


Slide 1

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Oracle's Trading Community Architecture

Understanding Parties, Party Relationships, Party Sites, and Accounts



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Slide 2

Introduction

Faun deHenry

- President and CEO of FMT Systems Inc.
- Work during last 20 years involved founding and operating regional consulting organizations
- Officer in Business Intelligence/Data Warehouse Special Interest Group
- Recognized speaker and trainer on topics including *Managing and Sustaining Virtual Teams*, *Best Practices for Virtual Organizations*, *Oracle's e-Business Suite*, and *business intelligence*

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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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Learning Objectives

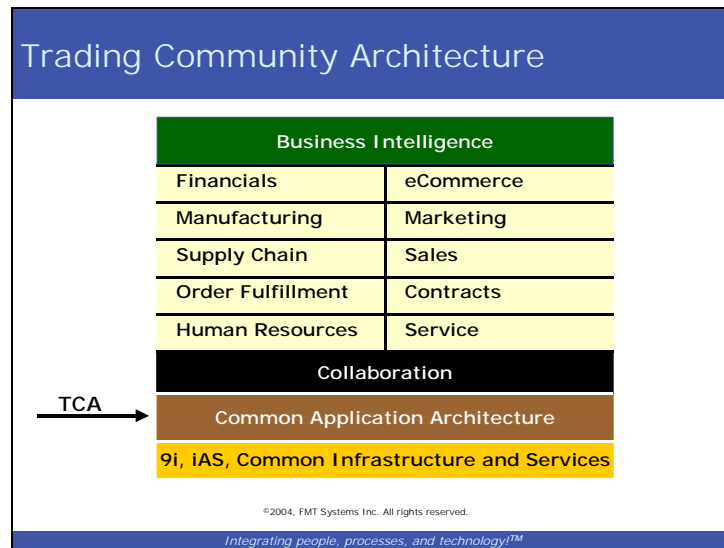
At the conclusion of this presentation, you should be able to:

- 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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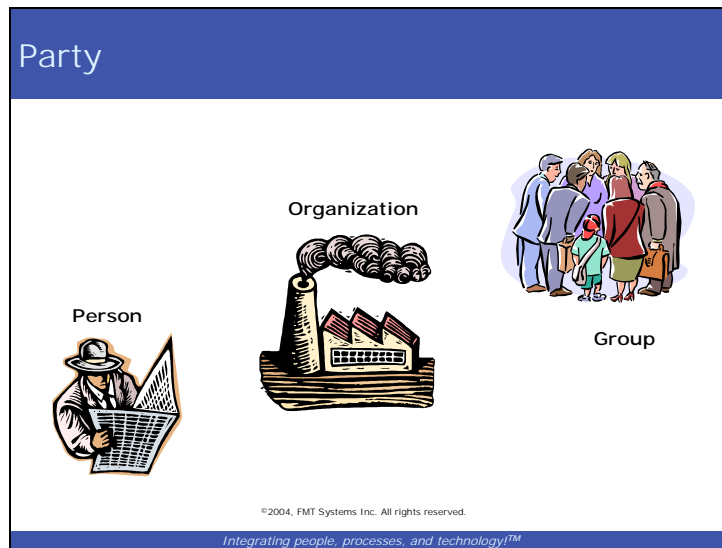
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TCA Data Model Components

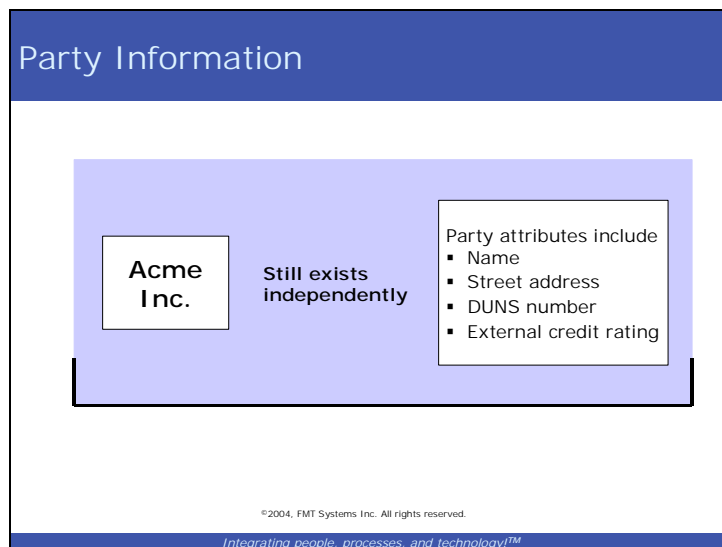
Party:	Represents any entity that can enter into business relationships with your organization — Organization, Person, or Group
Party Relationship:	a binary relationship between two parties such as a partnership. For example, Rebecca Morgan is a specific person party and Acme Inc. is an organization party. Rebecca Morgan at Acme Inc. is also treated as a party with the type <i>relationship</i> .
Location:	A street address
Party Site:	Associates a party with a location, indicating that party's usage of the location
Contact:	A person related to an organization, this can be a relationship between an organization and a person as well as between two people.
Contact Point:	Your avenue of contacting a party, i.e., a phone number, e-mail address, or fax number.
Customer Account:	Represents a customer relationship between your organization and a party.
Customer Account Site:	A party site that you use in relation to a customer account, i.e., a bill-to or ship-to address
Customer Account Contacts:	A party contact that is used as a means of contacting the customer regarding his/her account

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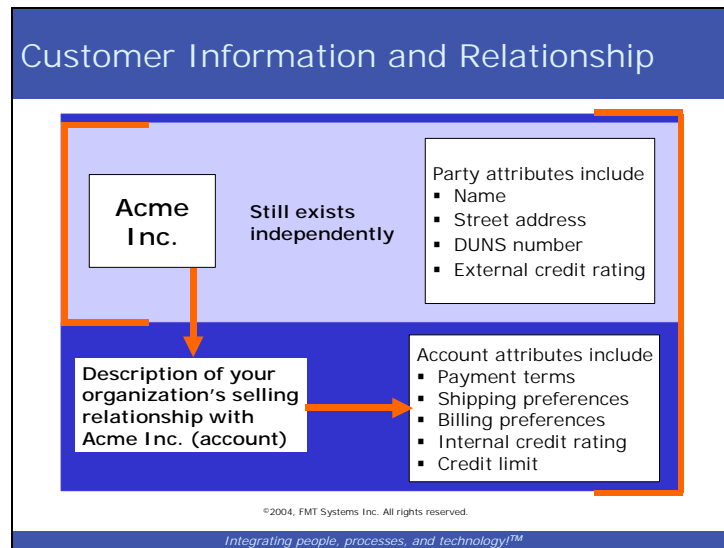
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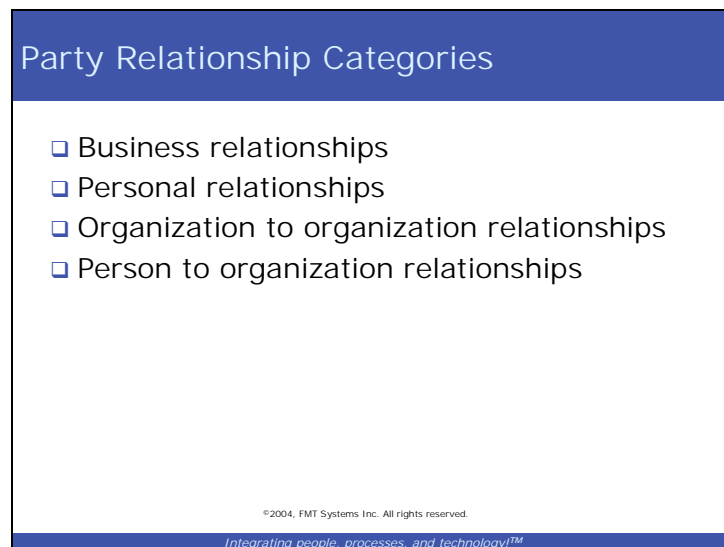
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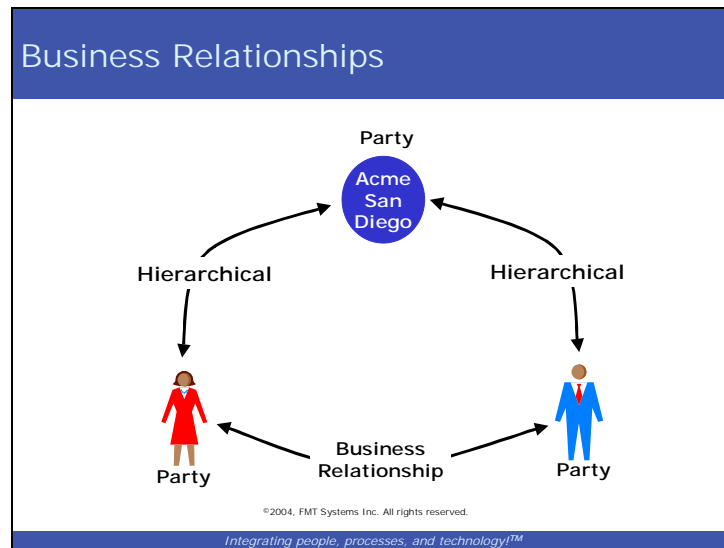
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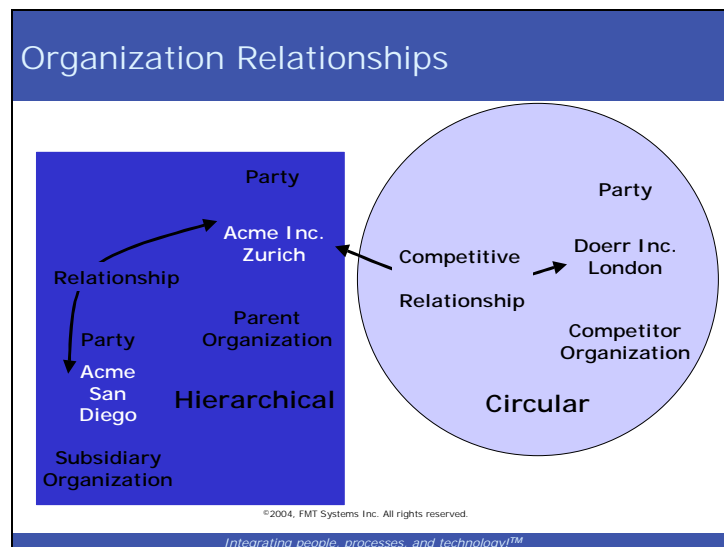
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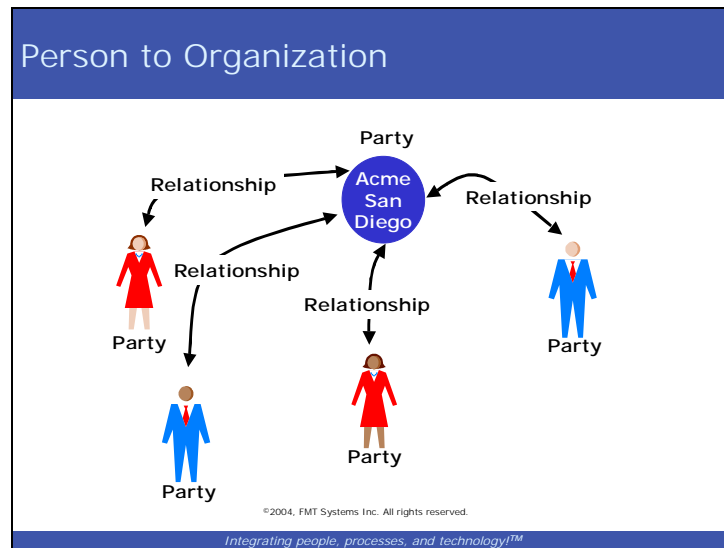
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Sample Scenario

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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Sample Scenario

[Use this slide to describe how you would model the prospect.]

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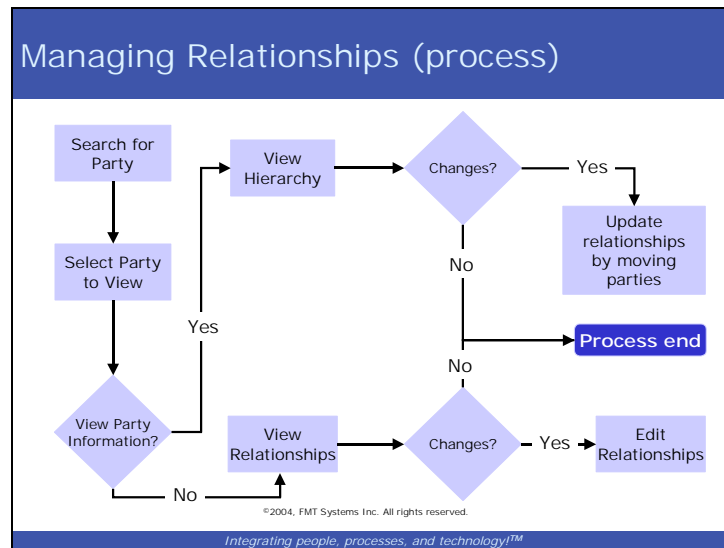
Sample Scenario

[Use this slide to describe how you would model the prospect.]

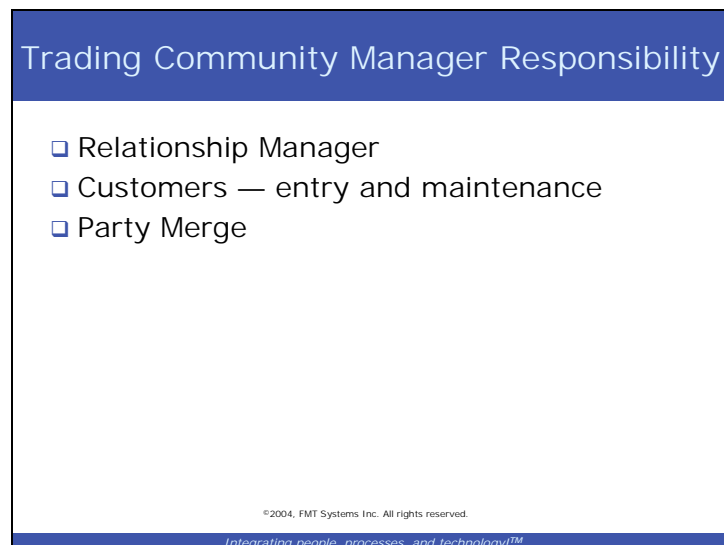
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Trading Community Manager Responsibility

The screenshot shows the Oracle E-Business Suite Home page. In the 'Applications' section, the 'Trading Community Manager' responsibility is highlighted with a red box. A red arrow points to this responsibility in the list. The page also shows a 'Worklist' section with a message 'There are no notifications in this view.' and a 'Favorites' section with a message 'You have not selected any favorites. Please use the "Add Favorites" button to setup your favorites.'

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TCM — Party Relationship Search

The screenshot shows the Oracle TCM Party Relationship Search page. The 'Name' field is populated with 'FMT%' and is highlighted with a red box. A red arrow points to the 'Go' button. Below the search fields, the 'Results' section displays a table with the following data:

Name	Registry ID	Type	Tax Registration Number	Taxpayer ID	Identifying Address
FMT Systems Inc.	13104	Organization	21-8746254	21-8746254	300 Frank H. Ogawa Plaza, Oakland, CA, 94612-2038, US
FMT Systems Inc.	12914	Organization			

A red arrow points to the first row of the results table. The page also includes a 'Party' section with instructions to search for relationships of a party, and a 'Results' section with instructions to view details about the party.

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TCM — Party Relationship Search

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Overview: FMT Systems Inc.

Type	Organization	Registry ID	13104
Tax Registration Number	21-8746254	Taxpayer ID	21-8746254
DUNS Number		SIC Type	
External System Number	15633	SIC Code	
Primary Contact Number	+1 (510) 628-0374	Identifying Address	300 Frank H. Ogawa Plaza, Oakland, CA, 94612-2038, US
Web Page		Additional Details	Credit Information

Relationship Types
To create relationships with a type that the party is not involved in, select the relationship type and click Go. To create, view, or edit relationships with types that the party is already involved in, select the relationship types and click View Relationships. You can also view the hierarchy for a hierarchical relationship type by clicking the Hierarchical icon.

Create Relationships of Type ALL Go

Select Relationship Type and... Click View Relationships

Select All Select None	Hierarchical	Circular Allowed	Number of Relationships
<input type="checkbox"/> Board Membership		Yes	1
<input type="checkbox"/> Contact		Yes	2

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TCM — View Relationships

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FMT Systems Inc. > Relationships

View Relationships: FMT Systems Inc.

To edit a relationship click on the appropriate icon in the Edit column. To create a new relationship, select the relationship type from the Create Relationships of Type dropdown list and then press the Go button. You can view details of the object party by clicking on the appropriate link in the Object Name column.

Create Relationships of Type ALL Go

Object Name	Relationship Phrase	Object Name	Object Registry ID	Relationship Type	Source	Start Date	End Date	Edit
FMT Systems Inc.	Contains Board Member	Fawn DelHenry	12905	Board Membership	User Entered	01-Mar-2001		
FMT Systems Inc.	Contact	Christy Sheets	13106	Contact	User Entered	04-May-2004		
FMT Systems Inc.	Contact	Carolyn Seid	13110	Contact	User Entered	04-May-2004		

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TCM — View Relationships

ORACLE

Hosted by APPSHOP

FMT Systems Inc. > Relationships > Faun deHenry

Overview: Faun deHenry

Type Person

Registry ID 12905

Pronunciation

Language

Tax Registration Number

Taxpayer ID

External System Number PER10124

Gender FEMALE

Primary Contact Number

Identifying Address

Primary Email faun@fmtsystems.com

Additional Information

Credit Information

Relationship Types

To create relationships with a type that the party is not involved in, select the relationship type and click Go. To create, view, or edit relationships with types that the party is already involved in, select the relationship types and click View Relationships. You can also view the hierarchy for a hierarchical relationship type by clicking the Hierarchical icon.

Create Relationships of Type ALL

Go

Select Relationship Type and...

View Relationships

Select All | Select None

Select Relationship Type

Hierarchical

Circular Allowed

Number of Relationships

☐ Board Membership

Yes

Yes

1

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Customer — Entry and Maintenance

☐ Enter new customers

☐ Manage your customer relationship and information

- Party relationships
- Third party data (D&B)

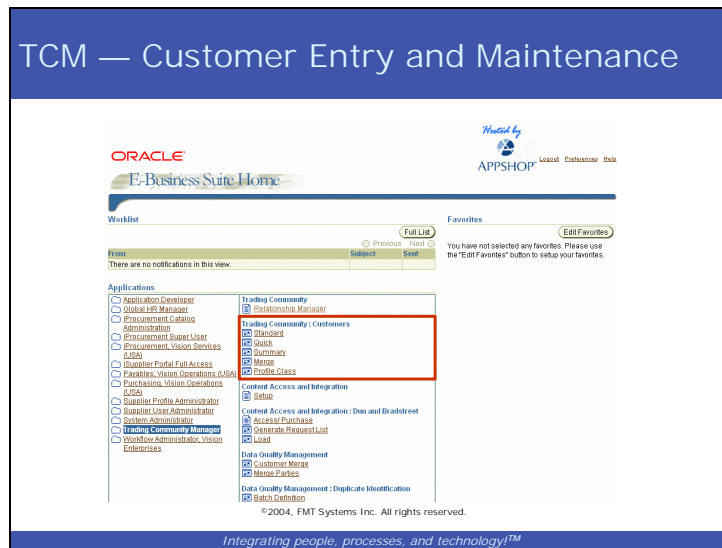
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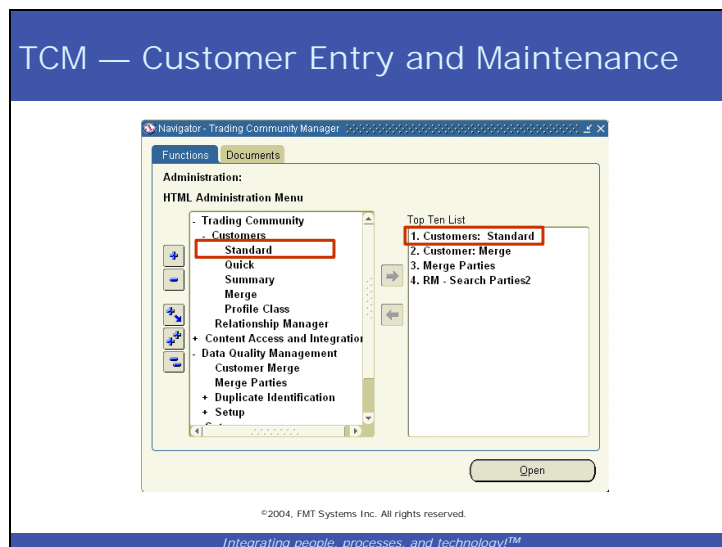
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TCM — Customer Entry

Search Criteria

☒ View Only Current Operating Unit

Match Rule

SAMPLE:BASIC SEARCH RULE

☒ Show Only Active Accounts

Customer

Name

Registry ID

All Account Names

All Account Numbers

Address

Address

City

State

Country

Site Number

Contact

Contact Name

Communication

Phone Number Flexible For

e-mail Address

Open Alternate Find/Enter window

Find

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TCM — Customer Entry

Search Criteria

☒ View Only Current Operating Unit

Match Rule

SAMPLE:BASIC SEARCH RULE

☒ Show Only Active Accounts

Customer

Name

Registry ID

All Account Names

All Account Numbers

Address

Address

City

State

Country

Site Number

Contact

Contact Name

Communication

Phone Number Flexible For

e-mail Address

Open Alternate Find/Enter window

Find

Decision

No customer matched your search criteria. Please press the New button to enter this new customer.

New

Cancel

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TCM — Customer Entry

Customers - Standard

Customer Type: **Organization** ☒ Active

Name: **ACME INC.**

Alternate Name: **ACME - GLOBAL**

Account Name:

Organization Number: **13162**

Customer Number: **2366**

Tax Registration Num: **58-4221313**

Taxpayer ID: **58-4221313**

Addresses | Classification | Order Management | Marketing | Communication | Contacts | Contacts - Roles

Address: ☐ Show Only Active Addresses

5432 Looney Tunes Lane, San Francisco, San Francisco, CA, 94104, United States

Duplicate Check | **Party Relationships** | Third Party Data | New | Open

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TCM — Customer Entry

Party Relations

Party Type: **ORGANIZATION**

Party Name: **ACME INC.**

Party Number: **13162**

Party Relations

Relationship Type	Relation	Object	Object Type	Start Date	End Date	Comments
EMPLOYMENT	Employer Of	Buzz Hargrove	PERSON	05-APR-2004		
COMPETITOR	Competitor Of	Business World	ORGANI	05-APR-2004		
PARTNER	Partner Of	FMT Systems Inc.	ORGANI	05-APR-2004		

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TCM — Customer Entry

Customers - Standard

Customer Type

Organization

☒ Active

Organization Number

13162

Name

ACME INC.

Customer Number

2366

Alternate Name

ACME - GLOBAL

Tax Registration Num

58-4221313

Account Name

Taxpayer ID

58-4221313

Addresses

Classification

Order Management

Marketing

Communication

Contacts

Contacts - Roles

Address

☐ Show Only Active Addresses

5432 Looney Tunes Lane, San Francisco, San Francisco, CA, 94104, United States

Duplicate Check

Party Relationships

Third Party Data

New

Open

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TCM — Customer Entry

ORACLE

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Path Search | Preferences | Help | Close Window

Summary

Business Verification

Special Events

User Entered

Dun and Bradstreet

Comparison

Summary

	User Entered	Dun and Bradstreet
Name	ACME INC.	
Alternate Name 1		
DUNS Number	-	
Equity DUNS	-	
Address	5432 Looney Tunes Lane	
Postal Town	San Francisco	
State/Province	CA	
Postal Code	94104	
Country	United States	
Primary Phone Number		
Last Update Date	27-Jun-2004	

User Entered | Dun and Bradstreet | Comparison | Path Search | Preferences | Help | Close Window

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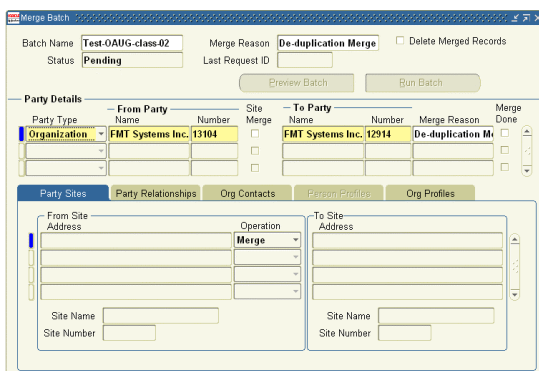
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Party Merge

- ❑ 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



The screenshot shows the 'Merge Batch' application window. At the top, there are fields for 'Batch Name' (Test OAU5-class-02), 'Status' (Pending), 'Merge Reason' (De-duplication Merge), and 'Last Request ID'. Below these are buttons for 'Preview Batch' and 'Run Batch'. The main section is titled 'Party Details' and contains two tables for 'From Party' and 'To Party'. The 'From Party' table has columns for 'Party Type', 'Name', and 'Number'. The 'To Party' table has columns for 'Name', 'Number', 'Merge Reason', and 'Merge Done'. Below the tables are tabs for 'Party Sites', 'Party Relationships', 'Org Contacts', 'Person Profiles', and 'Org Profiles'. The 'Party Sites' tab is active, showing fields for 'From Site Address', 'Operation' (set to Merge), 'To Site Address', 'Site Name', and 'Site Number'.

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Party Merge — Merge Batch

Batch Name: **Test-OAUG-class-02**
Status: **Pending**

Merge Reason: **De-duplication Merge**
Last Request ID:

☐ Delete Merged Records

Preview Batch

Run Batch

Party Details

From Party

Site

Party Type

Name

Number

Organization

FMT Systems Inc.

13104

To Party

Site

Party Type

Name

Number

Merge Reason

Merge Done

FMT Systems Inc.

12914

De-duplication Merge

☐

Party Sites

Party Relationships

Org Contacts

Person Profiles

Org Profiles

From Org Contact

Name

Title

Operation

ACME INC.

Transfer

Dorothy Sheets

MS.

Transfer

Carolyn Seid

MS.

Transfer

To Org Contact

Name

Title

ACME INC.

Dorothy Sheets

MS.

Carolyn Seid

MS.

Type

Partner Of

Department

Party Site

Type

Partner Of

Department

Party Site

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Party Merge — Preview Report

Page 1 of 1

Run Mode: Preview

Party Merge Preview Report
Request ID: 2200350

MERGE SUMMARY

From Party

To Party

FMT Systems Inc. [13104]

FMT systems Inc. [12914]

MERGE DETAILS

Old Party: FMT Systems Inc.

New Party: FMT Systems Inc.

Party Sites Details

From Record

Action

To Record

13104 Address: 300 Frank W. Ogden
Plaza, Oakland, CA 94612-2018, USA
(ID: 7540) [7540]

Copy

13104 Address:
Plaza, Oakland
7609]

Party Relationship

From Record

Action

To Record

"FMT Systems Inc."->"FMT Systems Inc." (ID: 7373) [7373]

Transfer

N/A

Contacts

From Record

Action

To Record

"FMT Systems Inc."->"ACME INC." (ID: 7376) [7376]

Transfer

N/A

"FMT Systems Inc."->"Carolyn Seid" (ID: 7353) [7353]

Transfer

N/A

"FMT Systems Inc."->"Dorothy Sheets" (ID: 7348) [7348]

Transfer

N/A

***** End of Report *****

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Summary

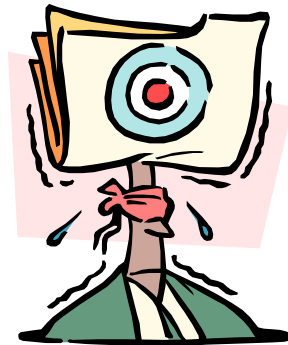
During this presentation, we have:

- 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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