

## (21B) Oracle CX Sales and Oracle B2B Service: Customer Data Mgmt (CDM)

Oracle CX Sales and B2B Service

DURATION

**2 Days**

MODULES

**10 Lectures**

COURSE CODE

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### Course Overview

The course familiarizes students with the integrations between CDM and the Oracle data clouds used to support data stewardship activities. Participants examine data security for personally identifiable information (PII) and perform a typical flow of data stewardship tasks including importing data, data matching and cleansing, data deduplication, and data enrichment. Finally, students view account profile history information and set data certification levels and reasons.

### What You Will Learn

- 1 Course Introduction
  - Learning Objectives
  - Instructor and Class Participants
  - Course Audience
  - Course Prerequisites
  - Course Goal
  - Course Objectives
  - Course Methodology
  - Course Materials
  - Course Agenda
- 2 Customer Data Management Overview
  - Learning Objectives
  - Challenge: Maintaining Trusted Master Customer Profile Data
  - Solution: Customer Data Management (CDM) Cloud Service
  - Customer Data Management (CDM)
    - CDM Users
    - Data Quality Management
    - Data Cleansing and Validation
    - Data Standardization
    - Address Verification
    - Deduplication
    - Duplicate Identification

- Duplicate Resolution
- Data Enrichment
- Sharing Data
- End User Tasks
- Data Steward Tasks
- Summary
- Lesson Highlights
- 3 Architecture
- Learning Objectives
- Customer Data Management Architecture
- CDM Functionality
- iii
- Additional Licenses
- EDQ and CDM
- Integrate CDM With the EDQ Server
- Integrate CDM With Data Clouds
- Associate a CDM Cloud Subscription to a Data Cloud Subscription
- 1. Integrate CDM With Data Cloud
- 2. Configure Profile Option
- Enable Address Cleansing
- CDM-Related Profile Options
- SOAP Web Services and REST APIs
- Lesson Highlights
- 4 Data Import
- Learning Objectives
- Source Systems
- Originating System and Record References
- Internal Identifiers
- Cross Referencing Example
- Data Import Techniques
- Use Import Management to Import Accounts
- 1. Create the Source File
- 2. Create the Import Activity
- 3. Monitor the Import Process
- 4. Verify the Import
- Lesson Highlights
- Practice
- 5 Address Cleansing and Verification
- Learning Objectives
- Address Cleansing and Verification Overview
- Address Cleansing and Verification Example
- Address Cleansing and Verification Benefits
- Non-Verified New Address
- Real-Time Address Cleansing and Verification
- Configuring Search Mode
- Batch Address Cleansing and Verification

- Address Verification Levels, Match Scores, and Result Codes
- Cleansing Configuration
- Create a Duplicate Cleansing Configuration
- 1. Create a Duplicate Cleansing Configuration
- 2. Map Address Attributes
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- 3. Set Configuration Parameters
- 4. Test Cleansing Configuration
- Create and Run Address Verification Batch Job
- Batch Address Verification Results
- Avoiding Conflicts Between Address Verification and Address Validation
- Web Services For Data Quality
- Lesson Highlights
- 6 Duplicate Identification
- Learning Objectives
- Duplicate Identification
- Matching Configuration
- Manage Matching Configurations
- Create a Duplicate Matching Configuration
- 1. Create a Duplicate Matching Configuration
- 2. Set Scoring Type
- 3. (If Scoring Type = Custom) Define Match Rules
- 4. Map Match Attributes
- 5. (Optional) Use Special Match Attribute Identifiers
- 6. Set Configuration Parameters
- 6. Set Configuration Parameters: Score Threshold
- 7. Test Matching Configuration
- 8. Configure the Possible Duplicates Page
- Tasks That Invoke Duplicate Identification
- Real-Time Duplicate Identification Example
- Real-Time Duplicate Identification Profile Options
- Batch Duplicate Identification Example
- Modify Duplicate Identification Batch Subset Rules Attribute List
- Clustering
- Clustering Strategy
- Key Generation
- Key Generation Statuses
- Matching and Scoring
- Matching and Scoring Considerations
- Matching and Scoring Possible Outcomes
- Duplicate Identification Batch Status
- Lesson Highlights
- Practice
- 7 Duplicate Resolution Configuration
- Learning Objectives

- Duplicate Resolution
- Merging Versus Linking
- Merge Process
- Nonduplicate Record
- Source System Confidence
- Survivorship Rules
- Survivorship Rule Types
- Survivorship Rule Considerations
- Agreement Rules
- Setting Up Duplicate Resolution
- Configuring Duplicate Resolution
- 1. Configure Profile Options
- 2. Configure Source System Confidence
- 3a. Configure Survivorship Rules: Set Master Record
- 3b. Configure Survivorship Rules: Set Attribute Value
- 4. Configure Agreement Rules
- Lesson Highlights
- Practice
- 8 Duplicate Resolution
- Learning Objectives
- Merge Requests
- Create Merge Request Manually (CRM End User)
- Create Merge Request Manually (Financial End User)
- Create Merge Request Manually (Data Steward)
- Manage Merge Requests
- Assign Requests to Data Stewards
- Resolve Merge Request Manually
- Manage Multiple Duplicate Identification Sets
- Override System Mapping
- Automerger
- Before Running Automerger
- 1. Determine if Request Dispatch Job is Running
- 2. Run the Request Dispatch Job
- Troubleshooting Automerger
- View Duplicate Resolution Statistics
- Web Services For Merge Resolution Requests
- High Volume Batch Deduplication Considerations
- Configure Merge for High Volume
- 1. Define Merge Process Scope
- 2. Set Master Record Selection Method
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- 3. Configure Automerger Action
- 4. Manage Merge Process Concurrency
- Recommended Practice For Initial Data Consolidation
- Lesson Highlights
- Practice

- 9 Data Enrichment
  - Learning Objectives
  - Data Enrichment
  - Data Enrichment Types
  - Batch Enrichment
    - 1. Create and Configure a Batch
    - 2. Configure Record Selection and Preview Batch
    - 3. Submit the Batch and Review the Results
  - Synchronize D&B Updates
  - Manual Enrichment
    - 1. Export Data to Be Enriched to a CSV File
    - 2. Import Data Into DaaS
    - Alternate 2. Search For Data in DaaS
    - 3. Download Data from DaaS
    - 4. Import the Enriched Data into CDM
  - Real Time Enrichment
  - Configure CDM For Data Enrichment
    - 1. Set Account and Contact Enrichment Preferences
    - 2. Configure Attribute Mappings
    - 3. Set Administrator Profile Options
  - Enrich Account and Contact Data with Social Attributes
  - DataFox
  - Configure DataFox
- Lesson Highlights
- 10 Monitoring Data Quality
- Learning Objectives
- Duplicate Resolution History
- Profile History
- Profile History Configuration
- Audit Reports
- Audit Report Configuration
- View Audit Report
- Lesson Highlights