Oracle® Customers Online

User Guide

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Send Us Your Comments

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Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

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Preface

Intended Audience

Welcome to Release 12.2 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.
- Computer desktop application usage and terminology.

If you have never used Oracle E-Business Suite, we suggest you attend one or more of the Oracle E-Business Suite training classes available through Oracle University.

See Related Information Sources on page x for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.
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Access to Oracle Support

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Structure

1 Overview

2 Dashboard
3 Customers
4 Import
5 Reports

Related 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.

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the Oracle E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

Guides Related to This Product

Oracle Common Application Calendar Implementation Guide

This guide describes how to define tasks and note types, set up task statuses and status transition rules, define task priorities, set up data security, and map notes and references to source objects such as a sales lead to Task Manager. In addition, it describes how to create users and run concurrent programs to retrieve new and updated tasks.

Oracle Common Application Calendar User Guide

Oracle Common Application Calendar enables you to manage daily tasks and appointments, create and maintain notes, and schedule resources. It provides a central place to store and view resource schedules, utilization, and availability. It also enables you to synchronize your calendar with external calendars such as Microsoft Outlook or handheld devices.

Oracle Customer Data Librarian Implementation Guide

Oracle Customer Data Librarian includes all of the functionality of Oracle Customers Online with the additional features of maintaining the quality of customer data. Therefore, you must first implement Oracle Customers Online fully. Then, use this guide to assign responsibilities and access to users and set the necessary profile options for data librarian deployment, data import, mapping, search and duplication removal, and data security.

Oracle Customer Data Librarian User Guide

Oracle Customer Data Librarian enables you to import customer information from external systems into the Oracle Trading Community Architecture Registry and manage the quality of this information. Quality includes data consolidation and completeness and the removal or merge of duplicate and unnecessary information. In addition, Oracle Customer Data Librarian contains all of the features in Oracle Customers Online, including purchasing information from D&B to enrich your customer data and mapping customer records to their source systems.

Oracle Customers Online Implementation Guide

This guide describes how to set up customer accounts, set up additional display attributes, set up data quality management, define the source systems for customer data and map customers to the source system. Before you can use Oracle Customers Online, you must implement Oracle Common Application Calendar, Oracle Customer Interaction History, and Oracle Trading Community Architecture. Oracle Customers Online features and data come from the marketing and sales applications and the additional applications of Oracle Order Management, Oracle Credit Management, and Oracle Receivables.

Oracle Financials Implementation Guide

This guide describes how to implement the Oracle Financials E-Business Suite. It takes you through the steps of setting up your organizations, including legal entities, and their accounting, using the Accounting Setup Manager. You can find information on intercompany accounting and sequencing of accounting entries with relevant examples.

Oracle Leads Management Implementation and Administration Guide

Oracle Leads Management enables you to capture, evaluate, and distribute the leads generated by marketing activities for sales follow-up. It provides solutions to automate and optimize prospect-to-sales conversion across the enterprise.

Oracle Marketing User Guide

This guide tells you how to create marketing programs, execute campaigns across multiple customer interaction channels such as Web, email, direct mail, and telemarketing, and monitor the performance of these programs. With Oracle Marketing, you can generate prospective customer lists and assess the effectiveness of these lists, and manage marketing collateral and marketing budgets.

Oracle Order Management User's Guide

This guide provides information on how to use Oracle Order Management. Use this guide to learn how to enter and update sales orders, maintain sales agreements, combine sales orders with procurement orders, and process orders. In addition, this guide describes how you can authorize and manage returns, schedule across orders, apply charges and discounts, enter shipping information for orders, raise order invoices and process invoices and payments.

Oracle Quoting User Guide

Oracle Quoting enables you to create and manage customer quotes across all sales and interaction channels and if approved by the customer, convert these quotes into orders. This guide describes how to create and modify quote templates, add and configure simple and related products, manage pricing and pricing adjustments, determine customer credit worthiness, and perform real-time global product availability checks.

Oracle Receivables User Guide

This guide provides you with information on how to use Oracle Receivables. Use this guide to learn how to create and maintain transactions and bills receivable, enter and apply receipts, enter customer information, and manage revenue. This guide also includes information about accounting in Receivables. Use the Standard Navigation Paths appendix to find out how to access each Receivables window.

Oracle Sales User Guide

Oracle Sales enables sales professionals plan and manage the sales process from leads to opportunities to quotes including the tracking of competitors for products within opportunities. It is integrated in the E-Business Suite and optimized for use with wireless. You can use the sales dashboard to view open opportunities, proposals, quotes, top customers, leads by age and by campaign, the latest sales forecast, and your calendar tasks.

Oracle TeleSales User Guide

Oracle TeleSales enables telesales agents manage the sales cycle, from prospects to booked orders. It offers a multi-channel selling solution that leverages all sales channels: whether selling over the phone, through the web or through mobile devices. Its E-Business Center offers a cross-application desktop for all Oracle call center applications, and provides elements of Service and Collections for a comprehensive customer view. You can use Oracle TeleSales for comprehensive customer management, list generation, lead, opportunity, and pipeline management, quote and order generation, event registration and collateral fulfillment.

Oracle TeleService Implementation and User Guide

This guide provides information on how to use Oracle TeleService. Oracle TeleService automates the call center and the resolution process from the time a customer calls in, sends an email, or enters a service request on the Web. Agents can use Oracle TeleService to update customer records, validate product ownership and contract coverage, provide proactive and personalized customer service, and resolve problems that arise from the initial contact using a knowledge base.

Oracle Trading Community Architecture Administration Guide

This guide enables you to define entities in the TCA Registry, create relationships, search, prevent duplication, and control access. In addition, you can use this guide to define time zones and phone formats, configure adapters for the processing of data in the TCA Registry, define sources that provide data for specific entities, and create user-defined attributes to extend the registry. You can administer these TCA tools and features from the Administration tab using the Trading Community Manager responsibility. This tab is also available in Oracle Customers Online and Oracle Customer Data Librarian.

Oracle Trading Community Architecture Reference Guide

This guide provides information including a comprehensive glossary to supplement the documentation for Oracle Trading Community Architecture and to help you understand products in the Oracle Customer Data Management family. It describes customer interface tables and the interface tables used for bulk import of data from external sources, and D&B data elements. In addition, you can learn about available relationship types, available replacement words and attributes for Data Quality Management data, available matching rules for various TCA administration tasks, and the results and impact of the party and account merge processes initiated in Oracle E-Business Suite applications.

Oracle Trading Community Architecture Technical Implementation Guide

This guide provides technical information on the various integration features such as APIs and business events that you can avail to connect into external systems and transact data between these systems through a data hub using the Trading Community Architecture data model. This means that you can create or update in one system and ensure that the change is reflected in the other systems. You can manipulate data at the granular Oracle Trading Community Architecture entity level such as party site or party relationship or at the higher business object level such as person. Use this guide to learn about available APIs, their functions, parameters, and validations and how to use them. You can also find details on the business events and how to subscribe to them.

Oracle Trading Community Architecture User Guide

Oracle Trading Community Architecture (TCA) maintains information including relationships about parties, customers, organizations, and locations that belong to your commercial community in the TCA Registry. This guide enables you to use the features and user interfaces provided by TCA and by other Oracle E-Business Suite applications to view, create, and update Registry information. For example, you can import batches of party data in bulk from external source systems into the TCA Registry, merge duplicate parties, sites, and customer accounts, generate time zones for phones and locations, and run various customer reports.

Installation and System Administration

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Approvals Management Implementation Guide

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

Oracle Diagnostics Framework User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle E-Business Suite Multiple Organizations Implementation Guide

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operating units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

Oracle e-Commerce Gateway Implementation Guide

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

Oracle e-Commerce Gateway User's Guide

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

Oracle iSetup User's Guide

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

Oracle Product Hub Implementation Guide

This guide explains how to set up hierarchies of items using catalogs and catalog categories and then to create user-defined attributes to capture all of the detailed information (such as cost information) about an object (such as an item or change order). It also explains how to set up optional features used in specific business cases; choose which features meet your business' needs. Finally, the guide explains the set up steps required to link to third party and legacy applications, then synchronize and enrich the data in a master product information repository.

Oracle Product Hub User's Guide

This guide explains how to centrally manage item information across an enterprise, focusing on product data consolidation and quality. The item information managed includes item attributes, categorization, organizations, suppliers, multilevel structures/bills of material, packaging, changes, attachments, and reporting.

Oracle Web Applications Desktop Integrator Implementation and Administration Guide

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing workflow processes embedded in Oracle E-Business Suite. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle E-Business Suite users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing

Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.

Training and Support

Training

Oracle offers a complete set of training courses to help you master your product 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 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 your product working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

1

Overview

This chapter covers the following topics:

- Introduction to 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.

- **Dashboard:** Quickly find and review key customer information, as well as manage work-related information such as tasks and employees for your organization and yourself. See: Dashboard Overview, page 2-1.

- **Customers:** View, create, and manage a variety of detailed customer information. See: Introduction to Customers, page 3-2.

- **Reports:** View customer profile trends and data quality information. See: Overview of Reports, page 5-1.

- **Import:** Load customer data from legacy, third party, or other external sources into interface tables for import. See: Import Overview, page 4-1.

- **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: 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: Introduction to Oracle Trading Community Architecture, *Oracle Trading Community Architecture User Guide*.

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

Data Quality Management provides flexible and powerful matching functionality for searches, as well as duplicate prevention and identification. See: Data Quality Management Overview, *Oracle Trading Community Architecture Administration Guide*.

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: Dashboard Page, page 2-3 and Searching for Organizations or Persons, page 3-6.
- Preventing creation of duplicate customers and contacts. See: Preventing Duplicate Organization, Persons, or Contacts, page 3-8.
- Identifying duplicate customers to submit for merging. See: Marking Duplicate Organizations or Persons, page 3-9.

2

Dashboard

This chapter covers the following topics:

- Dashboard Overview
- Dashboard Page

Dashboard Overview

Use the Other 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 Other tab. The tasks and notes in the Customers tab are specific to the associated customers.

Dashboard

Search for customers, view recent and bookmarked items, and quickly access common tasks. See: Dashboard Page, page 2-3.

Calendar

View and maintain your personal calendar, using the Oracle Common Application Calendar's calendar features. You can view by day, week, month, or year. See: Viewing Your Personal Calendar, *Oracle Common Application Calendar User Guide*.

You can also:

- View the daily personal calendar along with tasks. See: Viewing Your Tasks and Your Calendar Simultaneously, *Oracle Common Application Calendar User Guide*.
- View resource availability. See: Viewing the Availability of a Resource, *Oracle*

Common Application Calendar User Guide.

- View public calendars. See: Viewing a Public Calendar, *Oracle Common Application Calendar User Guide*.
- Create appointments. See: Creating an Appointment, *Oracle Common Application Calendar User Guide*.

Notes

Manage your personal notes, using the Oracle Applications Framework notes features from Oracle Common Application Calendar. A note is information, such as directions, special instructions, or reminders, that is attached to an object.

You can:

- View, but not update, notes. See: Viewing and Updating the Notes History Region in OA, *Oracle Common Application Calendar User Guide*.
- View, but not update, note details. See: Viewing and Updating the Note Details Page in OA, *Oracle Common Application Calendar User Guide*.
- Create notes. See: Using the Add Note Region in OA, *Oracle Common Application Calendar User Guide*.

Tasks

Manage tasks, defined as the lowest units of work, that you can assign to yourself or other resources, and associate with customers, using the Oracle Applications Framework tasks features from Oracle Common Application Calendar. See: Using the Personalized Task Search and Result Page, *Oracle Common Application Calendar User Guide*.

You can view, update, create, and delete tasks. See: Creating, Updating, and Finding Tasks, *Oracle Common Application Calendar User Guide*.

Employees

Manage employee information for your organization, using Resource Manager.

- Employees. See: Viewing Resource Information, *Oracle Trading Community Architecture User Guide*.
- Groups. See: Viewing Your Group Membership Information, *Oracle Trading Community Architecture User Guide*.
- Roles. See: Understanding Roles, *Oracle Trading Community Architecture User Guide*.

Related Topics

Introduction to Oracle Customers Online, page 1-1

Dashboard Page

The Dashboard 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.

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: Searching for Organizations or Persons, page 3-6.

Shortcuts

- **Create Organization:** See: Creating Organizations or Persons, page 3-7.
- **Create Person:** See: Creating Organizations or Persons, page 3-7.
- **Create Task:** Create tasks that you can assign to yourself or other resources, and associate with customers, using the Oracle Applications Framework tasks features from Oracle Common Application Calendar. The available regions are similar to those for creating sales related tasks. See: Creating Tasks, *Oracle Common Application Calendar User Guide*.
- **Create Note:** Create personal notes, using the Oracle Applications Framework notes features from Oracle Common Application Calendar. See: Using the Add Note Region in OA, *Oracle Common Application Calendar User Guide*.
- **Create Hierarchy:** Create hierarchies you can use to visually manage hierarchical relationships. See: Creating Hierarchies, page 3-30.

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, page 3-9.

Bookmarked Lists

View and access the organizations, persons, and contacts that you have manually bookmarked from the Overview page for that item. See: Overview, page 3-9. You can also:

- Update bookmarked items, page 3-11.
- Remove items from the bookmarked list.

Related Topics

Dashboard Overview, page 2-1

3

Customers

This chapter covers the following topics:

- Introduction to Customers
- Searching for Organizations or Persons
- Overview
- Profile
- Profile History
- Classifications
- Addresses
- Contact Points
- Contact Relationships
- Other Relationships
- Visualizing Relationships
- Accounts
- Transactions
- Notes
- Tasks
- Source Systems
- Hierarchies Overview
- Creating Hierarchies
- Viewing and Updating Hierarchies

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. Customers Online 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, page 3-5.

- **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: 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.

  > **Important:** If you do purchase D&B data, and your administrator sets up the Single Source of Truth (SST) record, then Customers Online uses the SST record for organization information. See: Single Source of Truth Data, page 3-4.

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

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

- Enter custom attributes specific to your organization.

  Your administrator can set up extensions, or custom attributes, for organization and person profiles, and addresses.

Related Topics

Major Features for Customers, page 3-3

Introduction to Oracle Customers Online , page 1-1

Major Features for Customers

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, page 3-6.

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

- **Overview:** View key information. See: Overview, page 3-9.
- **Profile:** Update profile details. See: Profile, page 3-11.
- **Classifications:** Manage custom and industrial classification assignments. Industrial classifications, such as NAICS and SIC codes, apply only to organizations. See: Classifications, page 3-12.
- **Addresses:** Manage addresses. See: Addresses, page 3-13.
- **Contact Points:** Manage contact points. See: Contact Points, page 3-15.
- **Relationships:**
  - **Contacts** (organizations only)**:** Manage the organization's contacts. See: Contact Relationships, page 3-16.
  - **Employment** (persons only)**:** Manage the person's employers, or organizations that the person is a contact for. See: Contact Relationships, page 3-16.
  - **Others:** Manage all other relationships not included in Contacts and Employment. See: Other Relationships, page 3-18.

  Customers Online also provides a visual hierarchy feature for managing hierarchical relationships among existing organizations and persons. See: Hierarchies Overview, page 3-29.

  > **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, page 3-16 and Other Relationships, page 3-18.

- **Accounts:** Manage customer account information such as account sites, account relationships, account contacts, and credit summaries. See: Accounts, page 3-21.
- **Transactions:** View transactions for the campaign to cash and problem to resolution flows. See: Transactions, page 3-25.

- **Notes:** Manage notes associated with the organization or person. See: Notes, page 3-28.

- **Tasks:** Manage tasks that are related to the organization or person. See: Tasks, page 3-28.

- **Attachments:** Manage attachments that are related to the organization or person. Attachments are unstructured data such as images, word-processing documents, spreadsheets, or text. See: *Oracle E-Business Suite User's Guide*.

- **Interactions:** View interactions, or contacts between the organization or person and a human or automated agent, such as phone calls and placed orders, using Oracle Customer Interaction History features. See: Interactions, *Oracle Customer Interaction History Implementation Guide*.

- **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. See: Source Systems, page 3-28.

Related Topics

Introduction to Customers, 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 either user-entered or source system data, depending on the setup and availability of data. See: Single Source of Truth Overview, *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, page 3-9. You can also view that information after purchasing D&B data. See: 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.

Related Topics

Introduction to Customers, page 3-2

Introduction to Contacts

In 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 Customers Online. A person can be a contact for multiple organizations. See: 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, page 3-9.
- Profile, page 3-11.
- Addresses, page 3-13.
- Contact Points, page 3-15.
- Notes, page 3-28.
- Tasks, page 3-28.
- Source Systems, page 3-28.
- See: Using Attachments, *Oracle Applications User's Guide*.
- See: Interactions, *Oracle Customer Interaction History Implementation Guide*.

To start, you search for the person that you want to manage information for as a contact. See: Searching for Organizations or Persons, page 3-6. After you select the person, you can switch from the person to a contact role, for the above features.

Customers Online 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, page 3-16.

Customers Online 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.

Related Topics

Major Features for Customers, 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. The entity may be an active party that has an active, inactive, or no account at all. However, you cannot search for inactive parties. You can also:

- Use the Persons page to search for contacts.
- Use the Dashboard page to quickly access organizations, persons, and contacts. See Dashboard Page, page 2-3.

For organization searches only, if you use Oracle Customer Data Librarian and the HZ: Display Certification Level profile option is set to *Yes*, then certification levels are displayed to help you evaluate the search results. The levels are assigned in Oracle Customer Data Librarian to indicate the quality of records, and the meaning of each level is based on your organization's business needs. See: Assigning Certifications, *Oracle Customer Data Librarian User Guide*.

If you see from the search results that the entity does not already exist, you can create organizations or persons. See: Creating Organizations or Persons, page 3-7.

> **Tip:** 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. See: Marking Duplicate Organizations or Persons, page 3-9.
- **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: 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. See: Overview, page 3-9. 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. In the person profile, you can switch to update information any of the person's contact roles. See: Profile, page 3-11.

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

Related Topics

Major Features for Customers, page 3-3

Creating Organizations or Persons

If you are creating a new contact for a specific organization, it is the same as creating a person with the organization already entered. See the note below. For more information on creating a contact, see: Creating Contact Relationships, page 3-17.

Enter the new organization or person's profile and address information. See: Creating and Updating Addresses, page 3-14.

> **Note:** To display an asterisk for mandatory fields in the Address page, you must define the same fields as mandatory in FAF and address validation, if both are used.

With the address feature in Oracle Customer Online, you can add more addresses after you create this organization or person, and select the primary address for each purpose. See: Addresses, page 3-13.

> **Important:** 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, page 3-16.
>
> - 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, page 3-5.

You can optionally create the organization or person and immediately add more details, 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: Profile, page 3-11.

Related Topics

Preventing Duplicate Organizations, Persons, or Contacts, page 3-8

Searching for Organizations and Persons, page 3-6

Preventing Duplicate Organizations, Persons, or Contacts

If your administrator has enabled organization, person, or contact duplicate prevention, you are warned if the organization, person, or contact that you are creating is a possible duplicate of an existing party. 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, person, or contact, or,.
- Discard the new organization, person, or contact and continue with the existing one.

You can view the status, and start and end dates of a contact relationship, on personalization.

- Status: status of the contact relationship
- Start Date: date from which the contact relationship is active
- End Date: date till which the contact relationship is active

Related Topics

Preventing Duplicate Relationships, page 3-19

Creating Organizations or Persons, page 3-7

Marking Duplicate Organizations or Persons

If you have Oracle Customer Data Librarian (CDL), and your administrator has set up duplicate identification for Customers Online, you can specify in Customers Online which organizations or persons are potential duplicates. Each set of duplicates that you mark is sent to CDL 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: Merge Requests Overview, *Oracle Customer Data Librarian User Guide*.

The HZ: Merge Master Party Defaulting profile option determines the default master record, which remains after the other duplicates merge into it. The data librarian can reassign the merge master before the actual merge.

Related Topics

Searching for Organizations and Persons, page 3-6

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 identifying address for a map of the location.

  (Organizations only) If you use Oracle Customer Data Librarian and the HZ: Display Certification Level profile option is set to *Yes*, then the certification level is displayed. Levels are assigned in Oracle Customer Data Librarian to indicate the quality of records, and the meaning of each level is based on your organization's business needs. See: Assigning Certifications, *Oracle Customer Data Librarian User Guide*

  > **Note:** Additional attributes are available if your administrator has set up extended custom attributes.

- **Contacts** (organizations only)**:** Aside from viewing a list of the organization's contacts, you can:

  - View contacts' overview information.
  - Update contacts. See: Profile, page 3-11.
  - Remove contacts. You only delete the contact relationship between the person and the organization, not the person record itself.

    Tip: To create contacts for the organization, go to contact relationships. See: Creating Contact Relationships, page 3-17.

- **Notes:** View, but not update, notes and note details. See: Viewing and Updating the Notes History Region in OA, *Oracle Common Application Calendar User Guide* and Viewing and Updating the Note Details Page in OA, *Oracle Common Application Calendar User Guide*.
- **Tasks:**View, update, and delete tasks. See: Creating, Updating, and Finding Tasks, *Oracle Common Application Calendar User Guide*.
- **Sources:** View source system details, create a source system, or view the source system history details. The source information is displayed if the profile HZ: Source System Mapping Access is set to any value other than *No Access*.

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, page 2-4.
- **Enrich** (organizations only)**:** Review and optionally purchase D&B information for this organization, if enabled. See: Viewing Information from Data Sources, *Oracle Trading Community Architecture User Guide*.
- **View Hierarchies** (organizations only)**:** View the hierarchies that the organization is part of, if any. See: Hierarchies Overview, page 3-29.
- **Visualize** (not applicable to contacts)**:** Open a dynamic graphic representation of the organization or person's relationships. See: Visualizing Relationships, page 3-20 .

Related Topics

Major Features for Customers, page 3-3

Introduction to Contacts, page 3-5

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.

> **Note:** Additional attributes are available if your administrator has set up extended custom attributes.

Related Topics

Major Features for Customers, page 3-3

Introduction to Contacts, page 3-5

Maintaining Parties, Oracle Customer Data Librarian User Guide.

Profile History

The profile history allows you to view the change history for an organization or person. You can use the profile history information to identify the changes since the time the customer is created.

You can also filter the change history by the source system identifier.

The Organization Profile History page displays the organization name, D-U-N-S number, tax ID, date of creation, the date from which the organization is effective, the date when the organization is inactive, and the source system name.

The Person Profile History page displays the prefix, name, gender, the taxpayer ID, date of creation, the date from which the person is active in the system, the date when the person is inactive, and the source system name. You can use OA Personalization to personalize the page.

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 2002 and 2012 codes. See: 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. See: Assigning Classifications, page 3-12.
- **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.

Related Topics

Major Features for Customers, 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. Class categories must be compiled before their classification codes can be associated with parties. Only active classification codes can be associated to parties.

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.

Related Topics

Classifications, page 3-12

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 identifying address is the main address for identifying the organization, person, or contact, regardless of purpose.

- **Create:** Create addresses. See: Creating and Updating Addresses, page 3-14.
- **Source:** View source system details for the address, create a source system, or view the source system history details.
- **Map:** View maps of addresses.
- **Update:** Update addresses. See: Creating and Updating Addresses, page 3-14.
- **Remove:** Inactivate addresses for the selected organization, person, or contact. You cannot remove an identifying address until you update another address and designate it as identifying.

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 primary address for that purpose. For example, an organization has many addresses for the bill-to purpose. The selected address is the primary bill-to address among all of the organizations's bill-to addresses.

Searching Organization Customer Address

Sometimes the number of address records for an organization customer can exceed the page size due to numerous addresses associated with the organization. The Address Search allows you to search the correct party site address without navigating through the individual address record. You can filter the organization addresses using the following search criteria:

- Country
- Purpose
- Site Number
- Postal Code
- Address Line 1

- Address Line 2
- Address Line 3
- Address Line 4
- City
- State
- County
- Province

> **Note:** You can use OAF personalization to display or hide the search criteria on the Addresses page.

To search for an address:

1. Navigate to the Organization customer record for which you want to search the address (from search results, Bookmarked Organizations, or Recent items).
2. Click the Addresses link.

   The View Addresses page appears.
3. In the Search region, specify the appropriate search criteria to filter the address list and click Go.

   The addresses matching the search criteria are displayed.
4. Click Clear to reset the search criteria.

> **Note:** You can also use wildcards to aid your search.

Related Topics

Major Features for Customers, page 3-3

Introduction to Contacts, page 3-5

Creating and Updating Addresses

First select the country, which determines the address format for you to use. See: Address Entry and Formatting Process, *Oracle Trading Community Architecture User Guide*.

Tip: Set the territory in your user preferences to determine the default country for creating and updating addresses.

If your administrator has set up address validation, then the address is validated based on the setup. If you do not enter complete or accurate address information, then you can select from a list of suggestions, if available. See: Address Entry and Real-Time Validation Process, *Oracle Trading Community Architecture User Guide*.

If the HZ: Validate First 5 Digits of US ZIP Code profile option is set to Yes, or you have not specified a value for the profile, and you enter more than five digits for a US ZIP code, then only the first five digits are validated against the Geography repository. If the first five digits are valid according to the HZ_GEOGRAPHIES, then the 5-digit ZIP code is displayed in the list of suggestions in the - State, County, City, and ZIP Code format. For example, if you enter 94404-1234 as the ZIP code, then the Suggestions list displays records, which match the ZIP code - 94404. If you do not enter a value for the ZIP code, then a value from the list of suggestions is displayed.

If the first five digits of the US ZIP code are valid, then the remaining digits after the fifth digit are stored in the ZIP+4 format.

You can specify that the address is the identifying address only if the address is active. If an identifying address already exists for the organization, person, or contact, the identifying 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 primary address for a purpose, use the Select Primary Address by Purpose page.

Note: Additional attributes are available if your administrator has set up extended custom attributes.

Related Topics

Addresses, page 3-13

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 view source system details for the contact point, create a source system for the contact point, or view the contact point's source system history details, 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.

Related Topics

Major Features for Customers, page 3-3

Introduction to Contacts, page 3-5

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, page 3-5 and Relationships Overview, *Oracle Trading Community Architecture User Guide*.

> **Note:** For contact relationships between persons, see: Other Relationships, page 3-18.

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, page 3-11.

For hierarchical contact relationships, you can also use the hierarchy to view and manage relationships for existing persons and organizations. See: Hierarchies Overview, page 3-29.

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. See: Creating Organizations or Persons, page 3-7.

2. Add a new contact for the organization, using a new or existing person. If you use a new person, you create not only the contact relationship but also the person. See: Creating Contact Relationships, page 3-17.

- View contact details, page 3-9.

- Update contacts, page 3-11.

- 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. See: Creating Organizations or Persons, page 3-7.
  - **Existing Person:** Find the person and create a new employment with a new or existing organization. If you use a new organization, you create not only the contact relationship but also the organization. See: Creating Contact Relationships, page 3-17.
- View employer details, page 3-9.
- Update employers, page 3-11.
- 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.

Related Topics

Major Features for Customers, page 3-3

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, page 3-5.

With the address feature in Oracle Customer Online, you can add more addresses for this contact, and select the primary address for each purpose. See: Addresses, page 3-13.

You can optionally create the relationship and immediately add more details, such as the purposes of this new contact relationship. See: Profile, page 3-11.

> **Note:** The new relationship has a start date of today, and no end date.
> To end the relationship, just remove the contact or employer, page 3-16.

You can also create a contact relationship as part of creating a new person. See: Creating Organizations or Persons, page 3-7.

Related Topics

Creating Relationships, page 3-19

Preventing Duplicate Organizations, Persons, or Contacts, page 3-8

Contact Relationships, page 3-16

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, page 3-16.
- Including person-to-person contact relationships. The contact relationship features are only for persons as contacts for organizations.

See: 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, page 3-19.
- View the object organization or person's overview information, page 3-9.
- Update relationships, page 3-20.
- 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, page 3-29.

Related Topics

Major Features for Customers, 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.

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, Persons, or Contacts, page 3-8.

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.

Related Topics

Other Relationships, page 3-18

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.

Related Topics

Other Relationships, page 3-18

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, page 3-9.
- Click Focus On Root to change the view back to the organization or person that you originally selected to visualize relationship for.

From 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, page 3-9.

Related Topics

Contact Relationships, page 3-16

Other Relationships, page 3-18

Accounts

An organization or person can have multiple accounts for various business purposes. You can view and maintain key information about each account, including the account sites, contacts, and relationships.

From the Accounts page, you can:

- View active or inactive accounts.
- Create accounts. See: Creating Accounts, page 3-22.
- View source system details for the account, create a source system for the account, or view the account's source system history details.
- Access the account details, either to view only or to update. To create account sites, contacts, and relationships, click Update. See: Viewing and Updating Accounts, page 3-22.
- For organizations only:
  - 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.

- View the credit summary for accounts that have credit reviews.

See: Viewing the Credit Summary, *Oracle Credit Management User Guide*.

Related Topics

Major Features for Customers, page 3-3

Customer Overview, *Oracle Receivables User Guide*

Creating Accounts

Aside from the account description and established date, the rest of the available information depends on what your administrator has set up in the Customer Information flexfield. When you create an account, the account number is always automatically generated.

Click Add More Details to save the new account and enter account details, for example site and contacts. See: Viewing and Updating Accounts, page 3-22.

Related Topics

Accounts, page 3-21

Viewing and Updating Accounts

Account Overview is the central page for account information, where you can view and update general account information as well as sites, contacts, and relationships. All this information is available on one page, to help you completely understand your relationship with your customers.

The account overview is either view only or updatable, depending on how you navigated to the page. Both versions provide the same information, but the updatable page lets you update account profile and detail information as well as create account sites, contacts, and relationships.

> **Note:** You can choose to view or update information relevant to specific operating units, or all operating units that you have access to. The operating unit setting applies also to subsequent subpages you might navigate to, for example to create account sites, account site contacts, and account relationships.

General Information

For organizations only, view the account's credit summary, if the account has a credit review. See: Viewing the Credit Summary, *Oracle Credit Management User Guide*.

If you are updating the account general information, you can change the account status. You can update the account number only if the Automatic Customer Numbering system option in Oracle Receivables is not set to Yes. Aside from the account description and established date, the rest of the available information depends on what your administrator has set up in the Customer Information flexfield.

Account Sites

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

- **Create or Update:** Create or update account sites. To view and maintain contacts for a specific site, click Update. See: Creating and Updating Account Sites, page 3-24.
- **Source:** View source system details for the account site, create a source system for the account site, or view the account site's source system history details
- **View Removed:** See all the removed, or inactive, account sites, and optionally restore any of them.
- **View Account Site Contacts by Role:** See the active contacts for all account sites, based on the selected role.

  Tip: To see contacts per site, update the specific site.
- **View by Purpose:** See the active account sites for specific purposes. You can determine the primary site for any purpose.
- **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. See: Viewing the Credit Summary, *Oracle Credit Management User Guide*.
- **Remove:** Remove, or inactivate, the account site.

Account Contacts

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

- **Create or Update:** When creating an account contact, select an existing person with contact relationships. You cannot create a new contact or person as a new account contact. Information in addition to the contact's profile is available based on the setup for the Contact Information flexfield.

  Information in addition to the contact role name is available based on the setup for the Contact Role Information flexfield.

- **View Removed:** See all the removed, or inactive, account contacts, and optionally restore any of them.
- **View by Role:** See the active account contacts, based on the selected role.
- **Source:** View the source system details for the account contact, create a new source system for the account contact, or view account contact's source system history.
- **Remove:** Remove, or inactivate, the account contact.

Account Relationships

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

- **Create or Update:** See: Creating Relationships, *Oracle Trading Community Architecture User Guide*. Once you create the relationship, you cannot update the reciprocal indicator.
- **View Removed:** See all the removed, or inactive, account relationships, and optionally restore any of them.
- **Remove:** Remove, or inactivate, the account relationship.

Related Topics

Accounts, page 3-21

Creating and Updating Account Sites

Address

> **Note:** The displayed operating unit comes from the operating unit selected in the Account Overview page for this account. See: Viewing and Updating Accounts, page 3-22.

When creating an account site, select an existing address as the site. You cannot create a new address as a new account site. Information in addition to the address is available based on the setup for the Address Information flexfield.

You cannot update the address or the additional flexfield information.

Business Purpose

- **Location:** If the Automatic Site Numbering system option in Oracle Receivables is set to Yes, then you cannot update the location.

- **Bill To Location:** You can update the bill to location only for the ship to purpose.

- **Source:** You can view the source system details, create a source system, or view the history of the source system.

Account Site Contacts

Account site contacts are available only on the Update Account Site Details page, not on the Create Account Sites page. Aside from viewing the account site's active contacts, you can:

- **Create or Update:**

  > **Note:** The displayed operating unit comes from the operating unit selected in the Account Overview page for this account. See: Viewing and Updating Accounts, page 3-22.

  When creating an account site contact, select an existing person with contact relationships. You cannot create a new contact or person as a new account site contact. Information in addition to the contact's profile is available based on the setup for the Contact Information flexfield.

  Information in addition to the contact role name is available based on the setup for the Contact Role Information flexfield.

- **View Removed:** See all the removed, or inactive, account site contacts, and optionally restore any of them.

- **Source:** You can view the source system details, create a source system, or view the history of the source system.

- **Remove:** Remove, or inactivate, the account site contact.

Related Topics

Accounts, page 3-21

Transactions

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

- Campaign to cash

- Problem to resolution

Note: You can choose to view transactions relevant to specific operating units, or all operating units that you have access to. Some transactions, such as campaigns and leads, are not associated with operating units, so the information displayed for these transactions does not change based on the selected operating unit.

Note: You can view transactions originating in non-Oracle applications on the Transactions page. See Extending the Transaction Viewer to Non-Oracle Applications, *Oracle Customers Online Implementation Guide*.

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 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 Marketing 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	*Oracle Leads Management Implementation and Administration Guide*
Opportunities	The organization or person's potential sales to their existing or new customers.	Oracle Sales and Oracle TeleSales	*Oracle Sales User Guide* and *Oracle TeleSales User Guide*

Transaction Type	Description	Oracle Application	See Also
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*
Install 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 User's Guide*
Service Requests	Requests for service from the organization or person's customers.	Oracle TeleService	*Oracle TeleService Implementation and User Guide*
Delinquencies	The organization or person's payments that do not meet the invoice schedule.	Oracle Advanced Collections	*Oracle Advanced Collections User Guide*
Broken Promises	The organization or person's promises to pay with the Broken status.	Oracle Advanced Collections	*Oracle Advanced 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.

Related Topics

Major Features for Customers, page 3-3

Extending Transactions Viewer to Non-Oracle Applications, *Oracle Customers Online Implementation Guide*

Notes

Manage notes associated with the organization or person, using the Oracle Applications Framework notes features from Oracle Common Application Calendar. A note is information, such as directions, special instructions, or reminders, that is attached to an object.

You can:

- View and update notes. See: Viewing and Updating the Notes History Region in OA, *Oracle Common Application Calendar User Guide*.
- View and update note details. See: Viewing and Updating the Note Details Page in OA, *Oracle Common Application Calendar User Guide*.
- Create notes. See: Using the Add Note Region in OA, *Oracle Common Application Calendar User Guide*.

Related Topics

Major Features for Customers, page 3-3

Tasks

Manage tasks, defined as the lowest units of work, that are related to the organization or person, using the Oracle Applications Framework tasks features from Oracle Common Application Calendar. You can:

- View and update tasks. See: Creating, Updating, and Finding Tasks, *Oracle Common Application Calendar User Guide*.
- Create tasks. The available regions for creating tasks are similar to those for sales related tasks. See: Creating Tasks, *Oracle Common Application Calendar User Guide*.
- Delete tasks.

Related Topics

Major Features for Customers, 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: Source Systems Overview, *Oracle Trading Community Architecture Administration Guide*.

In 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 active source systems.
- **Update:** Change the source ID of the source system mapping.
- **Remove:** Provide or modify the end date of the mapping.
- **View History:** View the history of the source system.

Related Topics

Major Features for Customers, 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: Relationships Overview, *Oracle Trading Community Architecture User 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. See: Creating Hierarchies, page 3-30.
- View and manage a specific hierarchy, including relationships within the hierarchy. See: Viewing and Updating Hierarchies, page 3-31.

The Hierarchies page also provides the same Recent Items bin from the Dashboard page. See: Recent Items, 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, page 3-16 and Other Relationships, page 3-18.

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: 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, page 3-32. The copied hierarchy would have a different relationship type, and you can make changes to it without modifying the original.

Related Topics

Introduction to Customers, page 3-2

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, page 3-33.

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, page 3-31.

> **Tip:** You can also create new hierarchies by copying existing hierarchies, page 3-32.

Related Topics

Hierarchies Overview, page 3-29

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.

Aside from viewing hierarchies, you can also:

- Create relationships by adding children to specific nodes in the hierarchy, page 3-

.

- Update relationships by:
  - Changing the relationship role or date range, or both, page 3-33.
  - Moving parties within the hierarchy, page 3-34.

    Important: 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, page 3-32.

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

Related Topics

Hierarchies Overview, page 3-29

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.

Related Topics

Viewing and Updating Hierarchies, page 3-31

Creating Hierarchies, page 3-30

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.

Related Topics

Creating Relationships, page 3-19

Viewing and Updating Hierarchies, page 3-31

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.

Related Topics

Updating Relationships, page 3-20

Viewing and Updating Hierarchies, page 3-31

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.

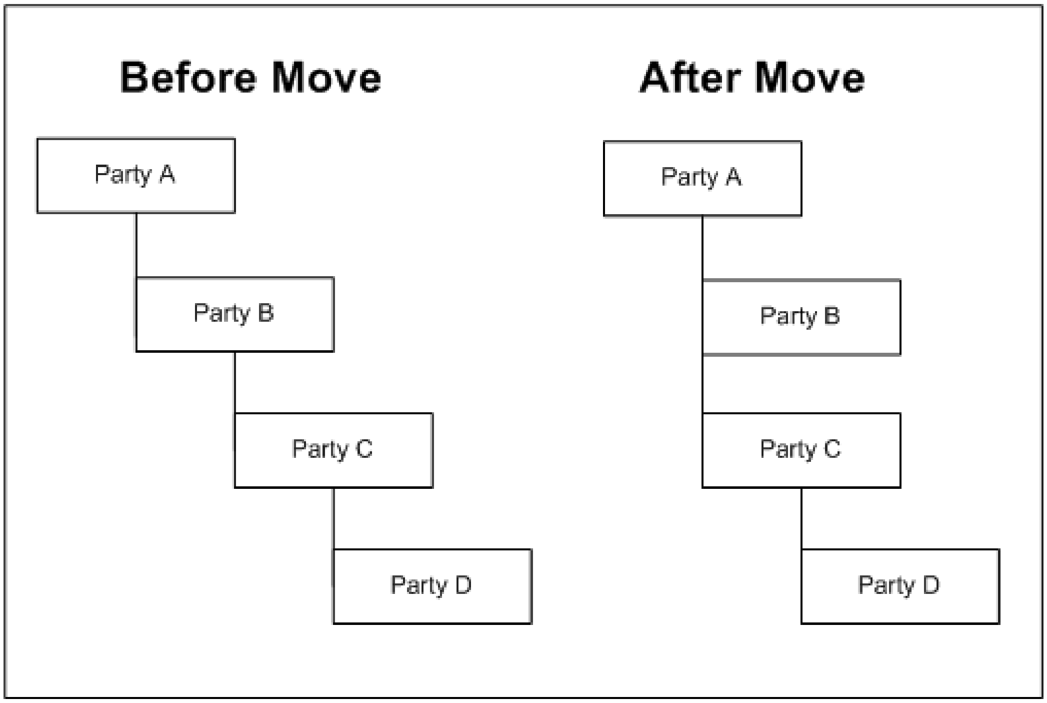
> **Note:** You cannot move parties with the relationship start date in the future.

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., page 3-33

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:


Before Move
After Move
Party A
Party B
Party C
Party D
Party A
Party B
Party C
Party D

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.

Related Topics

Viewing and Updating Hierarchies, page 3-31

4

Import

This chapter covers the following topics:

- Import Overview
- File Loads Overview
- Loading New Files
- Reviewing File Load Details
- Resolving File Load Errors

Import Overview

Bulk import is the process of loading customer data in bulk from legacy, third party, or other external sources into the TCA Registry.

In Oracle Customers Online, you can load source files of organization, person, or contact data into the TCA import interface tables. See: File Loads Overview, page 4-2.

For the transfer of data from the interface tables into the TCA Registry, you have these options.

- If the appropriate import profile options are set, the file load data can automatically transfer from the interface tables into the Registry, as soon as the file load completes successfully. See: Setting Up Import, *Oracle Customers Online Implementation Guide*.
- Use the Oracle Customer Data Librarian (CDL) batch import feature, if you have CDL. See: Import Batches Overview, *Oracle Customer Data Librarian User Guide*.
- Run the Import Batch to TCA Registry program using the Trading Community Manager responsibility. See: Import Batch to TCA Registry, *Oracle Trading Community Architecture User Guide*.

The import is only for information on the party level. To import both party and account information, use Customer Interface. See: Customer Interface, *Oracle Trading Community Architecture User Guide*.

Related Topics

Introduction to Oracle Customers Online, page 1-1

File Loads Overview

A file load contains information about loading data from one comma-separated value (CSV) file, or a file delimited by another allowed character, into the import interface tables. The file load:

- Identifies the source file to load, as well as the location, format, and content of the file.
- Defines how attributes from the file map to the interface table columns.

Each line in the source file, as separated by the end-of-line character, is called a party record. A party record contains a set of attributes related to an organization or person.

After a file load successfully completes the loading process, the interface table data from that source file is included in an import batch. The import batch has the same name as the file load, and contains information about transferring that same data from the interface tables into the TCA Registry.

A file load is active until its corresponding import batch is either:

- Successfully processed, and the data from the source file is imported into the TCA Registry.
- Rejected in Oracle Customer Data Librarian, and not available for import. See: Managing Import Batches, *Oracle Customer Data Librarian User Guide*.

In the completed file loads history, you can view completed, or inactive, file loads and their details. See: Reviewing File Load Details, page 4-8.

Searching for File Loads

You can search for active or completed file loads that you created by:

- **Load Name:** The user-defined file load name, which is not necessarily the same as the source file name.
- **Request ID:** The request ID of the interface table loading process, Import CSV Flow : Load CSV Data.
- **Creation Date:** The date that the file load was created, which is not necessarily the same as the source file creation date.
- **Load Status:** The status of the interface table loading process. Aside from Pending,

Processing, and Completed, possible statuses include:

  - *Partially Completed with Errors, Awaiting Resolution:* Records with no errors are successfully loaded into the interface tables, but there are records with errors that still must be resolved, either online or offline.
  - *Partially Completed with Errors, Awaiting Reload:* Errors from the load are resolved offline, and the corrected records need to be reloaded.

- **Import Status:** The status of importing the file load's corresponding import batch from the interface tables into the TCA Registry.

File Loads Process

1. Load a new source file by creating a file load, page 4-3.
2. View details of the file load, for any load or import status, page 4-8.
3. Correct errors from the loading process, if any, page 4-9.
4. If the load errors were corrected offline, you can load the file with the corrected records, page 4-12.
5. If you decide not to correct errors or load the corrected file, you can remove file loads with the Partially Completed with Errors, Awaiting Resolution or Partially Completed with Errors, Awaiting Reload status. Removed file loads do not appear in the completed file loads history.
6. After the file load's corresponding import batch is either rejected or successfully imported, you can view the file load in the completed file loads history.

You can also manage mappings that define which target attribute to load each source attribute value into. See: Managing Mappings, page 4-8.

Related Topics

Import Overview, page 4-1

Loading New Files

Loading a new source file into the import interface tables involves these main steps:

1. Defining the file load, page 4-5.
2. Providing the source-to-target attribute mapping, page 4-6.

3. Reviewing and submitting the file load, page 4-8.

Prerequisites

- You should have strong knowledge of the data and data structure to be imported, and experience working with the source files.

  > **Tip:** If the source file does not have a file header, add it to the file.

  - The column delimiter for the source file must be one of these:

    ,

    /

    ;

    \

  - If used, the character to enclose fields in the file must be one of these:

    "

    '

  - The format of date values in the file must be one of these:

    DD-MM-YYYY

    DD-MON-YYYY

    MM-DD-YYYY

    MON-DD-YYYY

- Make sure each record to be imported has a unique ID. See: Unique IDs for Interface Table Records, *Oracle Trading Community Architecture User Guide*.

- Make sure the source file contains information for either organizations or persons, not both.

  A source file for persons can also include persons who are contacts for organizations. All persons with contact relationships must have an associated organization name. After import, the corresponding contact relationships are also created in the TCA Registry. This feature does not include persons as contacts for other persons. See: Introduction to Contacts, page 3-5 and Contact Relationships, page 3-16.

  > **Note:** Addresses and contact points in the person record apply to the person being loaded, not to any contact relationships that the

person belongs to.

- The source file must be a CSV file, or a file delimited by another allowed character, and located in a workstation on your organization's network.

Related Topics

Loading Data into the Interface Tables, *Oracle Trading Community Architecture User Guide*

Interface Tables, *Oracle Trading Community Architecture User Guide*

Bulk Import Interface Tables, *Oracle Trading Community Architecture Reference Guide*

File Loads Overview, page 4-2

Defining File Loads

Provide a unique file load name, and information about the source file to load.

Source File Format

If the source file format does not match what you define for the file load, the file cannot be successfully processed.

This is an example of the first few columns and rows of a source file:

```
"Name", "ID Number", "Birthday"
"Smith, Jon", "12345", "27-09-1950"
"Lee, Jennie", "67890", "10-10-1979"
```

This table describes source file format elements and the format definition for the above example.

Format Element	**Description**	**Source File Example**	**Source File Format Definition**
File header	The first line in the file, with attribute text describing the values in the corresponding column	*"Name," "ID Number," "Birthday"*	File header exists
Column delimiter	The alphanumeric character that separates column values	The comma between separate fields, for example between *"Smith, Jon"* and *"12345"*	,

Format Element	Description	Source File Example	Source File Format Definition
Field enclosed by	The alphanumeric character that encloses a column value, used if values contain the column delimiter	The quotation marks, to indicate that *"Smith, Jon"* maps to a full name field, whereas *Smith, John* without quotation marks would map to last and first name fields	"
Date format	The format of date values in the source file	*"27-09-1950"* and *"10-10-1979"*	DD-MM-YYYY

Source File Contents

Specify if the file includes organization or person records. If the persons are also contacts for organizations, you must provide a mapping that includes the organization name attribute. See: Providing Mappings, page 4-6.

Select information types to be loaded. See:

- Addresses, page 3-13.
- Contact Points, page 3-15.
- Classifications, page 3-12.

Your party and information type selection determines the interface table attributes that are available to be used for mapping to the source file attributes.

Related Topics

Loading New Files, page 4-3

Providing Mappings

A mapping contains a specific set of attributes from the source file and the corresponding interface table attributes that they are to be loaded into. You can save mappings and use them for loading files from any source system.

By default, all the source attributes are displayed, in the order that they appear in the source file. You have these options for providing the target attribute mapping to use.

- Manually select the target interface table attribute for each source attribute. The available target attributes depend on the party and information type selected for the file load definition. See: Defining File Loads, page 4-5.

- Automatically map the attributes. If a target attribute has the same name as a source attribute, those attributes will be automatically mapped. It is possible that not all source attributes have a match. You can still manually select target attributes after the automatic map.

  Note: You can automatically map attributes only if your source file has a file header.

- Select an existing saved mapping. After you click Go, the target attributes that match your source file are displayed next to the corresponding source attribute.

  For example, the existing mapping has source attribute Name mapping to target attribute First Name, and source attribute Surname to target attribute Last Name. If your source file has attribute Surname, but not Name, then only target attribute Last Name would appear next to Surname.

  You can still modify the mapping after using the existing mapping.

You can optionally save the mapping as it is in the table, no matter which method you used to create or modify it. Enter a new mapping name or an existing one to overwrite it with the mapping that you are saving. You can manage saved mappings. See: Managing Mappings, page 4-8.

Whatever mapping you have when you move on to the next step is the mapping used for this file load, whether or not you saved it. If you saved a mapping, modified it, and then clicked Next, the modified mapping is used for the file load.

Caution: If you leave any target attribute blank, then the value for the corresponding source attribute will not be loaded.

Mapping Rules and Validations

Each target attribute can only be used once in a mapping. Other rules and validations for the mapping that you provide include:

- **Persons**
  - Person records must have either a first or last name. Include the First Name or Last Name target attributes in the mapping, or both.
  - Do not include the Organization Name attribute.
- **Contacts**
  - You must include these target attributes:
    - Both First Name and Last Name.

    - Organization Name.

  - Optionally include the Department Code, Department, Title, or Job Title attributes.

- **Contact Points**

  You must include the Contact Method Type target attribute. This table describes additional mandatory target attributes, based on the contact method type.

Contact Method Type	Mandatory Target Attribute
Phone or Fax	Either Telephone Number or Primary Phone
E-Mail	Email Address
Web	URL

Managing Mappings

Saved mappings can be used for file loads from any source. See: Providing Mappings, page 4-6. Access mapping management from the File Loads page. See: File Loads Process, page 4-3.

To manage mappings, you can:

- Rename mappings. All mappings that you create and update must have unique names.
- View source-to-target attribute mappings in the details.
- Delete mappings.

Related Topics

Loading New Files, page 4-3

Reviewing File Load Details

File load details are available for review:

- As the third step in loading a new source file, before you submit the file load. See: Loading New Files, page 4-3.

- As the second step in loading a file with corrected records. See: Reloading Offline Corrected Records, page 4-12.
- For all submitted file loads, active or completed. See: File Loads Overview, page 4-2 .

The file load details include:

- The file load definition. See: Defining File Loads, page 4-5.

  The source name is always CSV for file loads created through this process. See: Loading New Files, page 4-3.
- The source-to-target attribute mapping for the file load. See: Providing Mappings, page 4-6.

If you are reviewing file load details as part of loading or reloading a file, you also get a preview of the source file. You see all the source attributes and the first five party records in the source file, as they would be loaded. Review this information for obvious errors, such as missing or incorrect file headers or other formatting issues with the source file. You can still revise your source file.

> **Note:** This preview does not reflect changes from online error correction. See: Resolving File Load Errors, page 4-9.

Resolving File Load Errors

After you submit a file load, party records that pass all validations are successfully loaded into the interface tables. If any of the party records fail validation, then the record is marked with error and not loaded. The file load status is Partially Completed with Errors, Awaiting Resolution.

To resolve file load errors you can:

- Correct specific types of errors online by:
  - **Attribute:** Correct all errors for one attribute at a time, across all party records. Use this option when errors are concentrated around particular attributes. A party record with errors, however, cannot be reloaded until all of its attributes with errors are corrected. See: Correcting Errors by Attribute, page 4-10.
  - **Party Record:** Correct all errors for one party record at a time, across all attributes. When all attributes for the party are corrected, that record is immediately revalidated for loading. See: Correcting Errors by Party Record, page 4-11.

  You can switch between these two methods until you resolve all errors that are correctable online. See: Errors Correctable Online, page 4-10.

- Export records with any type of errors to a file and correct errors offline. See: Correcting Errors Offline, page 4-12.

  If the number of errors at the attribute level exceeds 200, then you must correct errors offline. Even if not, you might choose this option if there are many errors, or if you prefer to work with files offline. After you correct errors online, if you still see that there are errors, then those are errors that you can only correct offline.

  > **Important:** You can export records for offline correction only once for each file load. You can still correct errors online after you export, but it is up to you to keep track of your work if you correct errors both offline and online. Consider your options and strategy for error resolution before you export.

Errors Correctable Online

These type of errors can be corrected online, either by attribute or party record.

- **Data Type:** The source attribute contains a nonnumeric value for a target attribute that takes only numeric values.

- **Date Format:** The source attribute value is a date in a format that differs from what is defined for the file load. See: Defining File Loads, page 4-5.

- **Lookup:** If the target attribute uses lookups, then the source attribute value is validated against the lookup. For example, if a Gender target attribute uses lookup values *Female* and *Male*, the source attribute would fail if the provided value is anything else, such as *F* or *M*.

- **Mandatory Attributes:** Some target attributes are mandatory, either conditionally or unconditionally. The corresponding source attributes would fail if they do not contain values for mandatory target attributes. For information on some of these validations, see: Mapping Rules and Validations, page 4-7, and Bulk Import Interface Tables, *Oracle Trading Community Architecture Reference Guide*.

Related Topics

File Loads Overview, page 4-2

Correcting Errors by Attribute

Within a file load, correct errors online across party records for particular attributes. The attribute summary lists only the source attributes that contain errors, in the order they appear in the source file.

After you select the attribute to correct, you get the party records with an error for that attribute. These party records can collectively have one or more errors for the attribute. See: Errors Correctable Online, page 4-10.

> **Tip:** Use the source file row number to identify the party record, especially if the party name itself, organization or person name, is the attribute with error.

Provide new values for every party record before you apply the changes. If all the new values pass the validation for the online correctable errors, then the number of attributes with errors decreases by one. If the attribute is also the last correction needed for particular party records, then those records are loaded into the interface tables, and the number of party records with errors decreases accordingly.

Aside from correcting errors online by attribute, you can also:

- Correct errors online by party record, page 4-11.
- Export error records, if that has not yet already been done, for offline correction, page 4-12.

Related Topics

Resolving File Load Errors, page 4-9

Correcting Errors by Party Record

Within a file load, correct errors online across attributes for particular party records. The party record summary lists only the records that contain errors, in the order they appear in the source file.

> **Tip:** Use the source file row number to identify the party record, especially if the party name itself, organization or person name, is the attribute with error.

After you select the party to correct, you get the attributes within that record with an error. Each attribute can have one or more errors. See: Errors Correctable Online, page 4-10.

Provide new values for every attribute before you apply the changes. If all the new values pass the validation for the online correctable errors, then the party record is loaded into the interface tables, and the number of party records with errors decreases by one. If any of the corrections is the last one needed for particular attributes across all party records, then the number of attributes with errors decreases accordingly.

Aside from correcting errors online by party record, you can also:

- Correct errors online by attribute, page 4-10.

- Export error records, if that has not yet already been done, for offline correction, page 4-12.

Related Topics

Resolving File Load Errors, page 4-9

Correcting Errors Offline

For a particular file load, you can export all party records with errors to a file for offline correction. The exported file contains only the records with errors, and the file header, if any exists in the original source file.

Each line in the exported file contains all the attributes for a party record, in the order that the attributes and records appear in the source file. The exported file uses the format that is defined for the source file, for example the same column delimiter. See: Defining File Loads, page 4-5.

> **Tip:** To see which attributes to correct offline, you can view the errors that are correctable online by attribute. See: Correcting Errors by Attribute, page 4-10. The exported records, however, can contain errors that are not correctable online.

After you export for offline correction, the file load status is Partially Completed with Errors, Awaiting Reload. The file load is totally complete after you load the exported file with all errors resolved. If there are still errors after a reload, you can re-export and reload until you correct all errors.

Related Topics

Resolving File Load Errors, page 4-9

Reloading Offline Corrected Records

Prerequisite

Single quotation marks are automatically added to the beginning and end of each record in the exported file. You must remove those marks before loading the file. See: Prerequisites, page 4-4.

Procedure

1. Search for and select the original file load to load the corrected records for. See: File Loads Overview, page 4-2.

2. Provide the location of the exported file with corrected party records.

3. Review the load of the corrected records. This reload occurs with the same file load definition and mapping as the original source file. You also preview the corrected records to reload. See: Reviewing File Load Details, page 4-8.

5

Reports

This chapter covers the following topics:

- Overview of Reports
- Organization Enrichment Trend
- Data Completeness
- Organizations by Industry
- Customer Growth
- Organizations by Country
- Persons by Country
- Organizations by State/Province
- Persons by State/Province
- Duplicate Organizations
- Duplicate Persons

Overview of Reports

Quality

- **Organization Enrichment Trend**, page 5-2: How many customer records are enriched by third party data over a specified period range and interval?
- **Data Completeness**, page 5-3: How complete is my customer information for a specified period range and interval, on the party and attribute levels?

Profile

- **Organizations by Industry**, page 5-6: Which industries are my customers in?

- **Customer Growth**, page 5-6: What is my total customer count over time?
- **Organizations by Country**, page 5-7: Which countries are my organizations in?
- **Persons by Country**, page 5-7: Which countries are the person records in?
- **Organizations by State/Province**, page 5-7: Which states or provinces are my organizations in?
- **Persons by State/Province**, page 5-7: Which state or province are the person records in?
- **Duplicate Organizations**, page 5-8: How many organization records have duplicates?
- **Duplicate Persons**, page 5-8: 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: 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.

Related Topics

Overview of Reports, page 5-1

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 on the Manage Reports page, not the Data Completeness Reports page.

- **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. See: Viewing Data Completeness Reports, page 5-4.
- **Manage Reports:** Create, update, delete, and change the status of Data Completeness reports. See: Managing Data Completeness Reports, page 5-5.

  > **Note:** You can manage reports only if the IMC: Enable Manage Reports profile option is set to *Yes*.

Related Topics

Overview of Reports, page 5-1

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.

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.

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.

Related Topics

Data Completeness, page 5-3

Managing Data Completeness Reports

If the IMC: Enable Manage Reports profile option is set to *Yes*, 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.

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.

Related Topics

Data Completeness, page 5-3

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.

Related Topics

Overview of Reports, page 5-1

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.

Related Topics

Overview of Reports, page 5-1

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.

Related Topics

Overview of Reports, page 5-1

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.

Related Topics

Overview of Reports, page 5-1

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.

Related Topics

Overview of Reports, page 5-1

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.

Related Topics

Overview of Reports, page 5-1

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 identifying address is created. For a person record, a concatenated string of the first, middle, and last name plus the associated identifying 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.

Related Topics

Overview of Reports, page 5-1

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 identifying address is created. For a person record, a concatenated string of the first, middle, and last name plus the associated identifying 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.

Related Topics

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