Oracle® Customers Online

User Guide

Release 11*i*

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Oracle Customers Online User Guide, Release 11*i*

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Contents

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Oracle Customers Online User Guide, Release 11*i*

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Preface

Welcome to Release 11*i* of the *Oracle Customers Online User Guide*.

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 User Guide* contains the information you need to understand and use Oracle Customers Online.

- Chapter 1 provides an overview of Oracle Customers Online.
- Chapter 2 describes how to quickly access customer information, as well as manage work group activities using notes, tasks, employees, and calendar tools, for you and your organization.
- Chapter 3 describes how to view, create, and manage information for your customers and their contacts. Customer information includes profile, classifications, addresses, contact points, relationships, relationship hierarchies, accounts, transactions, notes, tasks, attachments, interactions, and source system mappings. You can also acquire D&B information for organizations to enrich customer information, and identify potential duplicates to improve data quality.
- Chapter 4 describes how to use Oracle Customers Online reports to evaluate customer profile trends and customer data quality.

Documentation Accessibility

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

Accessibility of Code Examples in Documentation

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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This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

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.
- **About Document** - Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on MetaLink.

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 (OCO).

Oracle Trading Community Architecture User Guide

User this user guide to learn about Oracle Trading Community Architecture (TCA) and how to use features from the Trading Community Manager responsibility to create, update, enrich, and cleanse the data in the TCA Registry. Oracle Customers Online is based on the TCA data model and incorporates many of the TCA features.

Oracle Trading Community Architecture Administration Guide

Use this guide to administer and implement Oracle Trading Community Architecture. You set up, control, and manage TCA tools, functionality, and concepts that affect data in TCA Registry, which Oracle Customers Online uses. Most of these administration features are available from the Administration tab in OCO.

Oracle Trading Community Architecture Reference Guide

This reference guide contains seeded relationship types, seeded Data Quality Management data, D&B data elements, import interface table fields and validations, and a comprehensive glossary. This guide supplements the documentation for Oracle Trading Community Architecture and individual products in the Oracle Customer Data Management family, including Oracle Customers Online.

Oracle Data Librarian User Guide

Use this user guide to learn how to use Oracle Data Librarian to establish and maintain the quality of your customer database, focusing on consolidation, cleanliness, and completeness. Oracle Data Librarian includes all of the features in Oracle Customers Online.

Oracle Data Librarian Implementation Guide

Use this guide to learn how to implement Oracle Data Librarian.

Oracle Common Application Components User's Guide

This document covers how to use various components in Oracle Customers Online, such as features for notes, tasks, calendars, employees, and attachments.

Oracle Receivables User Guide

This guide provides more information on functionality for credit summaries, debit items, and credit items that you can access from Oracle Customers Online.

Oracle Marketing User Guide

This guide provides more information on functionality for campaigns and events that you can access from Oracle Customers Online, as well as the import feature from the Import tab.

Oracle Collections User Guide

This guide provides more information on functionality for broken promises and delinquencies that you can access from Oracle Customers Online.

Oracle Customer Interaction History Implementation Guide

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

Oracle Install Base Concepts and Procedures

This guide provides more information on functionality for installed base that you can access from Oracle Customers Online.

Oracle Order Management User's Guide

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

Oracle Quoting User Guide

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

Oracle Sales Online User Guide

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

Oracle TeleService User Guide

This guide provides more information on functionality for service requests that you can access from Oracle Customers Online.

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

Use this user guide to learn how XML Web Services enables application-to-application integration between the Oracle customer repository and legacy or third-party enterprise systems. The guide also provides implementation information for the XML Web Services.

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 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

Oracle Common Application Components Implementation Guide

Many products use components from Oracle Common Application Components. Use this guide to correctly implement Oracle Common Application Components.

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*.

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

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

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

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

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Thank you for using Oracle Customers Online and this user guide.

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1

Overview

This chapter provides an overview of Oracle Customers Online.

Introduction to Oracle Customers Online

Use Oracle Customers Online (OCO) to view, create, and manage customer information. OCO helps you to make real-time decisions with the confidence that the data about your customers is accurate, timely, and complete.

- **Home:** Quickly find and review key customer information, as well as manage work-related information such as tasks and employees for your organization and yourself, on page 2-2.
- **Customers:** View, create, and manage a variety of detailed customer information, on page 3-2.
- **Reports:** View customer profile trends and data quality information, on page 4-2.
- **Import:** Import customer information from external data sources.

  You can only access the import feature through the Oracle Customers Online Import responsibility.
- **Administration:** Set up, control, and manage functionality that affect customer data and the usage of that data across the Oracle E-Business Suite. You can also access concurrent requests.

  > **See Also:** Introduction to Administration, *Oracle Trading Community Architecture Administration Guide*

  The Administration tab is available only if you have the Oracle Customers Online Superuser responsibility.

Oracle Trading Community Architecture and Oracle Customer Data Management

Oracle Customers Online is based on the Oracle Trading Community Architecture (TCA) data model and functionality. TCA is the foundation of customer information for the Oracle E-Business Suite.

> **See Also:** Introduction to Oracle Trading Community Architecture, *Oracle Trading Community Architecture User Guide*

Both TCA and OCO belong to the Oracle Customer Data Management (CDM) product family. CDM also includes Oracle Data Librarian, which has all OCO features and additional functionality to maintain the quality of your customer data.

> **See Also:** Oracle Customer Data Management, *Oracle Trading Community Architecture User Guide*

For reference material that supplements not only TCA but CDM product documentation, see *Oracle Trading Community Architecture Reference Guide*. This guide provides a glossary of terms for CDM, including Oracle Customers Online.

Data Quality Management

Your administrator can set up Oracle Customers Online to use Data Quality Management to power the matching logic for:

- Searching for customers and contacts. See Home Page on page 2-3 and Searching for Organizations or Persons on page 3-8.
- Preventing creation of duplicate customers. See Preventing Duplicate Organizations or Persons on page 3-10.
- Identifying duplicate customers to submit for merging. See Marking Duplicate Organizations or Persons on page 3-11.

Data Quality Management provides flexible and powerful matching functionality for searches, as well as duplicate prevention and identification.

> **See Also:** Data Quality Management Overview, *Oracle Trading Community Architecture Administration Guide*

2

Home

This chapter describes how to:

- Find and access customers, for example bookmarked customers and contacts, as well as review key customer information.
- Manage work group activities for you and your organization:
  - Maintain your personal calendar and manage your daily appointments.
  - Access information about your organization and employees.
  - Manage your personal notes and tasks.

Home Overview

Use the Home tab to quickly find and review critical customer information. You can also manage work group activities for your organization and yourself, such as employees, calendars, tasks, and notes.

Note: Your personal tasks and notes are available only from the Home tab. The tasks and notes in the Customers tab are specific to the associated customers.

- **Home:** Search for customers, view recent and bookmarked items, and quickly access common tasks, on page 2-3.
- **Calendar:** Maintain your personal calendar.
- **Tasks:** Manage tasks, defined as the lowest units of work, that you can assign to yourself or other resources, and associate with customers.
- **Notes:** Manage notes that you can assign to yourself or other resources, and relate to customers. A note is information, such as directions, special instructions, or reminders, that is attached to an object.
- **Employees:** Manage employee information for your organization.

See Also

Introduction to Oracle Customers Online on page 1-2

Home Page

The Home page is the starting point for accessing the customer information that you want to work on. You can quickly find customers, or browse items that you bookmarked or recently viewed. If you do not find a customer, you can create the organization or person.

See Also

Home Overview on page 2-2

Search

The type of entity you want to search determines the search criteria and results.

- **Organization:** Customers of type Organization.
- **Person:** Customers of type Person, or persons who are contacts for organizations.

The simple and advanced searches are not case sensitive. You can use the symbol % as a wild card, but it is automatically appended to the end of your entry if the search is not using Data Quality Management (DQM).

Your administrator can set up this search to use DQM, which provides powerful and flexible search functionality. The available search criteria for DQM searches are based on the match rule that your administrator selects.

See Also

Searching for Organizations or Persons on page 3-8

Shortcuts

- **Create Organization**, on page 3-9.
- **Create Person**, on page 3-9.
- **Create Task:** Create tasks that you can assign to yourself or other resources, and associate with customers.
- **Create Note:** Create notes that you can assign to yourself or other resources, and relate to customers.
- **Create Hierarchy:** Create hierarchies you can use to visually manage hierarchical relationships, on page 3-36.

Recent Items

Recent items include the last few items that you viewed in the application. You can access the overview of listed organizations, persons, or contacts. See Overview on page 3-12.

Bookmarked Lists

View and access the organizations, persons, and contacts that you have manually bookmarked from the Overview page for that item. See Overview on page 3-12. You can also:

- Update bookmarked items, on page 3-14.
- Remove items from the bookmarked list.

3 Customers

This chapter describes how to view, create, and manage information for your customers and their contacts. Customer information is available for both organizations and persons, for business-to-business and business-to-consumer relationships.

Customer and contact information includes:

- Profile
- Classifications (customers only)
- Addresses
- Contact points
- Relationships (customers only)
- Accounts (customers only)
- Transactions (customers only)
- Notes
- Tasks
- Attachments
- Interactions
- Source system mappings

You can also:

- Acquire D&B information for organizations to enrich customer information, and identify potential duplicate customers to improve data quality.
- Use hierarchies to manage hierarchical relationships.

Introduction to Customers

In Oracle Customers Online (OCO), customers are organizations or persons, each as a party in the Oracle Trading Community Architecture (TCA) Registry. OCO provides various features for you to manage your customer information.

- **Organizations:** View, create, and manage information for customers of type Organization.
- **Persons:** View, create, and manage information for customers of type Person, and for persons who are contacts for organizations. See Introduction to Contacts on page 3-6.
- **Hierarchies**: View, create, and manage customer relationship hierarchies, for example, corporate hierarchies.

If the following features are enabled, you can:

- Enrich user-entered information by purchasing D&B data for customers of type Organization.

  See Also: Introduction to D&B, *Oracle Trading Community Architecture User Guide*

  Your administrator can set up D&B purchase only if your organization has a contract with D&B.

  Note: If you do purchase D&B data, and your administrator sets up the single source of truth (SST) record, then OCO uses the SST record for organization information. See Single Source of Truth Data on page 3-5.

- Improve data quality by marking duplicate organizations or persons, and submitting those duplicate sets for merge in Oracle Data Librarian (ODL).

  Your administrator can enable duplicate identification only if your organization uses ODL.

See Also

Major Features for Customers on page 3-3

Introduction to Oracle Customers Online on page 1-2

Major Features for Customers

Oracle Customers Online provides many features for you to view, create, and manage information about organizations and persons, whether they are your customers or other members of your trading community.

To start, you search for the organization or person that you want to manage, or create a new organization or person. See Searching for Organizations or Persons on page 3-8.

After you find the organization or person that you want to work on, you can:

- **Overview:** View key information, on page 3-12.
- **Profile:** Update profile details, on page 3-14.
- **Classifications:** Manage custom and industrial classification assignments, on page 3-15. Industrial classifications, such as NAICS and SIC codes, apply only to organizations.
- **Addresses:** Manage addresses, on page 3-17.
- **Contact Points:** Manage contact points, on page 3-19.
- **Relationships:**
  - **Contacts** (organizations only): Manage the organization's contacts, on page 3-20.
  - **Employment** (persons only): Manage the person's employers, or organizations that the person is a contact for, on page 3-20.
  - **Others:** Manage all other relationships not included in Contacts and Employment, on page 3-23.

OCO also provides a visual hierarchy feature for managing hierarchical relationships among existing organizations and persons. See Hierarchies Overview on page 3-34.

> **Note:** You can create relationships only for existing parties through the hierarchy. To create hierarchical relationships and new parties at the same time, see Contact Relationships on page 3-20 and Other Relationships on page 3-23.

- **Accounts:** View customer account information such as account sites, account relationships, account contacts, and credit summaries, on page 3-28.
- **Transactions:** View transactions for the campaign to cash and problem to resolution flows, on page 3-31.
- **Notes:** Manage notes associated with the organization or person. A note is information, such as directions, special instructions, or reminders, that is attached to an object.
- **Tasks:** Manage tasks, defined as the lowest units of work, that are related to the organization or person.
- **Attachments:** Manage attachments that are related to the organization or person. Attachments are unstructured data such as images, word-processing documents, spreadsheets, or text.
- **Interactions:** View interactions, or contacts between the organization or person and a human or automated agent, such as phone calls and placed orders.
- **Source Systems:** Map the organization or person to the source system that the organization or person record comes from, for example a legacy or third party system, on page 3-33.

See Also

Introduction to Customers on page 3-2

Single Source of Truth Data

The single source of truth (SST) record is a view of the most accurate organization information, based on your administrator's setup. Each attribute in the SST record contains data from either a user-entered or third party data source, depending on the setup and availability of data.

See Also: Administering Third Party Data Integration, *Oracle Trading Community Architecture Administration Guide*

If the SST record is set up, then Oracle Customers Online uses the SST data where applicable, for example, the organization overview and profile.

Comparing Information from Data Sources

When you start the process to purchase D&B data for a specific organization, you first view the organization's existing user-entered and D&B information, if any. See Overview on page 3-12. You can also view that information after purchasing D&B data.

See Also: Viewing Information from Data Sources, *Oracle Trading Community Architecture User Guide*

In the Business Verification subtab, you can also compare the D&B data with the single source of truth record, if SST is set up. If not, you see only the D&B and user-entered information in this subtab.

Note: If you have the Oracle Customers Online Superuser responsibility, you can see all three sets of data at the time: user entered, D&B, and SST. If SST is not set up, only user-entered and D&B data are displayed.

See Also

Introduction to Customers on page 3-2

Introduction to Contacts

In Oracle Customers Online, a contact is a person who is a contact, employee, or member of an organization. Your administrator can add other roles, which a person plays in relation to organizations, to the Party Contacts relationship group to be considered a contact in OCO. A person can be a contact for multiple organizations.

> **See Also:** Relationships Overview, *Oracle Trading Community Architecture User Guide*

Information about a person is separate from the information for each contact role. For example, you can manage addresses for Joe Smith as a person, as well as for Joe Smith as a contact for Vision Corporation, and Joe Smith as a contact for Business World. These features for persons are also available for contacts:

- Overview on page 3-12
- Profile on page 3-14
- Addresses on page 3-17
- Contact Points on page 3-19
- Notes
- Tasks
- Attachments
- Interactions
- Source Systems on page 3-33

To start, you search for the person that you want to manage information for as a contact, on page 3-8. After you select the person, you can switch from the person to a contact role, for the above features.

OCO allows enterprises that maintain both business-to-business and business-to-consumer customer relationships to switch between viewing a business-to-consumer person customer record and viewing the person in the context of his or her role as a contact of an organization.

To view and manage a contact, the person must be in a contact relationship for at least one organization. For a specific person, you can view the organizations that he or she is a contact for, and create and manage contact relationships from the person’s perspective. You can also create and manage contacts for a specific organization, from the organization’s perspective. See Contact Relationships on page 3-20.

OCO supports detailed views of contacts, as described above, only for organization contacts. Persons who are contacts for other persons, such as an emergency contact, maintain their own addresses, contact points, and other information, and are not treated the same way as organization contacts.

See Also

Major Features for Customers on page 3-3

Searching for Organizations or Persons

The Organizations page is the starting point for your work on organizations, and the Persons page for persons. Use simple or advanced search to find the entity you want to work on. You can also:

- Use the Persons page to search for contacts.
- Use the Home page to quickly access organizations, persons, and contacts, on page 2-3.

If you see from the search results that the entity does not already exist, you can create organizations or persons, on page 3-9.

> **Note:** When you create a new person, you can also create a new contact relationship between that person and an organization.

You can also:

- **Mark Duplicates:** Identify duplicate organizations or persons to merge, if enabled, on page 3-11.
- **Purchase:** Search for D&B information to acquire for organizations, if enabled. The search criteria you used to find the organization are defaulted for the D&B search.

  See Also: Searching for Companies in the D&B Database, *Oracle Trading Community Architecture User Guide*

- Click a name to go to the organization or person overview, on page 3-12. In the person overview, you can switch to view information for contact roles that the person plays in relationships with organizations.
- **Update:** Update an organization or person, on page 3-14. In the person profile, you can switch to update information any of the person's contact roles.

The Organizations and Person pages also provide the same recent items from the Home page. See Recent Items on page 2-4.

See Also

Major Features for Customers on page 3-3

Creating Organizations or Persons

Enter the new organization or person's profile and address information. With the address feature in Oracle Customer Online, you can add more addresses for this organization or person, and select the preferred address for each purpose. See Addresses on page 3-17.

Note: If you enter an organization for the person you are creating, then:

- The new person is created.
- If you enter a new organization, the organization is also created.
- A contact relationship between the person and the corresponding organization is created. See Contact Relationships on page 3-20.
- The created profile and address information belongs to the contact, not the person.

You can view and manage information for the person in this contact role. See Introduction to Contacts on page 3-6.

You can optionally create the organization or person and immediately add more details, on page 3-14, such as:

- **Organization:** Business indicators, total employees, and income tax and financial information.
- **Person:** Personal ID, income taxpayer ID, gender, and data of birth.

See Also

Preventing Duplicate Organizations or Persons on page 3-10

Searching for Organizations and Persons on page 3-8

Preventing Duplicate Organizations or Persons

If your administrator has enabled organization or person duplicate prevention, you are warned if the organization or person that you are creating is a possible duplicate of existing parties. Duplicate prevention applies also to creating organizations or persons as part of creating a new relationship.

You can either:

- Continue to create the new organization or person.
- Discard the new organization or person and continue with an existing one instead.

See Also

Preventing Duplicate Relationships on page 3-24

Creating Organizations or Persons on page 3-9

Marking Duplicate Organizations or Persons

If you have Oracle Data Librarian (ODL), and your administrator has set up duplicate identification for Oracle Customers Online, you can specify in OCO which organizations or persons are potential duplicates. Each set of duplicates that you mark is sent to ODL as a merge request.

The data librarian can evaluate your merge request and merge the duplicates into one record, as well as determine how the duplicates' relationships, including contact relationships, are merged. The data librarian can also reject your merge request and retain the merge candidates as independent customer records.

> **See Also:** Merge Requests Overview, *Oracle Data Librarian User Guide*

In OCO, after you select two or more potential duplicates for a merge request, you designate the master record that remains after the other duplicates merge into it. The data librarian can reassign the merge master before the actual merge.

See Also

Searching for Organizations and Persons on page 3-8

Overview

The overview displays the most critical profile information about the selected organization, person, or contact, and lets you manage the associated notes and tasks. You can switch between the person and contact overview.

Note: You get a view-only version of the overview if you navigate here by clicking an organization, person, or contact name within a process flow.

- **Primary Information:** View basic profile information. You can click the primary address for a map of the location.
- **Contacts** (organizations only): Aside from viewing a list of the organization's contacts, you can:
  - View contacts' overview information.
  - Update contacts on page 3-14.
  - Remove contacts. You only delete the contact relationship between the person and the organization, not the person record itself.

Note: To create contacts for the organization, go to contact relationships. See Creating Contact Relationships on page 3-22.

- **Notes**
- **Tasks**

You can also:

- **Bookmark** or **Unbookmark:** Bookmark the organization, person, or contact so that it appears in the bookmarked list. If the item is already bookmarked, you can remove it from the list. See Bookmarked Lists on page 2-4.
- **Enrich** (organizations only): Review and optionally purchase D&B information for this organization, if enabled.

See Also: Viewing Information from Data Sources, *Oracle Trading Community Architecture User Guide*

- **Visualize** (not applicable to contacts): Open a dynamic graphic representation of the organization or person's relationships, on page 3-26.

See Also

Major Features for Customers on page 3-3

Introduction to Contacts on page 3-6

Profile

The profile allows you to view and enter the organization, person, or contact's profile details. You can switch between the person and contact profile.

If you change attributes that are common to both the person and the contact, the change is not reflected in both cases. For example, you have Joe as a person and the same Joe as the contact for Vision Corporation. If you change the address for Joe, you do not update the address for Joe in his contact role for Vision.

Note: The person and contact name is always the same. If you change Joe as a person to Joseph, you also get Joseph as the new contact name for all of Joe's contact roles.

For contacts only, you can enter purposes for the contact relationship. For example, Joe can be a contact for Vision's billing and shipping purposes.

See Also

Major Features for Customers on page 3-3

Introduction to Contacts on page 3-6

Classifications

Classify organizations and persons using classification schemes, which include a class category and a class code. The class category is a broad subject that you can classify entities in, and the code, or classification, is a specific value of the category.

For organizations only, you can use standard industrial classifications, including SIC, NACE, and NAICS codes.

> **See Also:** Classifications Overview, *Oracle Trading Community Architecture Administration Guide*

To manage classifications for the selected organization or person, you can:

- **Assign:** Assign classifications of the selected category, on page 3-16.
- **Update:** You can update only the classification's end date.
- **Remove:** Assign the classification an end date of today. The removed classification is immediately inactive.
- **View History:** View and optionally restore previously removed classifications so that they are again active classifications for the organization or person.

See Also

Major Features for Customers on page 3-3

Assigning Classifications

Within the class category that you selected for the organization or person, select the classification, or class code, that you want to assign. Depending on whether multiple assignments are allowed for the class category, you can select either only one or multiple classifications.

If the selected class category is hierarchical, you can optionally view the category in a hierarchical structure. The hierarchy focuses on the specific classification that you click View in Hierarchy for.

After you select at least one classification to assign, either in a nonhierarchical or hierarchical view, specify the date range for the classifications. If a classification is already assigned to the organization or person, you can add the same classification again only if the date ranges do not overlap.

See Also

Classifications on page 3-15

Addresses

Aside from entering an address when you create an organization, person, or contact, you can create and maintain additional addresses, assigning different purposes to each address. The primary address is the main address for identifying the organization, person, or contact, regardless of purpose.

- **Create:** Create addresses, on page 3-18.
- **Map:** View maps of addresses.
- **Update:** Update addresses, on page 3-18.
- **Remove:** Inactivate addresses for the selected organization, person, or contact. You cannot remove a primary address until you update another address and designate it as primary.

For other views of these addresses, you can:

- **View Removed:** View and optionally restore previously removed addresses so that they are again active addresses for the selected organization, person, or contact.
- **View by Purpose:** View addresses by purpose and optionally select the preferred address for that purpose. For example, an organization has many addresses for the bill-to purpose. The selected address is the preferred bill-to address among all of the organizations's bill-to addresses.

See Also

Major Features for Customers on page 3-3

Introduction to Contacts on page 3-6

Creating and Updating Addresses

You can specify that the address is the primary address only if the address is active. If a primary address already exists for the organization, person, or contact, the primary address is switched from the previous address to the newly designated address.

You can enter multiple purposes for the address. To view all addresses of this organization, person, or contact by purpose, and to select the preferred address for a purpose, use the Select Preferred Addresses page.

See Also

Addresses on page 3-17

Contact Points

Contact points are specific ways of contacting the organization, person, or contact. You can create and update these types of contact points: phone numbers, e-mail addresses, and URLs.

The primary contact point is the identifying contact point for each type. For example, of all e-mail addresses that a person has, only one is designated as the primary, or identifying, e-mail for that person.

The primary contact point must be active. When you update a contact point to be primary, but one already exists, the primary contact point for that type is switched from the previous contact point to the newly designated one.

You can remove, or inactivate, contact points. You cannot remove a primary contact point until you update another contact point of the same type and designate it as primary.

See Also

Major Features for Customers on page 3-3

Introduction to Contacts on page 3-6

Contact Relationships

In Oracle Customers Online, contacts are persons who play any of a specific group of contact roles for organizations. You can manage information about contacts separately from information about the persons themselves. See Introduction to Contacts on page 3-6.

Note: For contact relationships between persons, see Other Relationships on page 3-23.

For organizations, you can view and manage their contacts. An organization that has contacts is called an employer. For persons, you can see the employers that they are contacts for.

- **View History:** View and optionally restore previously removed contacts or employers so that they are again active. You remove the end dates for the corresponding contact relationships.
- **View by Purpose** (organizations only): View the contacts by purpose, and optionally assign a preferred one for the purpose. For example, an organization has many contacts for the billing purpose. The selected contact is the preferred billing contact among all of the organizations's billing contacts.

  To manage a contact's purposes, see Profile on page 3-14.

For hierarchical contact relationships, you can also use the hierarchy to view and manage relationships for existing persons and organizations. See Hierarchies Overview on page 3-34.

See Also: Relationships Overview, *Oracle Trading Community Architecture User Guide*

See Also

Major Features for Customers on page 3-3

Contact Relationships from Organization's Perspective

Manage contacts for the selected organization.

- Create contacts, or contact relationships with the organization as the subject.
  1. Create the organization itself, if needed, on page 3-9.
  2. Add a new contact for the organization, using a new or existing person, on page 3-22. If you use a new person, you create not only the contact relationship but also the person.
- View contact details, on page 3-12.
- Update contacts, on page 3-14.
- Remove contacts, assigning the relationship an end date of today. You are only deleting the contact relationship between the organization and the person, not the person record itself.

Contact Relationships from Person's Perspective

Manage employers that the selected person is a contact for.

- Create employment, or contact relationships with the person as the subject.
  - **New Person:** Create a person and enter a new or existing organization name, on page 3-9.
  - **Existing Person:** Find the person and create a new employment with a new or existing organization, on page 3-22. If you use a new organization, you create not only the contact relationship but also the organization.
- View employer details, on page 3-12.
- Update employers, on page 3-14.
- Remove employers, assigning the relationship an end date of today. You are only deleting the contact relationship between the person and the organization, not the organization record itself.

Creating Contact Relationships

Whether you are adding a contact for an organization, or an employer for a person, the relationship is the same and both directions of the relationship are created. The only difference is whether you are creating the relationship from the person or organization's perspective, meaning with the person or organization as the relationship subject.

You can enter an existing or new person as the contact, or organization as the employer. If you enter a new entity, you create not only the contact relationship but also the new person or organization.

The profile, address, and contact point information are all for the contact, not the person or organization itself. See Introduction to Contacts, on page 3-6.

With the address feature in Oracle Customer Online, you can add more addresses for this contact, and select the preferred address for each purpose. See Addresses on page 3-17.

You can optionally create the relationship and immediately add more details, such as the purposes of this new contact relationship, on page 3-14.

Note: The new relationship has a start date of today, and no end date. To end the relationship, just remove the contact or employer, on page 3-20.

You can also create a contact relationship as part of creating a new person. See Creating Organizations or Persons on page 3-9.

See Also

Creating Relationships on page 3-24

Preventing Duplicate Organizations and Persons on page 3-10

Contact Relationships on page 3-20

Other Relationships

You can use the Other relationships feature to view and manage all relationships for a person or organization:

- Excluding contact relationships between persons and organizations. See Contact Relationships on page 3-20.
- Including person-to-person contact relationships. The contact relationship features are only for persons as contacts for organizations.

> **See Also:** Relationships Overview, *Oracle Trading Community Architecture User Guide*

For the selected person or organization as the subject, you can:

- Create relationships of a selected role, on page 3-18.
- View the object organization or person's overview information, on page 3-12.
- Update relationships, on page 3-18.
- Remove relationships, assigning the relationship an end date of today. The removed relationship is immediately inactive. You do not remove the related organization or person, just the relationship.
- **View History:** View and optionally restore previously removed relationships so that they are again active relationships for the organization or person. The end dates of restored relationships are deleted.

For all hierarchical relationships, you can also use the hierarchy to view and manage relationships for existing persons and organizations. See Hierarchies Overview on page 3-34.

See Also

Major Features for Customers on page 3-3

Creating Relationships

When you create a relationship for a selected organization or person, you create both directions of the relationship. For example, the selected organization is Vision and you create a relationship with Subsidiary as the role and Vision2 as the object of the relationship. You can then see that Vision's subsidiaries include Vision2, when viewing the relationships of Vision. When you view relationships of Vision2, however, you can also see that Vision2's headquarters is Vision.

See Also

Other Relationships on page 3-23

Date Ranges

You can create multiple relationships between the same two parties, with different relationship roles, even if relationship date ranges overlap. For example, Joe Smith can be both a contact and beneficiary of Jane Smith at the same time.

To use the same relationship role for multiple relationships between the same two parties, however, the relationship date ranges must not overlap. For example, Joe Smith can be a contact for Jane Smith from 1997 through 2002, and then again from 2004 on.

If you use the current date for the start date, then the relationship's start time is the system time. If not, the start time is at the beginning of the start date. The relationship's end time is at the end of the end date. You do not have to enter an end date.

Preventing Duplicate Relationships

You can use new or existing organizations and persons to create a relationship with. You create the new organization or person as well as a new relationship. If duplicate prevention is enabled, you are warned if your new organization or person is a potential duplicate of existing parties. See Preventing Duplicate Organizations and Persons on page 3-10.

If you use existing organizations or persons for the relationship, you cannot create the relationship if a relationship between the two parties already exists with a date range that overlaps your new relationship.

Updating Relationships

You can update only the date range of existing relationships. If other relationships already exist between the same two parties with the same relationship role, your updated date range must not overlap the date ranges of those existing relationships.

You can enter or change an end date to terminate a relationship at the specified date. You can also extend a relationship by entering a later end date or removing the end date, even for relationships with an end date that already passed.

If you use the current date for the start date, then the relationship's start time is the system time. If not, the start time is at the beginning of the start date. The relationship's end time is at the end of the end date.

See Also

Other Relationships on page 3-23

Visualizing Relationships

Use visualization to view relationship information in a graphic format that shows all relationships, no matter how complex, to the selected organization or person. Select a party to place that party at the center and view all relationships to that party.

You can also:

- Change your view by selecting or deselecting the relationship roles you want to see. The roles are listed in the top right box.
- Double-click a party to place that party at the center and view all relationships to that party.
- Right-click a party to view overview information about the party. See Overview on page 3-12.
- Click Focus On Root to change the view back to the organization or person that you originally selected to visualize relationship for.

Under the list of relationship roles, you can select a function and click + or - to select a corresponding setting.

- **Draw Rings:** Specify whether or not to display rings for signifying levels of relationships with respect to the center organization or person.
- **Label Style:** Specify the displayed label style.
  - *Normal:* All text is displayed in one line.
  - *Slice:* Text that exceeds a certain number of characters is displayed on multiple lines.
  - *Truncate:* Text that exceeds a certain number of characters is truncated.
- **Rings:** If you are displaying rings, specify the number of rings to display.
- **Text Size:** Specify the text size of the labels.
- **Truncate:** If you are using the Truncate label style, specify the number of characters to display before truncating the rest of the text. The visualization does not always display the expected number of characters based on this setting. It optimizes the characters displayed based on the length of the words in the labels.

You can access this visualization feature only from the organization or person overview. See Overview on page 3-12.

See Also

Contact Relationships on page 3-20

Other Relationships on page 3-23

Accounts

An organization or person can have multiple accounts for various business purposes. You can view key information about each account, including the account sites, contacts, and relationships. To create or update account information, you must use relevant Oracle e-Business Suite applications, such as Oracle Receivables.

> **See Also:** Customer Overview, *Oracle Receivables User Guide*

From the Accounts page, you can:

- Access the account details, on page 3-29.
- For organizations only:
  - View the credit summary for accounts that have credit reviews.
  - View the aggregate credit summary for the organization, if it has a credit review. This summary is a consolidation of the credit summaries from all the organization's accounts.

    > **See Also:** Viewing the Credit Summary, *Oracle Receivables User Guide*

See Also

Major Features for Customers on page 3-3

Viewing Accounts

Account Profile

View profile information for the account, and, for organizations only, the account's credit summary, if the account has a credit review.

> **See Also:** Viewing the Credit Summary, *Oracle Receivables User Guide*

You can click the primary address for a map of the location.

Account Sites

Aside from viewing the account's active sites, you can also:

- **View Site Contacts by Role:** See the contacts for all account sites, based on the selected role. For contacts per site, view the site details.
- **View Sites by Purpose:** See the account sites for specific purposes, including the primary site for each purpose.
- **View Inactive:** See all the inactive account sites.
- **Map:** View the account site address in a map.
- **Credit Summary:** For organizations only, view the account site's credit summary, if the site has a credit review and a bill-to purpose.
- **Site Details:** View the account site details, including profile information, account site purposes, and account site contacts. For organizations only, you can also access the site's credit summary, if available as described above.

> **See Also:** Viewing the Credit Summary, *Oracle Receivables User Guide*

Account Contacts

Aside from viewing the account's active contacts, you can also:

- **View Account Contacts by Role:** See the account contacts for specific roles.
- **View Inactive:** See all the inactive account contacts.

Account Relationships

You can view the account's active and inactive relationships.

> **See Also:** Creating Customer Account Relationships, *Oracle Receivables User Guide*

See Also

Accounts on page 3-28

Transactions

View the selected organization or person's associated transactions. Oracle Customers Online displays transactions based on these customer relationship life cycles:

- Campaign to cash
- Problem to resolution

To create or update these transactions, use the Oracle application that the displayed information comes from, or another relevant application. For example, you can update credit items in Oracle Receivables, where those transactions come from.

This table shows the transaction types displayed in Oracle Customers Online and the application that the information comes from.

Transaction Type	Description	Oracle Application	See Also
Campaigns	Marketing activities designed to support a goal, advertising the organization or person's products, services, offers, and messages in front of existing and potential customers.	Oracle Marketing	*Oracle Marking User Guide*
Events	A seminar, class, product demonstration, or any other activity that is location specific. Events can be standalone or part of a marketing campaign.	Oracle Marketing	*Oracle Marketing User Guide*
Leads	Marketing leads of the organization's or person's customers.	Oracle Leads Management	None
Opportunities	The organization or person's potential sales to their existing or new customers.	Oracle Sales Online	*Oracle Sales Online User Guide*
Quotes	Offers from the organization or person to customers, including a total price and the primary salesperson for the quote.	Oracle Quoting	*Oracle Quoting User Guide*
Orders	Orders from the organization or person's customers for products or services.	Oracle Order Management	*Oracle Order Management User's Guide*
Debit Items	The organization or person's debit items.	Oracle Receivables	*Oracle Receivables User Guide*
Credit Items	The organization or person's credit items.	Oracle Receivables	*Oracle Receivables User Guide*

Transaction Type	Description	Oracle Application	See Also
Installed Base	Records of products shipped to the organization's or person's customers, including serial numbers and current status.	Oracle Install Base	*Oracle Install Base Concepts and Procedures*
Service Requests	Requests for service from the organization or person's customers.	Oracle TeleService	*Oracle TeleService User Guide*
Delinquencies	The organization or person's payments that do not meet the invoice schedule.	Oracle Collections	*Oracle Collections User Guide*
Broken Promises	The organization or person's promises to pay with the Broken status.	Oracle Collections	*Oracle Collections User Guide*

The list view shows the top five transactions for each transaction type. You can click More to view more or all transactions for the organization or person.

See Also

Major Features for Customers on page 3-3

Source Systems

Source System Management (SSM) allows mappings between an organization, person, or contact and its source systems. Use SSM mappings to track which legacy, third party, or other systems the record originated from.

> **See Also:** Source System Management Overview, *Oracle Trading Community Architecture Administration Guide*

In Oracle Customers Online, you can view active and inactive source system mappings. The source ID is the ID of the record in the source system. In the source system history are the inactive, or removed, source system mappings, which have passed end dates.

If your administrator has provided you privileges through the HZ: Source System Mapping Access profile option, you can also:

- **Create:** Create a new mapping between the organization, person, or contact and a source system. You can only map to source systems that are set up as actively providing data to the entity that you are working with, Organization, Person, or Contacts.
- **Update:** Change the source ID of the source system mapping.
- **Remove:** Provide or modify the end date of the mapping.

See Also

Major Features for Customers on page 3-3

Hierarchies Overview

A hierarchy is a collection of parties associated with a particular hierarchical relationship type at a given point in time. The hierarchy is a tree structure that shows relationships by organizing parties in hierarchical levels. For example, you can get a visual representation of a corporate structure.

> **See Also:** Relationships Overview, *Oracle Trading Community Architecture Administration Guide*

In Oracle Customers Online, you can view and manage hierarchies for existing organizations and persons. To start, you search for the hierarchies you want to manage, or to make sure that the hierarchy you want to create does not already exist. You can search by:

- **Party Name** or **Registry ID:** The organization or person in any level of the hierarchy.
- **Hierarchy Type:** The hierarchical relationship type of the hierarchy.

The search results display hierarchies that include the party you searched for. You can:

- Create a hierarchy after you verify that it does not already exist, on page 3-36.
- View and manage a specific hierarchy, including relationships within the hierarchy, on page 3-37.

The Hierarchies page also provides the same Recent Items bin from the Home page. See Recent Items on page 2-4.

The relationships in hierarchies are the same as ones in the contact and Other relationships features. To create relationships with new persons or organizations, you must use those features. Hierarchies involve only existing parties. See Contact Relationships on page 3-20 and Other Relationships on page 3-23.

See Also

Introduction to Customers on page 3-2

D&B Hierarchy

If D&B data was batch loaded or the Enterprise Management GDP acquired through online purchase, you can also access the corporate hierarchy that D&B provides. Use the D&B Hierarchy relationship type.

> **See Also:** D&B Hierarchy, *Oracle Trading Community Architecture Administration Guide*

All OCO hierarchy features also apply to the D&B Hierarchy. You should make a copy of the original D&B Hierarchy as provided by D&B. See Copying Hierarchies on page 3-39. The copied hierarchy would have a different relationship type, and you can make changes to it without modifying the original.

Creating Hierarchies

To create a hierarchy, you first define:

- The existing party that is the root, or uppermost level, of the hierarchy.
- The relationship type for the hierarchy.

The name of the hierarchy is automatically created based on the root node and hierarchy type. For example, if you enter *Vision* as the root party, and *Corporate* as the type, then the hierarchy name is *Vision - Corporate Hierarchy*.

You then add another existing party as a child of the root node, on page 3-40.

When you view this hierarchy, you would see this relationship between the root and the child, as well as other existing relationships that belong to the hierarchy. See Viewing and Updating Hierarchies on page 3-37.

Note: You can also create new hierarchies by copying existing hierarchies, on page 3-39.

See Also

Hierarchies Overview on page 3-34

Viewing and Updating Hierarchies

In the hierarchy that you select to view, the specified party is at the top. You can see its children, or parties ranked lower in relationships. If the selected person or organization is not the actual root node, then you can choose to view the entire hierarchy, all the way up to the root.

By default, the hierarchy as of the current date is displayed. The hierarchy represents a structure of relationships for the date that you specify. The hierarchy displays all relationships that fit both of these criteria:

- The start date is before or the same as the as of date.
- The end date is after the as of date, or no end date exists.

This table shows an example of three relationships and their date ranges.

Relationship	Start Date	End Date
A	January 1	January 10
B	January 10	January 30
C	January 15	None

This table shows examples of which relationships the hierarchy would display depending on the as of date.

As Of	Included Relationships
January 1	A
January 10	B
January 15	B and C
January 30	C

The hierarchy displays all existing, active relationships for the date, including relationships created and maintained with the contact and Other relationship features. You can filter the hierarchy by role if there are relationships with different roles in the hierarchy.

Aside from viewing hierarchies, you can also:

- Create relationships by adding children to specific nodes in the hierarchy, on page 3-40.
- Update relationships by:
  - Changing the relationship role or date range, or both, on page 3-41.
  - Moving parties within the hierarchy, on page 3-42.

    Tip: To ensure accurate results when you move parties, view the hierarchy with the current date for the as of date. All moves are based on the hierarchy as it is today.

  - Removing parties from the hierarchy.

    The relationship between the selected party and its parent gets an end date of today. If you view the hierarchy with an as of date that is earlier than today, you would still see this party.
- Copy hierarchies, if available, on page 3-39.

    Tip: To ensure accurate results, view the hierarchy with the as of date that you want to copy the hierarchy from.

See Also

Hierarchies Overview on page 3-34

Copying Hierarchies

From an existing hierarchy, you select the part of the hierarchy that you want to copy for creating a new hierarchy. Whether you select the root node or not, the copied hierarchy includes all relationships from the selected node down.

You must select a different relationship type for the copied hierarchy. Only relationship types that contain all the relationship roles of the original hierarchy are available. For example, if the hierarchy that you are copying from contains a total of six relationship roles, the available relationship types for the copied hierarchy must have at least those six roles.

Note: If no relationship types are available for the copied hierarchy, your administrator can create relationship types with the roles you need.

You copy the hierarchy as it is on the date you specify, even if you were viewing the original hierarchy as of another date.

Your new hierarchy is named the usual way, based on the root node and the relationship type.

See Also

Viewing and Updating Hierarchies on page 3-37

Creating Hierarchies on page 3-36

Adding Children in Hierarchies

You can add children to nodes in hierarchies, either as part of creating a new hierarchy or for updating an existing hierarchy. You create a new relationship between the parent and the child that you enter.

The relationship role describes the role of the child, or object party, with respect to the parent. For example, if Vision is the parent, you can enter *Subsidiary* for the role and *Vision2* for the object party to create this hierarchical corporate relationship: Vision2 is a subsidiary of Vision.

The selected hierarchy type determines the available roles, and the selected role determines the type of party for the object. For example, if the Subsidiary role is defined so that only an organization can be a subsidiary, then only organizations are available as the object party.

Note: You can use only existing parties as parent and child. Duplicate prevention, therefore, does not apply to creating relationships through a hierarchy.

See Also

Creating Relationships on page 3-24

Viewing and Updating Hierarchies on page 3-37

Updating Relationships in Hierarchies

When you select a relationship in a hierarchy to update, you can change only the relationship role and date range. The displayed role is the role that the subject, or parent, plays in the relationship.

When you change the relationship role, the existing relationship actually ends, and a new one is created with the new role. The current date is the end date of the old relationship. The new relationship has the date range that you specify.

See Also

Updating Relationships on page 3-25

Viewing and Updating Hierarchies on page 3-37

Moving Parties in Hierarchies

When you move selected parties within a hierarchy, you accordingly update affected relationships. You can select one or more parties that you want to move under a new parent in the same hierarchy. The parties that you move and the new parent can be on any level of the hierarchy.

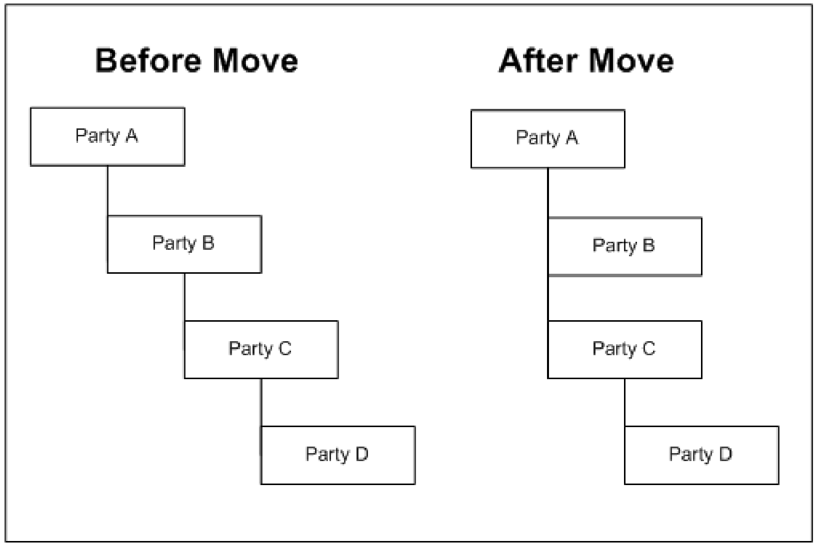
Note: You cannot move parties with the relationship start date in the future.

Each move ends the existing relationship and creates a new one based on the new structure in the hierarchy. The current date is the end date of the existing relationship as well as the start date of the new relationship.

Note: If you need to change start or end dates after moves, see Updating Relationships in Hierarchies on page 3-41.

For example, the current hierarchy has Party A as the parent of Party B, which is the parent of Party C, which is the parent of Party D. You move Party C and select Party A as its new parent. This move ends the relationship for Party B as the parent of Party C and creates a new relationship for Party A as the parent of Party C. Party D moves along with Party C and remains a child of Party C.

This diagram shows the hierarchy before and after the move:



The relationship role of the moved relationship stays the same with respect to parties that you move. For example, if Party C was a subsidiary of Party B, it would then be the subsidiary of Party A, and Party D is still a subsidiary of Party C.

See Also

Viewing and Updating Hierarchies on page 3-37

4

Reports

This chapter describes how to use Oracle Customers Online reports to evaluate customer profile trends and customer data quality.

Overview of Reports

Quality

- **Organization Enrichment Trend** on page 4-3**:** How many customer records are enriched by third party data over a specified period range and interval?
- **Data Completeness** on page 4-5**:** How complete is my customer information for a specified period range and interval, on the party and attribute levels?

Profile

- **Organizations by Industry** on page 4-9**:** Which industries are my customers in?
- **Customer Growth** on page 4-10**:** What is my total customer count over time?
- **Organizations by Country** on page 4-11**:** Which countries are my organizations in?
- **Persons by Country** on page 4-12**:** Which countries are the person records in?
- **Organizations by State/Province** on page 4-13**:** Which states or provinces are my organizations in?
- **Persons by State/Province** on page 4-14**:** Which state or province are the person records in?
- **Duplicate Organizations** on page 4-15**:** How many organization records have duplicates?
- **Duplicate Persons** on page 4-16**:** What percentage of my individual customer records are duplicates?

Organization Enrichment Trend

The Organization Enrichment Trend report provides information on the number of customer records that were enriched by acquiring third party data. In Oracle Customers Online, you can purchasing data from D&B to enrich customer data.

See Also: Introduction to D&B, *Oracle Trading Community Architecture User Guide*

For the period range at the interval that you specify, the report displays in both the graphical and tabular view:

- The number and percentage of organizations enriched, in the period interval, for the first time.
- The number and percentage of cumulative organizations enriched up to and including the period interval.
- The cumulative number of total organizations up to and including the period interval.

For example, you select to report by an interval of quarters and specify the period range of Q1 through Q2 of the 2004 fiscal year. This table shows an example of the data that the report could provide.

Period Interval	# Organizations Enriched in Period	% Organizations Enriched in Period	Cumulative # Enriched Organizations	Cumulative % Enriched Organizations	Cumulative # Organizations
Q1 2004	40	8	240	48	500
Q2 2004	50	7	290	41	700

From this sample data, you can determine that:

- Before Q1 2004, 200 organizations were enriched. 40 new organizations were enriched during Q1 2004, making the cumulative number 240. 8% of all organizations were enriched for the first time in Q1 2004, and 48% of all organizations were enriched at least once up to and including Q1 2004.
- The number of organizations enriched during Q2 2004 and the cumulative number of enriched organizations for Q2 2004 are greater than the numbers for Q1 2004. The percentages are lower in Q2 2004, however, because the cumulative number of total organizations increased at a greater rate.

With this information, you can set goals for Q3 2004, for example:

- Not only to increase the number of newly enriched organizations, but to match or exceed the rate of organizations added to your customer database.
- To have at least 50% of all organizations enriched at least once.

See Also

Overview of Reports on page 4-2

Data Completeness

Data Completeness reports provide statistics on the completeness of your customer data. Completeness is defined as having attribute values. For example, if a record has ten attributes and only values for five attributes, that record is 50% complete.

Each report has a configuration, or a specified set of attributes for one of the following: organization, person, or contact. For example, you can use one report to determine the completeness of all contact attributes, and another to report on only the contact phone attributes.

Possible report statuses are:

- **Active:** Report is configured and activated, and has no end date.
- **Inactive:** Report is configured but not yet activated, and has no start or end date. Inactive reports cannot provide data.

> **Note:** Inactive reports are displayed only if you are using the Oracle Customers Online Superuser responsibility.

- **Archived:** Report is deactivated, and has a start and end date. Archived reports can no longer provide data for periods after the end date, but is available for reference purposes.

From the Data Completeness Reports page, you can:

- **View Configuration:** See which attributes are reported on for a given report.
- Click the report name to run and view a report for a specified period range and interval, on page 4-6.
- **Manage Reports:** Create, update, delete, and change the status of Data Completeness reports, on page 4-8.

> **Note:** You can manage reports only if you are using the Oracle Customers Online Superuser responsibility.

See Also

Overview of Reports on page 4-2

Viewing Data Completeness Reports

You can rerun the same Data Completeness report for different period ranges. The period ranges must fall within the report's start and end date, or the system date if no end date exists.

For each period interval in the past, the report provides completeness data as of the last day in the month or quarter. For the current month or quarter, the report data is as of the previous business day.

See Also

Data Completeness on page 4-5

Summary Report

For each period interval, the report displays in both the graphical and tabular view the completeness percentage of all records, based on the attributes that are reported on. This percentage is the average of completeness percentages for each individual record.

For example, the report is configured with 20 attributes for organizations. You have three organization records, and their completeness information is shown in this table.

Organization	Attributes with Value	Completeness Percentage of Record
A	10	50
B	20	100
C	17	85

The completeness percentage for one organization record is based on how many attributes values the record has out of the 20 attributes configured for the report. The overall completeness percentage for all organizations, 78.33%, is the average of the three record percentages.

From the summary page, you can also:

- **View Configuration:** See which attributes are included in this report.
- View a detail report of completeness on the attribute level for any period interval, on page 4-7.

Detail Report

For the selected period interval, the Data Completeness report details show:

- Each attribute included in the report configuration.
- The completeness percentage of all records for each attribute.
- The number of records with a value for that attribute.

For example, there are 1000 total person records, and the report includes the Last Name attribute. If 900 records out of the 1000 have a last name, then the attribute's completeness percentage is 90.

By showing completeness at the attribute level, you can set goals for data completeness, for example, to have 100% completeness for last name, at least 90% for first name, and 50% for middle name.

Managing Data Completeness Reports

If you have the Oracle Customers Online Superuser responsibility, you can manage Data Completeness reports.

- **Create:** Create new reports to determine the completeness of data for organizations, persons, or contacts.
- **Configure:** Update reports of any status.
- **Copy:** Copy existing reports of any status as the basis for new reports.
- **Activate:** Activate inactive reports so that the report can be used, giving the report a start date of today.
- **Archive:** Give active reports an end date of today to limit the reporting range. You can still use the report, but only to report on data between the start and end date.
- **Delete**: Permanently remove reports of any status.

See Also

Data Completeness on page 4-5

Configuring Reports

When you create or copy a report, you enter a unique name for this Data Completeness report, and specify the attributes to be reported on. If you only save the report, you must activate it later to use the report. You can still update the attribute selections of inactive reports, but not active reports.

To update a report, the available actions depend on the report status:

- **Active:** Update the report name.
- **Inactive:** Update the report name and attribute selections.
- **Archived:** Update the report name.

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.

See Also

Overview of Reports on page 4-2

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.

See Also

Overview of Reports on page 4-2

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.

See Also

Overview of Reports on page 4-2

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.

See Also

Overview of Reports on page 4-2

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.

See Also

Overview of Reports on page 4-2

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.

See Also

Overview of Reports on page 4-2

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.

See Also

Overview of Reports on page 4-2

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.

See Also

Overview of Reports on page 4-2

Index

A

B

C

D

E

P

Q

R

S

T

U

V

W