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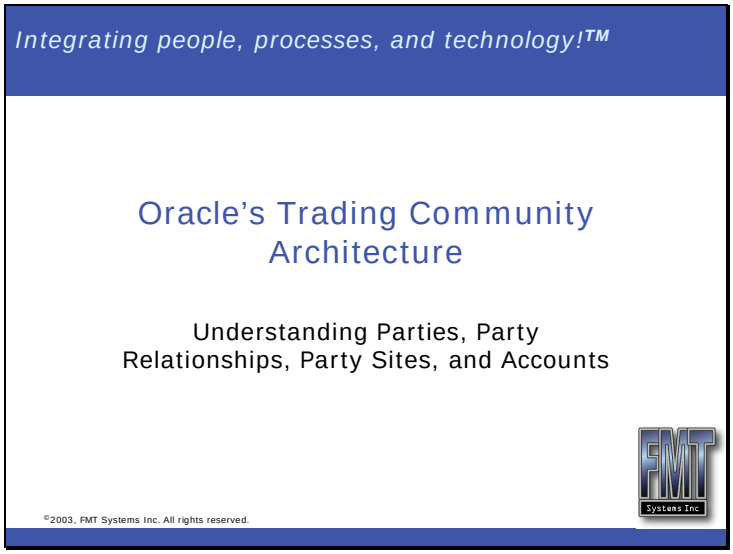

Slide 2

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Slide 3

Agenda

- Introduction
- Learning objectives
- Trading Community Architecture
  - Relationship to Oracle eBusiness Suite
  - Data model components
  - Parties
  - Party relationships
- Trading Community Manager Responsibility
  - Relationship Manager
  - Customers – entry and maintenance
  - Party Merge
- Summary
- Questions and answers

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Slide 4

Learning Objectives

At the conclusion of this presentation, you should be able to:

- Describe a party, party information, and party relationships
- Explain the difference between party attributes and customer attributes
- Discuss how the Trading Community Manager responsibility is used
- Explain the reasons for merging parties

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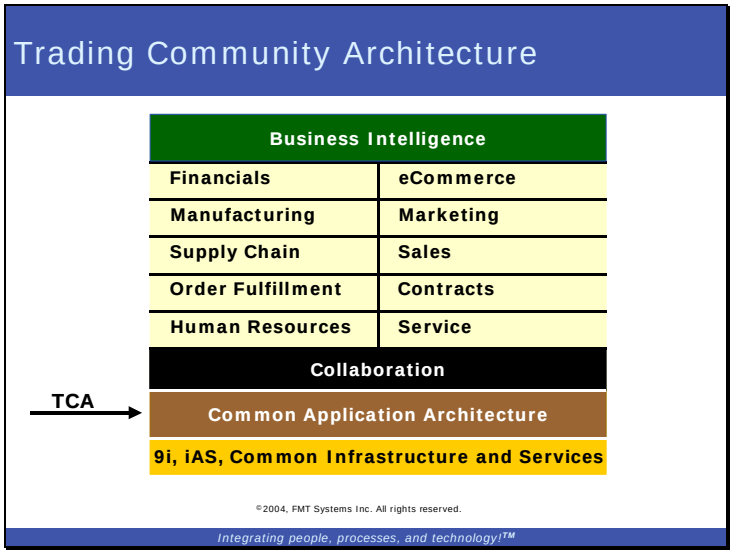

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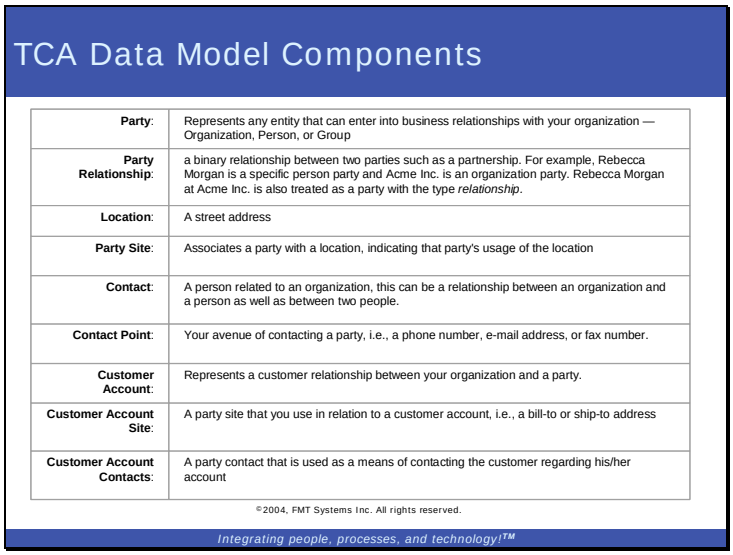

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Party

Person

Organization

Group

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Party Information

Acme Inc.

Still exists independently

Party attributes include
- Name
- Street address
- DUNS number
- External credit rating

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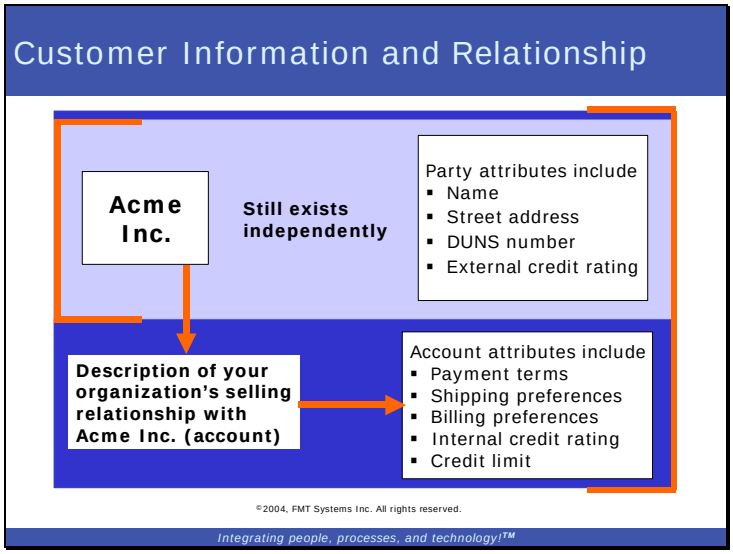

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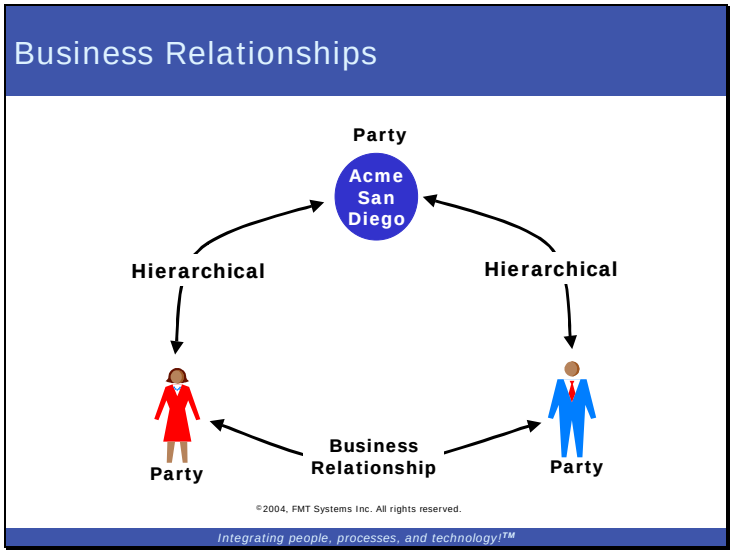

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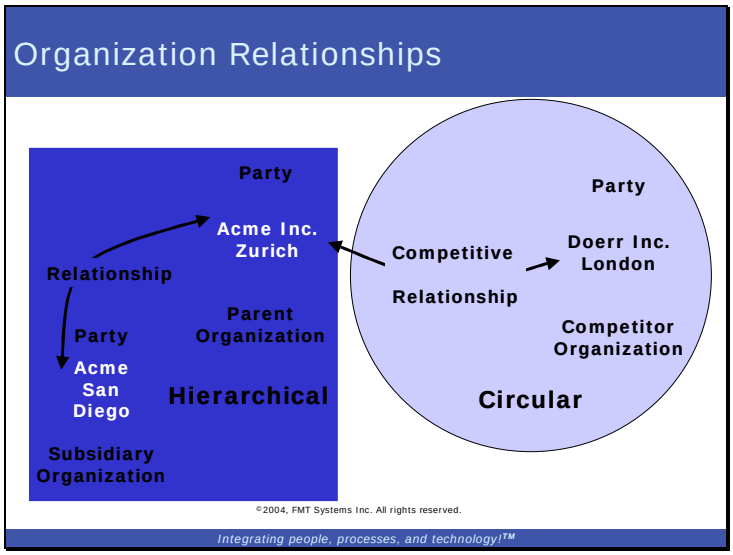

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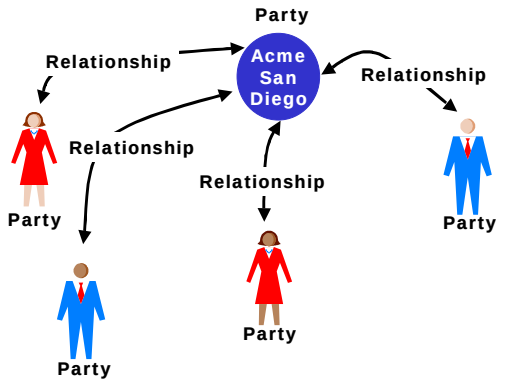
Person to Organization



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Sample Scenario

Your sales team returns from a trade show after having identified a prospect Acme Inc. This company has its corporate headquarters in New York with additional offices in Dallas and San Francisco. Your company has sales territories for the Northeast, the Southeast, the Midwest, and the West Coast.

How many parties would you create for this prospect?

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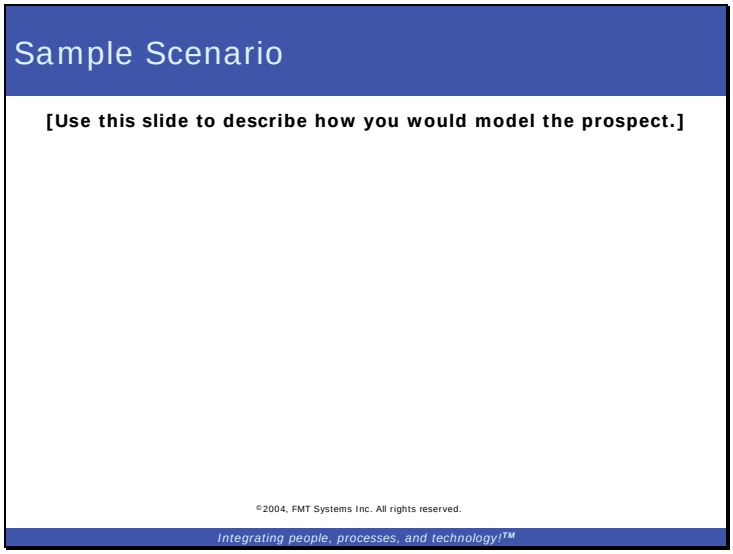

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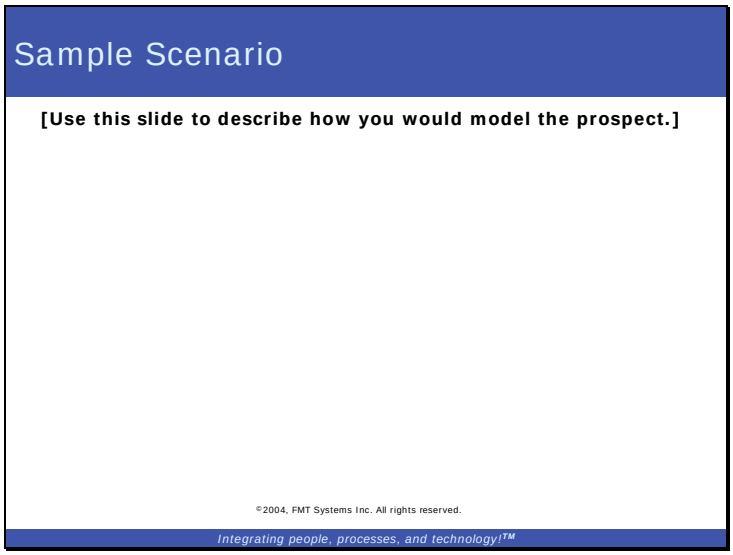

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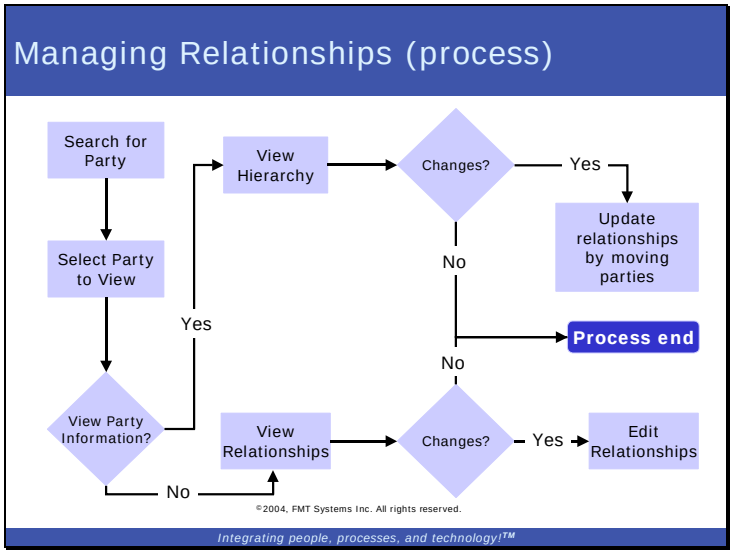

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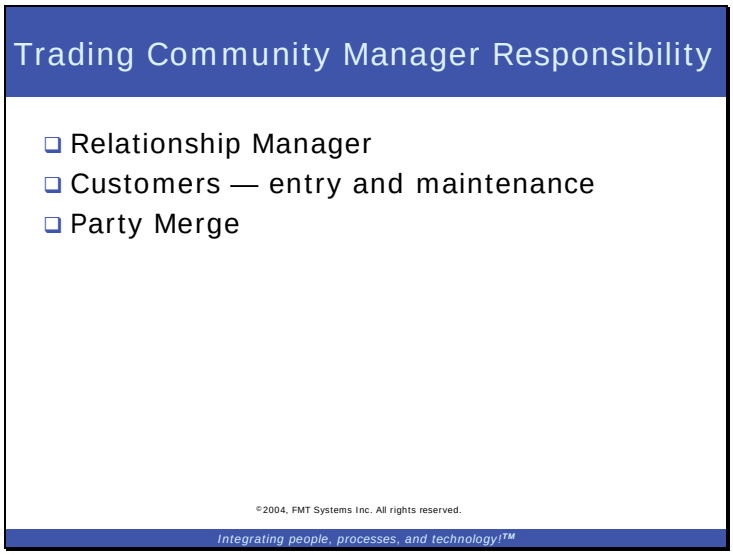

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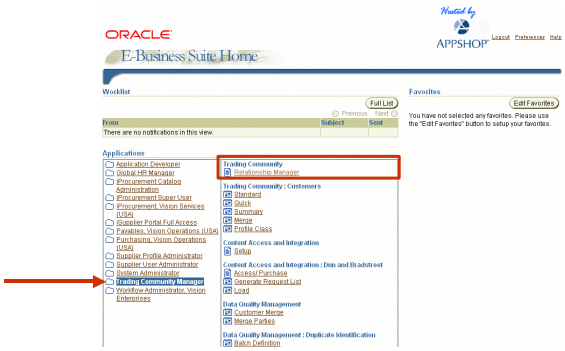
Trading Community Manager Responsibility



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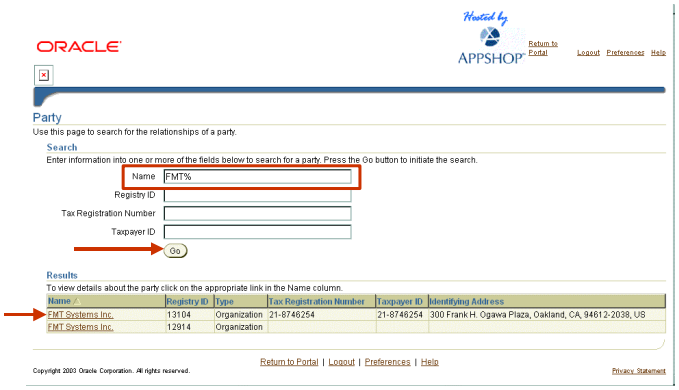
TCM — Party Relationship Search



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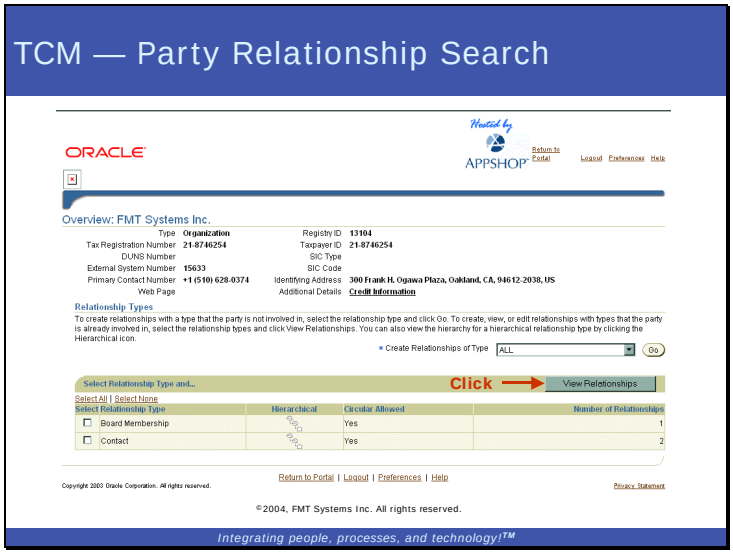

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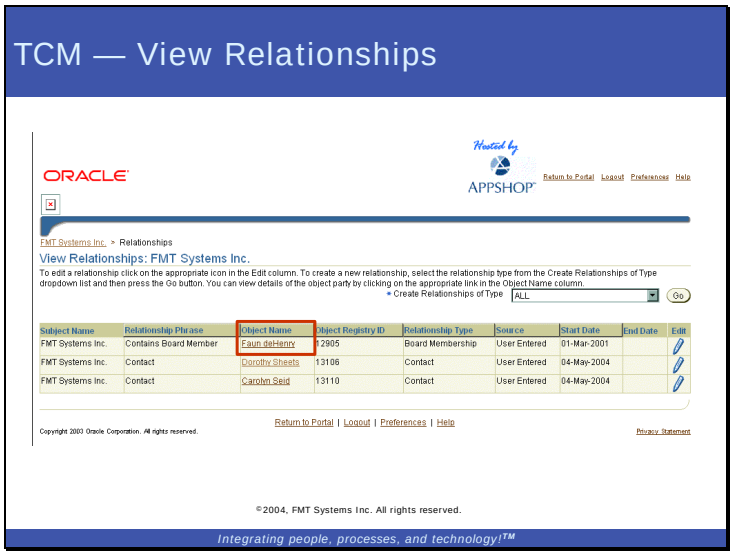

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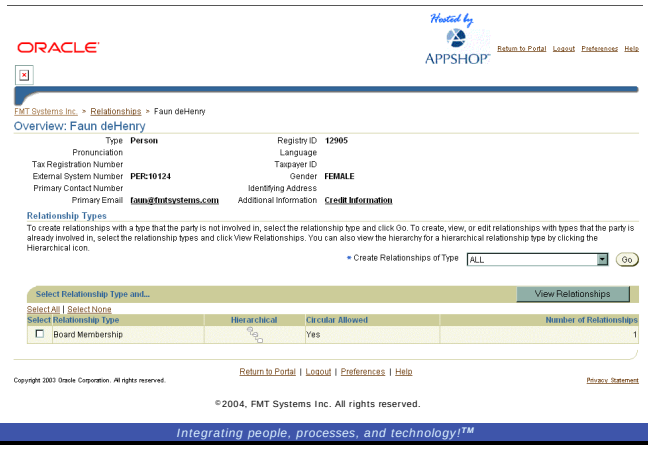
TCM — View Relationships



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Customer — Entry and Maintenance

- Enter new customers
- Manage your customer relationship and information
  - Party relationships
  - Third party data (D&B)

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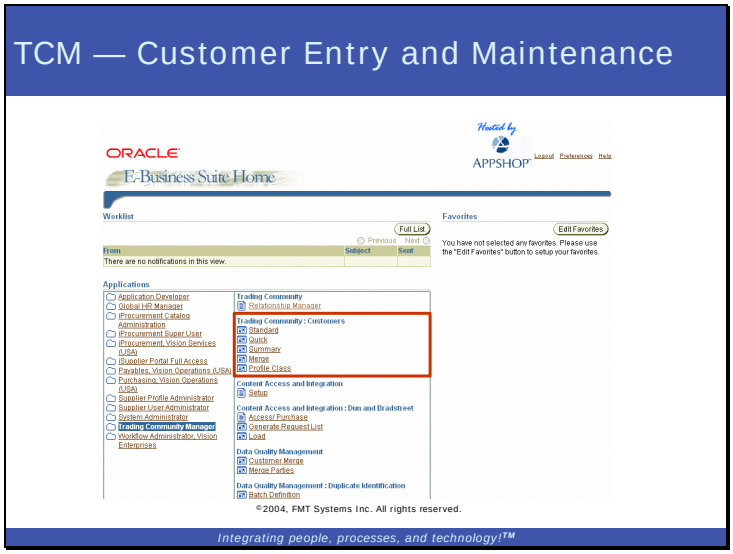

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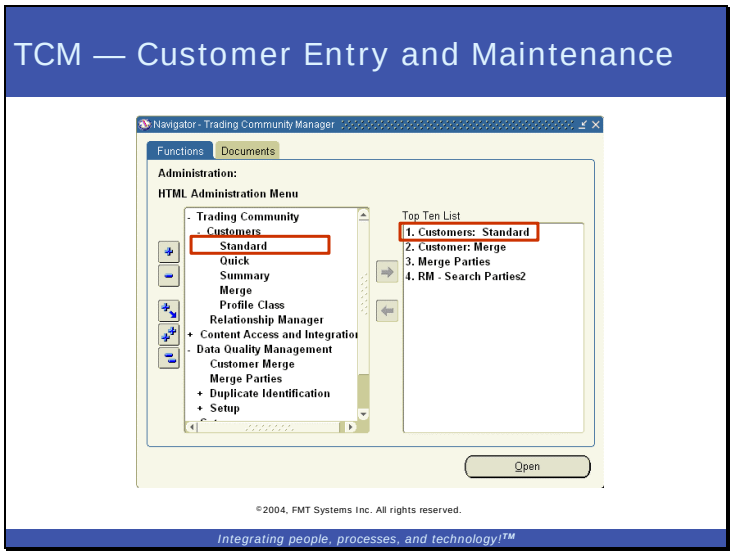

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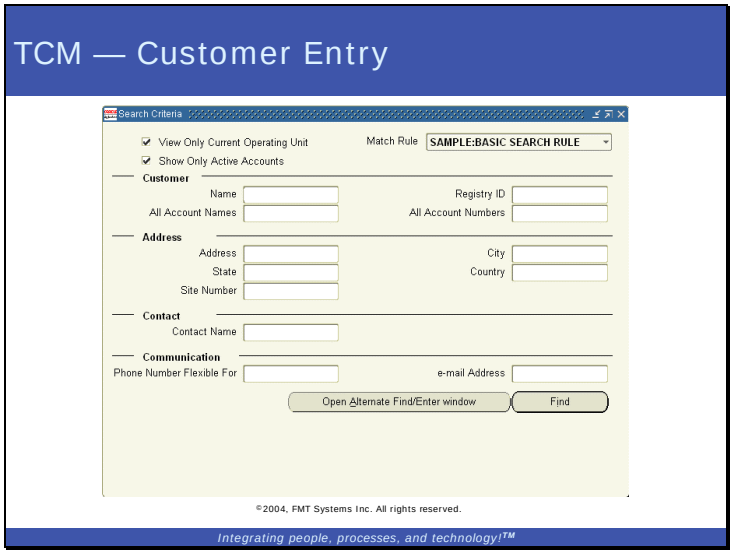

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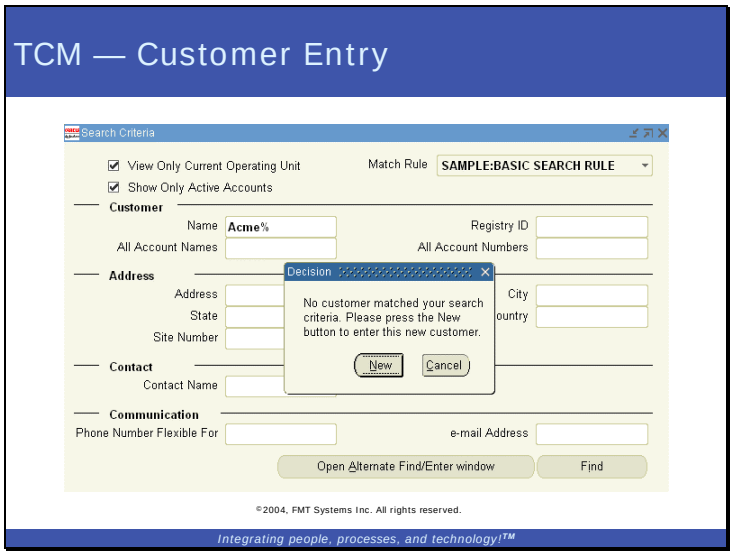

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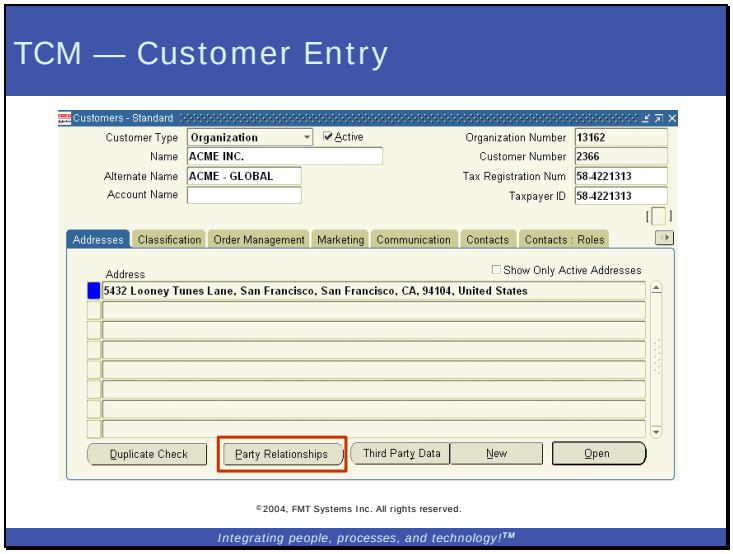

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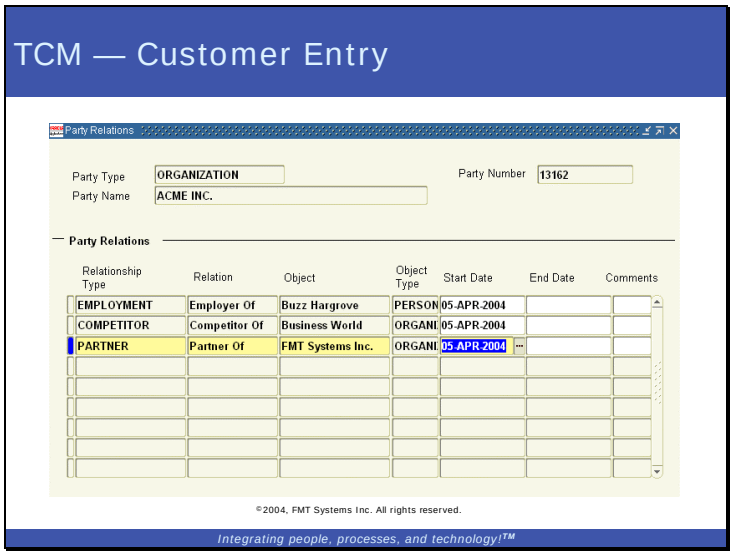

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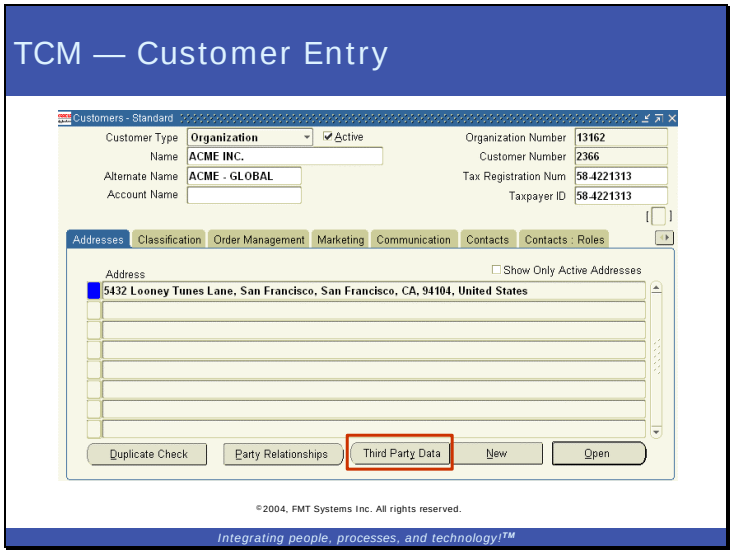

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Party Merge

- Consolidate duplicate parties or party sites, i.e., merge Acme Corporation into Acme Corp.
- Merge an acquired party into the acquiring party, i.e., merge Looney Tunes Network into Acme Corp.
- Combine duplicate party sites for a party.

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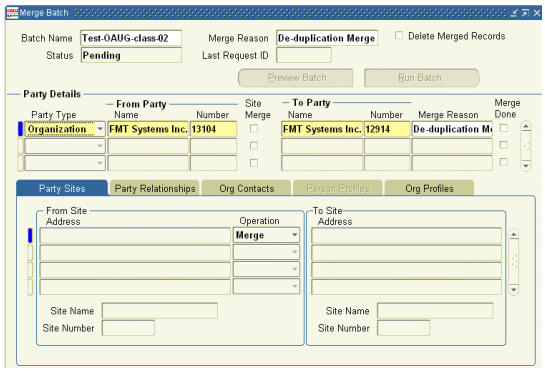
Party Merge — Merge Batch



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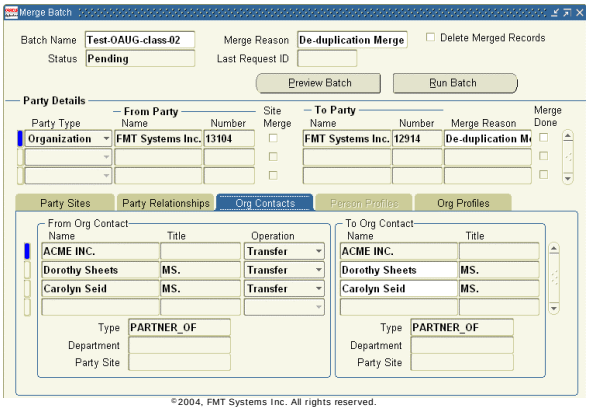
Party Merge — Merge Batch



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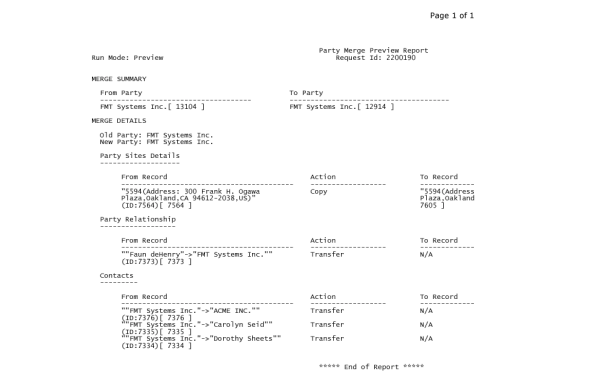
Party Merge — Preview Report



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Summary

During this presentation, we have:

- Described a party, party information, and party relationships
- Explained the difference between party attributes and customer attributes
- Discussed how the Trading Community Manager responsibility is used
- Explained the reasons for merging parties

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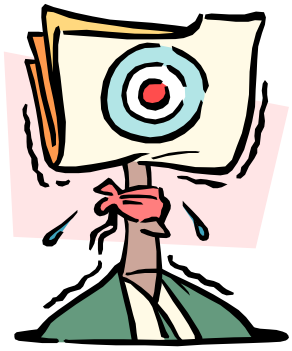
Questions and Answers



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Oracle's Trading Community Architecture

Understanding Parties, Party Relationships, Party Sites, and Accounts

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