Trading Community Architecture (TCA) 101

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Rhapsody Technologies, Inc.

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NorCal OAUG – Oracle TCA Panel Discussion

CDM SIG

Rhapsody
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Learning Objectives

- As a result of this presentation, you will be able to:
  - Trading Community Architecture
  - Key Entities of TCA
  - A Glance at Party Centric vs. Site Centric Approach

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Speaker's Qualifications

Mani Kumar Manda is the President and Founder of Rhapsody Technologies, Inc., a consulting firm with specialization in implementing Customer Master/Customer Hub solutions.

Mr. Manda had been working with Oracle Applications for over a decade and has implemented Technology Solutions for clients in many industries and is an active speaker of Customer Solutions.

Mr. Manda is also the founder and chair for Customer Data Management SIG.

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About Rhapsody

- Founded in 1998
- Oracle Partner
- Specializes in implementing Oracle Applications as well as Customer Data Integration (CDI) and Customer Data Hub (CDH) solutions using Oracle Applications/Customer Hub.
- Sample list of Customers…
  - ADP
  - DoubleClick
  - Motorola
  - Haworth
  - IRI
  - Torrington
  - Etc.
- Rhapsody's Partners…
  - Deloitte Consulting
  - Dun & Bradstreet
  - Trillium Software
  - Etc.

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Trading Community

- Trading Community is defined as a group of entities taking part in commerce.
- Trading Community includes both persons and organizations.
- Entities in Trading Community may play roles other than Seller and Buyer such as Partner, Contact, Dealer, Distributor, Agent, Influencer, etc.

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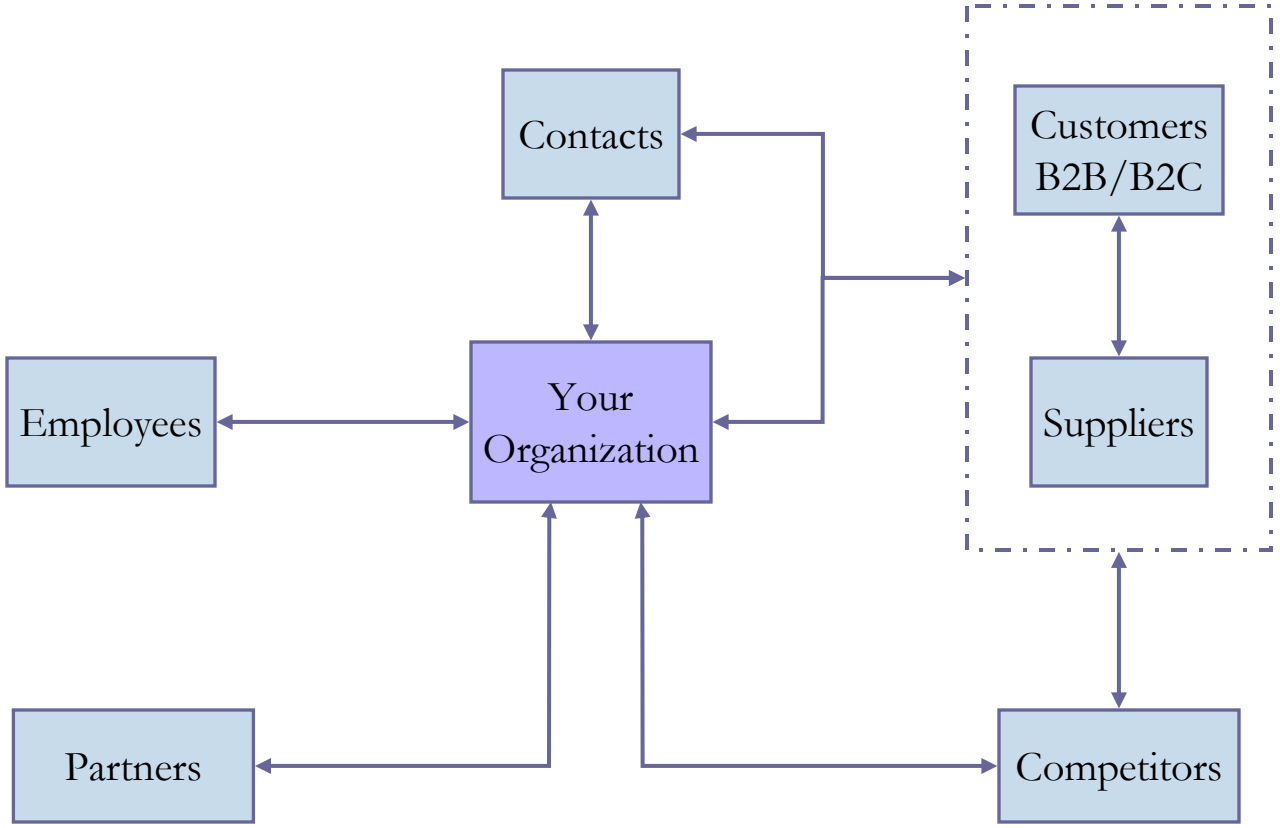
Trading Community



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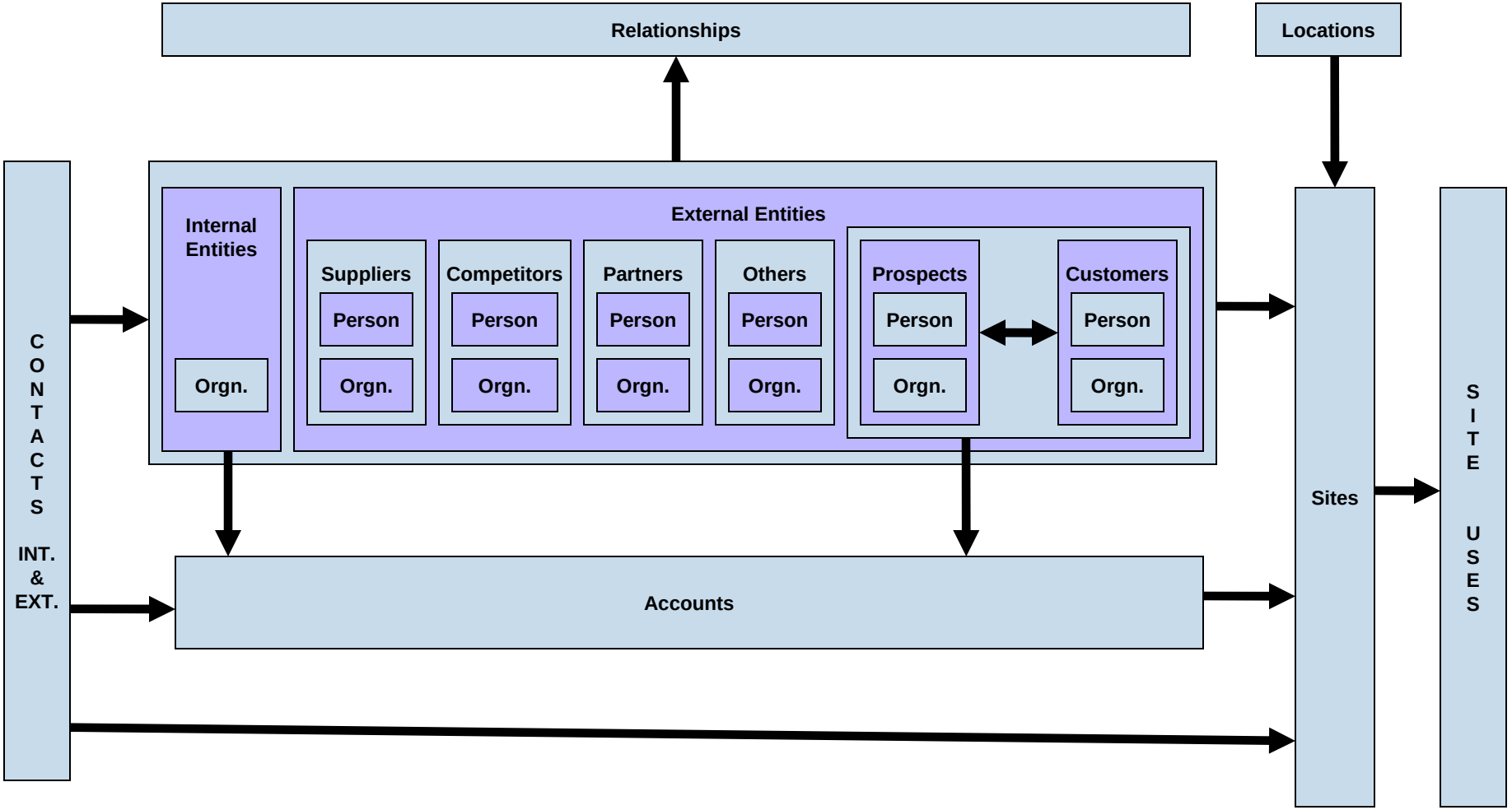
Trading Community



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Key Questions?

- Is your Contact Diane Miller at XYZ Corporation same as your customer Diane Miller?
- Who are your Customers?
- Who are your Competitors?
- Who are your Suppliers?
- Who are your Partners?
- Are there any Influencers in your business?
- What is your Customers Organizational Hierarchy?
- Is someone who used to be your Employee is now a Contact at Your Customer or Supplier?
- Etc.

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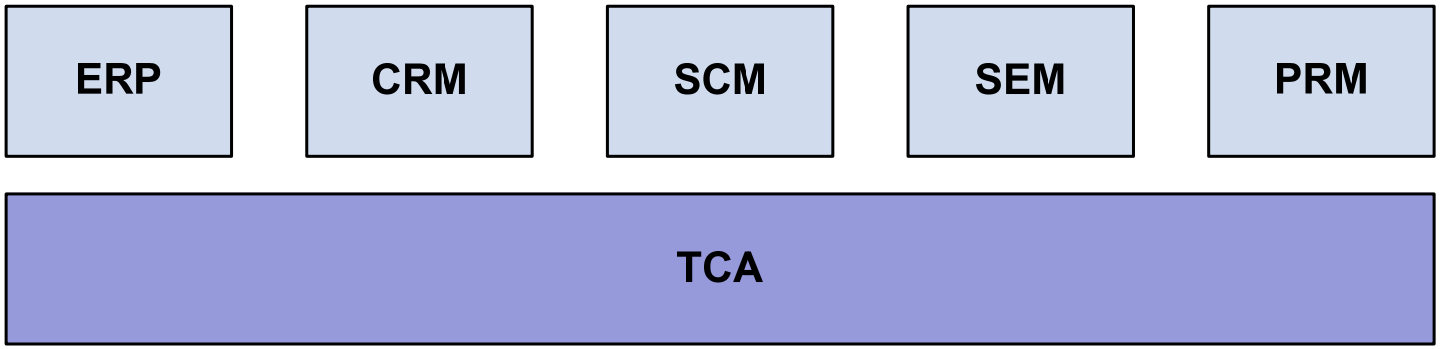
What is TCA?



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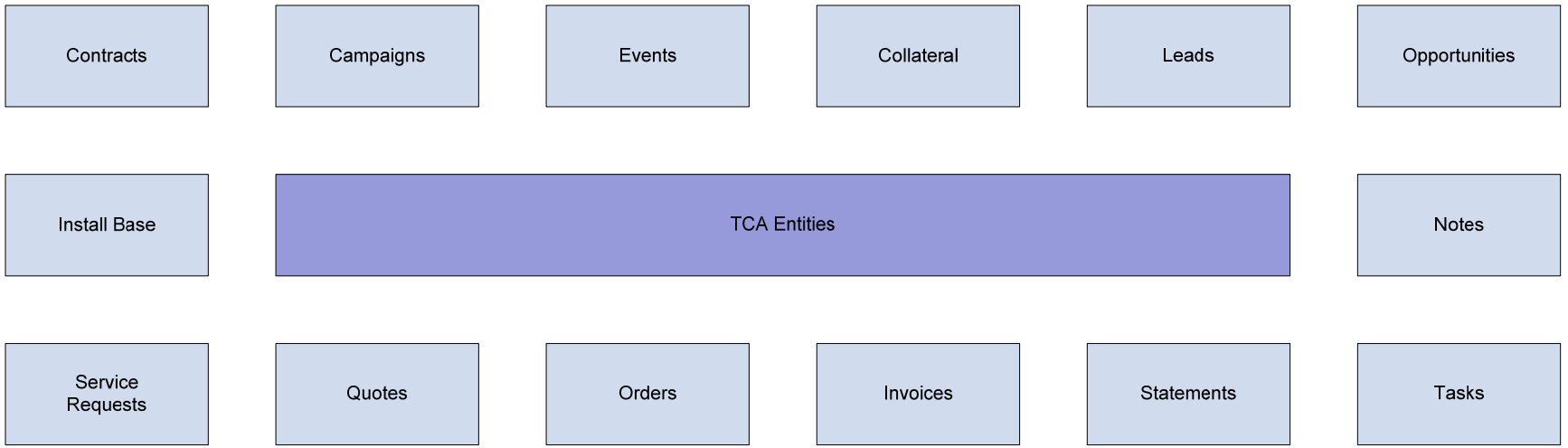

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What is TCA?

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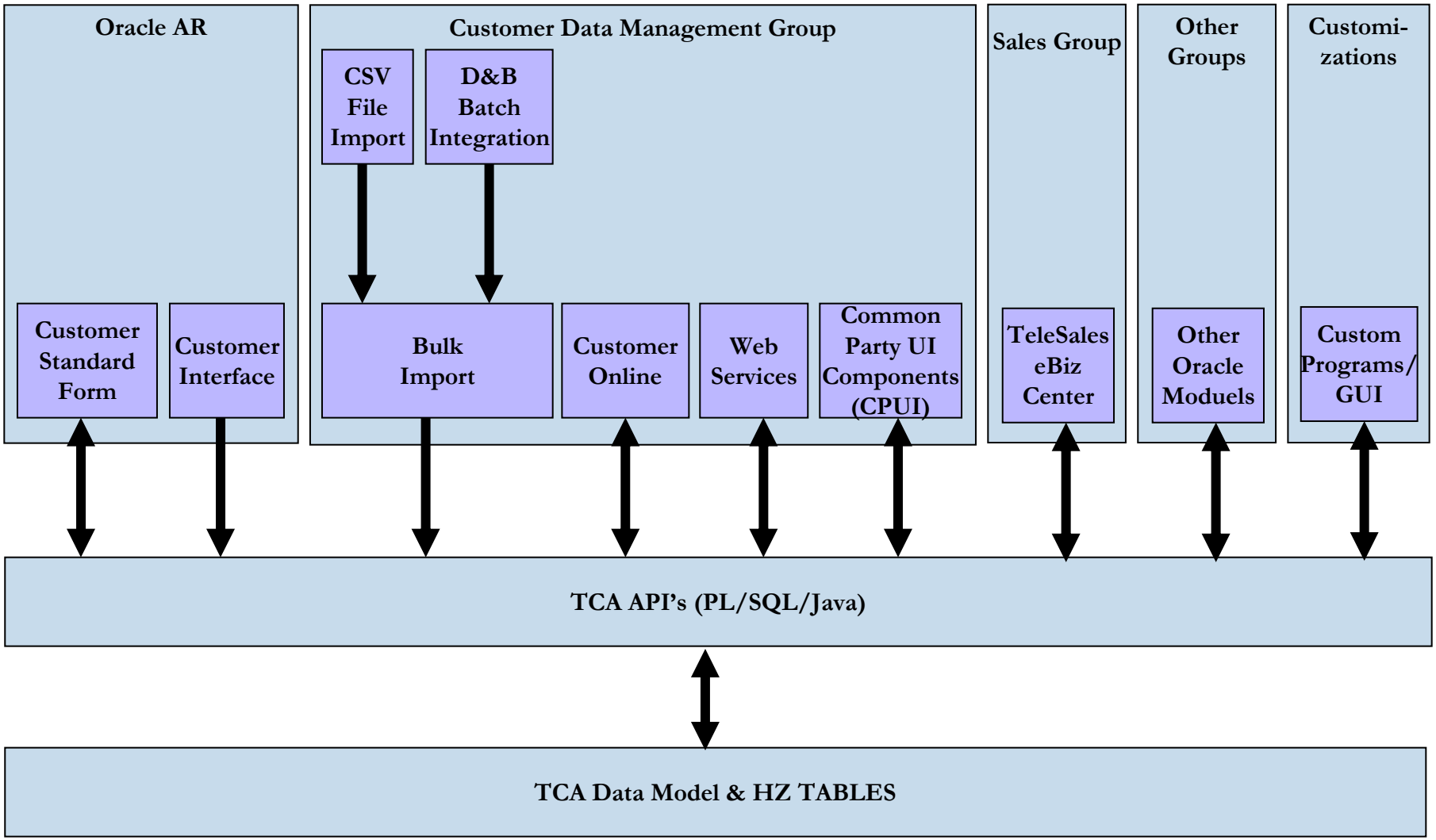
Entering/Importing Customer Data in to TCA



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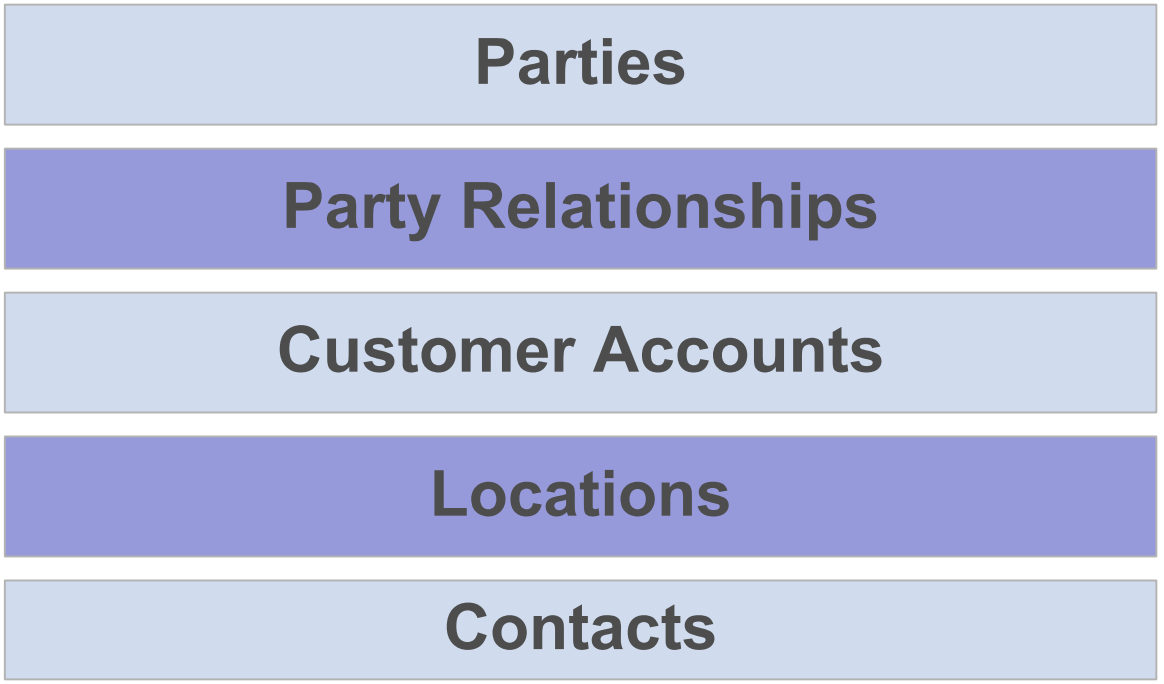
TCA - Key Entities



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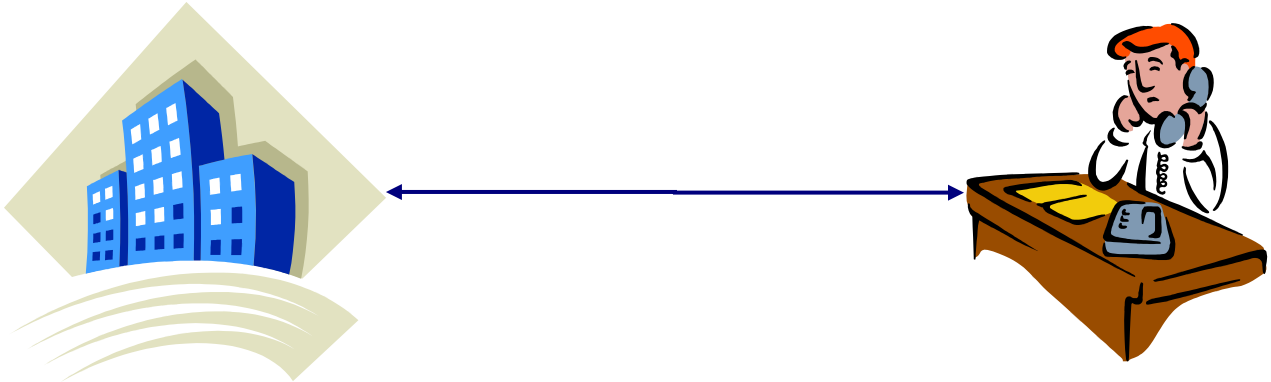
What is a Party?



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Party …

- A real thing that exists, such as a Person or Organization
- Represents a Trading Partner
- Can enter into business relationships
- And exists independent of any business relationship
- Can be an Organization, Person, Relationship or Group
  - Person Parties and Organization Parties can be created
  - Relationship party gets created behind the scenes
  - No functionality yet for Group Party
- Can be related to any number of other Parties in any number of ways
- Can be modeled using D&B data including D-U-N-S® Number (Data Universal Numbering System)

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Party …

- Can exist independent of an Account
- Can be classified
  - SIC (SIC-87, SIC-72, SIC-77), NAICS
  - Custom (user-defined)
- Unlimited cross references to Source Systems
- Party Attributes
  - Organization
    - Name
    - (Registry) Number
    - Classification
    - DUNS Number
    - Number of employees
    - Category Code
    - Etc.

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Party …

- Party Attributes
  - Person
    - Name (First, Middle and Last)
    - No DUNS Number
    - Etc.
- Examples
  - John Smith
  - Mary Smith
  - Echo Consulting Services
  - John Smith, an employee of Echo Consulting Services (Relationship Party between John Smith and Echo Consulting Services)
  - Smith Family (Group Party – No functionality to create or use Group party yet)

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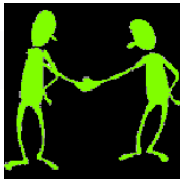

Party Relationships

- Binary relationship between two parties
- Inter-Company and Intra-company relationships
- Non-business relationships too
- Are reciprocal
- Unlimited in number
- Dynamic in nature
- Both seeded or user-defined Relationship Types
- Relationship itself is stored as a party
- Any number of relationships between two organizations (org-to-org) or two persons (person-to-person) or an organization and a person (org-to-person)

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Party Relationships …

- Build any type of relationship between Organizations, including the ability to capture branches, locations, competitors, suppliers, resellers, business partners, etc.
- Examples
  - John Smith is an employee of Echo Consulting Services
  - Echo Consulting Services is the employer of John Smith
  - John Smith is a contact for XYZ Consulting, Inc.
  - John Smith is the spouse of Donna Smith

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Accounts

- Represents the Selling Relationship
- Exists only when a Selling Relationship exists
- Each unique business relationship is an Account
- Equates to Old Customer (R10.7 and R11)
- Account Attributes
  - Account Number
  - Account Name (Optional, but shouldn't be Company Name)
  - Account Class Code
  - Etc.

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Accounts

- An Account cannot be created without a Party
- Examples
  - Savings Account of John Smith with American Bank
  - Checking Account of John Smith with American Bank
  - CD Account of John Smith with American Bank
  - Investment Account of John Smith with American Bank
  - Consulting Services Account for Infinity Technologies, Inc.
  - Master Account for Infinity Technologies, Inc.

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Party vs. Account

- Within TCA model, the concept of "Customer" is separated into two layers: the Party layer and the Account layer
  - CRM applications are referring to the Party layer when they refer to "Customer"
  - ERP Applications, on the other hand, are referring to the Account layer, when they refer to "Customer"
- Confusion arises because CRM and ERP suites are both using the word "Customer" to refer to two different things

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Party Vs. Customer …

- Per TCA Best Practices, the word "Customer" is the combination of both the "Party layer" and the "Account layer", where
  - Party layer exists independent of any selling or buying relationship
  - Customer Account layer exists in the context of a Party and only when a selling relationship exists

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Locations

- A geographic location
- Is a Party Site with one or more site uses
- Only one of the Party Sites can become an "Identifying Address" for the Party
- An Account Site in the context of an Account
- Examples [Each location resulting in one Party]
  - New York location (HQ) of Echo Consulting services
  - Chicago location (Branch) of Echo Consulting Services
  - Detroit location (Division) of Echo Consulting Services

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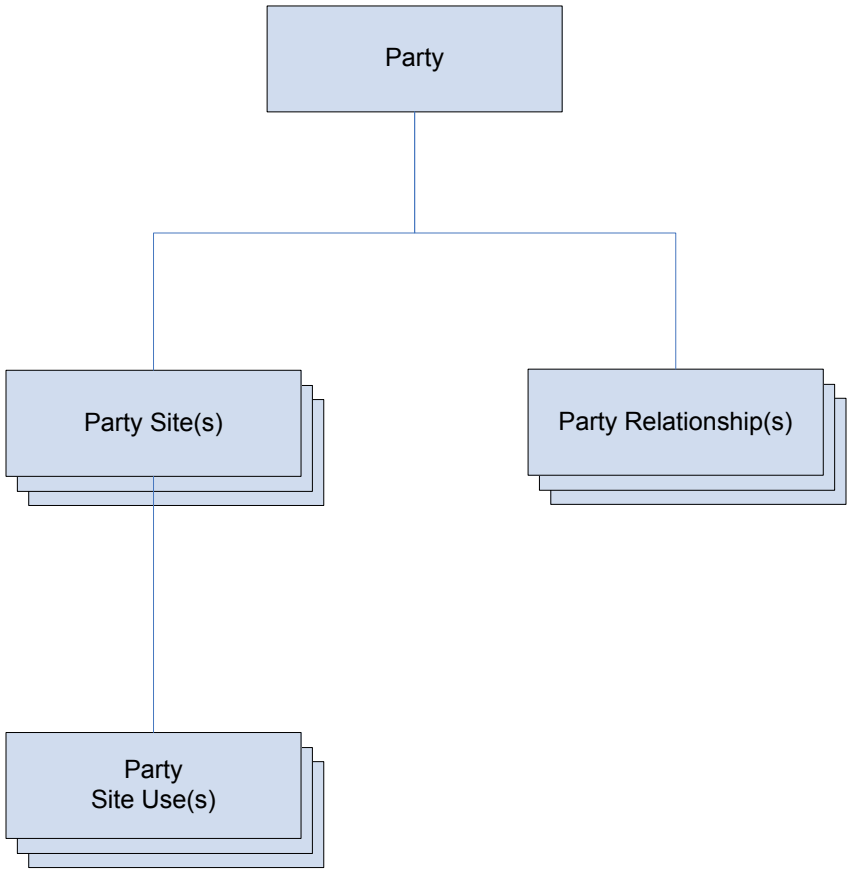
TCA Structure prior to Selling Relationship



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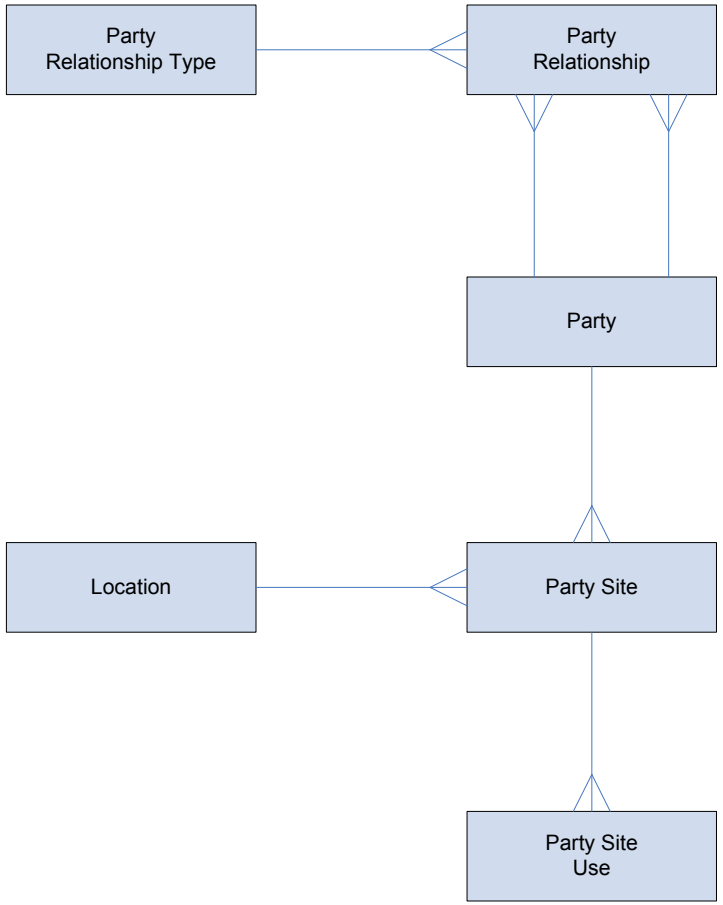

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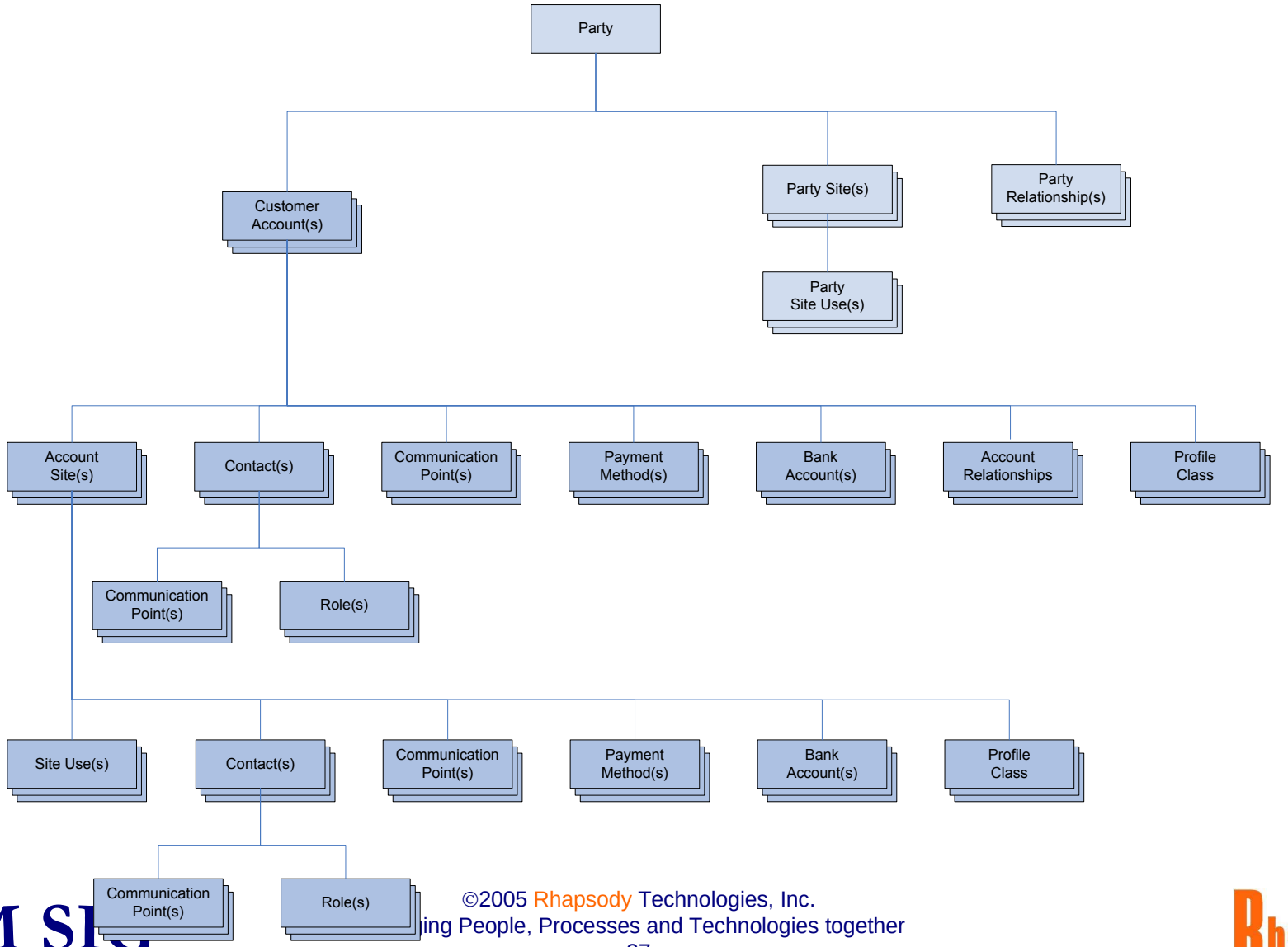
TCA Structure with selling relationship(s)



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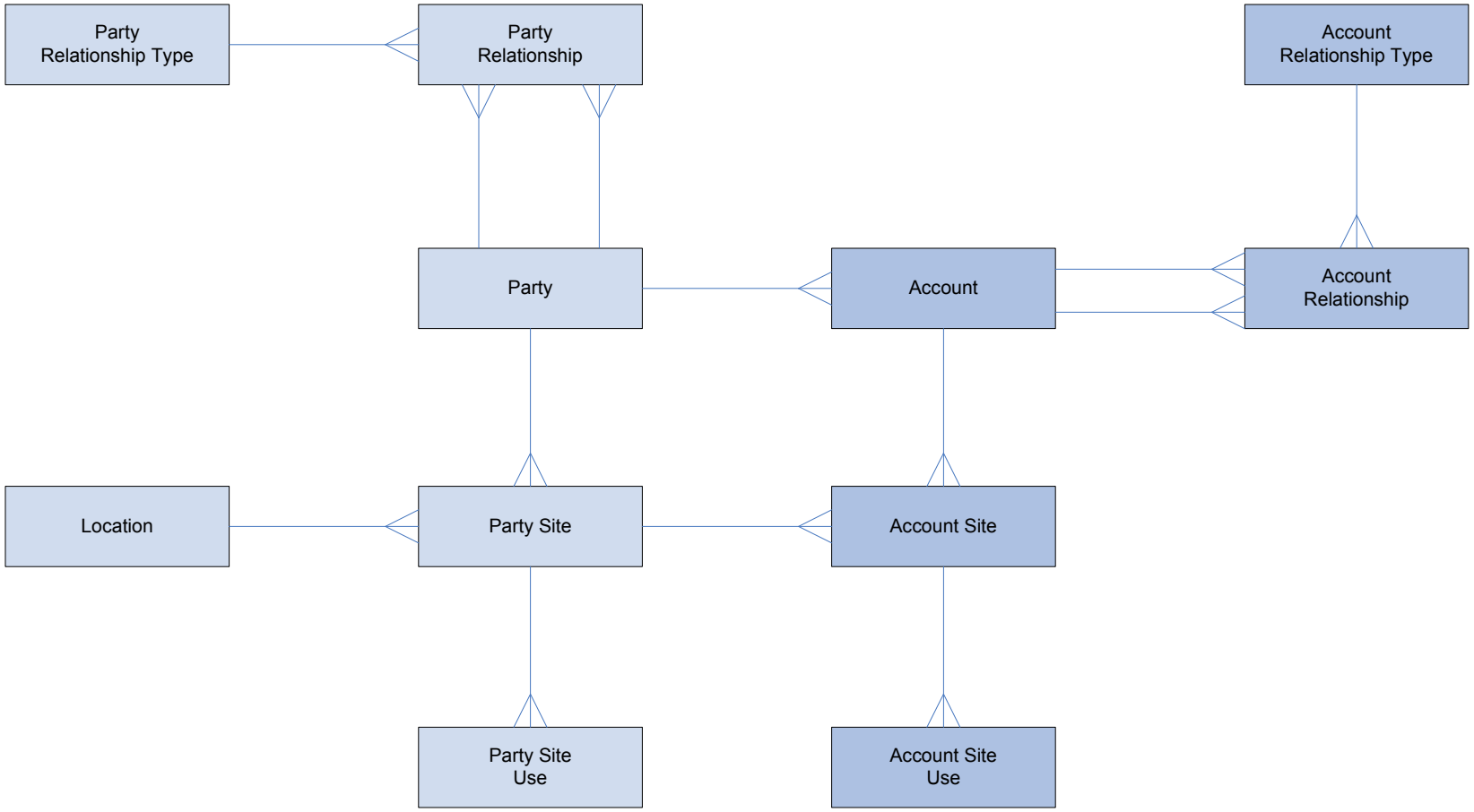
TCA Structure with selling relationships – Entity Modal



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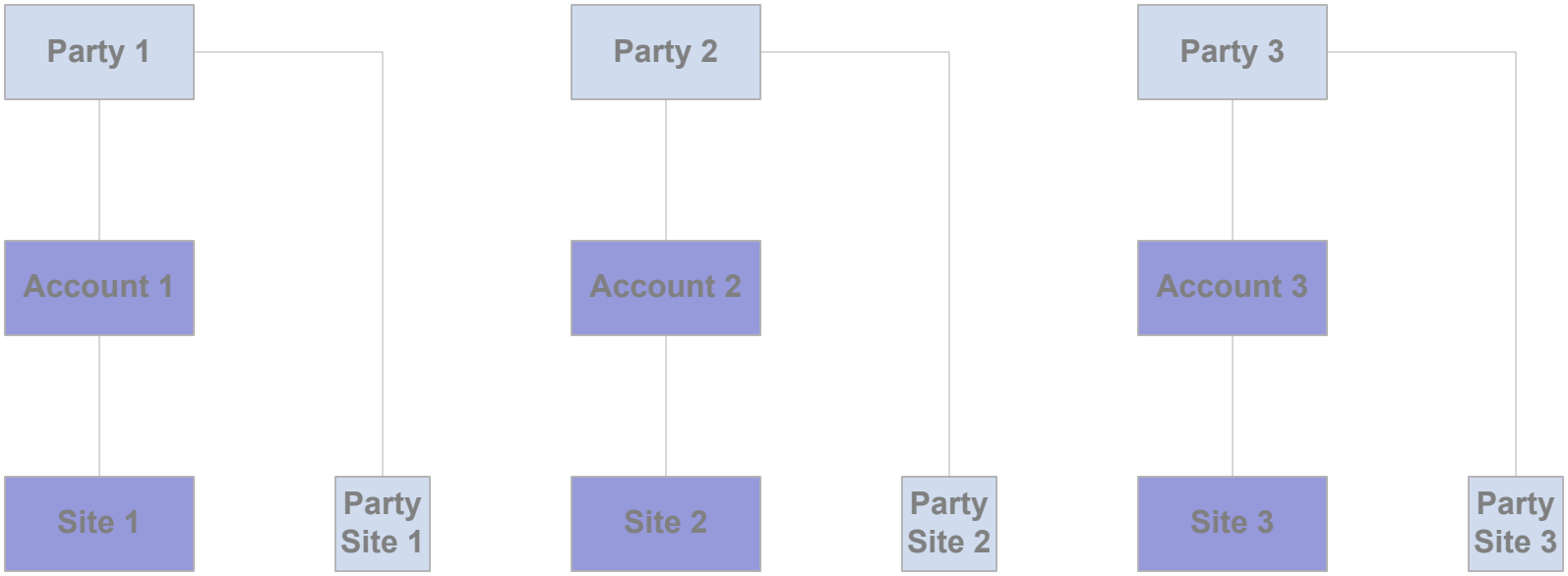
Party Centric Approach



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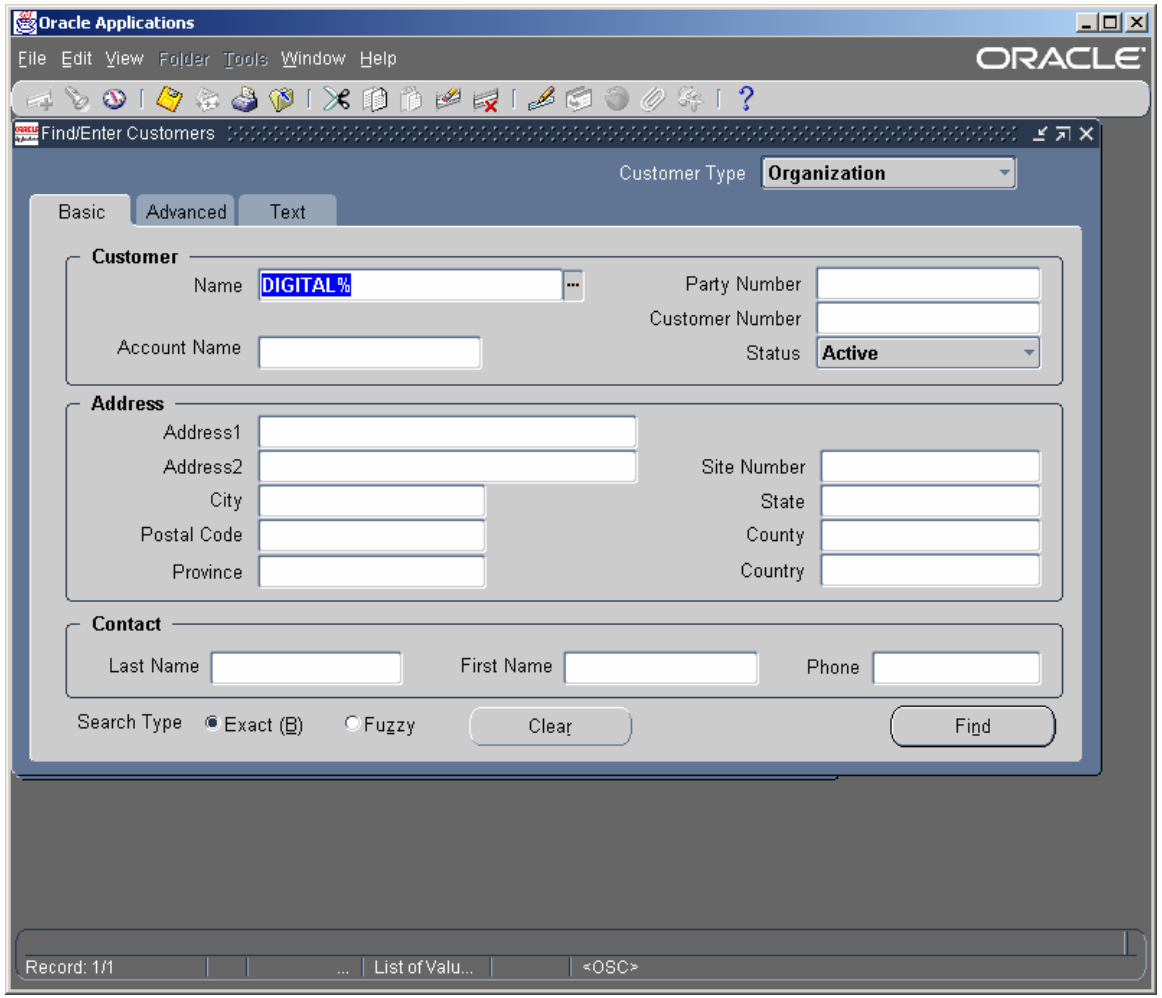

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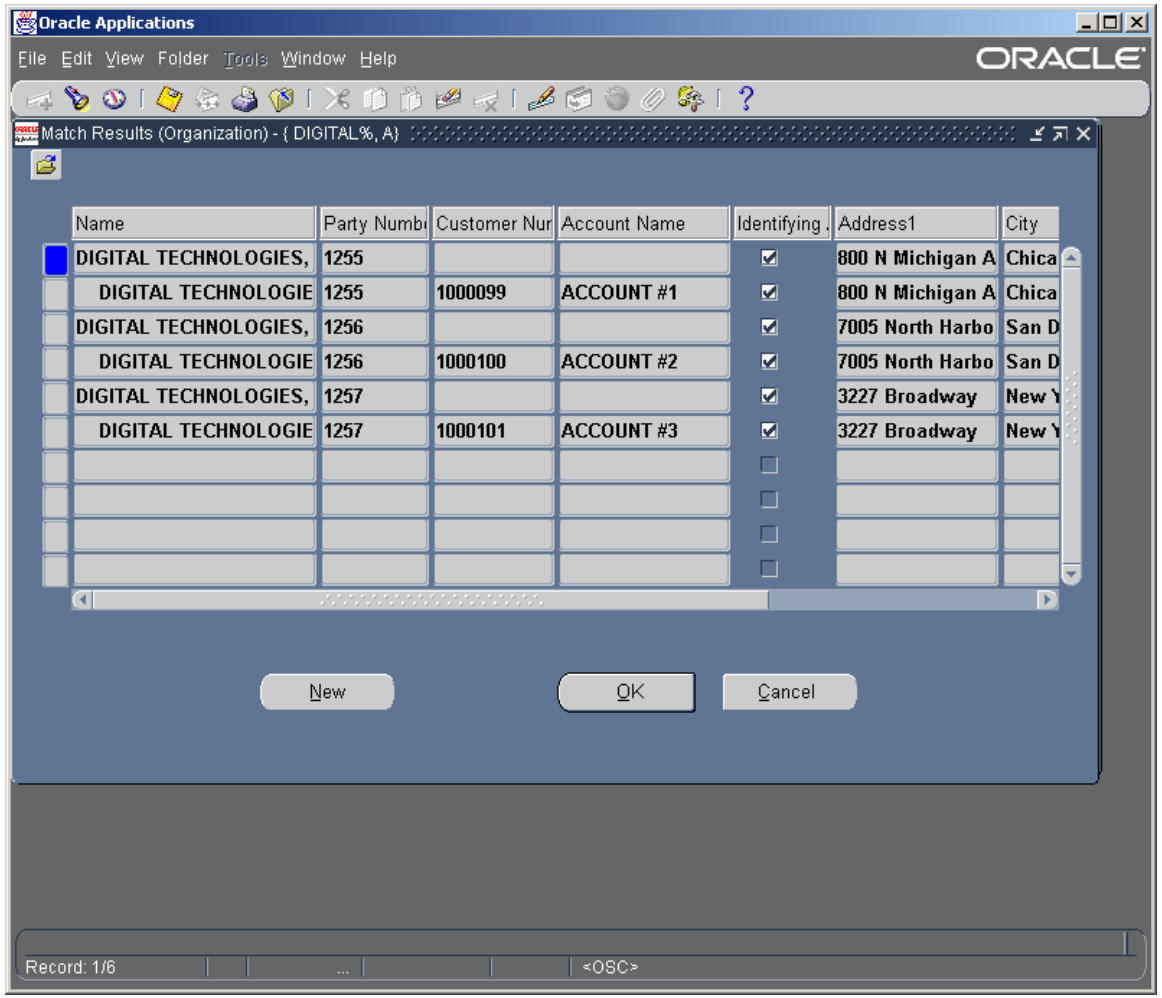

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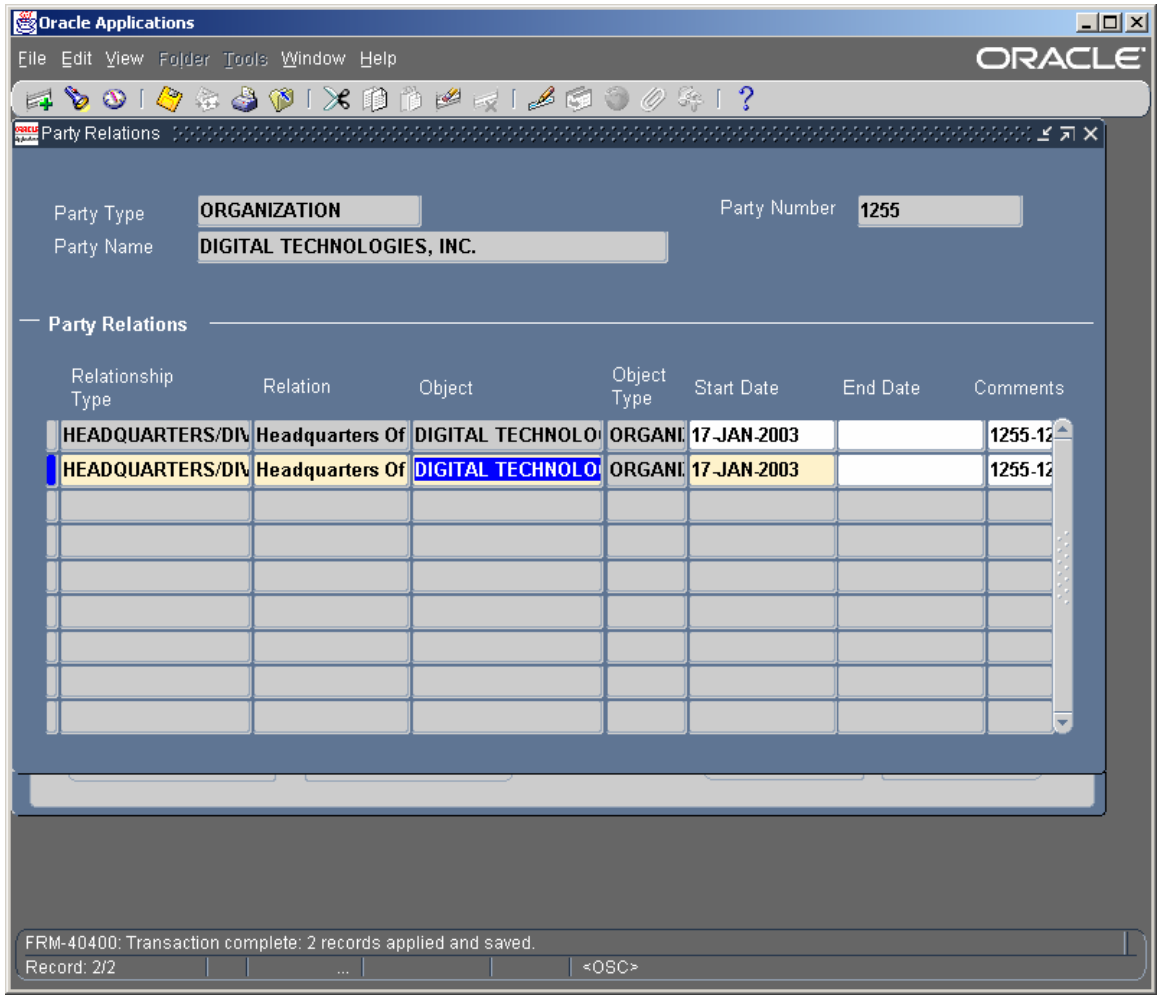

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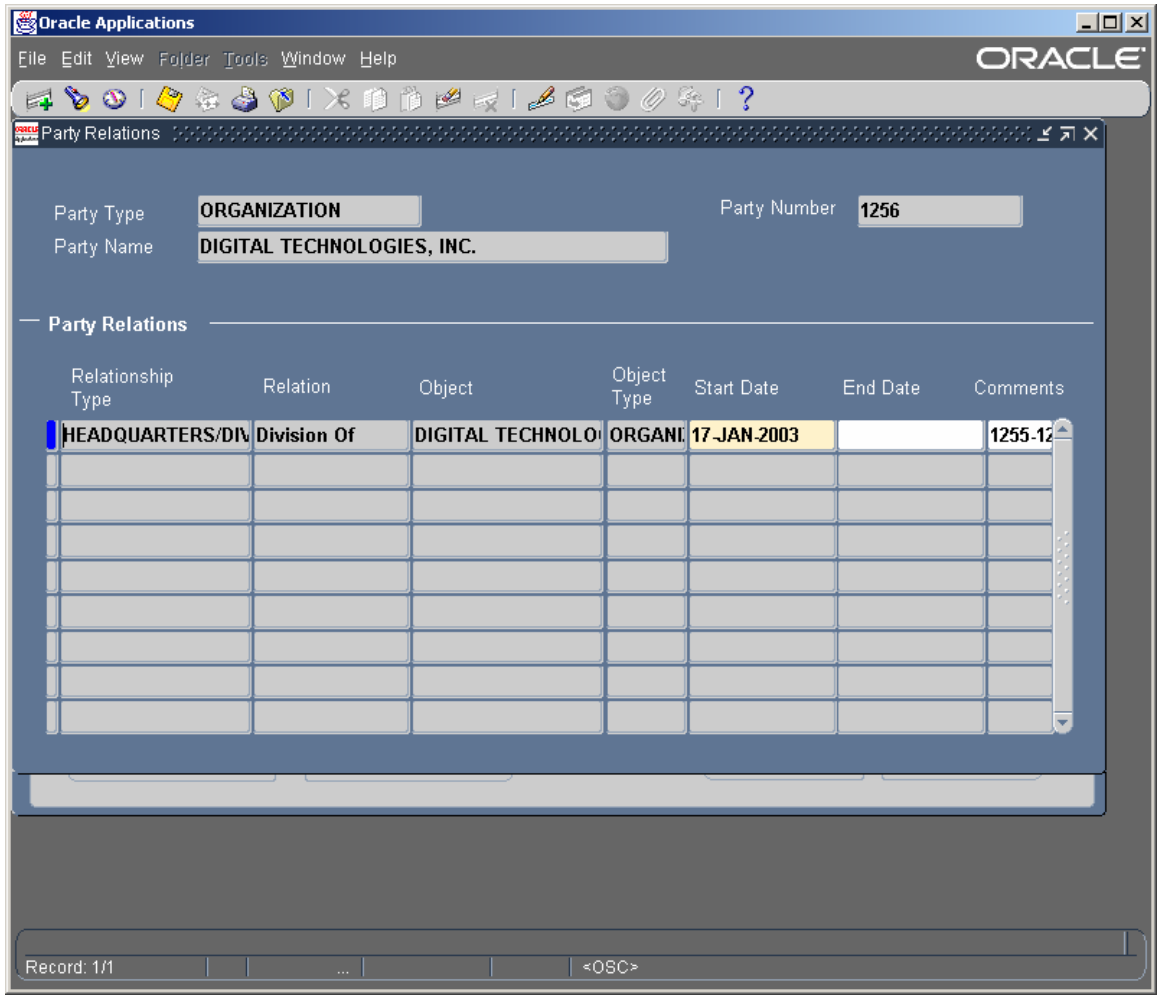

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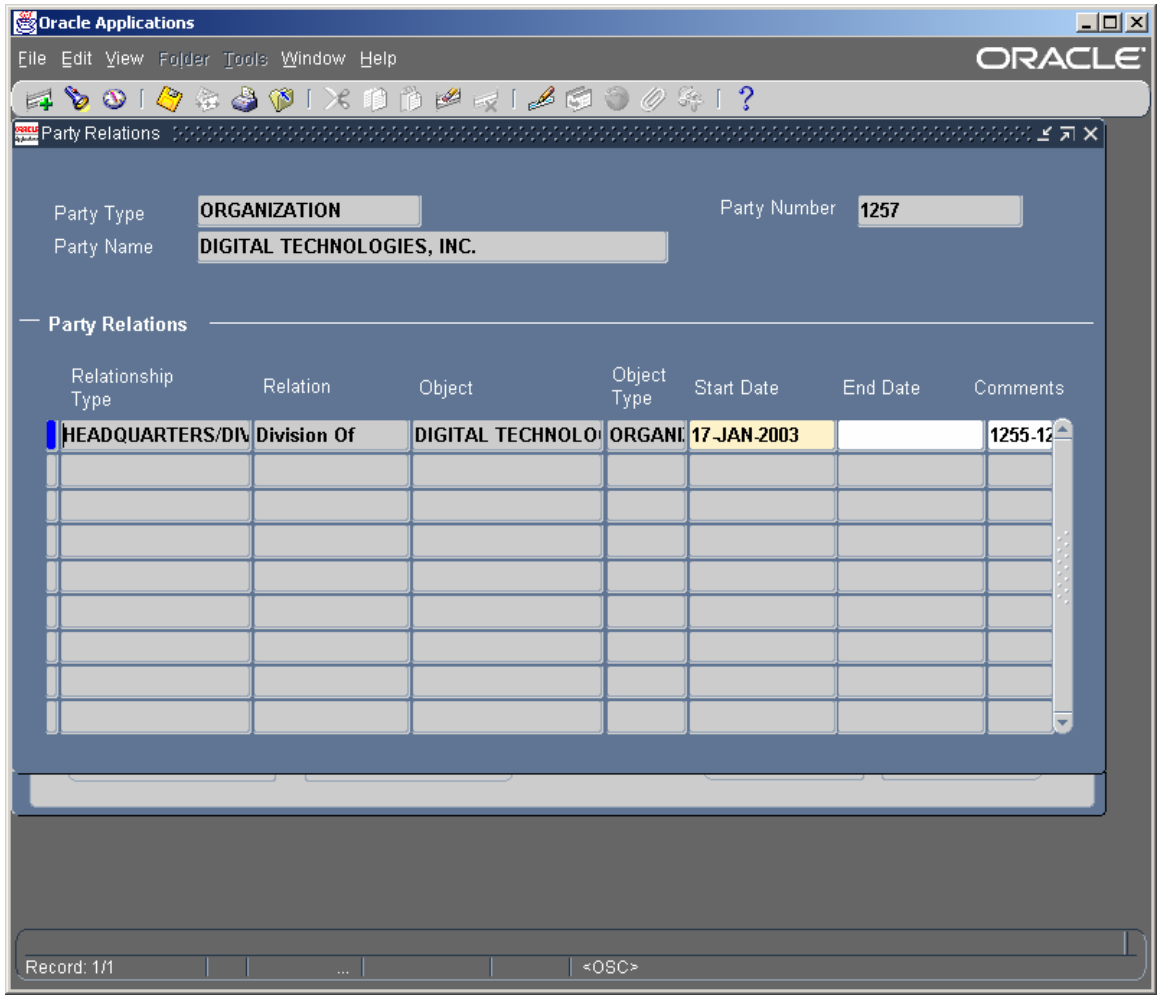

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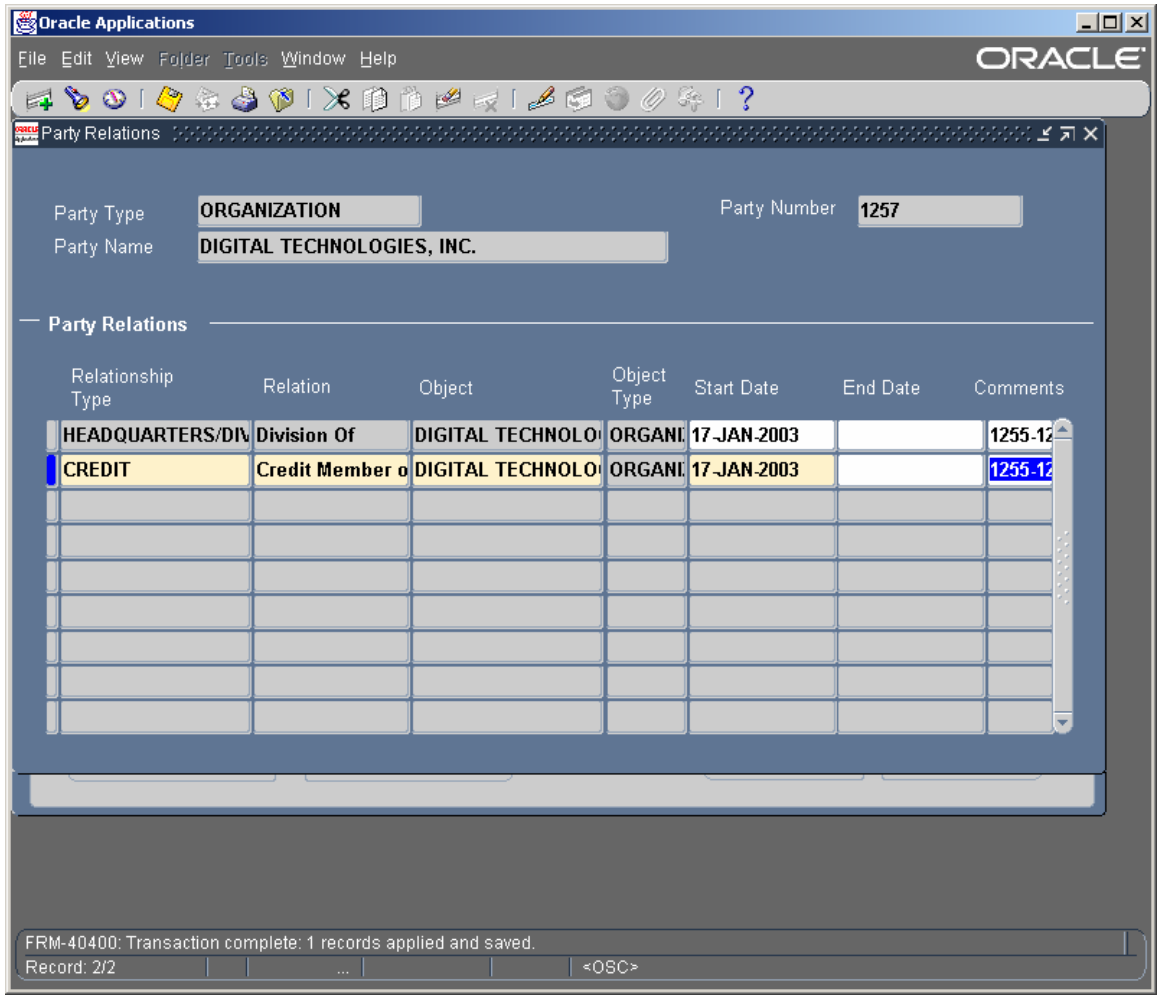
Party Centric Approach



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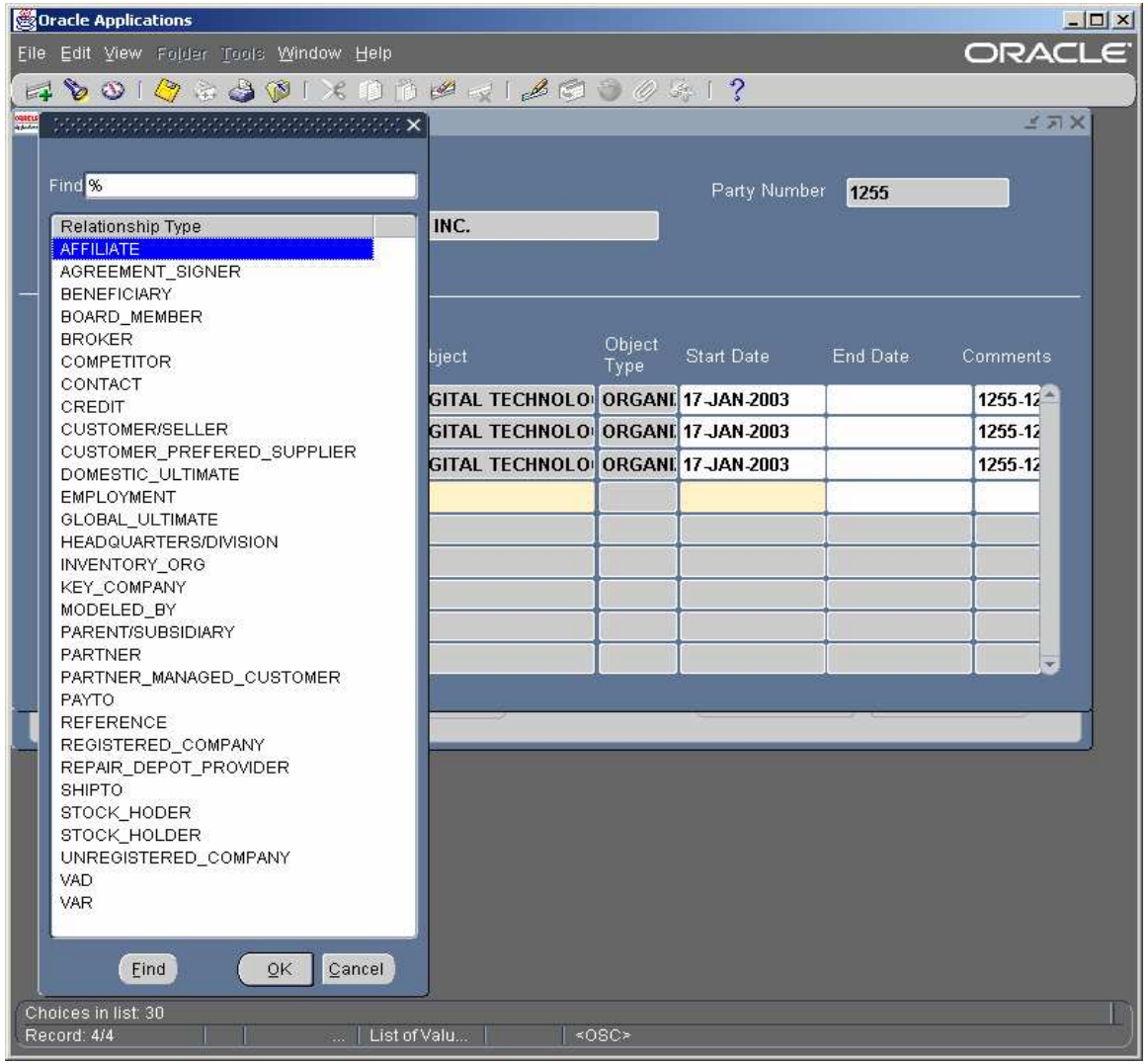
Party Centric Approach



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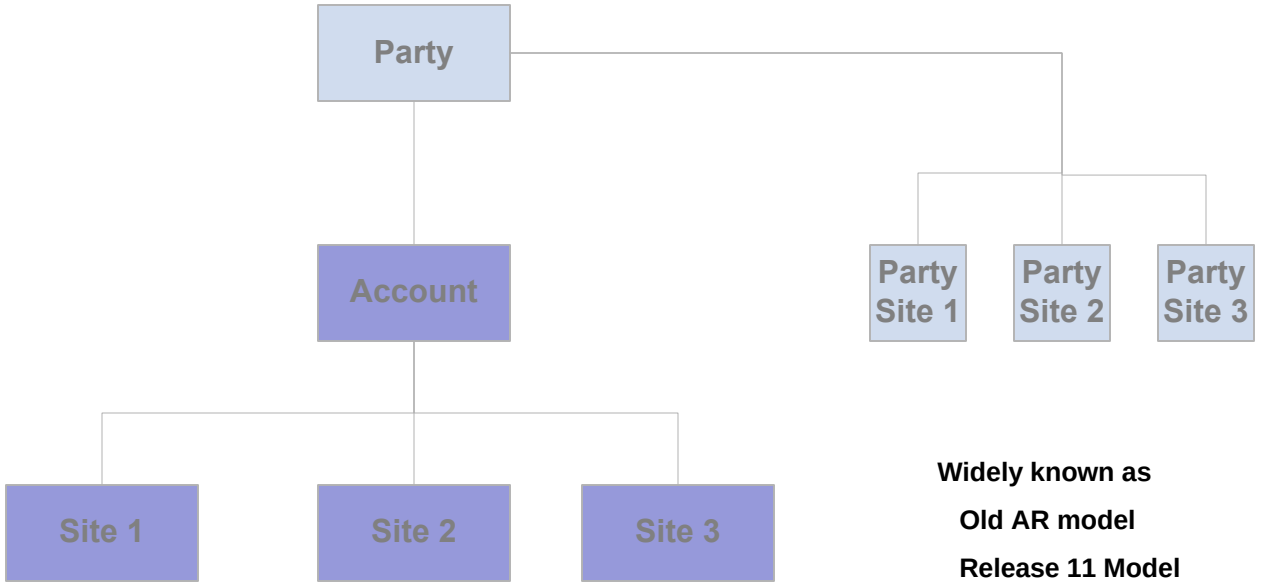
Site Centric Approach



Widely known as

Old AR model

Release 11 Model

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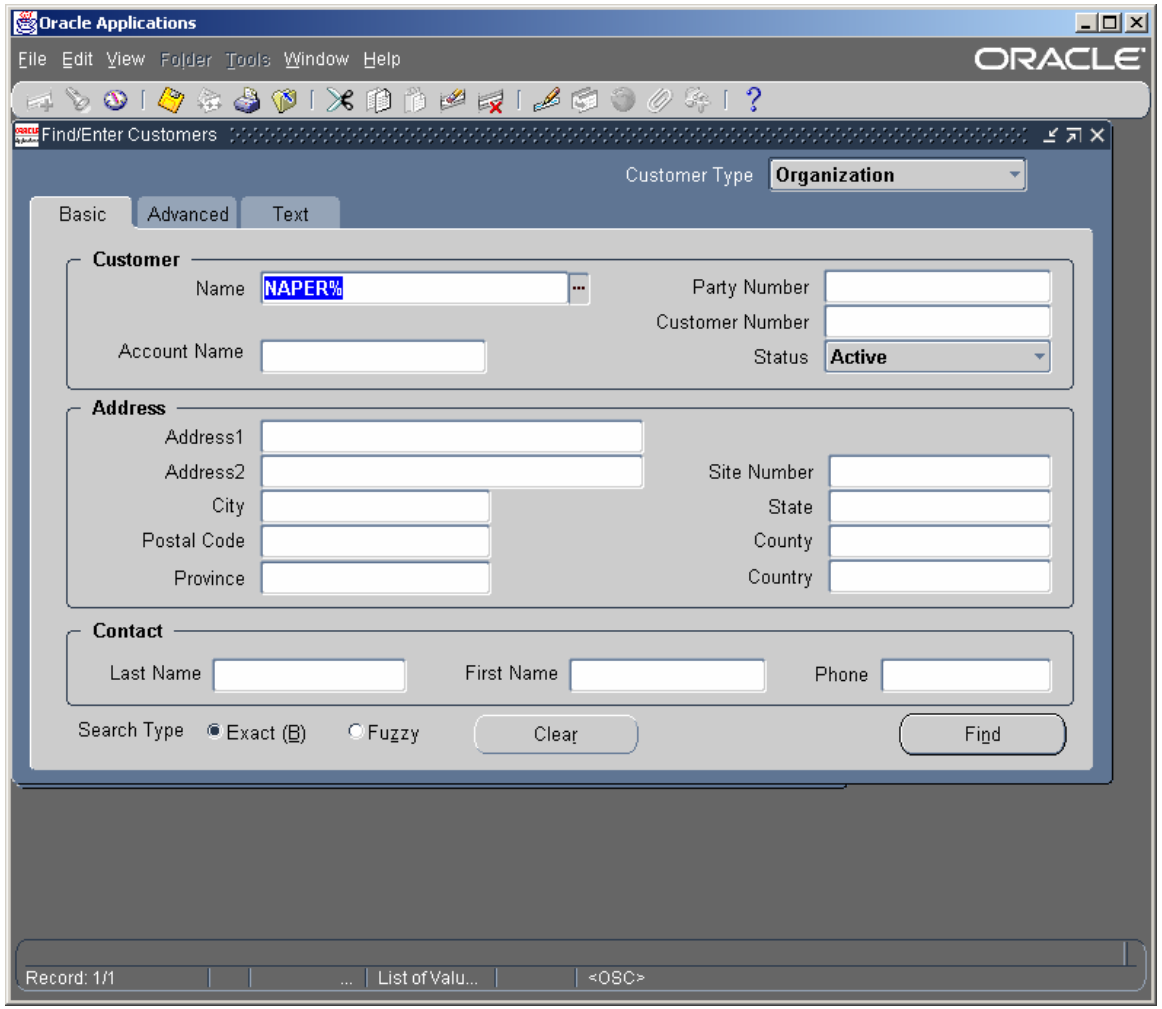
Site Centric Approach



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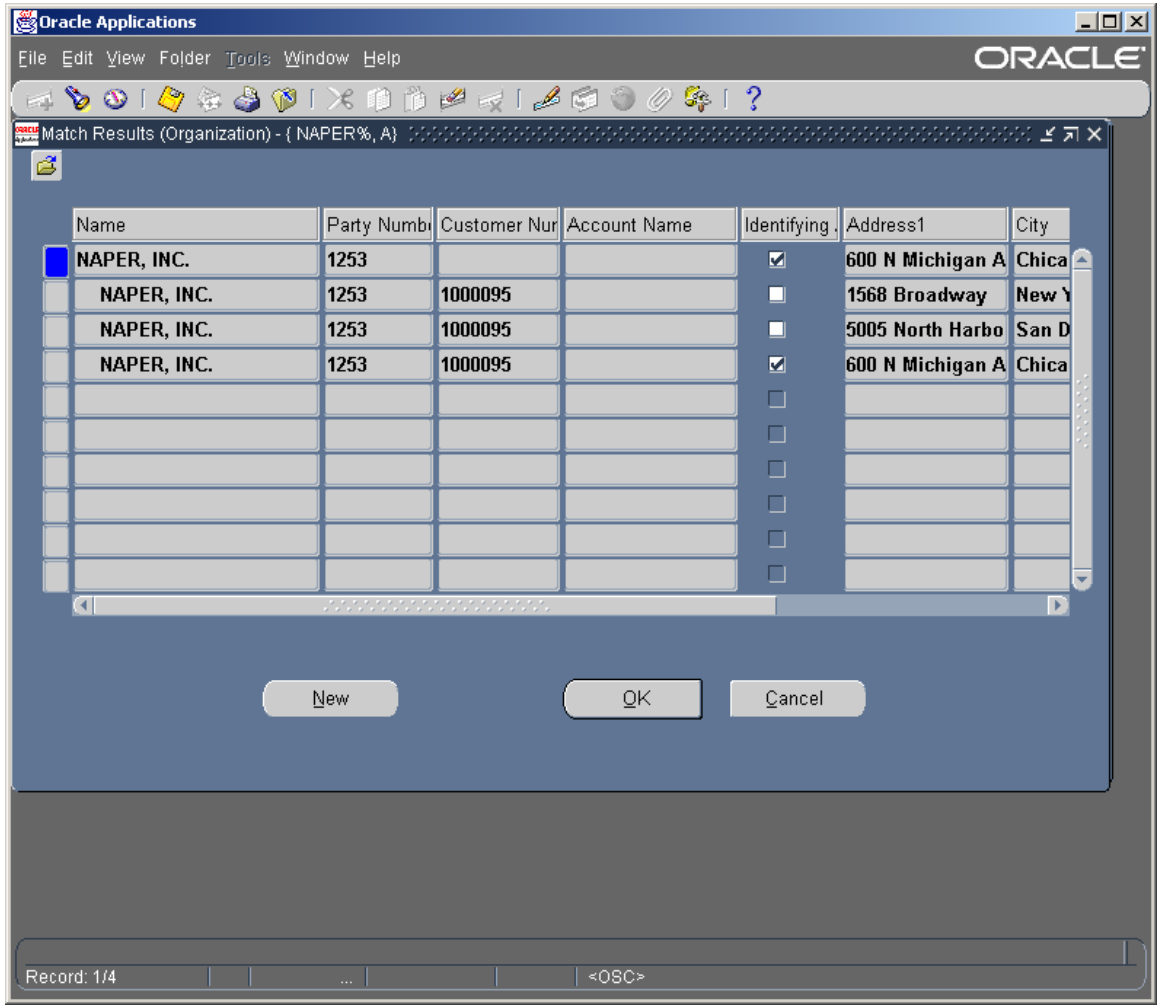

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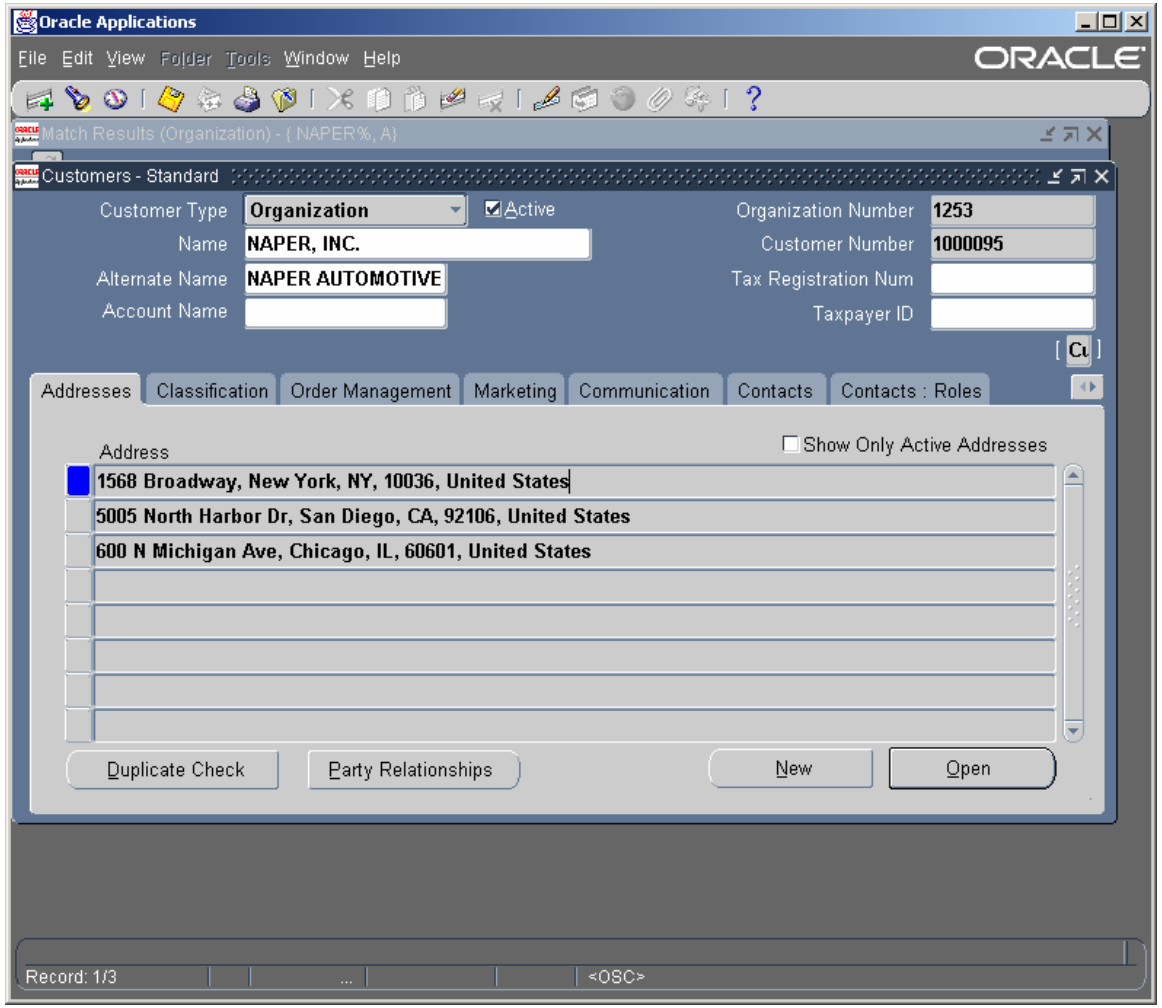

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QUESTIONS
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ANSWERS
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