Oracle Fusion Cloud Sales Automation

How do I manage linksets in Oracle Sales?

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1 How do I manage linksets in Oracle Sales?

Getting Started with Linking Duplicate Sales Accounts

Before You Start

You should have a subscription that entitles you to work with Customer Data Management and have received the e-mail with your environment and initial sign-on information.

Case Study

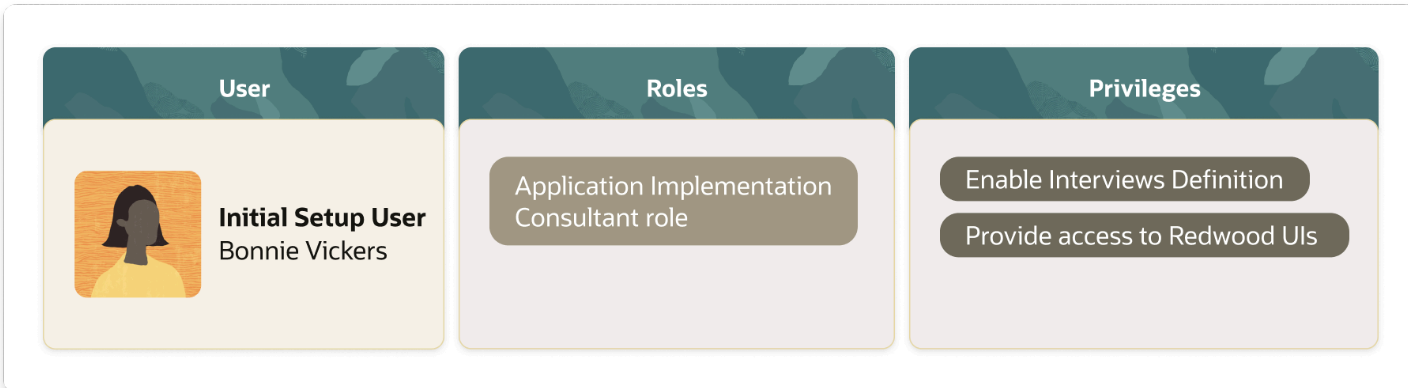
A case study is used to define the scope of this playbook. The case study is based on a fictitious company named Vision Corp., a global high-tech company that sells laptop and multiple server product lines to businesses and other organizations. Vision Corp. has recently acquired some software companies to diversify into the software business, First Software and Softgear, and their customers.

Suppose you are the data steward manager for Vision Corp's Sales and CDM implementation. In your application, you may find that a customer account, for example Acme Corp., may have been created multiple times. as Acme, Acme Corporation, Acme Corp, and so on, depending on the source system (Vision Corp., First Software or Softgear) of the records. Consequently, sales transactions are scattered across multiple sales accounts preventing a comprehensive view of the customer, Acme Corp. You may want to resolve these duplicate records by maintaining a single account as the main record so that all the duplicates are viewed and managed as a single account.

Verify You Have Required Roles and Privileges

Verify that either you have the sales administrator job role or you have added the following privileges to your job role:

- ZCH_VIEW_TRADING_COMMUNITY_LINK_PRIV
- ZCH_ENTER_TRADING_COMMUNITY_LINK_INFORMATION_PRIV
- ZCH_UPDATE_TRADING_COMMUNITY_LINK_PRIV
- ZCH_DELETE_TRADING_COMMUNITY_LINK_PRIV

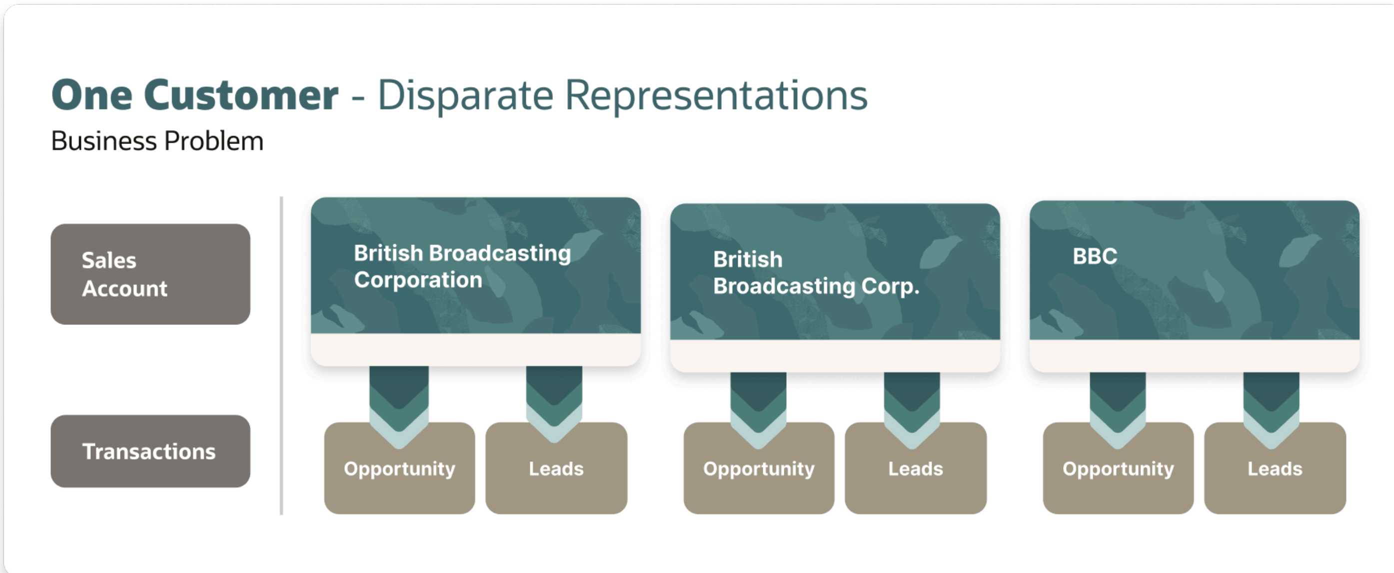


Overview of Linkset Management

Why do you need to manage duplicates?

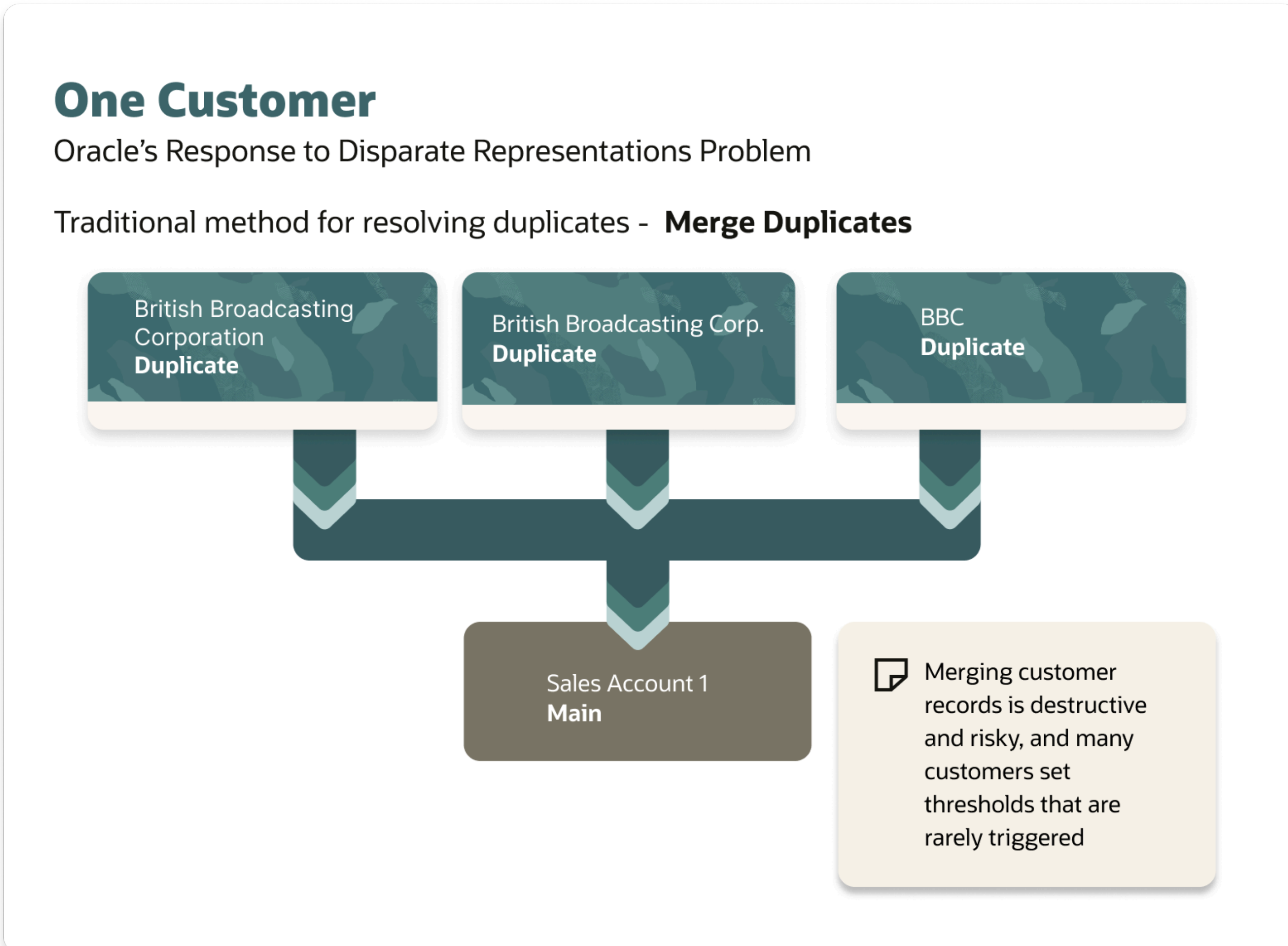
A business entity, such as an account, may have been created multiple times in the application. Consequently, sales transactions are scattered across multiple sales accounts preventing a comprehensive view of the customer.

Here's a visual representation of the problem:



Traditional method for resolving duplicates - Merge Duplicates

Party merge is one of the ways of resolving duplicate records of business entities.



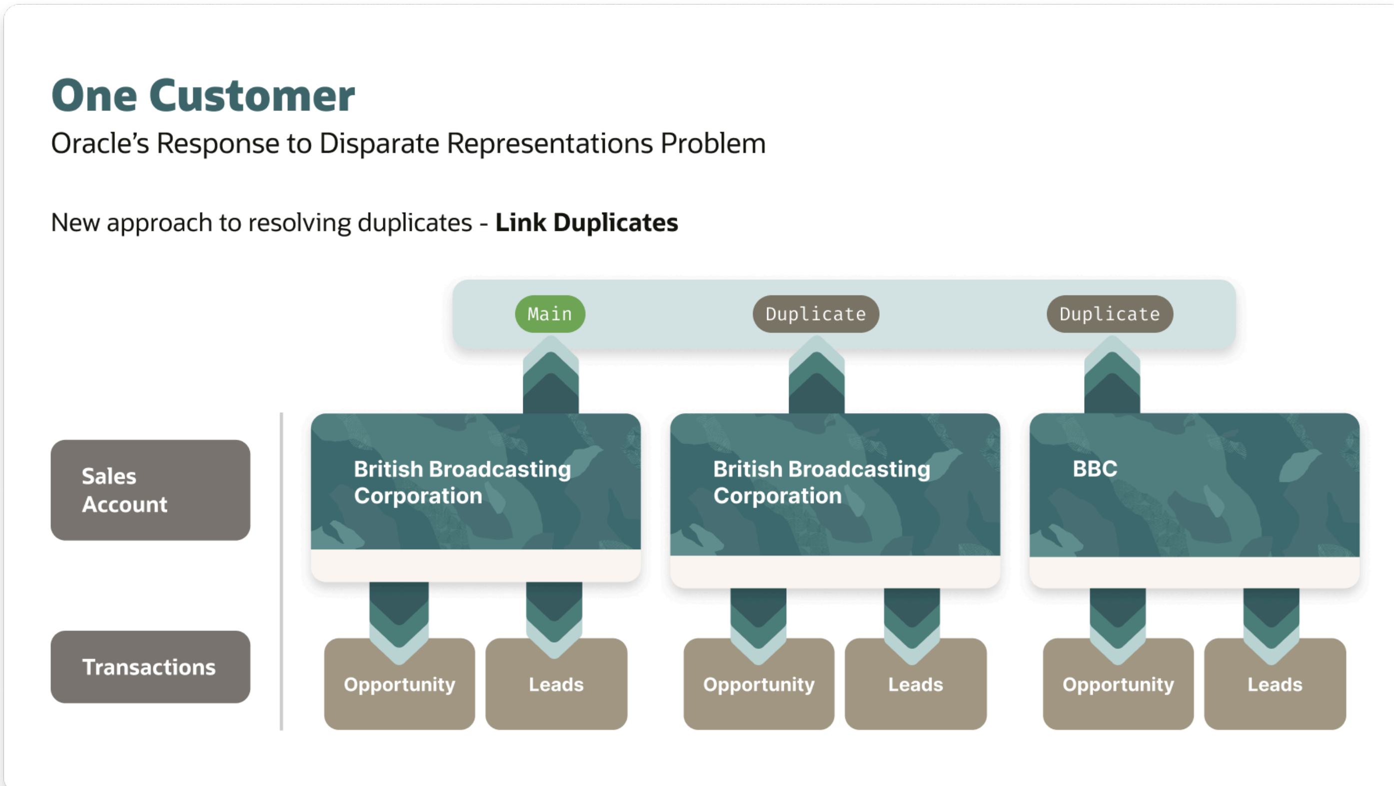
The other way is linking the parties. You can merge two or more duplicate parties by creating a merge duplicate resolution request. During merge, these parties are combined into one primary record. After completing the merge request, you can update only the master record. The merged duplicate records are also called non-master records. Note that merge supports the transfer of attachments from duplicate records to a master record.

Here are the highlights of merging:

- The merge process identifies the surviving sales account. It inactivates other accounts. Transactions are re-referenced to the surviving sales account.
- Because this process can't be undone many are hesitant to use this approach.

New approach to resolving duplicates - Link Duplicates

You use linking to associate two or more duplicate records while resolving duplicate records.



This association only creates a link between the records and doesn't affect the records. You use this association, which has a unique ID, to refer to the member records of a link. In a link, you designate one of the records as the main and the others as duplicates. This helps users identify the main sales account for use in transactions.

Here are the highlights of linking:

- All the duplicate accounts are linked. Instead of selecting one record and inactivating the rest, one account is "main".

- All sales accounts remain active.

What is the difference between merging and linking?

The merge approach retains the main record and inactivates other duplicate records. When you link records the main sales account is identified and all duplicate records remain active.

When should you merge or link duplicate records?

Duplicate records combine into a single master record during merge.

However, some parties can't merge for functional or legal reasons. For example, you can't merge duplicate records from different business units or geographical regions for certain bank operations. In these scenarios, you can create a link between duplicate records instead of merging them.

A link doesn't change the party and the associated child entities, such as addresses, contact points, and relationships. It also doesn't affect the transactional processing of the record. A link is a separate record in the data model, and has its own registry ID. The records remain active in links.

What happens when you link sales accounts together?

View the list of duplicate accounts on the sales accounts page

An account can link to one or more duplicate accounts.

You can view the list of duplicate accounts by following these steps:

1. Go to **Navigator** > **Redwood Sales** > **Accounts**
2. Drill down to any account.

   The main record and up to five duplicates are displayed.
3. Click **View All Duplicate Accounts** on the Duplicate Accounts panel.

All the duplicates of the selected account are displayed.

View the consolidated list of sales transactions on the Sales Accounts page

An account is associated with other transactions, such as opportunities, lead, asset, sales order, and so on.

Here's how you view the consolidated list of sales transactions of a sales accounts:

1. Go to **Navigator** > **Redwood Sales** > **Accounts**.
2. Search and select an account.

   All the transactions that belong to the selected account such as opportunities, lead, asset, sales order, and so on are displayed.
3. Drill down on the account to view details.

How do you link duplicate records?

How do you manually link duplicate records?

As a sales administrator, you can resolve duplicate accounts by manually linking the individual account records that you have determined as duplicates.

Here's how you manually link duplicate records:

1. Go to **Navigator** > **Redwood Sales** > **Accounts**.
2. Drill down to any account.
3. Search for Add Duplicate Account using the action bar.
4. Select a record from the picker on the Add Duplicate Account popup.

   > **Note:** Filter the accounts list by using the ellipses (...) beside the picker.

5. Click **Add**.

How do you automatically link duplicate records?

You can create a duplicate identification batch and define subset rules to retrieve a subset of the records to identify duplicates within the batch or in the database.

The auto linking task involves the following two steps:

1. Create a duplicate identification batch and select Create link request for all records as the automatic processing option.
2. Perform the task Run Request Dispatch Job to disposition the duplicate resolution sets.

Create a duplicate identification batch and a subset rule

We first proceed to creating a duplicate identification batch. To do this, you can specify the criteria for retrieving a subset of records in the duplicate identification batch. This is known as defining Subset rules, which are also known as Batch Selection Criteria rules. The data quality engine identifies potential duplicates from this subset of records based on one of these rules:

- Match all keywords: Select this option to perform an AND operation.
- Match any keyword: Select this option to perform an OR operation.

Now that you have an overview of the task, let's first create a duplicate identification batch to identify duplicate organizations in the registry, and then create a rule to retrieve a subset of records where the organization was created after 6 June 2024. Note that you can use predefined or custom attributes.

1. Click **Navigator** > **Customer Data Management** > **Duplicate Identification**.
2. Click the **Create** button.

   The Create Duplicate Identification Batch page appears.
3. Enter a batch name and description.

> **Note:** Another way is to copy an existing duplicate identification batch and quickly create a new batch from it. You can modify the details for this batch before submitting it.

4. Specify the Batch Match Mode such as **Against the Registry** or **Within the Batch**.

   In the Within the Batch Match mode, the duplicate identification is limited to the records in a batch that meet the subset rule conditions. In the Against the Registry Batch Match mode, the process aggregates the records that meet the subset rule conditions in a batch, and these records are matched against one another as well as against other records in the database.
5. Select the **Party Type** as Organization.
6. Select the **Automatic Processing Option** as **Create link request for all records**.
7. Provide the Batch Options. The batch options available depends upon the selected Automatic Processing Option. The following options are available when Create link request for all records is selected as the Automatic Processing Option:
   - Select an appropriate value for Cluster Key Level such as Typical.
   - Enter a value between 1 and 101, such as 70 for Match Threshold.
   - Enter a value between 1 and 101, such as 75 for Autolink Threshold.

   > **Note:** You need to keep in mind that the Autolink Threshold values that you provide in the Batch Options area override the values set in the Manage Customer Hub Profile Options page.
8. Click **Add** menu option or button under Duplicate Identification Batch: Selection Criteria.
9. Specify the Apply Rules option as **Match any keyword**.
10. Enter the following sample information in the Duplicate Identification Batch: Selection Criteria table:

    Duplicate Identification Batch: Selection Criteria

Object	Attribute	Operator	Value
Organization	Creation date	After	6 June 2024

11. Click **Save and Close** or **Schedule** per your requirement.

Run Request Dispatch Job

We will now proceed to running the request to disposition the duplicate resolution sets.

The dispatch job processes any resolution request in Pending or Submitted status. You can run this job in two modes:

- On demand: Submit request dispatch jobs directly from the **Duplicate Resolution** work area by selecting the batch and clicking the **Dispatch** button. This submits the job for immediate processing.
- Per a specific schedule: Do the following steps to set up a recurring job using the Run Request Dispatch Job. A setup user can access the Run Request Dispatch Job task in the Setup and Maintenance work area.
  a. Click the **Advanced** button on the Run Request Dispatch Job page.
  b. Click Schedule tab and select the **Using a Schedule** radio button.
  c. Select the frequency you want and click **Submit**.

  To see the list of dispatch jobs, and their statuses, navigate to **Tools** > **Scheduled Processes**.

How do you remove a sales account from the duplicate set?

You may have wrongly added an account to a list of duplicate sets. You have the choice to remove it from the duplicate set.

Here's how you remove a sales account from a list of duplicate records:

1. Go to **Navigator** > **Redwood Sales** > **Accounts**.
2. Drill down to any account.
3. Click **View All Duplicate Accounts** on the Duplicate Accounts panel.
4. Scroll down to the required account.
5. Click the ellipses (...) under the Actions column and click **Remove**.

The selected account is removed from the list of duplicates.

How do you promote a different sales account to be the main account?

A particular account may be the main account in the list of duplicate accounts. Later, you may want to change the main account for some business reason.

Here's how you promote an account as the main account:

1. Go to **Navigator** > **Redwood Sales** > **Accounts**.
2. Drill down to any account.
3. Click **View All Duplicate Accounts** on the Duplicate Accounts panel.
4. Scroll down to the required account.
5. Click the ellipses (...) under the Actions column and click **Promote to Main**.

The selected account is now the main account.