

Oracle® Customers Online

Implementation Guide

Release 11*i*

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Oracle Customers Online Implementation Guide, Release 11i

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Send Us Your Comments

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

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Preface

Intended Audience

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

This guide contains the information needed to implement Oracle Customers Online.

See Related Documents on page viii for more Oracle Applications product information.

TTY Access to Oracle Support Services

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Structure

1 General Implementation

This chapter describes general implementation of Oracle Customers Online.

2 Feature-Specific Implementation

This chapter describes implementation of specific features in Oracle Customers Online.

A Reports and Processes

This section lists the reports and processes that are seeded in Standard Request Submission for these responsibilities: Oracle Customers Online Superuser, Oracle Customers Online Data Librarian Superuser, and Oracle Customers Online Forms Access.

Related Documents

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 11i versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation:** See the Oracle Applications Documentation Library CD for current PDF documentation for your product with each release. The Oracle Applications Documentation Library is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help:** Online help patches (HTML) are available on Oracle*MetaLink*.
- **About Documents:** Refer to the About Document for the mini-pack or family pack that you have installed to learn about new documentation or documentation patches that you can download. About Documents are available on Oracle*MetaLink*.

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). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes. You can access this user's guide online by choosing *Getting Started with Oracle Applications* from any Oracle Applications help file.

Guides Related to This Product

- **Oracle Customers Online User Guide:** This guide describes how to use Oracle Customers Online to view, create, and maintain your customer information. Oracle Customers Online is based on Oracle Trading Community Architecture data model and functionality, and is also part of the Oracle Customer Data Management product family.
- **Oracle Customer Data Librarian Implementation Guide:** This guide describes how to implement Oracle Customer Data Librarian. As part of implementing Customer Data Librarian, you must also complete all the implementation steps for Oracle Customers Online.

- **Oracle Customer Data Librarian User Guide:** Use this guide to learn how to use Oracle Customer Data Librarian to establish and maintain the quality of the TCA Registry, focusing on consolidation, cleanliness, and completeness. Oracle Customer Data Librarian has all of the features in Oracle Customers Online, and is also part of the Oracle Customer Data Management product family.
- **Oracle Trading Community Architecture Administration Guide:** This guide describes how to administer and implement Oracle Trading Community Architecture. You set up, control, and manage functionality that affect data in the TCA Registry.
- **Oracle Trading Community Architecture Reference Guide:** This reference guide contains seeded relationship types, seeded Data Quality Management data, D&B data elements, Bulk Import interface table fields and validations, and a comprehensive glossary. This guide supplements the documentation for Oracle Trading Community Architecture and all products in the Oracle Customer Data Management family.
- **Oracle Trading Community Architecture User Guide:** Use this guide to learn about Oracle Trading Community Architecture and how to use features from the Trading Community Manager responsibility to create, update, enrich, and cleanse the data in the TCA Registry.
- **Oracle Receivables User Guide:** This guide provides information on accounts, credit summaries, debit items, and credit items, which you can view from Oracle Customers Online. The guide also describes setup steps to perform as part of implementing Oracle Customers Online.
- **Oracle General Ledger User Guide:** This guide describes using and setting up Oracle General Ledger. Some of the setup steps are also required as prerequisites for implementing Oracle Customers Online, for example, setting up sets of books and currencies.
- **Implementing Oracle HRMS:** This guide describes defining your organization structure, which is a prerequisite for implementing Oracle Customers Online.
- **Oracle Inventory User's Guide:** This guide describes setting up Oracle Inventory, which is a prerequisite application that should be set up for Oracle Customers Online.
- **Oracle Order Management Implementation Manual:** This guide describes setting the Item Validation Organization parameter, which is a prerequisite for implementing Oracle Customers Online.
- **Managing Your Workforce Using Oracle HRMS:** This guide describes using Oracle HRMS, including creating employees who are used in Oracle Customers Online.
- **Oracle Common Application Components Implementation Guide:** This guide describes setting up individual resources and running specific concurrent programs as part of implementing Oracle Customers Online.
- **Oracle Receivables Tax Manual:** This guide describes setting up tax validation for US addresses.
- **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, and employees.

- **Oracle Customer Interaction History Implementation Guide:** This guide provides information on interactions, which you can view from Oracle Customers Online.
- **Oracle Collections User Guide:** This guide provides information on broken promises and delinquencies, which you can view from Oracle Customers Online.
- **Oracle Install Base User Guide:** This guide provides information on installed base, which you can view from Oracle Customers Online.
- **Oracle Leads Management Implementation and Administration Guide:** This guide provides information on leads, which you can view from Oracle Customers Online.
- **Oracle Marketing User Guide:** This guide provides information on campaigns and events, which you can view from Oracle Customers Online.
- **Oracle Order Management User's Guide:** This guide provides information on orders, which you can view from Oracle Customers Online.
- **Oracle Quoting User Guide:** This guide provides information on quotes, which you can view from Oracle Customers Online.
- **Oracle Field Sales User Guide:** This guide provides information on opportunities, which you can view from Oracle Customers Online.
- **Oracle Sales User Guide:** This guide provides information on opportunities, which you can view from Oracle Customers Online.
- **Oracle TeleSales User Guide:** This guide provides information on opportunities, which you can view from Oracle Customers Online.
- **Oracle TeleService User Guide:** This guide provides information on service requests, which you can view from Oracle Customers Online.
- **Oracle Trading Community Architecture Technical Implementation Guide:** Use this technical implementation guide to learn how to use the public Oracle Trading Community Architecture application programming interfaces (APIs) and develop callouts based on Oracle Workflow Business Events System (BES). For each API, this guide provides a description of the API, the PL/SQL procedure, and the Java method, as well as a table of the parameter descriptions and validations. For each BES callout, this guide provides the name of the logical entity, its description, and the ID parameter name. Also included are setup instructions and sample code.

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 installing 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: A Guide to Using Rapid Install:** 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 and the technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

- **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 Documentation Set:** 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 Documentation Set:** 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 Flexfields Guide:** This manual provides flexfields planning, setup, and reference information, as well as information on creating custom reports on flexfields data.

Other Implementation Documentation

- **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 Administrator's Guide:** This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.
- **Oracle Workflow Developer's Guide:** This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.
- **Oracle Workflow User's Guide:** This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.
- **Oracle Workflow API Reference:** This guide describes the APIs provided for developers and administrators to access Oracle Workflow.
- **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 *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 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 and integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on *OracleMetaLink*.
- **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 tells you how to apply this UI to the design of an application built by using Oracle Forms.

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 an Oracle Applications form 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.

General Implementation

This chapter describes general implementation of Oracle Customers Online.

This chapter covers the following topics:

- Overview
- General Implementation Steps
- Setting Up Prerequisite Applications
- Creating Employees
- Importing Employees
- Setting Up Employees as Users
- Compiling Flexfields
- Setting Up Periodic Programs
- Setting Profile Options
- Verifying Implementation

Overview

Oracle Customers Online (OCO) lets users view, create, and manage their customer data.

The application is:

- Based on the data model and functionality of Oracle Trading Community Architecture (TCA).
- Part of the Oracle Customer Data Management (CDM) product family.

For reference material that supplements not only TCA but Customers Online implementation, see: *Oracle Trading Community Architecture Reference Guide*.

Aside from specific implementation for Customers Online, you can also use the Administration tab to administer functionality that affects not only OCO but all Oracle e-Business Suite applications that use TCA. See: Introduction to Administration, *Oracle Trading Community Architecture Administration Guide*.

Note: To use the Administration tab, you must have the Oracle Customers Online Superuser responsibility.

Related Topics

Oracle Customers Online User Guide

Dependencies, page 1-2

General Implementation Steps, page 1-3

Feature-Specific Implementation Overview, page 2-1

Dependencies

Oracle Customers Online includes features or data from other applications in the Oracle E-Business Suite.

Mandatory Dependencies

This table shows mandatory dependencies, listing the related application and the features or data in Oracle Customers Online that depend on that application.

Oracle Application	Features or Data in Oracle Customers Online
Oracle Common Application Components	Calendar, Tasks, Notes, and Employees subtabs in Home tab, as well as notes and tasks for organizations, persons, and contacts
Oracle Customer Interaction History	Interactions
Oracle GraphBuilder (Visualization tool)	Relationships visualization
Oracle Trading Community Architecture	Administration tab, data model (including classifications and relationships), Data Quality Management, D&B integration, Source System Management

Optional Dependencies

This table shows optional dependencies, listing the related application and the features or data in Customers Online that depend on that application.

Oracle Application	Features or Data in Oracle Customers Online
Oracle Collections	Delinquencies and broken promises
Oracle Credit Management	Credit summaries
Oracle Customer Data Librarian	Duplicate identification (marking duplicate organizations and persons for merge) and certification
Oracle Install Base	Installed base
Oracle Leads Management	Leads
Oracle Marketing	Campaigns and events
Oracle Order Management	Orders and returns
Oracle Quoting	Quotes
Oracle Receivables	Accounts, credit items, and debit items
Oracle Field Sales, Oracle Sales, and Oracle TeleSales	Opportunities
Oracle TeleService	Service requests

Related Topics

Overview, page 1-1

General Implementation Steps

Note: Use the Oracle Customers Online Superuser responsibility for general implementation steps, unless stated otherwise.

General implementation of Oracle Customers Online includes:

1. Setting Up Prerequisite Applications, page 1-4.
2. Creating Employees, page 1-5.
3. Setting Up Employees as Users, page 1-6.
4. Compiling Flexfields, page 1-7.
5. Setting Up Periodic Programs, page 1-7.
6. Setting Profile Options, page 1-8.
7. Verifying Implementation, page 1-16.

Related Topics

Overview, page 1-1

Setting Up Prerequisite Applications

This section provides a high level outline of the applications and some of the options that must be set up before you implement Customers Online. This section does not provide detailed information and instructions about how to set up Oracle applications. You must refer to the appropriate online help and documentation for each application.

To Set Up Prerequisite Applications for a Fresh Installation of Customers Online:

1. Add the following required responsibilities, if they are not already available.
 - Purchasing Super User
 - General Ledger Super User
 - Inventory
2. Log in using the General Ledger Super User responsibility.
 1. Set up accounting key flexfields.
 2. Set up currencies.
 3. Set up the calendar.
 4. Set up the set of books.

See: Setup, *Oracle General Ledger User Guide*.

3. Log in using an HR user responsibility and define the organization structures. See: Implementation Steps, *Implementing Oracle HRMS*.
4. Log in using the System Administrator responsibility. Set up the system profiles MO: Operating Unit and GL Set of Books Name. See: Profile Options in Oracle Application Object Library, *Oracle Applications System Administrator's Guide*.
5. Run the Adadmin utility. Select the option to convert the organization structure to multi-org.

Caution: After this utility runs, you cannot select this option in the future.

6. Log in to Oracle Receivables and set up the Sales Tax Location Flexfield. See: Setting Up, *Oracle Receivables User Guide*.
7. Log in to Oracle Inventory and set up this application, as necessary, to meet your requirements. See: Setting Up, *Oracle Inventory User's Guide*.
8. Log in using the Order Management Super User responsibility. Set up the Item Validation Organization parameter. See: Item Validation Organization, *Oracle Order Management Implementation Manual*.

Related Topics

Overview, page 1-1

Creating Employees

You must create the individuals who will be using Customers Online as employees before you can set them up as users. You can also import employees. See: Importing Employees, page 1-5.

To Create Employees with Full Oracle Human Resources (HRMS) Installation:

Responsibility: US HRMS Manager

See: Employee Management, Special Information Types *and* Entering a New Person (People Window), *Managing Your Workforce Using Oracle HRMS*.

1. Click New.
2. When defining a new person in the People window, make sure that you enter *Employee* in the Category field for that person.

Without Full Oracle HRMS Installation:

Responsibility: CRM Resource Manager

See: Entering Employees Window, *Managing Your Workforce Using Oracle HRMS*.

Related Topics

Overview, page 1-1

Importing Employees

Use this procedure to import employees from Oracle HRMS. For users to view the Calendar and Employees subtabs, among other things, each employee must be imported and then created as a resource.

Prerequisites

- Set up the employees in Oracle HRMS.

To Import Employees:

Responsibility: CRM Resource Manager

See: Importing Individual Resources, *Oracle Common Application Components Implementation Guide*.

Note: In the Selection Criterion window, make sure to select the *Employee* resource category.

Related Topics

Creating Employees, page 1-5

Setting Up Employees as Users

Set up individual employees as users of Oracle Customers Online, including assigning responsibilities to the users. These responsibilities are available for Customers Online users:

- **Oracle Customers Online User:** A general user of OCO.
- **Oracle Customers Online Superuser:** Generally considered the equivalent of a system administrator. All areas of the site are accessible.
- **Oracle Customers Online Forms Access:** Access to Party Merge, Customer Account Merge, and Oracle Customers Online lookups. Other included features are Data Quality Management setup and D&B integration, which users can also access from the Oracle Customers Online Superuser responsibility. You should assign the Oracle Customers Online Forms Access responsibility to all users who are assigned Oracle Customers Online Superuser.
- **TCA Data Security Administrator:** Administration privileges for Data Sharing and Security (DSS). Assign this responsibility along with Oracle Customers Online Superuser to users who need to administer DSS.

This table describes the menus and access available to each responsibility.

Responsibility	Menu	Access	Menu Exclusion
Oracle Customers Online User	IMC_NG_ROOT_MENU	Home, Customers, Import (with File Load subtab only), and Reports tabs	Administration and Data Quality tabs, and Batch Import subtab under Import tab
Oracle Customers Online Superuser	IMC_NG_ROOT_MENU	Home, Customers, Import (with File Load subtab only), Reports, and Administration tabs	Data Quality tab and Batch Import subtab under Import tab
Oracle Customers Online Forms Access	IMC Data Librarian Merge Root Menu	Party Merge, Data Quality Management, Account Merge, Dun & Bradstreet, Requests, Oracle Customers Online lookups	None
TCA Data Security Administrator	HZ Security Main Menu	View, create, update, and delete privileges for Data Sharing and Security administration	None

Note: The Oracle Customers Online Data Librarian and Oracle Customers Online Data Librarian Superuser responsibilities are for Oracle Customer Data Librarian. See: *Assigning Responsibilities to Users, Oracle Customer Data Librarian Implementation Guide*.

To Set Up Employees as OCO Users:

Responsibility: System Administrator

See: Users Window, *Oracle Applications System Administrator's Guide*.

Tip: Assign the Oracle Customers Online Forms Access responsibility to any user who is assigned the Oracle Customers Online Superuser responsibility.

Related Topics

Overview, page 1-1

Compiling Flexfields

You must freeze and compile all flexfields after installation of Customers Online is complete.

To Compile Flexfields:

Responsibility: Application Developer

See: Defining Key Flexfields *and* Defining Descriptive Flexfields, *Oracle Applications Flexfields Guide*.

Setting Up Periodic Programs

Set up these programs to automatically run at a frequency of your choice.

- These two programs process customer information that is then available to be used when Customers Online reports are requested. Choose a frequency setting based on how often and how much your customer information changes. You can set different schedules for profile and quality reports, based on your business needs.
 - **IMC: Refresh Summary Information for Reports:** Processes customer information for profile reports.
 - **IMC: Refresh Summary Information for Quality Reports:** Processes customer information for quality reports.

See: Overview of Reports, *Oracle Customers Online User Guide*.

- **Refresh of Classification Denormalization:** Runs a complete data refresh to populate the HZ_CLASS_CODE_DENORM denormalization table. See: Refresh of Classification Denormalization, *Oracle Trading Community Architecture Administration Guide*.
- These programs affect the employees feature in the Home tab.
 - **Flatten Employee Hierarchy**
 - **Flatten group hierarchy**
 - **Synchronize Employees**

See: Resource Manager Concurrent Programs, *Oracle Common Application Components Implementation Guide*.

- **Rebuilding Intermedia Index for Task Names:** This program affects tasks in the Home and Customers tabs. See: Task and Calendar Concurrent Program, *Oracle Common Application Components Implementation Guide*.

- **Synchronize JTF_NOTES_TL_C1 index:** This program affects notes in the Home and Customers tabs.

To Set Up Periodic Programs:

See: Running Reports and Programs, *Oracle Applications User Guide*.

Related Topics

Overview, page 1-1

Setting Profile Options

Set a value for each profile option to specify how Oracle Customers Online controls access to and processes data.

The prefixes in the profile option name indicate the application that the profile belongs to:

- **IMC:** Oracle Customers Online
- **HZ:** Oracle Trading Community Architecture
- **ICX:** Oracle Self-Service Web Applications

Many of the profile options in Oracle Trading Community Architecture are applicable to Customers Online, especially for features in the Administration tab. See: Setting Profile Options, *Oracle Trading Community Architecture Administration Guide*.

Unused or Internal Profile Options

These profile options are either internally used by Oracle Customers Online or not used at all. You should not modify their settings in any way.

- IMC: Limit on Number of Recently Created Records to show by Date
- IMC: Method for Defining "Recently Created"
- IMC: Profile for User Access
- IMC: "Recently Created" Value Definition
- IMC: Visualization Solution Type

Note: The HZ: Default Party Type profile option setting has no affect on this application.

To Set Profile Options:

Responsibility: System Administrator

See: Overview of Setting User Profiles, *Oracle Applications System Administrator's Guide*.

Important: Some profile options are set with a match rule. Make sure that all seeded or custom match rules you assign to profile options are compiled. See: Compiling Match Rules, *Oracle Trading Community Architecture Administration Guide*.

Related Topics

Profile Option Descriptions, page 1-9

Profile Option Access and Defaults, page 1-14

Overview, page 1-1

Profile Option Descriptions

These profile options are available for you to set up for Customers Online:

- General Profile Options, page 1-9
- Addresses Profile Options, page 1-9
- Bookmarked Lists Profile Options, page 1-10
- Certification Profile Option, page 1-10
- Duplicate Identification Profile Option, page 1-10
- Duplicate Prevention Profile Options, page 1-10
- Import Profile Options, page 1-11
- Recent Items Profile Option, page 1-12
- Relationships Profile Option, page 1-12
- Reports Profile Option, page 1-12
- Search Profile Options, page 1-13
- Source System Management Profile Option, page 1-14
- Third Party Data Integration Profile Option, page 1-14

Related Topics

Setting Profile Options, page 1-8

General Profile Options

HZ: Default Phone Number Purpose

Specify the default purpose for phone numbers and other similar contact point types such as fax and mobile. Even though the purpose is not displayed in the user interface, you can still set the default.

Addresses Profile Options

HZ: Default Flexible Address Format

For flexfield-based address formatting, determine the default format to use if no format is assigned to the selected country. See: *Flexible Addresses, Oracle Receivables User Guide*.

HZ: Validate US Addresses

Determine if US addresses are validated for city, state, county, and postal code combinations when the user creates or updates addresses. The addresses are validated based on data set up for sales tax purposes. Leaving this profile option blank is the same as setting it to *No*.

ICX: Territory

Select the territory that defaults in the user preferences for territory, which users can still override in their user preferences. The territory user preference determines the default country for entering addresses, and the address format is based on the country. If you leave this profile option blank, then the territory from the HZ: Reference Territory profile option is used.

Related Topics

Setting Up Addresses, page 2-4

Creating and Updating Addresses, *Oracle Customers Online User Guide*

Bookmarked Lists Profile Options

IMC: Maximum Number of Contact Bookmarks

Determine the maximum total number of organizations that a user can bookmark.

IMC: Maximum Number of Organization Bookmarks

Determine the maximum total number of contacts that a user can bookmark.

IMC: Maximum Number of People Bookmarks

Determine the maximum total number of people that a user can bookmark.

Related Topics

Bookmarked Lists, *Oracle Customers Online User Guide*

Certification Profile Option

HZ: Display Certification Level

Specify whether or not the certification level is displayed in the user interface. This profile option setting applies to all Oracle e-Business Suite applications that are using the TCA certification feature.

Duplicate Identification Profile Option

HZ: Allow Access to Submit Merge Requests

Determine if users can mark potential duplicate organizations or persons to submit as a merge request to Oracle Customer Data Librarian. Set this profile option to *Yes* only if you have Oracle Customer Data Librarian.

Related Topics

Marking Duplicate Organizations or Persons, *Oracle Customers Online User Guide*

Duplicate Prevention Profile Options

Important: Some profile options are set with a match rule. Make sure that all seeded or custom match rules you assign to profile options are compiled. See: *Compiling Match Rules, Oracle Trading Community Architecture Administration Guide*.

HZ: Enable Duplicate Prevention at Party Creation

Determine if duplicate prevention is enabled for organizations, persons, both, or neither. You can enable for organizations or persons only if you provide match rules for the appropriate match rules below.

HZ: Match Rule for Organization Duplicate Prevention

Specify the seeded or user-defined match rule for identifying potential duplicates of the organization that the user is creating. Use match rules with the Search purpose. The profile option defaults to the seeded match rule SAMPLE: SEARCH. See: SAMPLE: SEARCH, *Oracle Trading Community Architecture Reference Guide*.

HZ: Match Rule for Person Duplicate Prevention

Specify the seeded or user-defined match rule for identifying potential duplicates of the person that the user is creating. Use match rules with the Search purpose. The profile option defaults to the seeded match rule SAMPLE: SEARCH. See: SAMPLE: SEARCH, *Oracle Trading Community Architecture Reference Guide*.

Related Topics

Setting Up Duplicate Prevention, page 2-5.

Preventing Duplicate Organizations or Persons, *Oracle Customers Online User Guide*

Import Profile Options

Important: Some profile options are set with a match rule. Make sure that all seeded or custom match rules you assign to profile options are compiled. See: *Compiling Match Rules, Oracle Trading Community Architecture Administration Guide*.

IMC: Automate CSV File Load into TCA

Specify whether or not to enable automatic import from the interface tables into the TCA Registry right after file loads successfully completes. Leaving this profile option blank is the same as setting it to *No*.

IMC: CSV Batch De-Duplication Action

If the IMC: Automate CSV File Load into TCA and IMC: Run CSV Batch De-Duplication profile options are set to *Yes*, then you can optionally specify how to resolve duplicates found with batch de-duplication. The specified action would be taken on the batch before the data is imported into the TCA Registry.

IMC: CSV Batch De-Duplication Match Rule

If the IMC: Automate CSV File Load into TCA and IMC: Run CSV Batch De-Duplication profile options are set to *Yes*, then you must specify the match rule to use for the batch de-duplication process. Only match rules with Bulk Duplicate Identification purpose are used for batch de-duplication.

IMC: CSV Batch Registry Match Rule

If the IMC: Automate CSV File Load into TCA and IMC: Run CSV Batch Registry Match profile options are set to *Yes*, then you must specify the match rule to use for the Registry de-duplication process. Only match rules with Bulk Duplicate Identification

purpose are used for Registry de-duplication. You can select the same match rule as for batch de-duplication.

IMC: Run CSV Batch Address Validation

If the IMC: Automate CSV File Load into TCA profile options is set to *Yes*, you can specify if you want to run address validation on the batch that is automatically imported. Leaving this profile option blank is the same as setting it to *No*.

IMC: Run CSV Batch De-Duplication

If the IMC: Automate CSV File Load into TCA profile options is set to *Yes*, you can specify if you want to identify and resolve duplicates within the batch that is automatically imported. Leaving this profile option blank is the same as setting it to *No*.

IMC: Run CSV Batch Registry Match

If the IMC: Automate CSV File Load into TCA profile options is set to *Yes*, you can specify if you want to run de-duplication between the batch that is automatically imported and the TCA Registry. Leaving this profile option blank is the same as setting it to *No*.

Related Topics

Setting Up Import, page 2-6

Import Overview, *Oracle Customers Online User Guide*

Recent Items Profile Option

IMC: Maximum Number of Recent Items Displayed

Determine the maximum number of recent items to be displayed in the Recent Items bin in the Home and Customers tabs of Oracle Customers Online.

Related Topics

Recent Items, *Oracle Customers Online User Guide*

Relationships Profile Option

HZ: Allow Hierarchy Copy

Determine whether copying of relationship hierarchies is allowed or not.

Related Topics

Setting Up Relationships, page 2-7

Copying Hierarchies, *Oracle Customers Online User Guide*

Reports Profile Option

IMC: Enable Manage Reports

Determine access privileges to manage Data Completeness reports. You should set this profile option to *Yes* for superuser responsibilities, and *No* for general user responsibilities.

Related Topics

Managing Data Completeness Reports, *Oracle Customers Online User Guide*

Search Profile Options

Important: Some profile options are set with a match rule. Make sure that all seeded or custom match rules you assign to profile options are compiled. See: *Compiling Match Rules, Oracle Trading Community Architecture Administration Guide.*

HZ: Enable DQM Party Search

Determine whether Data Quality Management is enabled for organization and person searches. Set this profile option to *Yes* only if you provide a match rule for at least one of the following profile options. DQM search is enabled only for searches that has an assigned match rule.

HZ: Match Rule for Organization Advanced Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the organization advanced search. Use match rules with the Search purpose. The profile option defaults to the seeded match rule HZ_ORG_ADV_SEARCH_RULE. See: *HZ_ORG_ADV_SEARCH_RULE, Oracle Trading Community Architecture Reference Guide.*

HZ: Match Rule for Organization Simple Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the organization simple search. Use match rules with the Search purpose. The profile option defaults to the seeded match rule HZ_ORG_SIMPLE_SEARCH_RULE. See: *HZ_ORG_SIMPLE_SEARCH_RULE, Oracle Trading Community Architecture Reference Guide.*

HZ: Match Rule for Person Advanced Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the person advanced search. Use match rules with the Search purpose, but do not use a match rule that has the Organization Name attribute. The profile option defaults to the seeded match rule HZ_PERSON_ADVANCED_SEARCH_MATCH_RULE. See: *HZ_PERSON_ADVANCED_SEARCH_MATCH_RULE, Oracle Trading Community Architecture Reference Guide.*

HZ: Match Rule for Person Simple Search

Specify the seeded or user-defined match rule for determining the search criteria and results for the person simple search. Use match rules with the Search purpose, but do not use a match rule that has the Organization Name attribute. The profile option defaults to the seeded match rule HZ_PERSON_SIMPLE_SEARCH_RULE. See: *HZ_PERSON_SIMPLE_SEARCH_RULE, Oracle Trading Community Architecture Reference Guide.*

Related Topics

Setting Up Searches, page 2-8

Home Page, *Oracle Customers Online User Guide*

Searching for Organizations or Persons, *Oracle Customers Online User Guide*

Source System Management Profile Options

HZ: Source System Mapping Access

Specify the type of access for source system mapping. You should set the general user responsibilities to *View Only*, and the superuser responsibilities to *Create and Update*.

Related Topics

Setting Up Source System Management, page 2-10

Source Systems, *Oracle Customers Online User Guide*

Third Party Data Integration Profile Option

HZ: Allow Access to D&B Online Purchase

Specify whether users can access D&B purchase or not. Set this profile option to *Yes* only if you have a contract with D&B and have completed the integration with D&B.

Related Topics

Setting Up Third Party Data Integration, page 2-10

Searching for Organizations or Persons, *Oracle Customers Online User Guide*

Overview, *Oracle Customers Online User Guide*

Profile Option Access and Defaults

This table shows whether the profile option is required or not and displays the default profile option value, or *No Default* if none exists. A required profile option must have an entered or default value for its related feature to function properly.

The User Access column indicates if users can view or update the profile option. The System Admin Access: User Level, Responsibility Level, Application Level, and Site Level columns show the type of access system administrators have for setting the profile option at each level.

The available types of profile option access for users and system administrators are:

- **Update:** You can update the profile option.
- **View Only:** You can view the profile option but cannot change it.
- **No Access:** You cannot view or change the profile option value.

Note: If you cannot find specific profile options with the HZ prefix in this table, then see: Profile Option Access and Defaults, *Oracle Trading Community Architecture Administration Guide*.

Profile Option	Required	Default	User Access	System Admin Access: User Level	System Admin Access: Responsibility Level	System Admin Access: Application Level	System Admin Access: Site Level
HZ: Allow Hierarchy Copy	Required	No	No Access	No Access	Update	Update	Update
IMC: Automate CSV File Load into TCA	Required	No Default	Update	Update	Update	Update	Update
IMC: CSV Batch De-Duplication Match Rule	Required	No Default	Update	Update	Update	Update	Update
IMC: CSV Batch De-Duplication Action	Optional	No Default	Update	Update	Update	Update	Update
IMC: CSV Batch Registry Match Rule	Required	No Default	Update	Update	Update	Update	Update
IMC: Enable Manage Reports	Required	No	Update	Update	Update	Update	Update
IMC: Maximum Number of Contact Bookmarks	Required	10	Update	Update	No Access	Update	Update
IMC: Maximum Number of Organization Bookmarks	Required	10	Update	Update	No Access	Update	Update
IMC: Maximum Number of People Bookmarks	Required	10	Update	Update	No Access	Update	Update
IMC: Maximum Number of Recent Items Displayed	Required	10	Update	Update	View Only	Update	Update

Profile Option	Required	Default	User Access	System Admin Access: User Level	System Admin Access: Responsibility Level	System Admin Access: Application Level	System Admin Access: Site Level
IMC: Run CSV Batch Address Validation	Optional	No Default	Update	Update	Update	Update	Update
IMC: Run CSV Batch De-Duplication	Optional	No Default	Update	Update	Update	Update	Update
IMC: Run CSV Batch Registry Match	Optional	No Default	Update	Update	Update	Update	Update

Related Topics

Setting Profile Options, page 1-8

Verifying Implementation

Verify your implementation by logging in for the first time and looking at the application.

To Verify Implementation:

1. Enter a new password.
2. Click Update.
3. Verify your default responsibility.
4. Click Update.
5. Log out of the application.
6. Log in again using your new password.
7. Check to see if the Home tab appears.

Related Topics

Overview, page 1-1

Feature-Specific Implementation

This chapter describes implementation of specific features in Oracle Customers Online.

This chapter covers the following topics:

- Feature-Specific Implementation Overview
- Setting Up Accounts
- Setting Up Addresses
- Setting Up Duplicate Prevention
- Setting Up Extended Attributes
- Setting Up Import
- Setting Up Relationships
- Setting Up Searches
- Setting Up Source System Management
- Setting Up Third Party Data Integration

Feature-Specific Implementation Overview

Oracle Customers Online (OCO) provides many features for users to view and manage customer information. The setup and administration for many of these features are available from the Administration tab.

Note: To use the Administration tab, you must have the Oracle Customers Online Superuser responsibility.

The setup for some of these Customers Online features involves setting up and administering Data Quality Management (DQM). The DQM setup and functionality, for example the staged schema, are shared across all affected features. See: *Data Quality Management Overview, Oracle Trading Community Architecture Administration Guide*.

You can set up these features, which are included in or directly affect Customers Online:

- **Accounts:** Set up for accounts and account details. See: *Setting Up Accounts*, page 2-3.
- **Addresses:** Set up for creating and updating addresses. See: *Setting Up Addresses*, page 2-4.
- **Bookmarked Lists:** See:

- Bookmarked Lists Profile Options, page 1-10
- Bookmarked Lists, *Oracle Customers Online User Guide*
- **Certification:** Set up display of certification levels in organization search results and overview. See:
 - Certification Profile Option, page 1-10
 - Searching for Organizations or Persons *and Overview, Oracle Customers Online User Guide*

Note: Set up certification level display only if you also use Oracle Customer Data Librarian.
- **Classifications:** Create and manage the class categories and codes that users can use to classify their customers. See: *Administering Classifications, Oracle Trading Community Architecture Administration Guide.*
- **Data Sharing and Security (DSS):** Assign the TCA Data Security Administrator responsibility to those who need access to administer DSS. DSS administrators control the access privileges of users to create, update, or delete data in Customers Online. See:
 - Setting Up Employees as Users, page 1-6
 - Administering Data Sharing and Security, *Oracle Trading Community Architecture Administration Guide*
- **Duplicate Identification:** Set up for users to mark duplicate organizations or persons for merge. Set up duplicate identification only if you have Oracle Customer Data Librarian. See:
 - Duplicate Identification Profile Option, page 1-10
 - Marking Duplicate Organizations or Persons, *Oracle Customers Online User Guide*
- **Duplicate Prevention:** Set up duplicate prevention to warn users if the organization or person that they are creating is a potential duplicate of existing records. See: *Setting Up Duplicate Prevention, page 2-5.*
- **Extended Attributes:** Set up custom attributes that users can view and update. See: *Setting Up Extended Attributes, page 2-6.*
- **Import:** Set up for import of customer data. See: *Setting Up Import, page 2-6.*
- **Recent Items:** See:
 - Recent Items Profile Option, page 1-12
 - Recent Items, *Oracle Customers Online User Guide*
- **Relationships:** Manage the relationship types and roles that users can use to create relationships, including contact relationships. See: *Setting Up Relationships, page 2-7.*
- **Reports:** See:
 - Setting Up Periodic Programs, page 1-7
 - Reports Profile Option, page 1-12
 - Overview of Reports, *Oracle Customers Online User Guide*

- **Searches:** Set up the searches in the Home, Organizations, and Person pages with Data Quality Management. See: Setting Up Searches, page 2-8.
- **Source System Management (SSM):** Set up for users to map organization, person, and contact records to the source systems that the records originated from. See: Setting Up Source System Management, page 2-10.
- **Third Party Data Integration:** Set up for users to purchase information from D&B about customers of type Organization. See: Setting Up Third Party Data Integration, page 2-10.

Note: All feature-specific implementation steps are performed with the Oracle Customers Online Superuser responsibility, unless specified otherwise. Set profile options with the System Administrator responsibility.

Setting Up Accounts

Your account setup determines the type of information users can enter when they create or update accounts and account details. You can also make credit summaries available for them to view, for accounts or account sites.

To Set Up Accounts:

1. **Responsibility:** Trading Community Manager or Receivables Manager

Set up and compile descriptive flexfields to provide custom attributes for maintaining accounts and account details. This table shows the flexfields to set up and where the flexfield segments would be available to the user.

Flexfield Title	Flexfield Name	Accounts Functionality
Address Information	RA_ADDRESSES_HZ	Create and update account sites
Contact Information	RA_CONTACTS_HZ	Create and update account contacts and account site contacts
Contact Role Information	RA_CONTACT_ROLES_HZ	Create and update account contacts and account site contacts
Customer Information	RA_CUSTOMERS_HZ	Create and update accounts

See: Descriptive Flexfield Segments Window, *Oracle Applications Flexfields Guide*.

2. **Responsibility:** Receivables Manager

Set up system options in Oracle Receivables.

- **Automatic Customer Numbering:** If you select this option, then users cannot edit account numbers when they update accounts.
- **Automatic Site Numbering:** If you select this option, then users cannot enter or update locations for account site business purposes.

See: Transactions and Customers System Options, *Oracle Receivables User Guide*.

3. **Responsibility:** Credit Management Super User

Optionally set up and process credit reviews, for users to view credit summaries of accounts or account sites. Perform this step for either the account or account site level. See: Processing Credit Reviews, *Oracle Receivables User Guide*.

Related Topics

Accounts, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 2-1

Setting Up Addresses

Set up flexible address formats for creating or updating addresses. Address formats determine which and how fields are displayed. You can use the same format for multiple countries, but each country can use only one format. You can also optionally create custom formats and set up lists of values to validate specific fields.

For US addresses, you can also set up for address validation based on City, County, State, and Postal Code combinations. This validation is mostly used for tax purposes, and can leverage your existing tax setup, if available.

To Set Up Address Formats:

Responsibility: System Administrator (Step 1 to 2) and Receivables Manager (Step 3)

1. Aside from using seeded address formats, optionally create custom address formats. See: Creating Custom Address Styles, *Oracle Receivables User Guide*.

Tip: In seeded formats, you can hide fields that you do not want to display and use.

2. Optionally set up validation for specific fields. See: Defining Flexible Address Validation, *Oracle Receivables User Guide*.
3. Assign address formats to countries. See: Assigning an Address Style to a Country, *Oracle Receivables User Guide*.
4. Set profile options:
 - HZ: Default Flexible Address Format
 - ICX: Territory

See: Addresses Profile Options, page 1-9.

To Set Up Tax Validation for US Addresses:

Responsibility: Receivables Manager

1. Set up for US tax. See: Setup Steps for US Sales Tax, *Oracle Receivables Tax Manual*.
2. Set up tax validation with valid location combinations, from manual entry or content providers, in the AR_LOCATION_VALUES table. See: Importing Address Validation Data and Sales Tax Rates, *Oracle Receivables Tax Manual* or Implementing the Tax Vendor Extension, *Oracle Receivables Tax Manual*.
3. Set the HZ: Validate US Addresses profile option to Yes. See: Addresses Profile Options, page 1-9.

Related Topics

Creating and Updating Addresses, *Oracle Customers Online User Guide*

Flexible Addresses, *Oracle Receivables User Guide*

Feature-Specific Implementation Overview, page 2-1

Setting Up Duplicate Prevention

Set up duplicate prevention to warn users if the organization or person that they are creating is a potential duplicate of existing records, and provide options for resolving the issue.

Duplicate prevention uses Data Quality Management (DQM), which provides powerful matching functionality, based on match rules that determine which attributes to consider for identifying duplicates and how to score the results. You can use seeded match rules or create new rules.

To Set Up Duplicate Prevention:

1. Set up Data Quality Management. See: *Administering Data Quality Management, Oracle Trading Community Architecture Administration Guide*. Make sure to:
 - Run the DQM Staging program to create the staged schema.
 - Periodically run the DQM Synchronization program to update the staged schema.
 - Compile all match rules that you plan to use.

Optionally create your own match rules, with the Search purpose. When defining match rule thresholds, remember that a record's score must meet or exceed the match threshold to be considered a potential duplicate.

Note: The override threshold and the HZ: Duplicate Allowed profile option do not apply to duplicate prevention in Customers Online.

2. Assign search match rules to these profile options, for either organization or person duplicate prevention, or both. You can also keep the match rules that are defaults for the profile options.
 - HZ: Match Rule for Organization Duplicate Prevention
 - HZ: Match Rule for Person Duplicate PreventionSee: *Duplicate Prevention Profile Options*, page 1-10.
3. Set the HZ: Enable Duplicate Prevention at Party Creation profile option to enable duplicate prevention for organizations, persons, or both. See: *Duplicate Prevention Profile Options*, page 1-10.

Related Topics

Preventing Duplicate Organizations or Persons, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 2-1

Setting Up Extended Attributes

Set up extensions to provide custom attributes to display and use in the application. Specific UI pages would have an Additional Attributes option, from which users can select the extended attributes to view and update.

You create groups of attributes, with optional functions for user actions, and associate each group with an entity. You then assign attribute groups to a defined page. A page can contain multiple attribute groups, with the same associated entity, to display as an UI component. The entity determines where in the application the page is used.

For example, you create three attribute groups for organization profiles. You assign two of the groups to page A and the other to page B. When users are in the Overview page for organizations, they can select either page A or B from the Additional Attributes option, and access the assigned attribute groups accordingly.

This table shows the entities you can assign attribute groups to and the application pages they would be available in.

Entity	Application Page
Organization Profiles (HZ_ORGANIZATION_PROFILES)	For organizations only: <ul style="list-style-type: none">• Overview• Profile
Party Sites (HZ_PARTY_SITES)	<ul style="list-style-type: none">• Create Address• Update Address
Person Profiles (HZ_PERSON_PROFILES)	For persons and contacts only: <ul style="list-style-type: none">• Overview• Profile

To Set Up Extended Attributes:

See: *Administering Extensions, Oracle Trading Community Architecture Administration Guide.*

Related Topics

Overview, *Oracle Customers Online User Guide*

Profile, *Oracle Customers Online User Guide*

Creating and Updating Addresses, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 2-1

Setting Up Import

In Customers Online, users can import data from external sources by:

1. Loading CSV files of data into the import interface tables.
2. Automatically transferring the data from interface tables to the TCA Registry after the CSV file load successfully completes. This automatic import process

follows the same steps as when the Import Batch to TCA Registry program is submitted. See: Import Process, *Oracle Trading Community Architecture User Guide*.

The automatic import is optional, and the user has no control over that process. Users manually submit a CSV file load, and when the load succeeds, that data is transferred to the Registry based on your setup, without any notification to the user. If you do not set up automatic import, users can finish the import process with Oracle Trading Community Architecture or Oracle Customer Data Librarian.

To Set Up Automatic Import:

1. Set up as you would for TCA Bulk Import. See: Setting Up Bulk Import, *Oracle Trading Community Architecture Administration Guide*.
2. Set the IMC: Automate CSV File Load into TCA profile option to *Yes*.
3. Set these profile options if you want to run any of the optional preimport processes.
 - Batch de-duplication
 - IMC: Run CSV Batch De-Duplication
 - IMC: CSV Batch De-Duplication Match Rule
 - IMC: CSV Batch De-Duplication Action
 - Address validation
 - IMC: Run CSV Batch Address Validation
 - Registry de-duplication
 - IMC: Run CSV Batch Registry Match
 - IMC: CSV Batch Registry Match Rule

See: Import Profile Options, page 1-11.

Related Topics

Import Overview, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 2-1

Setting Up Relationships

In Customers Online, users create and manage relationships among the organizations and persons in their trading community. Customers Online includes a specific group of contact relationships, with persons as contacts, employees, or members of organizations. All other relationships, which are not in this group of contact relationships, are managed in the Other relationships feature.

Any hierarchical relationship can also be viewed and managed with the hierarchies feature.

To Set Up Relationships:

1. Create and manage the relationship types, phrases, and roles that relationships among your customers are based on. Customers Online displays only phrases, not roles. See: Administering Relationships, *Oracle Trading Community Architecture Administration Guide*.

The relationship phrase pairs you create will not appear in all relationship lists of values in Customers Online. For example, if you create a relationship phrase pair with Organization as the subject and object type, the phrase would not be available if the user is creating a relationship for a person.

2. Assign seeded or custom-defined relationship phrases to be used in Customers Online to an appropriate relationship group. Relationship phrases are not available to the user unless assigned to a relationship group. See: *Assigning Relationship Phrases and Roles to Relationship Groups, Oracle Trading Community Architecture Administration Guide*.

- **Party Contacts:** Relationship phrases assigned to the Party Contacts group are used for contact relationships. This group is already seeded with some phrases, but you can assign other phrases, seeded or custom, to be used for contact relationships.

In features for both persons and contacts, the user can switch between managing information for the person and for the person in a contact relationship role. For example, you add Representative as a contact relationship phrase, and the user creates relationships with Joe as an employee of Vision Corporation and as a representative for Elcaro Corporation. In the overview page, the user can switch among viewing information for Joe the person, Joe as a representative, and Joe as an employee. See: *Contacts Overview, Oracle Customers Online User Guide*.

- Relationship phrases assigned to all relationship groups other than Party Contacts are used for Other relationships. These other groups are not seeded with phrases, so you must assign any seeded or custom relationship phrases that you want to use for Other relationships.
3. Set the HZ: Allow Hierarchy Copy profile option to allow or prevent copying of relationship hierarchies. See:
 - Relationships Profile Option, page 1-12.
 - Copying Hierarchies, *Oracle Customers Online User Guide*.

Related Topics

Contact Relationships, *Oracle Customers Online User Guide*

Other Relationships, *Oracle Customers Online User Guide*

Hierarchies Overview, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 2-1

Setting Up Searches

The Home page in Customers Online provides simple and advanced searches for both organizations and persons. The Organizations page provides the same searches for organizations, and the Person page for persons.

For all these searches, you can set up Data Quality Management (DQM) to:

- Control the available search criteria.
- Improve the flexibility and performance of the search.

DQM provides powerful search functionality, based on match rules that determine which search criteria are available and how to select and rank the results. You can use seeded search match rules or create new rules.

If you do not set up DQM, Customers Online provides a basic set of search criteria and uses standard search functionality.

To Set Up Searches:

1. Set up Data Quality Management. See: *Administering Data Quality Management, Oracle Trading Community Architecture Administration Guide*. Make sure to:
 - Run the DQM Staging program to create the staged schema.
 - Periodically run the DQM Synchronization program to update the staged schema.
 - Compile all match rules that you plan to use.

Optionally create your own match rules, with the Search purpose. The acquisition and scoring attributes would be the available search criteria. With match rule sets, the superset of all attributes in the set is the search criteria.

Caution: Do not include the Organization Name attribute in match rules that you create for searching for persons in Customers Online.

If attributes are assigned a display order, they are presented as two columns of search criteria, from top to bottom in the left column, then the right. For example, you have six attributes assigned 1 through 6. Attribute 1 through 3 would be in the left column in ascending order, and 4 through 6 in the right column.

When defining match rule thresholds, remember that a record's score must meet or exceed the match threshold to be displayed in the search results.

2. Assign search match rules to these profile options, for any of the searches you want to set up with DQM. You can also keep the match rules that are defaults for the profile options.
 - HZ: Match Rule for Organization Advanced Search
 - HZ: Match Rule for Organization Simple Search
 - HZ: Match Rule for Person Advanced Search
 - HZ: Match Rule for Person Simple Search

See: Search Profile Options, page 1-13.

3. Set the HZ: Enable DQM Party Search profile option to *Yes*. Only the searches that you provided a match rule for in the previous step are enabled. See: Search Profile Options, page 1-13.

Related Topics

Home Page, *Oracle Customers Online User Guide*

Searching for Organizations or Persons, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 2-1

Setting Up Source System Management

For any organization or person record that originated from a third party, legacy, or other external data source, the user can use Customers Online to map the record to that system or just view the mapping.

To Set Up Source System Management:

1. Define the source systems that are actively providing data to organizations and persons, so that users can map specific organizations and persons to the records' source systems.

Control how source system and user-entered data are displayed, created, and overwritten. If you set up Single Source of Truth (SST), Customers Online would use and display the SST record.

See: *Administering Source System Management, Oracle Trading Community Architecture Administration Guide.*

2. Set the HZ: Source System Mapping Access profile option to determine user access for source system mapping. See: *Source System Management Profile Option, page 1-14.*

Related Topics

Source Systems, *Oracle Customers Online User Guide*

Feature-Specific Implementation Overview, page 2-1

Setting Up Third Party Data Integration

Customers Online lets users enrich information for customers of type Organization by purchasing data from D&B.

To Set Up Third Party Data Integration:

1. Integrate Customers Online with D&B. See: *Setting Up Third Party Data Integration, Oracle Trading Community Architecture Administration Guide.*
2. Set the HZ: Allow Access to D&B Online Purchase profile option to enable D&B purchasing for users. See: *Third Party Data Integration Profile Option, page 1-14.*

Related Topics

Setting Up Source System Management, page 2-10

Searching for Organizations or Persons, *Oracle Customers Online User Guide*

Overview, *Oracle Customers Online User Guide*

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

Feature-Specific Implementation Overview, page 2-1

Reports and Processes

This section lists the reports and processes that are seeded in Standard Request Submission for these responsibilities: Oracle Customers Online Superuser, Oracle Customers Online Data Librarian Superuser, and Oracle Customers Online Forms Access.

Some reports and programs can be submitted in multiple ways, but these descriptions are for running them from Standard Request Submission.

Reports

DNB Global Data Products Request Report

Provides details about the D&B information purchased within a specified date range. See: DNB Global Data Products Request Report, *Oracle Trading Community Architecture User Guide*.

Processes

Copy Relationship Type and All Relationships

Copies relationship types and, optionally, corresponding relationships. See: Copying Relationship Types, *Oracle Trading Community Architecture Administration Guide*.

Copy Organization Extensions Data for Profile Versioning

Copies organization profile extensions data and creates new extensions records for new organization profile versions. See: Copying Extensions Data for Profile Versioning, *Oracle Trading Community Architecture Administration Guide*.

Copy Person Extensions Data for Profile Versioning

Copies person profile extensions data and creates new extensions records for new person profile versions. See: Copying Extensions Data for Profile Versioning, *Oracle Trading Community Architecture Administration Guide*.

DQM Compile All Rules

Compiles all DQM match rules. See: DQM Compile All Rules Program, *Oracle Trading Community Architecture Administration Guide*.

DQM Index Optimization Program

Optimizes *interMedia* indexes in the DQM staged schema. See: DQM Index Optimization Program, *Oracle Trading Community Architecture Administration Guide*.

DQM Staging Program

Creates or updates the DQM staged schema. See: DQM Staging Program, *Oracle Trading Community Architecture Administration Guide*.

DQM Synchronization Program

Synchronizes the DQM staged schema with the TCA Registry. See: DQM Synchronization Program, *Oracle Trading Community Architecture Administration Guide*.

Flatten Employee Hierarchy

Affects the employees feature in the Home tab. See: Resource Manager Concurrent Programs, *Oracle Common Application Components Implementation Guide*.

Flatten group hierarchy

Affects the employees feature in the Home tab. See: Resource Manager Concurrent Programs, *Oracle Common Application Components Implementation Guide*.

Generate key for fuzzy match

Generates keys for fuzzy search.

Generate Request List for DNB Batch Load

Generates a list of parties that you want to purchase and batch load D&B information for. See: Generate Request List for D&B Batch Load, *Oracle Trading Community Architecture User Guide*.

Generate Time Zone for Locations

Creates or updates time zone information for locations. See: Generate Time Zone for Locations, *Oracle Trading Community Architecture User Guide*.

Generate Time Zone for Phone Numbers

Creates or updates time zone information for phone numbers. See: Generate Time Zone for Phone Numbers, *Oracle Trading Community Architecture User Guide*.

IMC: Refresh Summary Information for Quality Reports

Refreshes the information available for customer quality reports. See: Setting Up Periodic Programs, page 1-7.

IMC: Refresh Summary Information for Reports

Refreshes the information available for customer profile reports. See: Setting Up Periodic Programs, page 1-7.

Load D&B Data (8i Implementation)

Loads D&B information that was purchased online and corrected due to errors. See: Load D&B Data, *Oracle Trading Community Architecture User Guide*.

Rebuilding Intermedia Index for Task Names

Affects tasks in the Home and Customers tabs. See: Task and Calendar Concurrent Program, *Oracle Common Application Components Implementation Guide*.

Refresh of Classification Denormalization

Populates and refreshes the HZ_CLASS_CODE_DENORM denormalization table. See: Refresh of Classification Denormalization, *Oracle Trading Community Architecture Administration Guide*.

Source System – Migrate Party Level Source System References

Migrates source system information. See: Source System – Migrate Party Level Source System References, *Oracle Trading Community Architecture Administration Guide*.

Synchronize Employees

Affects the employees feature in the Home tab. See: Resource Manager Concurrent Programs, *Oracle Common Application Components Implementation Guide*.

Synchronize JTF_NOTES_TL_C1 index

Affects notes in the Home and Customers tabs.

Third Party Data Integration Update

Regenerates the Single Source of Truth record. See: Third Party Data Integration Update Program, *Oracle Trading Community Architecture Administration Guide*.

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