Phone Book	No	To change the phone number, click the phone book icon.
Lifetime Value	No	View the sum of all the orders placed by the customer. This is a read only field.
External System Number	No	If so configured, this number comes from a legacy system. Click the External System Number link to view details in the legacy system.
Last Name Pronunciation	No	Enter the pronunciation of the last name.
First Name Pronunciation	No	Enter the pronunciation of the first name.
Middle Name	No	Enter the middle name.
Second Title	No	Enter the second title, if desired.
Date of Birth	No	Select the date of birth by clicking the calendar icon and choosing a date.
Native Language	No	Select the native language from the drop down list.
Personal Email Address Book	No	Select an email address by clicking the email phonebook and choosing an address.

Field	Required Field	Description
Last Order Date	No	View the last order date.
Status	No	Select from the drop down list.

In the Personal Addresses section you can edit information such as:

- Identifying Address: Main address used to identify the person
- Address History: A history of all organizations and parties that have been at this address
- Map It: Map the address by clicking the icon
- Phonebook: Change the phone number by clicking the phone icon and selecting the correct phone number, click OK
- Start Date: Select the start date by clicking the calendar icon and selecting a date from the calendar
- End Date: Select the end date by clicking the calendar icon and selecting a date from the calendar
- Status: Displays the status indicated in the details
- Type: Displays the address type indicated in the details
- Select an Existing Address: Enter a full or partial address and click **Go**
- Create Address: To create an address, click **Create Address**

In the Product Interests section you can edit information about what product areas a person is interested in, such as:

- Product: Select a product from the drop down list
- Comments: Enter comments directly into the comments field

In the Personal Interests section you can edit information such as:

- Interest Type: Select an interest type from the drop down list
- Comments: Enter comments directly into the comments field

In the Restrictions section you can edit information such as:

- Restriction Type: Select a restriction type from the drop down list

- **Start Date:** Select a start date by clicking the calendar icon and choosing a date
- **End Date:** Select an end date by clicking the calendar icon and choosing a date
- **Reason:** Enter a reason into the field

To remove a product interest, personal interest, or restriction select the **Remove** check box and click **Update**.

## 5.4 Person Relationships

You can view people and organization relationships to the person you view in the Person Overview page by choosing Contacts and Relationships from the menu.

The page lists existing person-to-organization relationships and person-to-person relationships. Click the name of the organization or person to go to the related Organization Detail or Person Detail page.

Click the relationship name to view the person-to-person or person-to-organization relationship detail.

In the Person to Person Relationships section click Add Relationship to add a person-to-person relationship.

In the Person to Organization Relationships section click Add Relationship to add a person-to-organization relationship.

## 5.5 Person Notes

To view all notes that relate to a person, view the person in the Overview page and choose Notes from the menu. You can filter the search for notes by selecting a note type or asking for notes for the last number of days or both and click Apply. Click the Note to view details for the note. Click Create to create a new note. Click All Notes to view the text of all related notes.

### See Also

*Oracle CRM Application Foundation Concepts and Procedures*

## 5.6 Person Interactions

View interactions that relate to a person. An interaction is a contact between a customer, customer system or potential customer and a single human or automated agent. An interaction can be timed and has an outcome and result that can be

tracked. Multiple interaction activities can occur during an interaction. A single interaction can include multiple forms of communication (media items) between the customer and agent.

View the person in the Overview page and choose Interactions from the menu. All interactions appear. You can use any or all of the search criteria to filter the list by media type, source, activity type, start date, and end date.

The list of interactions includes the following fields:

- **Customer:** The organization, relationship, or person interacted with
- **Created By:** The internal employee or service agent that is interacting with a customer
- **Date:** The date that the interaction ended or was completed
- **Source:** The Oracle application which is the source for a particular interaction record
- **Activity Type:** An act performed by a human or automated agent as part of an Interaction such as answering a call, transferring a call, performing a balance inquiry, providing product information, providing pricing on a product, or upselling a product
- **Media Type:** A media type describes the broad classification that a media item can be grouped into. Media that fall into a single media type typically have the same media provider, queuing, and media controller. Examples of media types are e-mail, inbound telephone call, outbound telephone call, and faxes.

**See Also**

*Oracle CRM Application Foundation Concepts and Procedures*

## 5.7 Person Attachments

To view attachments that relate to a person, view the person in the Overview page and choose Attachments from the menu. A list of attachments appears. Select the attachment to view it. Select the description to view or update the attachment details. Click Create to create a new attachment for the organization.

**See Also**

*Oracle CRM Application Foundation Concepts and Procedures*

---

# Relationships

This chapter describes viewing, creating, and updating relationships. Sections in this chapter include:

- [Section 6.1, "Contact Overview"](#)
- [Section 6.2, "Relationship Notes"](#)
- [Section 6.3, "Relationship Interactions"](#)
- [Section 6.4, "Relationship Attachments"](#)
- [Section 6.5, "Add Organization to Organization Relationship"](#)
- [Section 6.6, "Add Organization to Person Relationship"](#)
- [Section 6.7, "Add Person to Organization Relationship"](#)
- [Section 6.8, "Add Person to Person Relationship"](#)
- [Section 6.9, "Person to Organization Relationship Details"](#)
- [Section 6.10, "Organization to Organization Relationship Details"](#)
- [Section 6.11, "Person to Person Relationship Details"](#)

## 6.1 Contact Overview

The Contact Overview page displays detailed information about the contact you selected from a report or from search results. This page displays the following:

- **Bookmark this Contact:** Select if you want this contact to appear in your Bookmarked Customers and Bookmarked Contacts reports. Click Update to save your changes.

- **Overview Information:** Information includes address and high-level information such as job title and primary role. Select the person's name to see the Person Overview page. Select the organization name to see the Organization Overview page. Select the address to view a map of the location.
- **Contact Points:** Displays how to reach the contact, such as phone numbers and e-mail address. Select the website to view the organization's website in a new browser window. Select the e-mail address to send an e-mail.
- **Contact Restrictions:** Displays restrictions including reason and dates for the contact restrictions.
- **Notes:** Notes for the contact appear in chronological order, the latest note first. Click Edit to customize the order of the columns. Select the note to view the full text. Select the name of the person who created the note to see the Employee Overview page for that person.
- **Interactions:** Displays active interactions with the contact, the most recent interaction listed first. An interaction is any contact between the customer and a human or automated agent. Click Edit to customize the order of the columns. Select the customer name to view the related overview page. Select the employee name in the Created By column to see the Employee Overview page for that person.
- **Menu:** The menu includes the following options:
  - **Overview:** Opens the Overview page.
  - **Details:** Opens the Person to Organization Relationship Details page for the person.
  - **Notes:** Opens the Relationship Notes page.
  - **Tasks:** Opens the Relationship Tasks page.
  - **Interactions:** Opens the Relationship Interactions page.
  - **Attachments:** Opens the Relationship Attachments page.

## 6.2 Relationship Notes

To view all notes that relate to a relationship, view the relationship in the Contact Overview page and choose Notes from the menu. You can filter the search for notes by selecting a note type or asking for notes for the last number of days or both and click Apply. Click the Note to view details for the note. Click Create to create a new note. Click All Notes to view the text of all related notes.

**See Also**

*Oracle CRM Application Foundation Concepts and Procedures*

## 6.3 Relationship Interactions

View interactions that relate to a relationship. An interaction is a contact between a customer, customer system or potential customer and a single human or automated agent. An interaction can be timed and has an outcome and result that can be tracked. Multiple interaction activities can occur during an interaction. A single interaction can include multiple forms of communication (media items) between the customer and agent.

View the relationship in the Contact Overview page and choose Interactions from the menu. All interactions appear. You can use any or all of the search criteria to filter the list by media type, source, activity type, start date, and end date.

The list of interactions includes the following fields:

- Customer: The organization, relationship, or person interacted with
- Created By: The internal employee or service agent that is interacting with a customer
- Date: The date that the interaction ended or was completed
- Source: The Oracle application which is the source for a particular interaction record
- Activity Type: An act performed by a human or automated agent as part of an Interaction such as answering a call, transferring a call, performing a balance inquiry, providing product information, providing pricing on a product, or upselling a product
- Media Type: A media type describes the broad classification that a media item can be grouped into. Media that fall into a single media type typically have the same media provider, queuing, and media controller. Examples of media types are e-mail, inbound telephone call, outbound telephone call, and faxes.

**See Also**

*Oracle CRM Application Foundation Concepts and Procedures*

## 6.4 Relationship Attachments

To view attachments that relate to a relationship, view the relationship in the Contact Overview page and choose Attachments from the menu. A list of attachments appears. Select the attachment to view it. Select the description to view or update the attachment details. Click Create to create a new attachment for the relationship.

### See Also

*Oracle CRM Application Foundation Concepts and Procedures*

## 6.5 Add Organization to Organization Relationship

You can add a relationship from one organization to another, such as parent and subsidiary, headquarters and division, partner and competitor.

### Prerequisites

At least one organization should exist in the database.

### Steps

Follow these steps to create a new organization to organization relationship:

1. View one organization in the Organization Overview page.
2. Select **Contacts and Relationships**.

The Organization Contacts and Relationships page displays all existing contacts and relationships for the organization.

3. In the Organization to Organization Relationship section, click **Add Relationship**.

The Add Organization to Organization Relationship page appears.

4. If the organization already exists, then perform the following steps:
  - a. In the Select an Organization field enter the name or partial name and click **Go**.

The search results page opens with the name and all addresses of the organization. Addresses are read-only.
  - b. From the Search Results page, select the organization for which you want to create a relationship.

- c. Click **Select**.
5. If the related organization does not exist in the database, then click **Create Organization** and follow the Create Organization procedure.
6. In the Relationship Information section, choose a **Relationship Type**.
7. Optionally, enter a start and end date, phone and e-mail information, and status. If a start date is not entered, the field will default to the current date when you save your work.
8. Enter a note about the newly created relationship.
9. Optionally, add other relationships for your note.
10. Click **Create**.

This page contains the flexfield *Party Relationship Information*.

## 6.6 Add Organization to Person Relationship

You can add an organization to person relationship such as a contact or employee.

### Prerequisites

The organization should exist in the database.

### Steps

Follow these steps to create a new organization to person relationship:

1. View the organization in the Organization Overview page.
2. Select **Contacts and Relationships**.

The Organization Contacts and Relationships page displays all existing contacts and relationships for the organization.
3. In the Person to Organization Relationship section, click **Add Relationship**.

The Add Organization to Person Relationship page appears.
4. If the person already exists, then perform the following steps:
  - a. In the Select a Person field enter the name or partial name and click **Go**.

The search results page opens with matching names and addresses.
  - b. From the Search Results page, select the person you want to relate to the organization.

- c. Click **Select**.
5. If the related person does not exist in the database, then click **Create Person** and follow the Create Person procedure.
6. In the Relationship Information section, choose a **Relationship Type**.
7. Optionally, enter a start and end date, phone and e-mail information, and status. If a start date is not entered, the field will default to the current date when you save your work.
8. Enter a note about the newly created relationship.
9. Optionally, add other relationships for your note.
10. Click **Create**.

This page contains the flexfield *Party Relation*.

### **Guidelines**

Additional relationship types can be added by your system administrator.

## **6.7 Add Person to Organization Relationship**

You can add a person to organization relationship such as an employee or contact.

### **Prerequisites**

The person should exist in the database.

### **Steps**

Follow these steps to create a new person to organization relationship:

1. View the person in the Person Overview page.
2. Select **Contacts and Relationships**.  
The Person Relationships page displays all existing relationships for the person.
3. In the Person to Organization Relationship section, click **Add Relationship**.  
The Add Person to Organization Relationship page appears.
4. If the organization already exists, then perform the following steps:
  - a. In the Select an Organization field enter the name or partial name and click **Go**.



The search results page opens with matching names and addresses.

- b. From the Search Results page, select the person you want to relate.
  - c. Click **Select**.
5. If the related person does not exist in the database, then click **Create Person** and follow the Create Person procedure.
  6. In the Relationship Information section, choose a **Relationship Type**.
  7. Optionally, enter a start and end date, phone and e-mail information, and status. If a start date is not entered, the field will default to the current date when you save your work.
  8. Enter a note about the newly created relationship.
  9. Optionally, add other relationships for your note.
  10. Click **Create**.

This page contains the flexfield *Party Relationship Information*.

## 6.9 Person to Organization Relationship Details

Select the relationship on the Person Overview page, the Person Relationships page, the Organization Overview page, or the Organization Contacts and Relationships page to view the details of the relationship. If the related party is a person, then the person's name appears along with the start and end dates for the relationship, the person's phone and e-mail addresses, and the status of the relationship. The section includes the flexfield *Party Relationship Information*.

Other details include address and job title information for the person as well as the person's roles. The section includes the flexfield *Organization Contact Information*.

Addresses and restrictions for the related person also appear. Click Add Address to add a relationship address.

## 6.10 Organization to Organization Relationship Details

Select the relationship on the Organization Overview page or the Organization Contacts and Relationships page to view the details of the relationship. If the related party is an organization, then the organization name appears along with the start and end dates for the relationship, the organization's phone and e-mail addresses, the status of the relationship, and addresses for the related organization. Click Add Address to add a relationship address.

This page includes the descriptive flexfield *Party Relationship Information*.

## 6.11 Person to Person Relationship Details

Select the relationship type from the Person Relationships page to view the details of the relationship. If the related party is a person, then the person's name appears along with the start and end dates for the relationship, the person's phone and e-mail addresses, and the status of the relationship. Addresses for the related person also appear. Click Add Address to add a relationship address.

This page contains the flexfield *Party Relationship Information*.



This chapter describes the reports available in Oracle Customers Online. Sections in this chapter include:

- [Section 7.1, "Overview of Reports"](#)
- [Section 7.2, "Customers by Industry Report"](#)
- [Section 7.3, "Customer Growth Report"](#)
- [Section 7.4, "Customers by Country Reports"](#)
- [Section 7.5, "Customers by State or Province Reports"](#)
- [Section 7.6, "Duplicate Organizations Report"](#)
- [Section 7.7, "Duplicate People Report"](#)

## 7.1 Overview of Reports

You can run the following reports:

- Customers by Industry: Which industries are my customers in?
- Customer Growth: What is my total customer count over time?
- Organizations by Country: Which countries are my organizations in?
- People by Country: Which countries are my people in?
- Organizations by State or Province: Which states or provinces are my organizations in?
- People by State or Province: Which states or provinces are my people in?
- Duplicate Organizations: What percentage of my customer organizations are duplicates?

- Duplicate People: What percentage of my individual customers are duplicates?

## 7.2 Customers by Industry Report

The Customers by Industry report lists the industries and number of your customers in each industry and percentage of the total. The top five industries are also shown in a pie chart with all remaining industries included in the Other category.

## 7.3 Customer Growth Report

The Customer Growth report provides a line graph showing your cumulative number of customers by specified time period, such as monthly. The report also lists the time periods, number of cumulative customers in each time period, and the percentage of each time period to the whole. If you want to change time periods, then click Edit.

## 7.4 Customers by Country Reports

The Customers by Country report lists the countries and number of your people or organizations in each country and percentage of the total. The top five countries are also shown in a pie chart with all remaining countries included in the Other category.

## 7.5 Customers by State or Province Reports

The Customers by State or Province report lists the states or provinces within a specified country and number of your people or organizations in each state and percentage of the total. The top five states or provinces are also shown in a pie chart with all remaining states and provinces included in the Other category. To change countries, click Edit.

## 7.6 Duplicate Organizations Report

The Duplication Organizations report lists the number of organization customers that have duplicate records, categorized by frequency of duplicates. A bar chart shows the percentage of organizations that have no duplicates, percentage with one duplicate, and so on.

The report is created based on the following steps:

1. A concatenated string of organization name and associated primary address is created. For a person record, a concatenated string of the first, middle, and last name plus the associated primary address is created.
2. All records with similar sounding phonetic information are grouped and a count is determined to calculate how many Acme Corporations exist in the system (independent of whether they are captured as Acme or ACME).
3. A table is then compiled with a frequency column (meaning the number of times a record is repeated) and a count column that shows how many parties are possible duplicates.

## 7.7 Duplicate People Report

The Duplication People report lists the number of person customers that have duplicate records, categorized by number of duplicates. A bar chart shows the percentage of people that have no duplicates, percentage with one duplicate, and so on.

The report is created based on the following steps:

1. A concatenated string of organization name and associated primary address is created. For a person record, a concatenated string of the first, middle, and last name plus the associated primary address is created.
2. All records with similar sounding phonetic information are grouped and a count is determined to calculate how many Joe Smiths exist in the system (independent of whether they are captured as Joe or Joseph).
3. A table is then compiled with a frequency column (meaning the number of times a record is repeated) and a count column that shows how many parties are possible duplicates.

