

# Oracle Fusion Cloud Sales Automation

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**How do I link sales accounts  
to back-office records to show  
customer 360 information?**



Oracle Fusion Cloud Sales Automation

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## Get Help

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Thanks for helping us improve our user assistance!

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# 1 Getting Started with Linking Sales Accounts to Back-office Accounts

## Before You Start

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

## Case Study

The case study defines the scope of this playbook through a fictitious company named Vision Corp. It's a global high-tech company that sells laptops and multiple server product lines to businesses and other organizations.

Vision Corp. has implemented both Enterprise Resource Planning (ERP) and Customer Experience (CX) systems. The company now contains different sales and financial party records that pertain to the same entities because the data was loaded from various legacy systems. Therefore, a sales representative of Vision Corp. doesn't have a complete view of their account and back-office transactions because invoices, subscriptions, and orders aren't associated with the sales account.

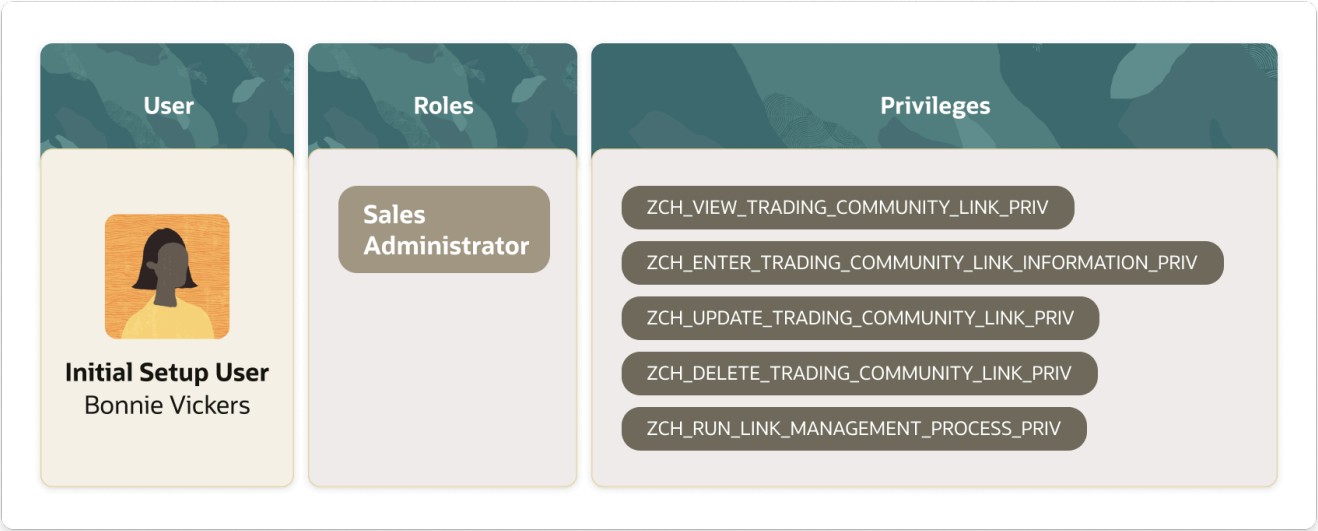
The best solution for this situation is to use linksets to manage the relationships between parties in both ERP and CX. The duplicate identification functionality of customer data management enables Vision Corp. to automatically identify and suggest matching back-office (BO) records such as orders, invoicing, payments, and revenue recognition, and front office (FO) party records that can be used to create BOFO linksets.

## Verify You Have Required Role and Privileges

Verify that either you have the Sales Administrator job role or you have added the following privileges to your user profile:

- 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

- ZCH\_RUN\_LINK\_MANAGEMENT\_PROCESS\_PRIV





## 2 Overview of Linkset for Back-office and Front-office Account Linkage

### Why do you need to link accounts?

Oracle Fusion Cloud Applications use the party model to manage business entity data. Party is a business relationship agnostic term encompassing individuals, organizations, and households, interacting with the deploying company. Parties can have different roles in relation to the deploying company, such as customer, supplier, or partner.

In Oracle Sales, the sales account of a party is used to conduct front-office transactions as part of the sales process. Transactional items such as opportunities are associated with the sales account of a party.

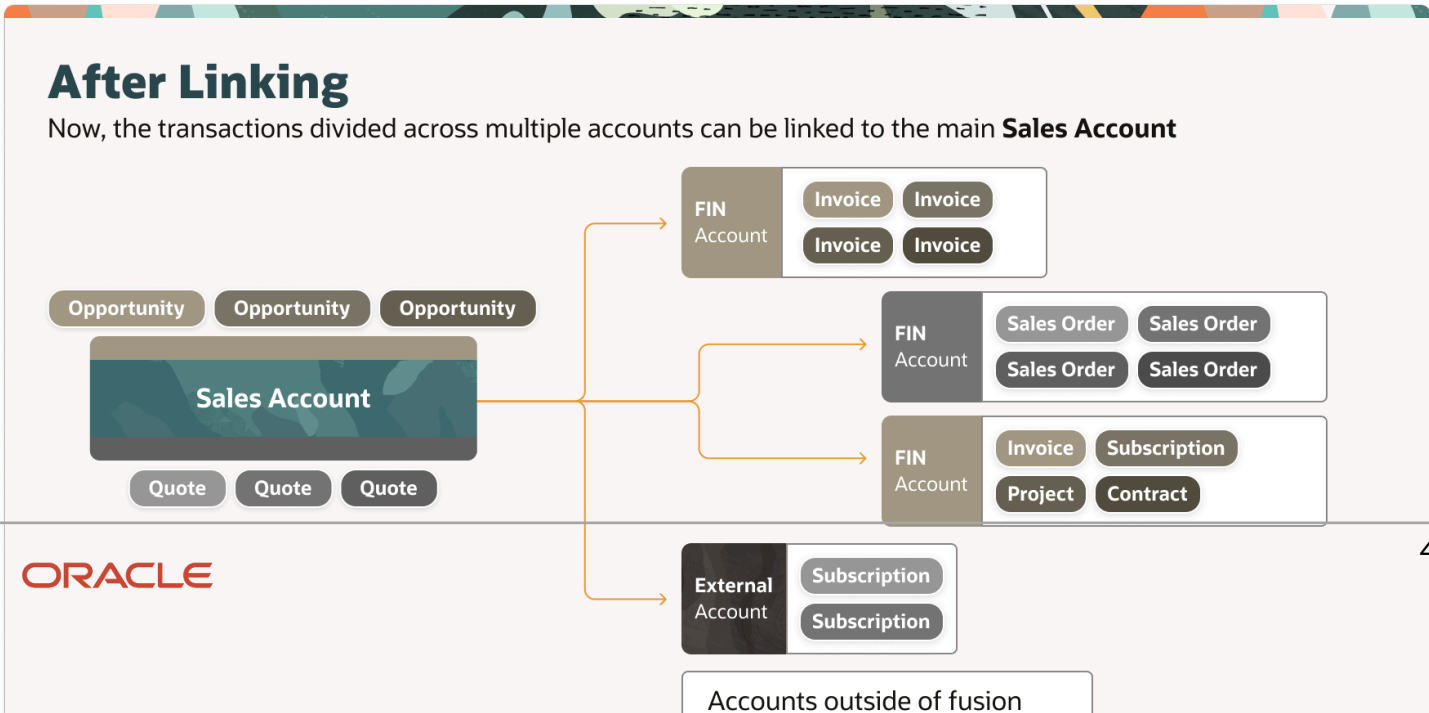
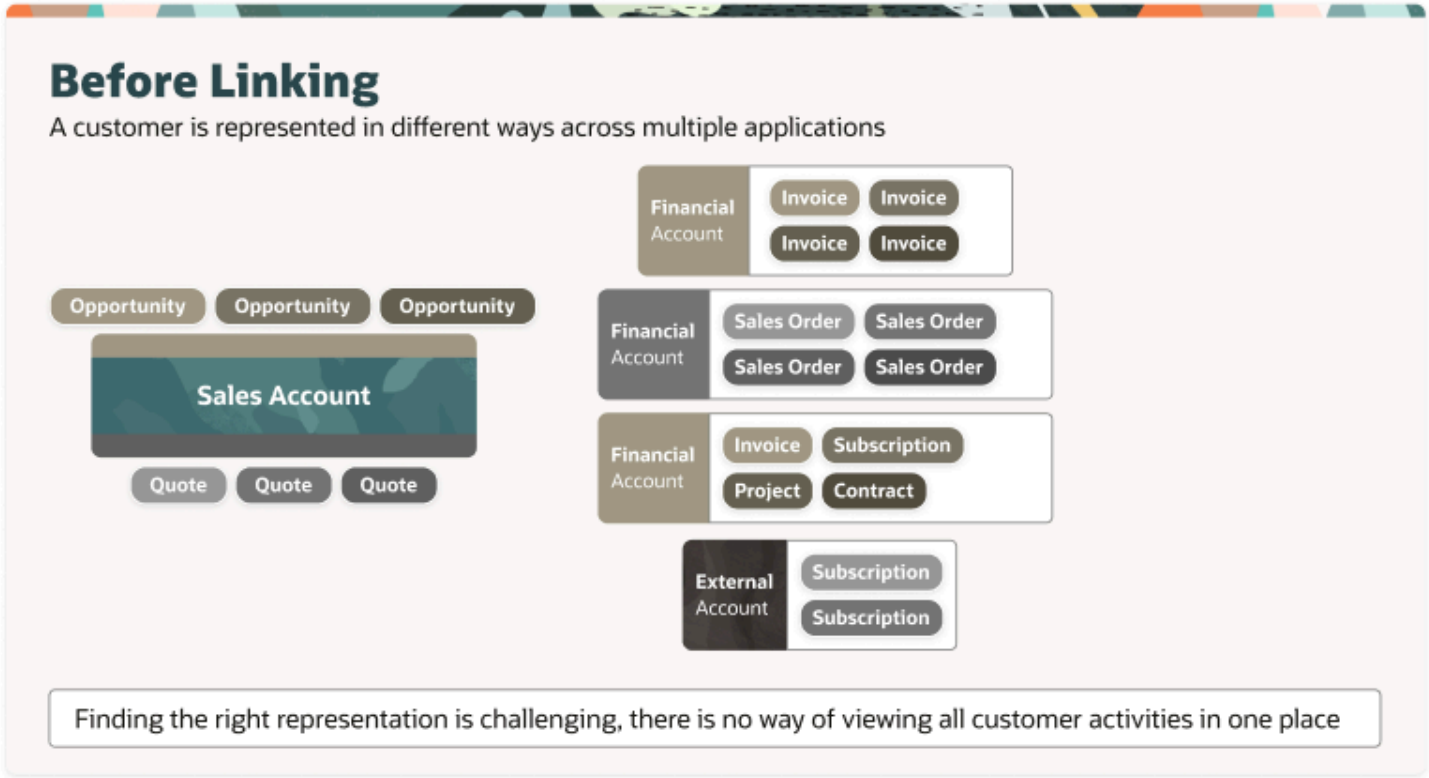
In Oracle Financials, the customer account of the same party is used to conduct back-office transactions as part of the financial process. Transactional items such as invoices, belong to customer accounts associated with the party.

Thus, we see that using the party model the same business entity is represented by a Sales Account in Oracle Sales but by a Customer Account in Oracle Financials.

Now consider the problem being faced by the fictitious company from our case study, Vision Corp., that has implemented both Enterprise Resource Planning (ERP) and Customer Experience (CX) systems. The company contains different sales and financial party records that pertain to the same entities because the data was loaded from various legacy systems. Therefore, a sales representative of Vision Corp. doesn't have a complete view of their account and back-office transactions because invoices, subscriptions, and orders aren't associated with the sales account.

The best solution for this situation is to use linksets to manage the relationships between parties in both ERP and CX. The duplicate identification functionality of customer data management enables Vision Corp. to automatically identify and suggest matching back-office (BO) party records such as orders, invoicing, payments, and revenue recognition, and front office (FO) party records that can be used to create BOFO link sets.

Here's a visual representation of the problem and its resolution:



## What happens when you link sales and back-office accounts together?

### View the list of linked accounts on the Sales Accounts page

You need at least the view link privilege (ZCH\_VIEW\_TRADING\_COMMUNITY\_LINK\_PRIV) to view the linked accounts.

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

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

A panel titled Linked Customers is displayed.

3. Click **View All Linked Customers** to view a table with the full list of linked records.

### View the transactions from the linked accounts on the Sales Account page

You can view the list of middle and back-office records from the linked accounts on the sales Accounts page. You don't require any link privileges to view the transactions.

Follow these steps:

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

Middle and back-office records are displayed under their respective panels. Five records, if available, are listed in each panel.

3. Click **View All <object name>** on the object's panel. For example, to view orders of the selected sales account click View All Orders.



## 3 Link Front-office and Back-office Records

### How do you manually link records?

As a Sales Administrator, you can link back-office records such as financial customers with sales accounts.

Here's how you manually link records:

1. Go to **Navigator > Redwood Sales > Accounts**.
2. Drill down to any account.
3. Search for Link Financial Customer using the search bar.
4. Select a record from the drop-down list on the Link Financial Customer popup and click **Add**.

### How do you create links automatically?

We can automatically create links between ship-to, sold-to, and bill-to financial customers that are related to a sales account using the Create Links Between Sales and Financial Parties scheduled process.

1. Go to **Navigator > Tools > Scheduled Processes**.
2. On the Scheduled Processes Overview page, click Schedule New Process.
3. Enter Create Links Between Sales and Financial Parties and click OK.
4. Click Submit.

Sales accounts are linked to financial customers.

### How do you create links automatically using duplicate identification batches?

You can create a link using a duplicate identification batch and define subset rules to retrieve a subset of the records to link sales accounts and financial customers.

Subset rules, also known as batch selection criteria rules, specify the criteria for retrieving a subset of records in the batch. The data quality engine links records 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 batch to link sales accounts and financial customers in the registry, and then create a rule to retrieve a subset of records where the customer was created before April 8, 2025 or the system date. Note that you can use predefined or custom attributes.

1. Go to **Navigator > Customer Data Management > Duplicate Identification**.
2. Click **Actions > Create**.

The Create Duplicate Identification Batch page appears.

3. Enter a batch name and description.

**Note:** Another way is to copy an existing 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 linking 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 and against other records in the database.

5. Specify the Party Type as Organization.
6. Specify the Automatic Processing option as Create Link Request for Sales Accounts and Financial Customers.
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 Sales Accounts and Financial Customers 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 value that you provide in the Batch Options area override the values set in the Manage Customer Hub Profile Options page.

- Select Send Notifications to notify the status of the batch to all interested parties such as initiator or submitter.
8. Click Add menu option or button under Duplicate Identification Batch: Selection Criteria.
  9. Specify the Apply Rules options as Match any keyword.
  10. Enter the following sample information in the Duplicate Identification Batch: Selection Criteria table:

***Duplicate Identification Batch: Selection Criteria Sample***

| Object       | Attribute | Operator | Value                       |
|--------------|-----------|----------|-----------------------------|
| Organization | Created   | Before   | 8 April 2025 or System Date |

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

## How do you remove a back-office account from a linkset?

You may have wrongly linked an account to a middle or back-office record. You have the choice to remove it from the link set.

Here's how you remove a back office record from a sales account:

1. Go to **Navigator > Redwood Sales > Accounts**.

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## Link Front-office and Back-office Records

2. Drill down to any account.
3. Click **View All Linked Customers** on the Linked Customers panel.
4. Select the required account.
5. Click the Ellipses (...) under the Actions column and click **Unlink**.

All the middle or back-office records of the selected linked customer are removed from the link.

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Link Front-office and Back-office Records