Oracle® Customers Online

Concepts and Procedures

Release 11*i*

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Contents

5 Relationships

6 Using the Person Overview

7 Reports

8 Data Cleansing

Glossary

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

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Preface

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 Applications training classes available through Oracle University.
- The Oracle Applications graphical user interface.

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

How To Use This Guide

The *Oracle Customers Online Concepts and Procedures* contains the information you need to understand and use Oracle Customers Online. This user guide includes:

- Chapter 1 provides overviews of Oracle Customers Online.
- Chapter 2 describes how to use the Home tab.
- Chapter 3 describes how to use the Customers tab.
- Chapter 4 describes how to view and update information about organizations.
- Chapter 5 describes how to view, create, and update relationships.
- Chapter 6 describes how to view and update person information.
- Chapter 7 describes the reports available in Oracle Customers Online.
- Chapter 8 describes how to use the Data Cleansing tab.
- A glossary provides definitions of terms specific to Oracle Customers Online that are used in this guide.

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JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

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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** - Online help patches are available on MetaLink.
- **11*i* Features Matrix** - This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on MetaLink.
- **Readme File** - Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

Related Guides

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

You can read the guides 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.

Guides 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.

Guides Related to This Product

Oracle Customers Online Implementation Guide

Use this guide to learn how to implement Oracle Customers Online.

Oracle CRM Application Foundation User Guide

This document covers how to use various components in Oracle Customers Online, such as notes and tasks.

Oracle Marketing Online User Guide

This guide provides more information on functionality for campaigns and events that you can access from Oracle Customers Online.

Oracle Sales Online User Guide

This guide provides more information on functionality for organization and person accounts that you can access from Oracle Customers Online.

Oracle Trading Community Architecture Relationship Manager User Guide

Use this user guide to learn how to manage relationships among existing parties in the TCA Registry. You can view, create, and edit relationships, as well as view hierarchical relationships in a structural hierarchy. You can access Relationship Manager from the Customers tab.

Oracle Trading Community Architecture Third Party Data Integration User Guide

User this user guide to learn how to view and acquire third party information in the TCA Registry. The user guide describes purchasing third party data from D&B. You can access D&B integration from the Customers tab.

Oracle Trading Community Architecture Administration User Guide

Use this user guide to learn how to set up and administer relationships, classifications, Third Party Data Integration, and Data Sharing and Security. You also get access to set up Data Quality Management. These administration features are available from the Administration tab.

Oracle Marketing Online Implementation Guide

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

Oracle Trading Community Architecture Data Quality Management User Guide

Use this user guide to learn how to set up Data Quality Management for powerful search and duplicate identification functionality that Oracle Customers Online implements and leverages.

Oracle Trading Community Architecture Party Merge User Guide

Use this user guide to learn how to merge parties and their related entities in the TCA Registry. The Oracle Trading Community Architecture Party Merge User Guide describes how to set up and process party merge batches as well as how to identify merge errors.

Oracle Trading Community Architecture Oracle Customers Online XML Web Services User Guide

Use this user guide to learn how OCO XML Web Services enables application-to-application integration between the Oracle customer repository and legacy or third-party enterprise systems.

Oracle Trading Community Architecture API User Notes

Use these technical user notes to learn how to access the public TCA application programming interfaces (APIs). For each API, these user notes provide a description of the API, the PL/SQL procedure, and the Java method, as well as a table of the parameter descriptions and validations.

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 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.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

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 6*i* 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 Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

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 guide 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 Applications Message Manual

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

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 a complete set of training courses to help you and your staff master Oracle Customers Online and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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 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 Oracle8*i* server, and your hardware and software environment.

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

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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.

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1

Introduction to Oracle Customers Online

This chapter discusses the key features of Oracle Customers Online.

Overview

Oracle Customers Online solves the 3 C's of customer data management: 1) consolidation, 2) cleanliness, and 3) 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, as well as access employees and calendars.

  See also: *Oracle CRM Application Foundation User Guide*

- Customers - View your most important customer information on a single tab.
- Reports
- Data Cleansing - Merge duplicate parties and cleanse single parties.
- Import - Import customer information from a list.

  See also: *Oracle Marketing Online Implementation Guide*

- Administration - Adminster classifications, relationships, Data Quality Management, Third Party Data Integration, and Data Sharing and Security, and access concurrent requests.

  See also: Introduction, *Oracle Trading Community Architecture Administration User Guide*

The Data Cleansing, Import, and Administration tabs are available only if you have the appropriate responsibilities.

See also: Setting Up Employees as Users, *Oracle Customers Online Implementation Guide*

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 as well as between two people.
- **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

2

The Home Tab

This chapter describes how to use the Home Tab.

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.

- 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.
  - Create Organization
  - Create Person
  - Create Contact

- Calendar
- Tasks
- Appointments
- External Search
- Bookmarked Customers
- Recently Created Customers

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.
- 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 in a new window.

Employee Search

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

- Name: You can enter first name or last name.
- 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.

Bookmarked Customers

The Home page displays customers that you have manually bookmarked on the Organization, Person, and Contact Overview pages. The Bookmarked Customer List is created bookmarked organizations, contacts, and people. 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 relevant overview page.
- Location: The full identifying address of the party appears. Double-click an address to view a map of the location in a new window.

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 list on the application home page and the Customers tab home page:

- 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.

  By default, the total number of bookmarked customers that can be displayed is 30.

See Also

- Organization Overview
- Contact Overview
- Person Overview

Recently Created Customers

The Home page displays customers recently created by the 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.

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 records recently created by the user. 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.

See Also

- Organization Overview
- Contact Overview
- Person Overview

3

The Customers Tab

This chapter describes how to use the Customers Tab.

Overview of the Customers Tab

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

- Customer Home page
- Organization page
- Contact page
- Person page

The Customers tab also has the:

- Relationships subtab, which lets you view, create, and manage relationships, as well as view and manage hierarchical relationships in a visual hierarchy. The relationships here are the same as the ones you manage in other tabs in Oracle Customers Online.

  See also: Introduction, *Oracle Trading Community Architecture Relationship Manager User Guide*

- Enrichment subtab, which lets you purchase and view information from D&B.

  See also: Introduction to D&B, *Oracle Trading Community Architecture Third Party Data Integration User Guide*

Customer Home Page

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

- 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 "Recent 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.
  - Create Organization
  - Create Person
  - Create Contact
- External Search
- Bookmarked Customers
- Recently Created Customers

See Also

Customers Tab

Organization Page

Use the Organization page to view your bookmarked organizations as well as the most recently created 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.

- Recent Items

  This report is the same as the Recently Created Customers on the Oracle Customers Online Home Page, except that it is restricted to organizations.

- 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.

  – Create Organization

  – Create Person

  – Create Contact

- Bookmarked Organizations

  This list is the same as Bookmarked Customers on the Oracle Customers Online application Hone Page, except that it is restricted to organizations.

- Recently Created Organization

See Also

Customers Tab

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.

- Recent Items
- Actions
  - In the actions bin you can use Quick Note to enter a note for the contact.
  - Use Territory Lookup to find the sales or service representatives assigned to the customer who matches the search criteria.
  - Create Organization
  - Create Person
  - Create Contact
- Bookmarked Contacts

  This list is the same as Bookmarked Customers on the Oracle Customers Online Home Page, except that it is restricted to contacts.

- Recently Created Contacts

  This list is the same as Recently Created Customers on the Oracle Customers Online home Page, except that it is restricted to contacts.

See Also

Customers Tab

Person Page

Use the Person page to view your bookmarked people as well as the most recently created 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.

- Recent Items
- Actions

  In the actions bin you can perform the following:

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

- Bookmarked People

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

- Recently Created People

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

See Also

Customers Tab

4

Using the Organization Overview

This chapter describes how to view and update information about organizations.

Organization Overview

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

- 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.
  - Classifications: Opens the classifications page for the organization where you can assign class category and status to a given organization.
  - 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.
  - Accounts: Opens the Organization Accounts page displaying each account number for the organization.
  - 360 View: You can view campaigns, events, leads, opportunities, orders, invoices, installed base, and service requests for the person.
- 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.
- Visualize Relationships: Select Visualize Relationships to open a dynamic graphic representation of relationships to the organization.

- 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 personalize 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.

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	Click the email address book icon to enter or change and email 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	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.

Table 4-1 Create Organization Fields

Field	Required Field	Description
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.

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

Table 4-2 Address Fields

Field	Required Field	Description
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.

Table 4-2 Address Fields

Field	Required Field	Description
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 **Go** 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 **Go** 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.

3. 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.

Visualize Relationships

You can see relationship information in a graphic format that shows all relationships, no matter how complex, to the organization you viewed in the Organization Overview or to the person you viewed in the Person Overview. Click Visualize Relationships to see the graphical representation. Select a party to place that party at the center and view all relationships to that party. You can add a ring to also see relationships to a party located on a smaller relationship ring.

Change your view by selecting or deselecting the types of relationships you want to see, such as contacts. You can zoom the view out and in by clicking the plus and minus buttons beside Rings. Enlarge or reduce the text using the buttons next to Text. Choose how you want the party name labels displayed. You can also turn the link labels off and on.

Double-click a party to place that party at the center and view all relationships to that party.

Right-click a party to view information about the party in the overview page.

Visualization JSP Page

Place your cursor over a party name in the chart to view more information about the party. Change your view by selecting or deselecting the types of relationships you want to see, such as contacts, or change the font size or number of rings. Click Redraw Graph. After drilling down to various parties you can use the Refocus button to return to your original chart.

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.
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	Click the email address book icon to enter or change and email 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	No	Click the link to view the organization's web site. Click the icon to add or edit web site addresses.
Context Value	No	Select Context Value and click **Go** to show relevant fields.
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.This is the number assigned to prospects or customers as the system-generated party number in Oracle's Trading Community Architecture.

Field	Required Field	Description
Alias	No	Enter an organization alias.
SIC Code	No	Select an SIC code by entering a partial four-digit code and clicking **Go**. 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.
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:

- Primary: Used to indicate primary address type across physical addresses
- Type: Displays the address type indicated in the details
- 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**.

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

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 refresh, then display fields according to the country that you have chosen.
3. Enter the appropriate address lines as they appear. This includes city, postal code, etc. To choose a state or province, enter the appropriate location then click **Go**. Choose the correct item from the list provided.
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. Select a status from the drop down list.
7. Optionally, select **Do Not Mail** and a reason for the contact restriction.
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 **OK**.

This page contains the flexfield *Party Site Information*.

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.

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 User Guide

Organization Tasks

View a summary of tasks for the organization by displaying the Organization Overview page and selecting Tasks from the menu. All tasks for the organization appear. You can filter the list using one or more of the selection criteria such as task type and dates. The Tasks Summary displays the following fields:

- Task number: Click the number to see details for the task.
- Name of the task
- Type of task
- Task status
- Priority of the task
- Planned start and end dates
- Owner type for the task
- Owner of the task

If you want to create a new task for the organization, then click Create. To delete a task, select the Remove box and click Update.

See Also

Oracle CRM Application Foundation User Guide

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
- 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.
- 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.
- Date: The date that the interaction ended or was completed. Click the calendar icon to choose a date.
- 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.

See Also

Oracle CRM Application Foundation User Guide

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 User Guide

Organization Accounts

View a list of each account number for the organization by displaying the Organization Overview page and selecting Accounts from the menu. The list of accounts includes the date the account was established, the current balance, the account subcategory code, the tax code, and the date of suspension if the account is suspended. Click the account number to view account details. Click Create to create a new account.

See Also

Oracle Sales Online User Guide

Adding Classifications

You can use party classification scheme to classify parties or other business entities into various categories. A classification scheme includes a class category and a class code. The class category is a broad subject within which you can classify customers. The class code is a specific value of the category.

> **Note:** Sales applications support only one level of classifications. They do not support classification hierarchies.

For example, if you want to know the industry sector to which a party belongs, you can use a pre-defined class category, such as *SIC 1987*, which includes the 1987 version of standard industrial classification codes. You can also define your class categories for you own purposes. For example, you may define a class category to determine if there are any special business considerations, special pricing arrangements, or special terms for a party.

The database contains a number of classification schemes already set up for you. These are:

- 1987 SIC: The 1987 edition of the U.S. Industrial Classification Codes (SIC).
- 1977 SIC: The 1977 edition of the U.S. Industrial Classification Codes (SIC).
- 1972 SIC: The 1972 edition of the U.S. Industrial Classification Codes (SIC).
- NACE: General Industrial Classification of Economic Activities within the European Community (NACE, Revision 1).

Use this procedure to add classifications to an organization, person, or a relationship.

Prerequisites

Classifications must be set up in Sales Online Administration.

Steps

1. In the Overview page for the organization, person, or relationship, choose **Classification** from the menu.

   The Classifications page appears.

2. Select a Class Category from the drop down list.

   The Class Category determines the Classification Codes you will be able to search on.

3. Select a Class Category status from the drop down list.
4. Click **Apply**.
5. In the "Add a Classification Code Name" field, enter a full or partial code. You can use % as a wild card.
6. Choose a code by selecting the "Select" check box.
7. Click the **Select** button.

360 View

The 360 View is available from the Organization Overview page or the Person Overview page. You can view the following information for a selected customer:

- Campaigns
- Events
- Leads
- Opportunities
- Orders
- Invoices
- Installed Base
- Service Requests

Campaigns

A list of campaigns that target an organization or person appear when you display the party in the Organization Overview page or the Person Overview page and choose Campaigns from the 360 View menu.

See Also

Oracle Marketing Online User Guide

Events

An event can be a seminar, a class, a product demonstration, or any other activity that is location specific. Events can be stand alone or part of a marketing campaign. A list of events in which a party is enrolled appear when you display the party in the Organization Overview page or the Person Overview page and choose Events from the View menu.

See Also

Oracle Marketing Online User Guide

Leads

You can view a summary of leads for a customer by viewing the customer in the Organization tab or the Person tab and then choosing Leads from the 360 View menu. Click the organization name to go to Organization Details or the person's name to go to Person Details. If you are viewing leads for a person, then you can choose whether to view leads for the person as a customer or for the person as a contact. Click Quick Create to create a new lead. You can change existing information for the lead.

Opportunities

You can view a summary of opportunities for a customer by viewing the customer in the Organization tab or the Person tab and then choosing Opportunities from the 360 View menu. Click the organization name to go to Organization Details or the person's name to go to Person Details. If you are viewing opportunities for a person, then you can choose whether to view opportunities for the person as a customer or for the person as a contact. Click Quick Create or Create to create a new opportunity. You can edit the close date and the amount for an opportunity.

Orders

You can view a summary of orders for a customer by viewing the customer in the Organization tab or the Person tab and then choosing Order from the 360 View menu. Click the order number to view details for an order. Click Details in the Shipments column to view the details for the shipment of the order. Click the organization name to go to Organization Details or the person's name to go to Person Details.

Invoices

You can view a summary of invoices for a customer by viewing the customer in the Organization tab or the Person tab and then choosing Invoice from the 360 View menu. Click the invoice number to view details for an invoice. Click Details in the Payments column to see payment details for the invoice. Click the organization name to go to Organization Details or the person's name to go to Person Details.

Installed Base

The installed base is a record of products shipped to the customer including serial numbers and current status. You can view the installed base for a customer by viewing the customer in the Organization Overview page or the Person Overview page and then choosing Installed Base from the 360 View menu.

Service Requests

You can view a summary of service requests for a customer by viewing the customer in the Organization Overview page or the Person Overview page and then choosing Service from the 360 View menu.

5

Relationships

This chapter describes viewing, creating, and updating relationships.

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:

- Menu: The menu includes the following options:
  - Overview: Opens the Overview page.
  - Details: Opens the Person to Organization Relationship Details page for the person.
  - Classifications: Opens the classifications page for the contact where you can assign a class category and status to a given contact.
  - Notes: Opens the Relationship Notes page.
  - Tasks: Opens the Relationship Tasks page.
  - Interactions: Opens the Relationship Interactions page.
  - Attachments: Opens the Relationship Attachments page.
- 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, primary role, phone numbers, address, and email. 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 information, such as phone numbers, addresses, and email addresses are included here.
- 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.

Create Contact

Steps

Use this procedure to create a new contact.

1. Choose the Customers tab.
2. In the Home, Organization, Contact or Person page, click **Create Contact** in the Action section**.**
3. Enter a name and click Go or click Create Person to add a new name to the database.
4. Enter the required information and optional information. See the table below for detailed descriptions of each field.

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

   The following table describes the initial fields of Create Contact

Table 5-1 Create Contact Fields

Field	Required Field	Description
Person	Yes	The person is a required field.
Customer	Yes	The customer is a required field.
Address	No	Enter the address of the contact.

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

Table 5-2 Relationship Information Fields

Field	Required Field	Description
Relationship Type	Yes	Select an relationship type from the list of values.
Start Date	No	Enter the start date or click the date picker to choose a date. The Start Date will be defaulted to today's date if empty.
End Date	No	Enter the end date or click the date picker to choose a date.

Table 5-2 Relationship Information Fields

Field	Required Field	Description
Phone Book	No	Enter the phone number or click phone book to choose from a list of numbers.
Email Address Book	No	Enter an email address or click email address book to choose from a list. Click send email to send to the value listed in the field. You must have the email client configured in the browser to use this feature.
Status	No	Choose the status of the contact.
Context Value	No	Select Context Value and click 'Go' to show relevant fields.

The following table describes fields in the Other Details section of Create Contact.

Table 5-3 Other Details Fields

Field	Required Field	Description
Mailstop	No	Enter the mailstop of the contact.
Department	No	Enter the department of the contact.
Department Type	No	Choose a department type from the drop down list.
Job Title	No	Enter the job title of the contact.
Job Title Type	No	Choose a job title from the drop down list.
Preferred Language	No	Choose the preferred language from the drop down list.
Decision Maker, Reference options	Yes	Select the type of contact: Decision Maker Reference.

The following table describes the Notes fields in Create Contact.

Table 5-4 Notes Fields and Relate To Fields Section

Field	Required Field	Description
Type	Yes	Choose the type of contact from the drop down list. The type is a required field for creating notes.
Status	Yes	Choose the status of the contact from the drop down list. The status is a required field for creating notes
Note	Yes	Enter notes regarding this contact. The note is a required field for creating notes
Type	No	Choose the type of the contact from the drop down list.
Name	No	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.

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

You have successfully created a contact when the Contact Detail page opens.

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 User Guide

Relationship Tasks

View a summary of tasks for the relationship by displaying the Contact Overview page and selecting Tasks from the menu. All tasks for the relationship appear. You can filter the list using one or more of the selection criteria such as task type and dates. The Tasks Summary displays the following fields:

- Task number: Click the number to see details for the task.
- Name of the task
- Type of task
- Task status
- Priority of the task
- Planned start and end dates
- Owner type for the task
- Owner of the task

If you want to create a new task for the relationship, then click Create. To delete a task, select the Remove box and click Update.

See Also

Oracle CRM Application Foundation User Guide

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
- 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.
- 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.
- Date: The date that the interaction ended or was completed. Click the calendar icon to choose a date.
- 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.

See Also

Oracle CRM Application Foundation User Guide

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 User Guide

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.*

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.

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 organization you want to relate the person to.
   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.*

Add Person to Person Relationship

You can add a person to person relationship such as a spouse or associate.

Prerequisites

One person should exist in the database.

Steps

Follow these steps to create a new person to person 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 Person Relationship section, click **Add Relationship.**

   The Add Person 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.

   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.*

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.

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.*

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.*

6

Using the Person Overview

This chapter describes how to view and update person information.

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.
- Visualize Relationships: Select Visualize Relationships to open a dynamic graphic representation of relationships to the person.
- 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.
  - Classifications: Opens the classifications page for the person where you can assign class category and status to a given person.
  - 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.
  - Accounts: Opens the Person Accounts page displaying each account number for the person.
  - 360 View: You can view campaigns, events, leads, opportunities, orders, invoices, installed base, and service requests for the person.

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*.

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.

Field	Required Field	Description
Personal Email Address Book	No	Select an email address by clicking the email phonebook and choosing an address.
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.**

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.

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 User Guide

Person Tasks

View a summary of tasks for the person by displaying the Person Overview page and selecting Tasks from the menu. All tasks for the person appear. You can filter the list using one or more of the selection criteria such as task type and dates. The Tasks Summary displays the following fields:

- Task number: Click the number to see details for the task.
- Name of the task
- Type of task
- Task status
- Priority of the task
- Planned start and end dates
- Owner type for the task
- Owner of the task

If you want to create a new task for the person, then click Create. To delete a task, select the Remove box and click Update.

See Also

Oracle CRM Application Foundation User Guide

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
- 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.
- 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.
- Date: The date that the interaction ended or was completed. Click the calendar icon to choose a date.
- 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.

See Also

Oracle CRM Application Foundation User Guide

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 User Guide

Person Accounts

View a list of each account number for the person by displaying the Person Overview page and selecting Accounts from the menu. The list of accounts includes the date the account was established, the current balance, the account subcategory code, the tax code, and the date of suspension if the account is suspended. Click the account number to view account details. Click Create to create a new account.

See Also

Oracle Sales Online User Guide

360 View

The 360 View is available from the Organization Overview page or the Person Overview page. You can view the following information for a selected customer:

- Campaigns
- Events
- Leads
- Opportunities
- Orders
- Invoices
- Installed Base
- Service Requests

Campaigns

A list of campaigns that target an organization or person appear when you display the party in the Organization Overview page or the Person Overview page and choose Campaigns from the 360 View menu.

See Also

Oracle Marketing Online User Guide

Events

An event can be a seminar, a class, a product demonstration, or any other activity that is location specific. Events can be stand alone or part of a marketing campaign. A list of events in which a party is enrolled appear when you display the party in the Organization Overview page or the Person Overview page and choose Events from the View menu.

See Also

Oracle Marketing Online User Guide

Leads

You can view a summary of leads for a customer by viewing the customer in the Organization tab or the Person tab and then choosing Leads from the 360 View menu. Click the organization name to go to Organization Details or the person's name to go to Person Details. If you are viewing leads for a person, then you can choose whether to view leads for the person as a customer or for the person as a contact. Click Quick Create to create a new lead. You can change existing information for the lead.

Opportunities

You can view a summary of opportunities for a customer by viewing the customer in the Organization tab or the Person tab and then choosing Opportunities from the 360 View menu. Click the organization name to go to Organization Details or the person's name to go to Person Details. If you are viewing opportunities for a person, then you can choose whether to view opportunities for the person as a customer or for the person as a contact. Click Quick Create or Create to create a new opportunity. You can edit the close date and the amount for an opportunity.

Orders

You can view a summary of orders for a customer by viewing the customer in the Organization tab or the Person tab and then choosing Order from the 360 View menu. Click the order number to view details for an order. Click Details in the Shipments column to view the details for the shipment of the order. Click the organization name to go to Organization Details or the person's name to go to Person Details.

Invoices

You can view a summary of invoices for a customer by viewing the customer in the Organization Overview page or the Person Overview page and then choosing Invoice from the 360 View menu. Click the invoice number to view details for an invoice. Click Details in the Payments column to see payment details for the invoice. Click the organization name to go to Organization Details or the person's name to go to Person Details.

Installed Base

The installed base is a record of products shipped to the customer including serial numbers and current status. You can view the installed base for a customer by viewing the customer in the Organization Overview page or the Person Overview page and then choosing Installed Base from the 360 View menu.

Service Requests

You can view a summary of service requests for a customer by viewing the customer in the Organization Overview page or the Person Overview page and then choosing Service from the 360 View menu.

7

Reports

This chapter describes the reports available in Oracle Customers Online.

Overview of Reports

You can run the following reports:

- Organizations 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?
- Persons by Country: Which countries are the person records in?
- Organizations by State/Province: Which states or provinces are my organizations in?
- Persons by State/Province: Which state or province are the person records in?
- Duplicate Organizations: How many organization records have duplicates?
- Duplicate Persons: What percentage of my individual customers are duplicates?

Organizations by Industry

The Organization by Industry report lists the industries and number of your organizations 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.

Customer Growth

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.

Organizations by Country

The Organizations by Country report lists the countries and number of your 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.

Persons by Country

The Persons by Country report lists the countries and number of your people 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.

Organizations by State/Province

The Organizations by State/Province report lists the states or provinces within a specified country and number of your 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.

Persons by State/Province

The Persons by State/Province report lists the states or provinces within a specified country and number of your people 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.

Duplicate Organizations

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.

Duplicate Persons

The Duplication Persons 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.

8

Data Cleansing

This chapter describes how to use the Data Cleansing tab.

Overview of Data Cleansing

The Data Cleansing tab allows you to resolve duplicate information in the TCA Registry, including duplicate parties or duplicate information within a party. See De-Duplication Overview on page 8-3.

De-Duplication Overview

Use de-duplication to:

- Merge duplicate parties in the Oracle Trading Community Architecture (TCA) Registry.
- Cleanse a specific party so that it does not have any duplicate information.

Parties are entities, of type Person, Organization, or Group, that can enter into business relationships. Party information includes the party name, addresses, contacts, and contact points. Every party in the TCA Registry also has a unique Registry ID.

The TCA Registry is the single source of party information for all Oracle E-Business Suite applications. These applications provide user interfaces, batch data entry functionality, and other features for you to enter party information. Multiple points of data entry can result in duplicate and inaccurate information.

Each application must quickly, accurately, and consistently retrieve information from the TCA Registry for transaction processing. Duplicate data in the Registry can reduce the efficiency and accuracy of party processing and reports.

De-duplication provides functionality for the entire process of resolving duplicate parties and information in the TCA Registry:

- **Identify duplicates** - Create merge requests, which contain information about the duplicate parties that you want to merge or the party that you want to cleanse.
- **Manage merge requests** - Review, assign, and reject specific requests.
- **Map merge requests** - Determine the results of the merge by specifying the information that remains after the merge. You map the duplicate information to merge either among parties or within the party that you are cleansing.
- **Submit merge requests** - Run the Party Merge process to perform the actual merge, either for duplicate parties or within a party to cleanse it.

Note: If you have third party information in the TCA Registry, de-duplication uses the single source of truth record for each party as well as the records for the Other entities.

See also: Introduction, *Oracle Trading Community Architecture Third Party Data Integration User Guide*

Major Features

System Duplicate Identification

The System Duplicate Identification (SDI) feature lets you create SDI batches that contain potential sets of duplicates. De-duplication runs a program to identify duplicates based on criteria that you specify. You can use any duplicate set in a batch as the basis for a new merge request.

Merge Request Creation

You can create two types of merge requests:

- **Multiple** - Contains a duplicate set of two or more parties to merge.
- **Single** - Contains a single party to cleanse.

De-duplication provides three methods for creating merge requests. Each Multiple type request must contain parties of the same type, such as Person or Organization.

Merge Request Management

Aside from reviewing merge requests, you can:

- Assign requests to specific users
- Unassign requests
- Reject requests

Merge Request Mapping and Submission

For each merge request, you map the duplicate information to determine the results of the merge. For both Single and Multiple type requests, you map address and relationship information. De-duplication can provide default suggestions for either mapping.

For Multiple type requests, you also map party profile attributes, which describe the party. For example, for the DUNS Number attribute, you specify which number from the duplicate set should remain after the merge.

After reviewing your mapping, you can submit the merge request for the Party Merge process.

Examples

These examples illustrate using de-duplication to merge multiple duplicate parties or cleanse a party.

Merging Multiple Parties

Create Merge Request

You create a merge request of type Multiple with a set of four duplicate parties to merge, each with its own party sites or addresses, relationships, and party profile attribute values.

This table shows the duplicates, addresses, and attribute values for Registry ID, CEO Name, and Number of Total Employees.

Duplicate	Registry ID	CEO Name	Number of Total Employees	Party Site
Party A	102	Joe Smith	100,000	Address 1 Address 2
Party B	101	Joseph Smith	200,000	Address 3 Address 4
Party C	101	Joseph Smith	100,000	Address 5 Address 6
Party D	102	Joey Smith	100,000	Address 7 Address 8 Address 9

You specify Party D as the master party that remains after the other three duplicates merge into it.

Map Party Profile Attributes

Because Party D is the master party, the attribute values from Party D default as the ones to remain after the merge. You can, however, designate a value from any duplicate to remain after the merge, as shown for example in this table.

Attribute	Party	Attribute Value
Registry ID	Party D	102
CEO Name	Party B	Joseph Smith
Number of Employees	Party D	100,000

As a result, Party D remains after the merge with these party profile values.

Map Addresses and Relationships

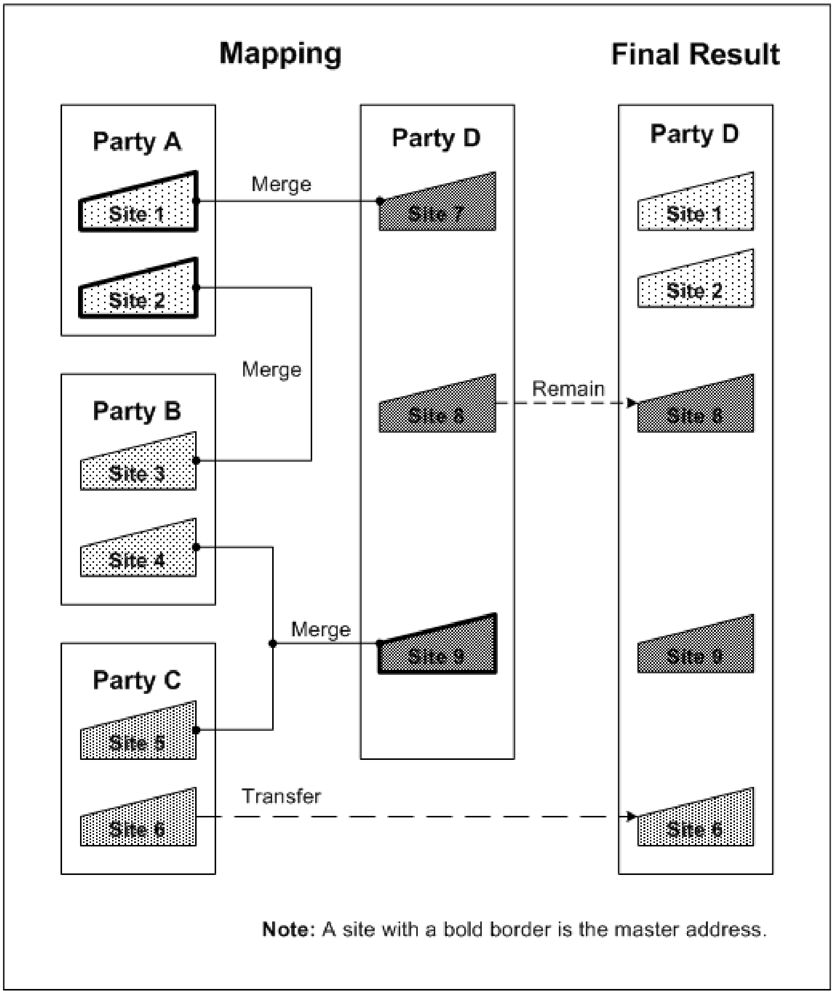
You decide to use the default mapping suggestions:

- Address 1 and 7 are duplicates, and Address 1 is the master address that remains after the merge.
- Address 2 and 3 are duplicates, with Address 2 as the master.
- Address 4, 5, and 9 are duplicates, with Address 9 as the master.
- Address 6 is not a duplicate and should transfer to Party D after the merge.
- Address 8 is not a duplicate and should remain in Party D.

As a result, Party D remains after the merge with these party sites:

- Address 1, which Address 7 merged into
- Address 2, which Address 3 merged into
- Address 6, which transferred to Party D
- Address 8, which remained in Party D
- Address 9, which Address 4 and 5 merged into

This diagram illustrates the address mapping and the result after the merge:



Note: Address 7 merged into Address 1, which remained after the merge even though Address 7 is the site from Party D. De-duplication lets you specify the master address no matter if it is from the master party or not.

For this merge request, you would also similarly map relationships among the four parties.

Cleansing a Party

Create Merge Request

You create a merge request of type Single with one party to cleanse address and relationship information for. For example, this party has these employee relationships, in which the party is the employer of these employees:

- Jennifer Smith
- Joey Lee
- Jenny Smith
- Janie Smythe
- Joseph Lee

Map Addresses and Relationships

The suggested mapping defaults for the employee relationships include the duplicate sets shown in this table.

Duplicate Employees	Master Employee
Jennifer Smith Jenny Smith	Jennifer Smith
Joseph Lee Joey Lee	Joseph Lee

The master employee is randomly defaulted. You can select another employee as the master or override the default groupings themselves. In this case, you designate Jenny Smith as the master employee for the first duplicate set and determine that Joseph and Joey Lee are not duplicates.

As a result, these employees remain after the merge:

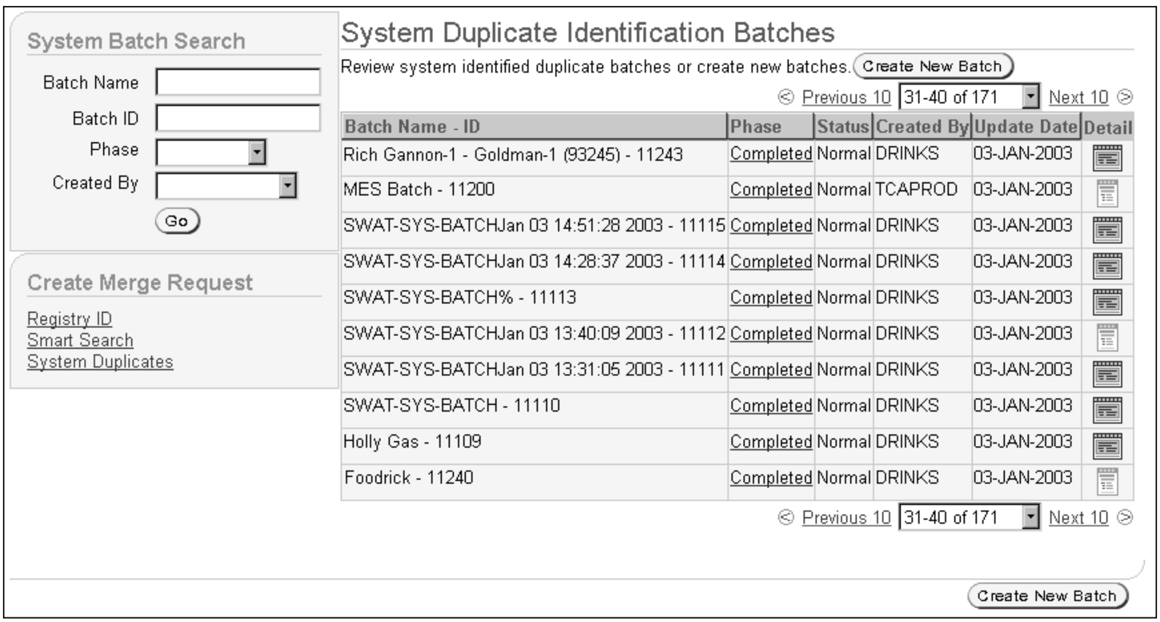
- Jenny Smith
- Janie Smythe
- Joseph Lee
- Joey Lee

For this merge request, you would also similarly map the party’s addresses.

System Duplicate Identification

System Duplicate Identification (SDI) is a process that produces batches of system-identified duplicates to merge. Each duplicate set within a batch can have either multiple parties to merge together or just one party to cleanse. De-duplication runs the DQM Duplicate Identification program to generate the duplicate sets in each batch, based on your criteria.

You can use any of the duplicate sets in an SDI batch as the basis of a new merge request. See Merge Requests Overview on page 8-14 and Creating Merge Requests on page 8-17.



System Batch Search

Batch Name

Batch ID

Phase

Created By

Go

Create Merge Request

Registry ID

Smart Search

System Duplicates

System Duplicate Identification Batches

Review system identified duplicate batches or create new batches. Create New Batch

Previous 10 | 31-40 of 171 | Next 10

Batch Name - ID	Phase	Status	Created By	Update Date	Detail
Rich Gannon-1 - Goldman-1 (93245) - 11243	Completed	Normal	DRINKS	03-JAN-2003	
MES Batch - 11200	Completed	Normal	TCAPROD	03-JAN-2003	
SWAT-SYS-BATCHJan 03 14:51:28 2003 - 11115	Completed	Normal	DRINKS	03-JAN-2003	
SWAT-SYS-BATCHJan 03 14:28:37 2003 - 11114	Completed	Normal	DRINKS	03-JAN-2003	
SWAT-SYS-BATCH% - 11113	Completed	Normal	DRINKS	03-JAN-2003	
SWAT-SYS-BATCHJan 03 13:40:09 2003 - 11112	Completed	Normal	DRINKS	03-JAN-2003	
SWAT-SYS-BATCHJan 03 13:31:05 2003 - 11111	Completed	Normal	DRINKS	03-JAN-2003	
SWAT-SYS-BATCH - 11110	Completed	Normal	DRINKS	03-JAN-2003	
Holly Gas - 11109	Completed	Normal	DRINKS	03-JAN-2003	
Foodrick - 11240	Completed	Normal	DRINKS	03-JAN-2003	

Previous 10 | 31-40 of 171 | Next 10

Create New Batch

From the System Duplicate Identification Batches page (Data Cleansing > De-Duplication > System Duplicate Identification), you can:

- Create System Duplicate Identification batches, on page 8-12.
- Review System Duplicate Identification batches, on page 8-13.
- Create merge requests based on duplicate sets from SDI batches, on page 8-19.
- Create merge requests using any method in the Create Merge Request bin, on page 8-17.

The System Duplicate Identification Batches page shows all SDI batches. To restrict the list, you can search for batches by:

- **Batch Name** - The name of the batch.
- **Batch ID** - The number that is automatically appended to the batch name when the batch is created.
- **Phase** - The status of the DQM Duplicate Identification program that generates the duplicate sets after the batch is submitted.
  - Running
  - Pending
  - Inactive
  - Completed

  Note: Duplicate sets are sequentially generated and immediately available, even if the program is still identifying more duplicates.

- **Created By** - The user who created the SDI batch. Only users assigned to the Oracle Customers Online Data Librarian responsibility can create batches.

Creating System Duplicate Identification Batches

You can create System Duplicate Identification batches that contain sets of system-identified duplicates. De-duplication generates SDI batches based on:

- The Data Quality Management match rule that you specify.

  See also: Match Rules Overview, *Oracle Trading Community Architecture Data Quality Management User Guide*

- Your conditions for a subset of parties to use for identifying duplicates. For example, you can specify that the Registry ID must be less than 1001. A party must comply with all conditions to be considered for the SDI batch.

When you define and submit a SDI batch, the DQM Duplicate Identification program sequentially generates at least one duplicate set for the batch, using your match rule and conditions. The batch appears in the System Duplicate Identification Batches page as soon as you submit the batch, even if the program has not yet finished running.

For an overview of SDI batches, see System Duplicate Identification on page 8-10.

To create a System Duplicate Identification batch:

1. Navigate to the System Duplicate Identification Batches page (Data Cleansing > De-Duplication > System Duplicate Identification).
2. Click the Create New Batch button.
3. Enter details for the batch, including the name, description, and match rule to use.

   A unique batch number is automatically appended to the batch name when you submit the batch.
4. Optionally specify conditions that duplicates in the batch must comply to. For each condition, you select a party attribute, operation, and value.
5. Click the Submit button.

Reviewing System Duplicate Identification Batches

You can review any System Duplicate Identification batch that was submitted, even if the DQM Duplicate Identification program is still running to generate all duplicate sets. You can also review the details of the program, for example the error log.

For an overview of SDI batches, see System Duplicate Identification on page 8-10.

To review a System Duplicate Identification batch:

1. Navigate to the System Duplicate Identification Batches page and optionally run a search to narrow down the list. See System Duplicate Identification on page 8-10.
2. Click on the phase for a specific batch if you want to view details of the DQM Duplicate Identification program.
3. Click the Detail icon for the batch that you want to review.
4. Optionally create a merge request using any of the duplicate sets in this batch. See System Duplicates on page 8-19.

Merge Requests Overview

A merge request contains all the information for a specific merge process, including:

- The party or parties involved in the merge
- The intended results of the merge

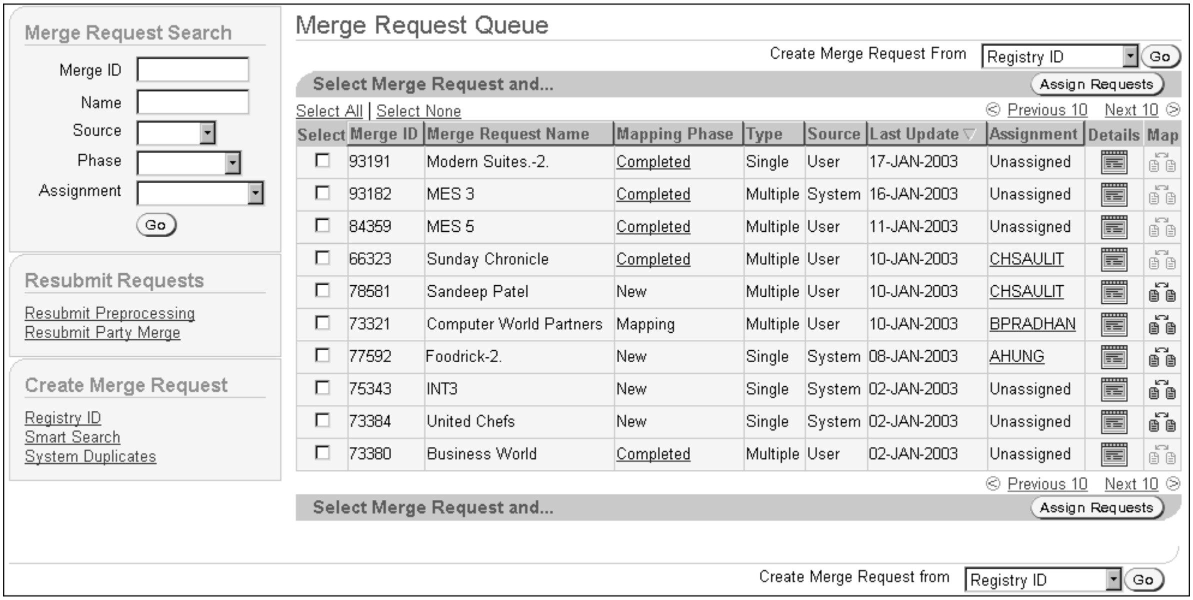
For an overview of the entire merge process, see De-Duplication Overview on page 8-3.

A merge request of type Multiple contains a set of duplicate parties to merge. Each Multiple type request has a designated master party that remains after the other duplicates merge into it. A request of type Single involves cleansing one party.

When you create or update a merge request, the Create Merge Batch process runs to create or re-create the request, including generating the suggested mapping defaults. For example, if you remove a duplicate from the request, the process runs to regenerate the merge request. Running the Create Merge Batch process is called preprocessing in de-duplication.

After you map the merge request to determine the results of the merge, you submit the request for the actual Party Merge process.

Merge Request Queue



Start at the Merge Request Queue page to:

- Create merge requests, on page 8-17
- Review merge requests, on page 8-23
- Assign and unassign merge requests, on page 8-24
- Reject merge requests, on page 8-27
- Map and submit merge requests, on page 8-25

The Merge Request Queue page shows all merge requests. To restrict the list, you can search for requests by:

- **Merge ID** - The merge request ID.
- **Name** - The master party of Multiple type requests or the party to cleanse in Single type requests.

- **Source** - The method used to create the merge request.
  - *System* - From a System Duplicate Identification batch
  - *User* - Using Smart Search or Registry ID selection
- **Phase** - The mapping phase of the request.
  - *Completed* - Party Merge process successfully completed.
  - *Error* - Party Merge process resulted in error.
  - *Mapping* - Request has been modified since creation.
  - *Preprocess* - Create Merge Batch process is running to create or regenerate the request, which is not yet ready for mapping.
  - *Rejected* - Request has been rejected.
  - *New* - Create Merge Batch process has successfully completed, and the request has not been modified since but is ready for mapping.
  - *Submitted* - Request has been submitted for the Party Merge process.
- **Assignment** - The user assigned to the request, or *Unassigned*.

Resubmitting Requests

From the Resubmit Requests bin on the Merge Request Queue page, you can resubmit the Create Merge Batch or Party Merge process for appropriate merge requests. For example, if the Party Merge process resulted in an error, you can resubmit the process for that merge request after you fix the problem.

> **See also:** Using Standard Request Submission, *Oracle Applications User's Guide*

Creating Merge Requests

You can create merge requests:

- From a duplicate set in a System Duplicate Identification (SDI) batch, on page 8-19.

  A SDI batch contains sets of duplicates that de-duplication identifies based on your criteria for the batch. You select a duplicate set from any batch to create a new merge request.

  For more information about SDI batches, see System Duplicate Identification on page 8-10.

- Using Smart Search to find potential duplicates, on page 8-21.

  Smart Search provides a list of parties based on your criteria. You select at least one party to include in a new merge request.

- By selecting specific parties, on page 8-22.

  From a Registry ID list of values, you select at least one party to include in your new merge request.

> **Note:** To create a merge request of type Single, use any of the methods to create a request with only the party that you want to cleanse.

In your new merge request, you cannot include parties that already belong to either another merge request or a merge batch in Party Merge. A message would inform you if you select such a party.

> **See also:** Creating the Merge Batch, *Oracle Trading Community Architecture Party Merge User Guide*

For merge requests of type Multiple, you determine the master party that the other duplicates merge into. The master party is also a main factor for the suggested defaults that de-duplication generates for mapping the merge request.

Before you submit the new request for creation, you can still remove parties from Multiple type requests. You do not delete the party from the TCA Registry, and the party is available to be included in other SDI batches, duplicate sets, or merge requests.

After you submit a new merge request, the Create Merge Batch process runs to create the merge request. Depending on the request type, the name of your new merge request is:

- **Multiple** - The name of the master party.
- **Single** - The name of the one party in the request.

For an overview of merge requests, see Merge Requests Overview on page 8-14.

System Duplicates

Use the Merge Request Queue or System Duplicate Identification Batches page to start the process of creating a merge request from a duplicate set in a System Duplicate Identification batch.

See System Duplicate Identification on page 8-10 and Creating Merge Requests on page 8-17.

To create a merge request from a System Duplicate Identification batch using the Merge Request Queue page:

1. Navigate to the Merge Request Queue page (Data Cleansing > De-Duplication > Merge Requests).
2. Select the System Duplicates method.
3. Search for and select the SDI batch to use.
4. Select a duplicate set from the batch. Duplicate sets already used to create merge requests are not available.
5. If your merge request is of type Multiple, select the master party.

   Click the Remove from Set icon to remove any party from the duplicate set.

   > **Note:** Any party that you remove from a set cannot be selected for a merge request again using this duplicate set.

6. Click the Submit button.

To create a merge request from a System Duplicate Identification batch using the System Duplicate Identification page:

1. Navigate to the System Duplicate Identification Batches page (Data Cleansing > De-Duplication > System Duplicate Identification).
2. Review the batch that you want to use. See Reviewing System Duplicate Identification Batches on page 8-13.

   You can also click System Duplicates in the Create Merge Request bin, and select the batch to use.

3. Select a duplicate set from the batch. Duplicate sets already used to create merge requests are not available.
4. If your merge request is of type Multiple, select the master party.

   Click the Remove from Set icon to remove any party from the duplicate set.

   Note: Any party that you remove from a set cannot be selected for a merge request again using this duplicate set.

   ---

5. Click the Submit button.

Smart Search

Smart Search is a powerful search engine which finds parties that not only exactly match but are similar to your criteria. You browse the search results and create a merge request either with parties that are in fact duplicates or with a single party that you want to cleanse.

The available search criteria depends on the Data Quality Management (DQM) match rule that is assigned to the DQM: Match Rule for Identifying Duplicates profile option.

> **See also:** Setting Up De-Duplication, *Oracle Customers Online Implementation Guide*

For an overview of creating merge requests, see Creating Merge Requests on page 8-17.

To create a merge request using Smart Search:

1. Navigate to the Merge Request Queue page (Data Cleansing > De-Duplication > Merge Requests).
2. Select the Smart Search method.
3. Run the search with at least one criterion and select at least one party to include in the merge request.
4. If your merge request is of type Multiple, select the master party.

   Click the Remove from Set icon to remove any party from the duplicate set.
5. Click the Submit button.

Registry ID

You can specify the exact party or parties to include in a new merge request by Registry ID.

For an overview of creating merge requests, see Creating Merge Requests on page 8-17.

To create a merge request by selecting duplicates using Registry IDs:

1. Navigate to the Merge Request Queue page (Data Cleansing > De-Duplication > Merge Requests).
2. Select the Registry ID method.
3. Use the Registry ID list of values to select at least one party to include in the merge request.
4. If your merge request is of type Multiple, select the master party.

   Click the Remove from Set icon to remove any party from the duplicate set.
5. Click the Submit button.

Reviewing Merge Requests

The Request Review page provides a summary of the merge request, including the involved party or parties and any cumulative notes that were made during the request mapping process. For merge requests already submitted for the Party Merge process, you can review the details of the process, for example the error log.

Note: The notes are available only if the IMC: Display Notes for Merge Request Mapping profile option is set to *Yes*.

For an overview of merge requests, see Merge Requests Overview on page 8-14.

To review a merge request:

1. Navigate to the Merge Request Queue page and optionally search for the merge request. See Merge Requests Overview on page 8-14.
2. If the request has a mapping phase of Submitted for Merge, Completed, or Error, you can click on the phase to see details of the Party Merge process.
3. Click on the Details icon to view merge request details.

Assigning and Unassigning Merge Requests

You can assign and unassign merge requests of any phase, no matter whom the request is currently assigned to or who created the request. You assign merge requests only to users who are assigned to the Oracle Customers Online Data Librarian responsibility.

For an overview of merge requests, see Merge Requests Overview on page 8-14.

To assign or unassign merge requests:

1. Navigate to the Merge Request Queue page and optionally search for merge requests. See Merge Requests Overview on page 8-14.
2. Select at least one request.
3. Click the Assign Requests button.
4. Select either the user to assign to or leave the Assign To field blank to unassign.

> **Note:** You can click on the Remove from Set icon to remove any merge request from the assignment. You are not deleting or rejecting the request.

5. Click the Apply button.

Mapping Merge Requests

A new merge request contains information about the included parties to merge or the party to cleanse, but you can map the request to determine the results of the merge. For all aspects of the merge result, de-duplication provides defaults which you can review and modify as needed.

Note: You cannot update the mapping of requests that are already submitted for the Party Merge process.

As you go through the mapping process, you can:

- **Save your work at any time** - When you navigate out of a mapping step, your work for that step is automatically saved. For substeps with an Apply or Save Note button, you must click that button to save your work.
- **Cancel your work at any time** - When you click the Cancel button, you discard all mapping for the merge request, and mapping defaults are regenerated.
- **Record cumulative notes** - You record comments for any step of the mapping process. These notes are cumulative and displayed in each subsequent step.

Note: The notes are available only if the IMC: Display Notes for Merge Request Mapping profile option is set to *Yes*.

For an overview of merge requests, see Merge Requests Overview on page 8-14. For examples of mapping, see Examples on page 8-6.

Addresses and Relationships

For Single type requests, you map sets of duplicate addresses and relationships for the party and determine the master address or relationship that remains after the merge for each set.

For Multiple type merge requests, you map sets of duplicate addresses and relationships among the parties and determine the master address or relationship that remain for each set. The master address or relationship does not need to come from the master party.

Party Profile Attributes

Party profile attributes, such as First and Last Names, SIC Code, and CEO Name, describe the parties in the TCA Registry. Each party can have attribute values for any of the attributes, for example a number for the DUNS Number attribute.

For Multiple type requests, you map each attribute to determine which value remains after the merge. For example, if the request contains five duplicates, each with a DUNS Number, you specify the number that remains after the merge. That number does not need to come from the master party. Party profile attribute mapping does not apply to Single type requests.

Mapping Processes

Addresses, relationships, and party profile attributes can be mapped in any sequence, at different times, and by different data librarians. For Multiple type requests, the request summary should be reviewed first to confirm the master party, which affects defaults for the other mapping steps.

To map a merge request of type Single:

1. Review the request summary, on page 8-27.
2. Map duplicate addresses within the party, on page 8-30.
3. Map duplicate relationships within the party, on page 8-33.
4. Review and submit the request for the Party Merge process.

To map a merge request of type Multiple:

1. Review the request summary, on page 8-27.
2. Map party profile attributes, on page 8-28.
3. Map duplicate addresses among the parties, on page 8-30.
4. Map duplicate relationships among the parties, on page 8-33.
5. Review and submit the request for the Party Merge process.

Note: After you submit a merge request, you can access details of the Party Merge process in the Merge Request Queue page. See Reviewing Merge Requests on page 8-23.

Request Summary

The Request Summary page provides an overview of the merge request that you are mapping, of type Multiple or Single.

For Multiple type merge requests, you also see the included duplicates and the master party that is currently selected for the request. You can select a different master party or remove duplicates from the request.

You can also reject merge requests from the Request Summary page, no matter whom the request is assigned to. You cannot reject a merge request with a Completed phase.

Warning: A rejected merge request is no longer available for mapping and cannot be reactivated. To view rejected requests, search for requests with the Rejected phase. See Merge Request Queue on page 8-15.

For an overview of the entire mapping process, see Mapping Merge Requests on page 8-25.

To review and update the merge request summary:

1. Navigate to the Merge Request Queue page and optionally search for the merge request. See Merge Request Overview on page 8-14.
2. Click the Details icon for the merge request that you want to review.
3. Click the Reject Request button if you want to reject the merge request.
4. For Multiple type requests, you can select a different master party or remove parties from the request. For more information about master parties and removing duplicates, see Creating Merge Requests on page 8-17.

Note: If you change the master party or remove any party, you must click the Apply button, return to the Merge Request Queue page, and wait for mapping defaults to regenerate before continuing with the mapping process.

---

5. Optionally enter any notes, if available, for the request summary step and click the Save Note button.

Profile Attributes

For merge requests of type Multiple, use the Profile Attributes page to determine the party profile attribute values that remain with the master party after the merge. The attribute values from the master party default as the selected values, but you can choose values from another party, or candidate, in the duplicate set.

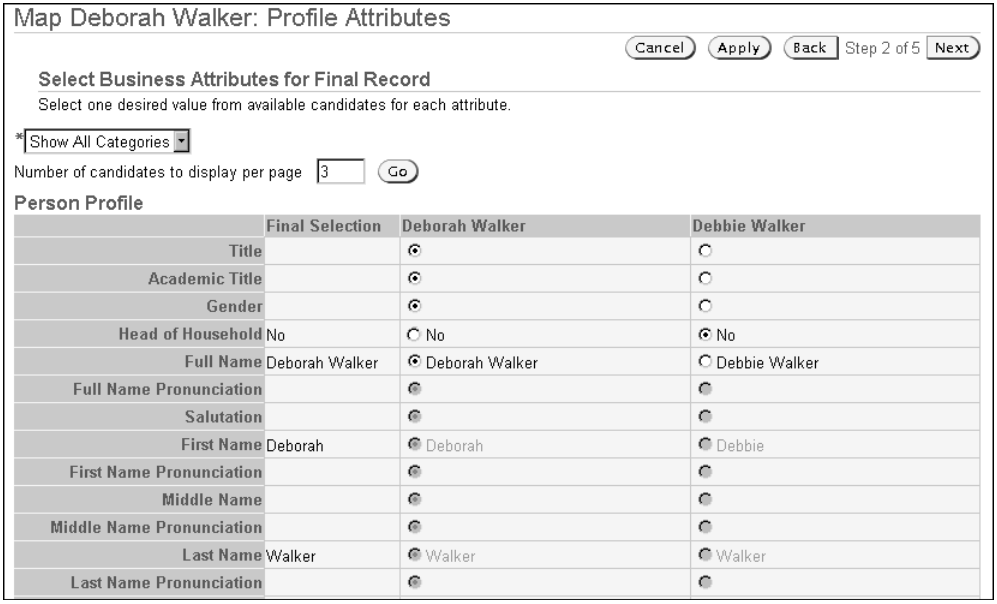
The type of attributes you map, Organization Profile attributes or Person Profile attributes, depends on the type of parties in the merge request: The attributes for each party type are also categorized, and you can specify the category to display in the Profile Attributes page.

Some attributes belong to attribute groups, and all attribute values in a group must come from the same party. Every group has a primary attribute, and the candidate that its value comes from also determines the values for the other attributes in the group.

For example, SIC Code is the primary attribute and SIC Code Type is the other attribute in the group. In the Profile Attributes page, only SIC Code is enabled for you to select an attribute value. If you specify that the value for SIC Code comes from Candidate 2, the value for SIC Code Type would also come from Candidate 2.

Tip: Any attribute with disabled selection is a nonprimary attribute in a group, with the first enabled attribute above it as the primary attribute.

For an overview of the entire mapping process, see Mapping Merge Requests on page 8-25.



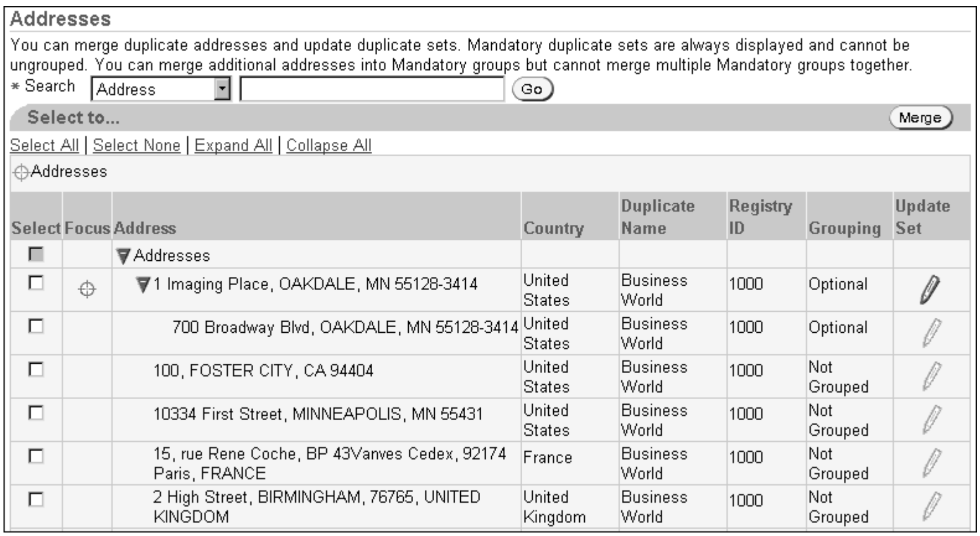
To map party profile attributes:

1. Navigate to the Profile Attributes page from another mapping step.
2. Specify the category to display, and optionally specify the number of candidates to display per page.
3. Select values for each attribute or accept the defaults from the master party.
4. Optionally enter any notes, if available, for the profile attributes mapping step and click the Save Note button.
5. Click the Apply button after you finish all your changes, if any.

Addresses

Use the Addresses page to map addresses either within a party for Single type merge requests or among the parties in Multiple type requests. You determine which addresses are duplicates by creating duplicate address sets and specify the master address that remains after the other addresses merge into it.

If the HZ: Show Address Mapping Suggestions profile option is set to *Yes*, all suggested address mapping is shown by default. If not, the Addresses page displays addresses without any groupings except for the Mandatory duplicate sets. You can use the search to narrow down the list of addresses and subsequently find more addresses to map.


Addresses

You can merge duplicate addresses and update duplicate sets. Mandatory duplicate sets are always displayed and cannot be ungrouped. You can merge additional addresses into Mandatory groups but cannot merge multiple Mandatory groups together.

* Search Address Go

Select to... Merge

Select All | Select None | Expand All | Collapse All

Addresses

Select	Focus	Address	Country	Duplicate Name	Registry ID	Grouping	Update Set
		Addresses					
		1 Imaging Place, OAKDALE, MN 55128-3414	United States	Business World	1000	Optional	
		700 Broadway Blvd, OAKDALE, MN 55128-3414	United States	Business World	1000	Optional	
		100, FOSTER CITY, CA 94404	United States	Business World	1000	Not Grouped	
		10334 First Street, MINNEAPOLIS, MN 55431	United States	Business World	1000	Not Grouped	
		15, rue Rene Coche, BP 43Vanves Cedex, 92174 Paris, FRANCE	France	Business World	1000	Not Grouped	
		2 High Street, BIRMINGHAM, 76765, UNITED KINGDOM	United Kingdom	Business World	1000	Not Grouped	

The Addresses table shows duplicate address sets in a hierarchical manner. For each set, the master address is the parent and the other duplicates are its children. Any address that does not belong to a hierarchy is not included in any duplicate address set and is automatically transferred to the resulting party after the merge.

Every address has a grouping status:

- **Mandatory** - Addresses in a Mandatory duplicate set must merge together because they have the same location ID.
- **Optional** - Addresses in an Optional duplicate set can be removed from the group and included in another set.
- **Not Grouped** - Addresses are not currently mapped to any duplicate set. These addresses will exist after the merge as an address either of the one party for Single type merge requests or of the master party for Multiple type requests.

At any point of the address mapping process, you can:

- Apply the mapping suggestions and override whatever groupings you currently have, if any.
- Clear all groupings, including suggested defaults, except for Mandatory duplicate sets.

When you submit the request for the Party Merge process, the duplicate address sets would be merged based on your mapping, with the resulting master addresses.

For an overview of the entire mapping process, see Mapping Merge Requests on page 8-25.

To map addresses:

1. Navigate to the Addresses page from another mapping step.
2. If no suggestions are defaulted, optionally search for addresses to limit the list or select Apply Suggested Groupings from the Change Defaults poplist.

   Note: If you already have duplicate sets of addresses and run a search for more addresses, any search results would be added without disrupting the existing groupings.

3. You can select at least two addresses and click the Merge button to create a duplicate address set to merge. If you select a master address from any duplicate address set, the other addresses in that set are also included.

For Mandatory duplicate sets:

- You must select the master to merge the set with other addresses because the Mandatory addresses must merge together.
- You can select only one Mandatory master to include in the new duplicate set.
- You must keep the Mandatory master as the master in the new set.

Select the master address if applicable and optionally remove any Optional or Not Grouped address from the set. You do not delete the address from the TCA Registry, and the removed address is available to be included in other duplicate address sets.

Click the Apply button.

4. To update a duplicate address set, click the Update Set icon and you can:

   – Select another master address if the current master is not Mandatory.

   – Remove Optional or Not Grouped addresses from the set.

     If you remove all addresses other than the master, you ungroup the entire set and all addresses in the set would have the Not Grouped grouping.

   Click the Apply button.

5. Optionally enter any notes, if available, for the address mapping step and click the Save Note button.

Relationships

Use the Relationships page to map relationships either within a party for Single type merge requests or among the parties in Multiple type requests. You determine which relationships are duplicates by creating duplicate relationship sets and specify the master relationship that remains after the other relationships merge into it.

For each relationship role, the Relationships table shows the number of original relationships in the merge request and the number of relationships that will exist after the actual merge. You can resolve duplicates within each relationship role.

If the HZ: Show Relationship Mapping Suggestions profile option is set to *Yes*, all suggested relationship mapping for the relationship role is shown by default in the Resolve Duplicates page. If not, the page displays all relationships in the role without any groupings except for the Mandatory duplicate sets. You can use the search to narrow down the list of relationships and subsequently find more relationships to map.

The table in the Resolve Duplicates page shows duplicate relationship sets in a hierarchical manner. For each set, the master relationship is the parent and the other duplicates are its children. Any relationship that does not belong to a hierarchy is not included in any duplicate relationship set.

Every relationship has a grouping status:

- **Mandatory** - Relationships in a Mandatory duplicate set must merge together because they involve the same parties.
- **Optional** - Relationships in an Optional duplicate set can be removed from the group and included in another set.
- **Not Grouped** - Relationships are not currently mapped to any duplicate set. These relationships will exist after the merge as a relationship either of the one party for Single type merge requests or of the master party for Multiple type requests.

At any point of the relationship mapping process, you can:

- Apply the mapping suggestions and override whatever groupings you currently have, if any.
- Clear all groupings, including suggested defaults, except for Mandatory duplicate sets.

When you submit the request for the Party Merge process, the duplicate relationship sets would be merged based on your mapping, with the resulting master relationships.

For an overview of the entire mapping process, see Mapping Merge Requests on page 8-25.

> **See also:** Relationships Overview, *Oracle Trading Community Architecture Relationship Manager User Guide*

To map relationships:

1. Navigate to the Relationships page from another mapping step.
2. Optionally select Apply Suggested Groupings from the Change Defaults poplist for suggested mapping.
3. Select the relationship role that you want to map and click the Resolve Duplicates button.
4. If no suggestions are defaulted, optionally search for relationships to limit the list.

> **Note:** If you already have duplicate sets of relationships and run a search for more relationships, any search results would be added without disrupting the existing groupings.

5. You can select at least two relationships and click the Merge button to create a duplicate relationship set to merge. If you select a master relationship from any duplicate relationship set, the other relationships in that set are also included.

   For Mandatory duplicate sets:

   - You must select the master to merge the set with other relationships because the Mandatory relationships must merge together.
   - You can select only one Mandatory master to include in the new duplicate set.
   - You must keep the Mandatory master as the master in the new set.

   Select the master relationship if applicable and optionally remove any Optional or Not Grouped relationship from the set. You do not delete the relationship from the TCA Registry, and the removed relationship is available to be included in other duplicate relationship sets.

Click the Apply button.

6. To update a duplicate relationship set, click the Update Set icon and you can:
   - Select another master relationship if the current master is not Mandatory.
   - Remove Optional or Not Grouped relationships from the set.

     If you remove all relationships other than the master, you ungroup the entire set and all relationships in the set would have the Not Grouped grouping.

   Click the Apply button.
7. Click the Return to Overview button to go back to the Relationships page.
8. Optionally enter any notes, if available, for the relationship mapping step and click the Save Note button.

Glossary

Data Quality Management (DQM)

Oracle Trading Community Architecture Data Quality Management provides powerful search and matching functionality, for example for search engines and duplicate identification.

Duplicate

A duplicate is a record that has been identified as a duplicate of at least one other record.

Duplicate Set

A duplicate set is a group of records that have been identified as duplicates of one another. Using de-duplication, you merge the duplicates into the designated master record of the set. A duplicate set can also consist of one party to cleanse.

Mapping

Mapping is the process of determining the results of a merge, including the master records and the information that remains after the merge.

Master

A master is the record that remains after other duplicates in a duplicate set merge into it.

Match Rule

A match rule is a set of rules that determine the results of a DQM search or duplicate identification.

Merge Request

A merge request contains a duplicate set that has been identified for merging, either a set of duplicate parties or one party with duplicate information to cleanse. After a merge request is created, mapped, and submitted, the Party Merge process merges the duplicate parties or information.

Multiple Merge Request Type

A merge request of type Multiple consists of a duplicate set with at least two parties to merge.

Party

A party is a person, organization, or collection of parties that can enter into relationships with other parties.

Party Profile Attributes

Party profile attributes describe basic details of a party, for example name and address. Attribute values are the values that a party has for the attributes. For example, Oracle Corporation is the attribute value for the Organization Name attribute. Attribute values can be purchased, entered, or imported into the TCA Registry.

The profile attributes are categorized for parties of type Person and Organization:

- **Person** - Person Profile, Financial Details, Demographics, and Tax Details
- **Organization** - Business Profile, Business Details, Socioeconomic Details, Tax Details, and Special Events

Preprocessing

Preprocessing is when the Create Merge Batch process runs after you submit a new merge request to be created or after you update a merge request. Preprocessing creates or regenerates the merge request and all suggested mapping defaults.

Registry ID

A Registry ID is the unique number given to each entity in the TCA Registry.

Relationship

A relationship is a state of connectedness between two parties, consisting of two entities and two directions. For example, a relationship has the forward direction stating that Organization A is the employer of Person B, as well as the corresponding backward direction stating that Person B is the employee of Organization A.

Single Merge Request Type

A merge request of type Single consists of a duplicate set with just one party to cleanse.

Smart Search

Smart Search is a search engine powered by DQM that searches for and identifies potential duplicate parties, based on the entered search criteria and the setup of Smart Search.

System Duplicate Identification (SDI)

System Duplicate Identification is the process of de-duplication using DQM to identify duplicates, based on the de-duplication and DQM setup.

System Duplicate Identification (SDI) Batch

A System Duplicate Identification batch contains duplicate sets that de-duplication identifies by going through the SDI process. These duplicate sets can be used to create merge requests.

TCA Registry

The TCA Registry is the central repository of party information for all Oracle applications. The party information includes details about organizations and people, the relationships among the parties, and the places where the parties do business.

Trading Community Architecture (TCA)

Oracle Trading Community Architecture is a model that provides a virtual representation of the community that business is conducted in. This model includes parties and related party entities.