Oracle Loyalty Cloud

Import and Export Management for Loyalty

21D

Oracle Loyalty Cloud
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Help

Use help icons ⑦ to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select **Show Help Icons**. Not all pages have help icons.

If you don't see **Show Help Icons** in the Settings and Actions menu, you can access the Oracle Help Center to find guides and videos.

▶ **Watch:** This video tutorial shows you how to find and use help.

You can also read about it instead.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

Convention	Meaning
boldface	Boldface type indicates user interface elements, navigation paths, or values you enter or select.
monospace	Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.
>	Greater than symbol separates elements in a navigation path.

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Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

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1 About This Guide

Audience and Scope

This guide's intended for anyone who's involved in importing and exporting business data in Oracle Loyalty Cloud, and it discusses both standard and optimized import modes. This guide assumes that your company's Oracle Loyalty Cloud service is up and running at a basic level, as described in the Getting Started with Your Sales Implementation and the Implementing Loyalty guides. If you want to set up and work with the additional features of Oracle Loyalty Cloud, see the Oracle Loyalty Cloud documentation on Oracle Help Center at: `https://docs.oracle.com`

The following table lists the objects supported by the standard import mechanism:

Display Name	Language Independent Code	Parent Object
Loyalty Member	LoyaltyMember	Not applicable
Card	LoyaltyCard	LoyaltyMember
Member Promotion Enrollment	MemberPromotionsEnrolled	LoyaltyMember
Loyalty Transaction	Transaction	Not applicable
Loyalty Program	Program	Not applicable
Loyalty Promotion	Promotion	Not applicable
Loyalty Promotion Incentive Choice	PromotionIncentiveChoice	Promotion
Loyalty Promotion Specific Attribute	AttributeDefinition	Promotion

Note: We recommend that you use standard import primarily for incremental data loads, such as day to day scenarios and not for one-time large data migrations. If you want to know more about best practices to help you improve performance in Oracle Loyalty, familiarize yourself with the Understanding Import and Export Management for CX Sales and B2B Service guide, and also Oracle Sales Cloud Optimizing Performance (Document 2420396.2) available on My Oracle Support.

The following table lists the objects supported by the optimized import mechanism:

Display Name	Language Independent Code	Parent Object
Loyalty Transaction	Transaction	Not applicable

Display Name	Language Independent Code	Parent Object
Loyalty Member	LoyaltyMember	Not applicable
Loyalty Member Tier	MemberTier	LoyaltyMember
Card	LoyaltyCard	LoyaltyMember
Voucher	LoyaltyVoucher	LoyaltyMember
Loyalty Accrual Item	AccrualItem	LoyaltyMember
Member Promotion Enrollment	MemberPromotionsEnrolled	LoyaltyMember
Loyalty Member Association	LoyaltyMemberAssociation	LoyaltyMember
Member Attribute Items	LoyaltyAttributeItem	LoyaltyMember
Promotion Attributes (Buckets)	LoyaltyPromotionAttribute	LoyaltyMember
Promotion Attribute Transactions (Bucket Transactions)	LoyaltyPromotionAttributeTransaction	LoyaltyMember

Note: We recommend that you use optimized import primarily for one-time large data migrations, for example if you're migrating data from a legacy system to Oracle Loyalty Cloud.

This guide's a companion document to the Understanding Import and Export Management for CX Sales and B2B Service guide. This guide assumes that you're familiar with the concepts described in that guide, in particular, the concepts described in the following chapters:

- Functional Overview
- Getting Started with Import
- Managing Import Queues
- Managing Import Mappings
- Managing Import Objects
- Generating Diagnostic Logs
- Importing Custom Objects
- Importing Your Data
- Importing Your Data Using External Data Loader Client
- Export Your Data

Related Topics

- Getting Started with Your Sales Implementation

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- Implementing Loyalty
- Understanding Import and Export Management for CX Sales and B2B Service
- Oracle Sales Cloud Optimizing Performance (Document 2420396.2)

Related Guides

You can refer to the following related guides to understand more about the tasks covered in this guide.

Title	Description
Understanding Import and Export Management for CX Sales and B2B Service	Describes how to import legacy and other data into Oracle CX Sales and B2B Service using import and export management.
Getting Started with Oracle Cloud	Describes how to subscribe to Oracle Cloud services, add users, assign roles, and access service consoles.
Extending Loyalty	Describes how to create and expand objects and configure the user interfaces and navigation menus.
Implementing Loyalty	Contains conceptual information and procedures required to implement components and features of Oracle Loyalty Cloud.

2 Manage Optimized Import

Known Issue for Optimized Import

Optimized imports use the same CSV template file as standard imports.

However, before running specific optimized imports, for example, importing member data and transaction data, you must remove the attributes in the CSV file that only support standard import, and replace those attributes with the replacement attributes as suggested as listed in the following topics.

Suggested Member Data Attributes for Optimized Import

You can use the optimized import functionality to create, update, or delete your member data.

Before you import member data using optimized import, you must remove the attributes in the CSV file that only support standard import, and replace those attributes with the replacement attributes as suggested as listed in the following table.

Attributes That Only Support Standard Import Mode	Suggested Attributes to Use for Both Standard and Optimized Modes
Status	StatusCode
PartyName	PartyNumber
ProgramNumber	LoyProgramName
AccountTypeCode	AccntId
RealTimeBonusFlag	Not required.
ReferredByNam	ReferredByNumber
RelType	RelationshipId
MemberEmailAddress	Not required.
EnrollFlag	Not required.
AccrualToHouseholdFlag	Not required.
CreationSource	Not required.

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Attributes That Only Support Standard Import Mode	Suggested Attributes to Use for Both Standard and Optimized Modes
LoyHouseholdName	Not available
LoyAccountName	AccntId
URL	Not required.
HouseholdMemberNumber	Not available
Note: For the following attributes, you must first import your contact data as a prerequisite. Use PartyNumber as the mapping attribute after importing your contact data.	
PersonName	PartyNumber
ContactName	PartyNumber
DateOfBirth	PartyNumber
WorkPhoneNumer	PartyNumber
MobileNumber	PartyNumber
AddressLineOne	PartyNumber
AddressLineTwo	PartyNumber
AddressLineThree	PartyNumber
City	PartyNumber
Country	PartyNumber
County	PartyNumber
PostalCode	PartyNumber

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Attributes That Only Support Standard Import Mode	Suggested Attributes to Use for Both Standard and Optimized Modes
Province	PartyNumber
State	PartyNumber
JobTitle	PartyNumber
ContactFirstName	PartyNumber
ContactLastName	PartyNumber

Suggested Transaction Data Attributes for Optimized Import

You can use the optimized import functionality to create, update, or delete your transaction data.

Before you import transaction data using optimized import, you must remove the attributes in the CSV file that only support standard import, and replace those attributes with the replacement attributes as suggested as listed in the following table.

Attributes That Only Support Standard Import Mode	Suggested Attributes to Use for Both Standard and Optimized Modes
ProgramNumber	ProgramName
InvOrgId	OrganizationCode
Description	ProductNumber
TransferPoints	Not required
EventName	Not required.
BackupInvOrgId	Not required
BackupProductNumber	Not required
CorpRefName	CorporateReferenceNumber
CorpRefMemberId	CorporateReferenceNumber

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Attributes That Only Support Standard Import Mode	Suggested Attributes to Use for Both Standard and Optimized Modes
VoucherNumber	VoucherId

Suggested Membership Card Data Attributes for Optimized Import

You can use the optimized import functionality to create, update, or delete your membership card data.

Before you import membership card data using optimized import, you must remove the attributes in the CSV file that only support standard import, and replace those attributes with the replacement attributes as suggested as listed in the following table.

Attributes That Only Support Standard Import Mode	Suggested Attributes to Use for Both Standard and Optimized Modes
LoyCardId	CardNumber
CardType	Not required
CardStatus	StatusCode

Add the Required Role and Data Security Policy

Before using optimized mode to import contacts, accounts, and households in a member card data import, you must complete the following procedure to add the required role and data security policy:

1. Log in to the application as the Security Manager user.
2. Open Tools, and then click **Security Console**.
3. In the Security Console, click **Users**.
4. Enter "All" and "LOYALTY_PROGRAM_ADMINISTRATOR" in the search fields, and click **Search**.
5. In the Display Name column, select **LOYALTY_PROGRAM_ADMINISTRATOR**.
6. Click **Roles** and enter the "Master Data Management Application Administrator" role in the search field for job roles, and click **Search**.
7. Click on the search results, and in the Action Menu, select **Edit Role** and complete the following fields:

   o **Name.** Master Data Management Application Administrator

   o **Code.** ORA_ZCH_MASTER_DATA_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB

   o **Description.** Administers the installation and maintenance of customer data management application and foundation model.

8. Click **Next**.
9. Navigate to step 3, **Data Security Policy.**
10. Select **+Create Data Security Policy**.

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11. Complete the following fields to create the policy:

    ○ **Policy Name.** Grant PII to Social Security Number

    ○ **Database Resource.** Search for "Trading Community Party"

    ○ **Data set.** all values

    ○ **Actions.** Manage Trading Community Person Social Security

12. Click OK.
13. From the Data Security Policies edit screen for the role, click **Next** three times, and then click **Save and Close**.
14. Assign the new role to the user who's performing the optimized import.

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3 Import Your Member Data

Import Your Member Data

Use this topic to import member data into Oracle Loyalty Cloud. You can use the import functionality to create, update, or delete member records.

To import member records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

Note: It's recommended that you verify your data before you import business data using Oracle Loyalty Cloud, for example in fields such as DateTime, where the format can change according to locale. The import process doesn't perform data validation.

How to Map Your Member Source Data to Target Object Attributes

To import your member data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You must do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.
- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start Importing Member Data

You can use the import functionality to either import members from a legacy or an external system, or you can batch enroll members from file. Set EnrollFlag to Y for the member record in the file if you want to batch enroll members, set EnrollFlag to N if you want to import member from a legacy or external system. EnrollFlag is only applicable for the create member scenario. When importing a member from a legacy or external system, import the member and its child objects as a whole for data integrity.

Note: In the current release, all member child objects aren't available with Import Management, hence you can use the batch enrolling member and the migrating member data with the supported child objects for the release.

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You must set certain options for some attributes in the application before you can populate the attributes. For example, you must set up a loyalty program before you import the member data. When importing members from a legacy or an external system (where EnrollFlag is set to N), you must import contact, account, and household records before you import Loyalty Member data, because the member data contains references to contact, account, household data. When batch enrolling members (where EnrollFlag is set to Y), you can choose to use existing contact, account, household records, or you can provide the required information in the input file to create contact, account, household records when enrolling the member. When enrolling the member, the default member tier and member status history records are created. This member enrollment behavior is the same as enrolling a member using the REST API.

> **Note:** When importing a child record, ensure that its parent record exists in the database.

Options to Uniquely Identify the Member Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Public unique identifiers**: If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Member object, the attribute is MemberNumber.

- **Internal ID**: If you're identifying a record that already exists in Oracle Loyalty Cloud, then you can use the internal ID of the record. An Internal ID is typically a system-generated unique identifier attribute with "id" in the attribute name. You can determine the internal ID of a record by exporting Oracle Loyalty Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Loyalty Member object, these attributes are as follows:

    - LoyMemberId
    - PrConId
    - AccntId
    - OrgGroupId
    - AccrualToMemId

Required Attributes and Validations for Member Import

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new member records, required attributes for updating these member records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member import:

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member record	Updating an Existing Member record
MemberNumber	The unique ID for the Loyalty Member record.	Text	30	None	Conditionally Required

A value is required if EnrollFlag is N. | Required |
| MemberTypeCode | The member type code. The default value is ORA_MEM_TYPE_ | Text | 30 | If providing a value, then the value must be a valid, enabled lookup code for lookup type ORA_LOY_MEM_T | Conditionally Required

A value is required if the default value isn't used. | Not Required |
| StatusCode | The status code of the member. | Text | 30 | If providing a value, the value must be a valid, enabled lookup code for lookup type ORA_LOY_MEM_S | Conditionally Required

A value is required if the default value isn't used. | Optional |
MemberClassCode	The class code of the member.	Text	30	If providing a value, the value must be a valid, enabled lookup code for lookup type ORA_LOY_MEM_C	Optional	Optional
MemberGrpCode	The group code of the member.	Text	30	If providing a value, the value must be a valid, enabled lookup code for lookup type ORA_LOY_MEM_G	Optional	Optional
MemberPhaseCod	The phase code of the member.	Text	30	If providing a value, the value must be a valid, enabled lookup code for lookup type ORA_LOY_MEM_P	Optional	Optional
LoyProgramName	The program name of the	Text	50	The program must exist.	Required	Not Required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member record	Updating an Existing Member record
	member enrolls					
ReferredByNumbe	The public unique identifier of referred by member.	Text	30	The referred by member must exist and from same loyalty program.	Optional	Optional
PrConId	The party identifier of the contact that associate with the member.	Number	18	The contact must exist. One contact can be associate with single member within a given program.	Conditionally Required Either PrConId or PartyNumber must be provided for the following two cases: • A value is required when importing a member from a legacy or external system. • A value is required if batch enrolling a member that's associated with an existing contact.	Not Required
PartyNumber	The party number of the contact that associate with the member	Text	30	The contact must exist. One contact can be associate with single member within a given program.	Conditionally Required Either PrConId or PartyNumber must be provided for	Not Required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member record	Updating an Existing Member record
					the following two cases: A value is required when importing a member from a legacy or external system. A value is required if batch enrolling a member that's associated with an existing contact.	
ContactFirstName	The first name of the contact	Text	150	None	Conditionally Required A value is required when batch enrolling a member with a new contact.	Not Required
ContactLastName	The last name of the contact	Text	150	None	Conditionally Required A value is required when batch enrolling a member with a new contact.	Not Required
AccntId	The party identifier of the account that's associated with the company type of the member.	Number	18	The account must exist.	Conditionally Required Either AccntId or AccountPartyNum must be provided for the following two cases when member type is ORA_MEM_TYPE_ as follows:	Optional

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member record	Updating an Existing Member record
					A value is require when importing the company type of the member from a legacy or external system. A value is required if batch enrolling a company type of the member that's associated with the existing account.	
AccountPartyNum	The party number of the account that associate with company type of member	Text	30	The account must exist.	Conditionally Required Either AccntId or AccountPartyNum must be provided for following two cases when member type is ORA_MEM_TYPE_ as follows: A value is require when importing the company type of the member from a legacy or external system A value is required if batch enrolling the company type of the member that's associate with the existing account.	Optional
LoyAccountName	The name of the account.	Text	360	None	Conditionally Required	Not Required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member record	Updating an Existing Member record
					A value is required when batch enrolling the company type of the member with new account.	
OrgGroupId	The party identifier of the household that's associated with the household type of the member.	Number	18	The household must exist.	Conditionally Required Either OrgGroupId or HouseholdPartyNu must be provided for the following two cases when the member type is ORA_MEM_TYPE_ A value is require when importing household type of member from a legacy or external system. A value is required if batch enrolling the household type of the member that's associated with the existing household.	Optional
HouseholdPartyNu	The party number of the household that's associated with the household type of the member.	Text	30	The household must exist.	Conditionally Required Either OrgGroupId or HouseholdPartyNu must be provided for the following two cases when member type is ORA_MEM_TYPE_	Optional

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member record	Updating an Existing Member record
					A value is require when importing the household type of the member from a legacy or external system. A value is required if batch enrolling the household type of the member that's associated with the existing household.	
LoyHouseholdNam	The name of the household.	Text	360	None	Conditionally Required A value is required when batch enrolling the household type of the member with a new household.	Not Required
AccrualTypeCode	The accrual type code of the company type of the member.	Text	30	If providing a value, the value must be a valid, enabled lookup code for lookup type ORA_LOY_MEM_A	Conditionally Required A value is required when creating the company type of the member.	Optional
AccrualToMemberI	The unique identifier of the household member which the individual member associates with.	Number	18	The member must exist and be from same program.	Conditionally Required Either AccrualToMemberI or HouseholdMembe must be provided when creating the individual type of member and associating	Optional

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member record	Updating an Existing Member record
					it with an existing household member.	
HouseholdMembe	The household member which the individual member associates with.	Text	30	The member must exist and be from same program.	Conditionally Required Either AccrualToMemberl or HouseholdMembe must be provided when creating the individual type of the member and associating it with an existing household member.	Optional
CurrencyCode	The currency code for the member.	Text	15	None	A list of valid values are defined in the lookup table, ZCA_COMMON_CC CY. Review and update the profile option using the Setup and Maintenance work area, and the Manage Currency Profile Options task.	Optional
SurvMemberNumk	The public unique identifier of the surviving member number	Text	30	The member must exist and be from same program	Conditionally Required A value is required when the member is in merged status.	Optional
StartDate	The date when the member	DateTime		None	Conditionally Required	Optional

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member record	Updating an Existing Member record
	joined the program.				A value is required if you're not using current date time.	

You can view the Loyalty Member object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File for Member Data

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or by using a predefined template. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Click the object name link under the Display Name column to navigate to the **Manage Mapping** page.
4. If you don't have an existing mapping, then click **Create Import Mapping** to create a mapping.
5. On the **Edit Import Mapping** page, map the required field attributes by dragging them from the Target Attributes section to the Source File section. Save the mapping when you're done.
6. Click the link in the **Mapping Number** column of the required mapping.

> **Note:** You can filter the mappings using the Find drop-down list.

7. On the **Edit Import Mapping** page, select **Download Template** from the Actions drop-down list.
8. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **MemberNumber** and **LoyProgramName** information from a legacy system to identify the member and the program records. In the first row, **ContactFirstName** and **ContactLastName** are provided to enroll a new contact and associate it with a member. In the second row, a value is provided for **PartyNumber** which identifies the existing contact to associate with the member.

MembernNumber	LoyProgramName	MemberTypeCode	ContactFirstName	ContactLastName	PartyNumber	EnrollFlag
MEM00000001	ABC Reward	ORA_MEM_TYPE_	Steve	Braun		Y
MEM00000002	ABC Reward	ORA_MEM_TYPE_			Party_7231354	N

In the following sample source file, the user enters **MemberNumber** to identify the member, updating the **StatusCode** of the member in Oracle Loyalty Cloud.

MemberNumber	StatusCode
MEM00000001	ORA_MEM_STATUS_INACTIVE
MEM00000002	ORA_MEM_STATUS_CANCEL

In the following sample source file, the user enters **MemberNumber** to identify the member, deleting the member in Oracle Loyalty Cloud by the given **MemberNumber**. The child member records for the member will be cascade deleted.

MemberNumber	
MEM00000001	
MEM00000002	

Create the Member Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Member** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.

   > **Note:** Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.

7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

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Review the Member Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**.

To check the status of the import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

> **Note:** On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Member Data Using Optimized Volume Import

Use this topic to import your data into Oracle Loyalty using optimized import. You can use the import functionality to create, update, or delete your records.

Use this import mode to import a large number of records for the objects that are supported. When importing the data, select the Enable High-Volume Import option. Optimized import is designed to import millions of records in one import job. This mode doesn't trigger any custom logic configured through the application composer.

Before You Start

Before using optimized import to import your member data, you must do the following:

- **Update your CSV file.** Optimized import mode imports use the same CSV template file as standard imports. However, before running an optimized import, you must remove the attributes in the CSV file that only support standard import, and replace those attributes with the replacement attributes. For more information, see the topic Known Issue for Optimized Import.

- **Add the required role and date security.** Before using optimized import to import contacts, accounts, and households, you must add the required role and data security policy. For more information, see the topic Add the Required Role and Data Security Policy.

Import Your Member Data In Optimized Import Mode

When you import your data using the optimized import mode, do so in the following order:

1. Contacts (or accounts or households)
2. Members

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To import your data using the optimized import mode:

1. Open Tools, and click **Import Management**.
2. On the Manage Imports page, click **Create Import Activity**.
3. On the Enter Import Options page, do the following:

   > **Note:** Select Contact (or Account or Household), Member, then Transaction, in that order, for each import job.

   a. Enter a name for your import in the Name field (for example, Contact Import, Member Import, or Transaction Import), then select the object to import for the job from the Object field (for contact data, select Contacts; for member data, select Loyalty Member; for transaction data, select Loyalty Transaction).
   b. Select the CSV file to import (for example. MyContacts.csv, MyMembers.csv, or MyTransactions.csv) by clicking **Browse** beside File Name.
   c. Select the **Enable High-Volume Import** option in the Advanced Options section.
   d. Specify any other options as required, and click **Next**.
4. On the next two pages, accept the defaults and click **Next**, and then click **Submit Job** on the last page.
5. On the Manage Imports page, check that your job status is set to **Completed**.
6. You can click your import job name to find details of your import job including any validation errors that are typically provided in the Import Attachments section.
7. (Optional) You can also generate a diagnostic log by clicking **Generate Diagnostics** from the Actions field.
8. Repeat these steps as required to import your contact (or accounts or households) and member data.

Related Topics

- Known Issue for Optimized Import
- Add the Required Role and Data Security Policy

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4 Import Your Transaction Data

Import Your Transaction Data

Use this topic to import transaction data into Oracle Loyalty Cloud. You can use the import functionality to create, update, or delete transaction records.

To import transaction records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

Note: It's recommended that you verify your data before you import business data using Oracle Loyalty Cloud. The import process doesn't perform data validation.

How to Map Your Transaction Source Data to Target Object Attributes

To import your transaction data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start Importing Transaction Data

You need to set certain options for some attributes in the application before you can populate the attributes. For example, you need to set up a loyalty program and import the member data before you import the transaction data, because the transaction data contains references to program and member data. Also, when importing a child record, ensure that its parent record exists in the database.

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Select a Unique Identifier for Your Transaction Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Public unique identifiers**: If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Transaction object, the attribute is TransactionNumber.

- **Internal ID**: If you're identifying a record that already exists in Oracle Loyalty Cloud, then you can use the internal ID of the record. An Internal ID is typically a system-generated unique identifier attribute with "id" in the attribute name. You can determine the internal ID of a record by exporting Oracle Loyalty Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Loyalty Transaction object, these attributes are as follows:

  - LoyTransactionId
  - InvOrgId
  - ProdId
  - CancelledTransactionId
  - ChildTransactionId
  - ParentTransactionId

Required Attributes and Validations for Transaction Import

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

> **Note:** In the following table, Product Name is listed, which is derived from Product Number and Org ID (both listed). However, this attribute appears as Product Name, or Voucher Type, in the Oracle Loyalty Cloud UI.

The following table lists the required attributes for importing new transaction records, required attributes for updating these transaction records, prerequisite setup tasks for the attributes, and specific validations, if any, for a transaction import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Transaction record	Updating an Existing Loyalty Transaction record
TransactionNumber	The unique ID for the Loyalty Transaction record.	Text	30	None	Required	Required
MemberNumber	The member for whom the transaction is created.	Text	30	The member must exist.	Required	Not required
ProgramName	The name of the loyalty program.	text	100	The program must exist.	Conditionally required. A value is required if ProgramNumber is empty.	Not required
ProgramNumber	The unique ID for the loyalty program.	Text	30	The program must exist.	Conditionally required. A value is required if ProgramNumber is empty.	Not required
TypeCode	The transaction type code name. The accepted values are ORA_TXN_ACC, ORA_TXN_RED, and so on.	Text	30	If providing a value, the value must be a valid, enabled lookup code for lookup type ORA_LOY_TXN_TY	Required	Not required
SubTypeCode	The transaction subtype name. This attribute is dependent on the TypeCodeName attribute. The accepted values are:	Text	30	If providing a value, the value must be a valid, enabled lookup code for lookup type ORA_LOY_ACCRL_ or ORA_LOY_REDEM_	Required	Not required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Transaction record	Updating an Existing Loyalty Transaction record
	A. If Accrual - ORA_ACC_MCR, ORA_ACC_PROD, and so on. B. If Redemption - ORA_RED_PROD, ORA_RED_MDT, and so on.					
ProductNumber	The product that's used in the transaction.	Text	300	The product must exist.	Conditionally required. A value is required when SubTypeCode is ORA_ACC_PROD or ORA_RED_PROD.	Optional
InvOrgId	The organization from where inventory is being picked. For example, when a transaction is created, sometimes the inventory or goods are picked from the partner and directly delivered to the customer. The transaction is created for one organization, but the inventory is being picked from a different organization.	Number	18	The product must exist.	Conditionally required. A value is required when SubTypeCode is ORA_ACC_PROD or ORA_RED_PROD.	Optional
StatusCode	The current state of the transaction. The accepted	Text	30	If providing a value, the value must be a valid, enabled	Required	Optional

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Transaction record	Updating an Existing Loyalty Transaction record
	values are ORA_TXN_STAT_IN ORA_TXN_STAT_R or ORA_TXN_STAT_P ORA_TXN_STAT_IN is the default value if StatusCode isn't provided.			lookup code for lookup type ORA_LOY_TXN_ST		
TransactionDate	The date when the transaction is completed. The date defaults to the current date if no value is provided.	DateTime	Not applicable	None	Required	Optional
AccrualDisputedTr	The attribute indicates the transaction number of the accrual transaction which was incorrect when created.	Text	30	The transaction must exist.	Conditionally required. A value is required when AccrualDisputeTyp is ORA_ACRL_DISPU	Optional
Points	The transaction points. This attribute corresponds to the price of the transaction in points.	Number	Not applicable	None	Conditionally required A value is required when TypeCode is ORA_TXN_RED and SubTypeCode is ORA_RED_TRAN for the transfer point case.	Optional

You can view the Loyalty Transaction object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File for Transaction Data

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses TransactionNumber and ProgramName information from a legacy system to identify the transaction and the program records. A value is provided for **ProductNumber** and **InvOrgId** to identify the product.

TransactionN	ProgramNam	MemberNum	TypeCode	SubTypeCode	ProductNumb	InvOrgId	TransactionD	AmountValue
TXN0000000	ABC Reward	MEM0000000	ORA_TXN _ACC	ORA_ACC_ PROD	CRMITEM-AS54888-0018	204	12/11/2018 12:08:56 PM	100
TXN0000000	ABC Reward	MEM0000000	ORA_TXN _RED	ORA_RED_ PROD	CRMITEM-AS54888-0018	204	12/11/2018 15:18:56 PM	500

In the following sample source file, the user enters **TransactionNumber** to identify the record, updating the TransactionDate of the transaction in Oracle Loyalty Cloud.

Note: You can only update the transaction if the transaction is in either an In Progress or in a Rejected status.

TransactionNumber	TransactionDate
TXN00000001	12/11/2018 12:08:56 PM
TXN00000002	12/11/2018 15:18:56 PM

In the following sample source file, the user enters TransactionNumber to identify the transaction record, deleting the transaction record in Oracle Loyalty Cloud by the given TransactionNumber.

Note: You can only delete a transaction while it's in progress.

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TransactionNumber	
TXN00000001	
TXN00000002	

Create the Transaction Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Transaction** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.

   > **Note:** Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.

7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Transaction Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

> **Note:** On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Transaction Data Using Optimized Import

Use this topic to import your transaction data into Oracle Loyalty using the optimized import mode. You can use the import functionality to create, update, or delete your records.

Use this import mode to import a large number of transaction records. When importing the data, select the Enable High-Volume Import option. The optimized import mode is designed to import millions of records in one import job. This mode doesn't trigger any custom logic configured through the application composer.

Before You Start

Optimized imports use the same CSV template file as standard imports. However, before running an optimized import, you must remove the attributes in the CSV file that only support standard import and replace those attributes with the replacement attributes. For more information, see the topic Known Issue for Optimized Import.

Import Your Transaction Data In Optimized Import Mode

After you have mapped your attributes correctly, you can import your transaction data in optimized import mode.

> **Note:** Ensure that you have imported your contact (or account or household), and member data before importing transaction data.

To import your data using the optimized import mode:

1. Open Tools, and click Import Management.
2. On the Manage Imports page, click Create Import Activity.
3. On the Enter Import Options page, do the following:

   > **Note:** Select Contact (or Account or Household), Member, then Transaction, in that order, for each import job.

   a. Enter a name for your import in the Name field (for example, Contact Import, Member Import, or Transaction Import), then select the object to import for the job from the Object field (for contact data, select Contacts; for member data, select Loyalty Member; for transaction data, select Loyalty Transaction).
   b. Select the CSV file to import (for example. MyContacts.csv, MyMembers.csv, or MyTransactions.csv) by clicking Browse beside File Name.
   c. Select the Enable High-Volume Import option in the Advanced Options section.
   d. Specify any other options as required, and click Next.
4. On the next two pages, accept the defaults and click Next, and then click Submit Job on the last page.
5. On the Manage Imports page, check that your job status is set to Completed.
6. You can click your import job name to find details of your import job including any validation errors that are typically provided in the Import Attachments section.
7. (Optional) You can also generate a diagnostic log by clicking Generate Diagnostics from the Actions field.
8. Repeat these steps as required to import your:

   a. Member data
   b. Transaction data

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Related Topics

- Known Issue for Optimized Import

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5 Import Your Member Child Objects

Import Your Member Promotion Enrollment Data

Use this topic to import member promotion enrollment data into Oracle Loyalty Cloud. You can use the import functionality to create, update, or delete member promotion enrollment records.

To import member promotion enrollment records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

Note: It's recommended that you verify your data before you import business data using Oracle Loyalty Cloud. The import process doesn't perform data validation.

How to Map Your Source Data to Target Object Attributes

To import your member promotion enrollment data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to set up a program and a promotion and import member data before you import member promotion enrollment data, because the member promotion enrollment data typically contain references to programs, promotions, and members. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Public unique identifiers (PUID)**: If you're creating new records, then you can provide a user-friendly PUID. These are attributes denoted with the word Number, and are usually visible in the business object's UI. If you update a record for which you have previously provided a Number attribute, or for which a Number attribute

is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Member Promotion Enrollment object, the attribute is PromoMemNumber.

- **Internal ID**: If you're identifying a record that already exists in Oracle Loyalty Cloud, then you can use the internal ID of the record. An Internal ID is typically a system-generated unique identifier attribute with "id" in the attribute name. You can determine the internal ID of a record by exporting Oracle Loyalty Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Loyalty Member Promotion Enrollment object, the attributes are as follows:

  - LoyPromoMemId
  - MemberId

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new member promotion enrollment records, required attributes for updating these member promotion enrollment records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member promotion enrollment import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Promotion Enrollment Record	Updating an Existing Loyalty Member Promotion Enrollment Record
PromotionName	The name of the promotion being enrolled.	Text	30	The promotion must exist. The member and the promotion must belong to the same program. The promotion must be active and available for enrollment.	Conditionally Required A value is required if PromotionNumber is empty.	Not required
MemberNumber	The member for whom the Promotion is being enrolled.	Text	30	The member must exist. The member and the promotion must belong to the same program.	Required	Not required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Promotion Enrollment Record	Updating an Existing Loyalty Member Promotion Enrollment Record
LoyPromoMemId	The unique ID of the member promotion enrollment.	Number	18	None	Not required	Conditionally required A value is required if PromoMemNumber is empty.
EnrollmentStart	The start date for the promotion being enrolled.	TIMESTAMP	Not applicable	The time stamp must be between the start and end of the promotion.	Required	Not required
PromtionNumber	The PUID of the promotion being enrolled.	Text	30	The promotion must exist. The member and the promotion must belong to the same program. The promotion should be active and available for enrollment.	Conditionally Required A value is required if PromotionName is empty.	Not Required
PromoMemNumbe	The member promotion enrollment number.	Text	30	None	Not required Oracle Loyalty Cloud will generate one if it isn't provided in the import file.	Conditionally required A value is required if LoyPromoMemId is empty.

You can view the Loyalty Member Promotion Enrollment object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. The user can enter either **PromotionName** or **PromotionNumber** in the sample file.

MemberNumber	EnrollmentStart	PromotionNumber or PromotionName
MEM0000007001	06/09/2019 7:51:09 AM	Loy_Test Redeem
MEM0000003075	06/09/2019 7:51:09AM	PROM0000001002

In the following sample source file, the user enters **CardNumber** or **LoyCardId** to identify the card, updating the expiry date of the card in Oracle Loyalty Cloud.

CardNumber	ExpiryDate
CARD0000014007	12/11/2018 12:08:56 PM
MEM0000015002	12/11/2018 15:18:56 PM

In the following sample source file, the user enters the **PromoMemNumber** or **LoyPromoMemId** to identify the member promotion enrollment, deleting the enrollment in Oracle Loyalty Cloud by the given **PromoMemNumber** or **LoyPromoMemId**.

PromomemNumber or LoyPromoMemId	
MP0000009004	
300100176639442	

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Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Member Promotion Enrollment** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.

   > **Note:** Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.

7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

> **Note:** On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Member Card Data

Use this topic to import member card data into Oracle Loyalty Cloud. You can use the import functionality to create, update, or delete member card records.

To import member card records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your member card data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to set up a program and import member data before you import member card data, because the member card data typically contain references to programs and members. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Public unique identifiers (PUID)**: If you're creating new records, then you can provide a user-friendly PUID. These are attributes denoted with the word Number, and are usually visible in the business object's UI. If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Member Card object, the attribute is CardNumber.

- **Internal ID**: If you're identifying a record that already exists in Oracle Loyalty Cloud, then you can use the internal ID of the record. An Internal ID is typically a system-generated unique identifier attribute with "id" in the attribute name. You can determine the internal ID of a record by exporting Oracle Loyalty Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Loyalty Member Card object, the attributes are as follows:
  - LoyCardId
  - MemberId

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new member card records, required attributes for updating these member card records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member card import:

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Card Record	Updating an Existing Loyalty Member Card Record
MemberNumber	The member for whom the member card is created.	Text	30	The member must exist	Required	Not required
LoyCardId	The unique ID of the member card.	Number	18	None	Not required	Conditionally required A value is required if CardNumber is empty.
CardNumber	The member card number.	Text	30	None	Required Oracle Loyalty Cloud will generate a card number if one isn't provided in the import file.	Conditionally required A value is required if LoyCardId is empty.
NameOnCard	The name on the member card.	Text	30	None	Required	Not required
ExpiryDate	The expiration date for the member card.	TIMESTAMP	Not applicable	None	Required	Not required
CardType	The member card type.	Text	30	None	Required	Not required

You can view the Loyalty Member Card object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.

2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **MemberNumber** information from a legacy system to identify the member.

MemberNumber	ExpryDate	NameOnCard	CardType
MEM00000001	6/23/2019 12:08:56 AM	User Name 1	Platinum
MEM00000002	6/29/2019 12:08:56 AM	User Name 2	Gold

In the following sample source file, the user enters **CardNumber** or **LoyCardId** to identify the card, updating the expiry date of the card in Oracle Loyalty Cloud.

CardNumber or LoyCardId	ExpiryDate
CARD0000014007	12/11/2018 12:08:56 PM
MEM0000015002	12/11/2018 15:18:56 PM

In the following sample source file, the user enters the **CardNumber** or **LoyCardId** to identify the program, deleting the program in Oracle Application Cloud by the given **CardNumber** or **LoyCardId**.

CardNumber or LoyCardId	
CARD0000014007	
MEM0000015002	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Card** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.

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6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.

> **Note:** Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.

7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

> **Note:** On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Member Card Data Using Optimized Import

Use this topic to import member card data into Oracle Loyalty Cloud using the optimized import mode. You can use the import functionality to create, update, or delete member card records.

To import member card records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your member card data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

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Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to import member and member tier data before you import member card data, because the member card data typically contains references to members and member tier. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

A preferred option to uniquely identify an object record is to use public unique identifiers (PUID). If you're creating new records, then you can provide a user-friendly PUID. These are attributes denoted with the word Number, and are usually visible in the business object's UI. If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Member Card object, the attribute is CardNumber.

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new member card records, required attributes for updating these member card records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member card import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Card Record	Updating an Existing Loyalty Member Card Record
MemberNumber	The member for whom the member card is created.	Text	30	The member must exist.	Required	Not required
CardNumber	The member card number.	Text	30	None	Required Oracle Loyalty Cloud generates a card number if one isn't provided in the import file.	Required
NameOnCard	The name on the member card.	Text	30	None	Required	Not required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Card Record	Updating an Existing Loyalty Member Card Record
ExpiryDate	The expiration date for the member card.	TIMESTAMP	Not applicable	None	Required	Not Required
CardTypeCode	The member card type code.	Text	30	None	Required	Not Required
StatusCode	The member card status code.	Text	30	None	Required	Not required

You can view the Loyalty Member Card object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page. You don't need to pass the ActiveFlag and MemTierNum attributes in your import data. The import template displays them as required, however if you don't pass these values, then these attributes are stamped with the default value. The LoyCardId, CardType and CardStatus attributes don't support optimized import, and you should not pass them in the input CSV file, even though they're exposed in the import template.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **CardNumber** information from a legacy system to identify the member card.

CardNumber	MemberNumber	ExpiryDate	Name	StatusCode	CardTypeCode
CARDNUM100	MEM00000001	6/23/2019 12:08:56 AM	User Name 1	ORA_MEM_CARD_ST/	ORA_MEM_CARD_REG
CARDNUM200	MEM00000002	6/29/2019 12:08:56 AM	User Name 2	ORA_MEM_CARD_ST/	ORA_MEM_CARD_REG

In the following sample source file, the user enters **CardNumber** to identify the card, updating the expiry date of the card in Oracle Loyalty Cloud.

CardNumber	ExpiryDate
CARDNUM100	12/11/2018 12:08:56 PM
CARDNUM200	12/11/2018 15:18:56 PM

In the following sample source file, the user enters the **CardNumber** to identify the member card, deleting the card in Oracle Application Cloud by the given **CardNumber**.

CardNumber	
CARDNUM100	
CARDNUM200	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Card** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.
7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

> **Note:** On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Member Tier Data Using Optimized Import

Use this topic to import member tier data into Oracle Loyalty Cloud using the optimized mode. You can use the import functionality to create, update, or delete member tier records.

To import member tier records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your member tier data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to set up a program, create tiers in this program, and import member data before you import member tier data. This is because the member tier data typically contain references to members and those tiers. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Public unique identifiers (PUID)**: If you're creating new records, then you can provide a user-friendly PUID. These are attributes denoted with the word Number, and are usually visible in the business object's UI. If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Member Tier object, the attribute is MemTierNum.

- **Internal ID**: If you're identifying a record that already exists in Oracle Loyalty Cloud, then you can use the internal ID of the record. An Internal ID is typically a system-generated unique identifier attribute with "id" in

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the attribute name. You can determine the internal ID of a record by exporting Oracle Loyalty Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Loyalty Member Tier object, the attribute is as follows:

- o MemTierId

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new member tier records, required attributes for updating these member tier records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member tier import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Tier Record	Updating an Existing Loyalty Member Tier Record
MemberNumber	The member for whom the member tier is created.	Text	30	The member must exist	Required	Not required
MemTierId	The member tier number.	Number	18	None	Not required	Conditionally required. A value is required if MemTierNum is empty.
MemTierNum	The member tier number.	Text	30	None	Required. Oracle Loyalty Cloud will generate a tier number if one isn't provided in the import file.	Conditionally required. A value is required if MemTierId is empty.
TierName	The tier name of the member tier record.	Text	30	The tier must exist for the program of the parent member object.	Required	Not required
ActiveFlag	This indicates if this member	Text	1	None	Required	Not required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Tier Record	Updating an Existing Loyalty Member Tier Record
	tier is currently active.					
StartDate	The start date for the member tier.	TIMESTAMP	Not applicable	None	Required	Not required

You can view the Loyalty Member Tier object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page. You should not include the ReasonValue attribute in your import data. The import template displays it as required in the import template, however it's not required, and causes a validation error if you include it in import data.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **MemberNumber** information from a legacy system to identify the member.

MemberNumbe	MemTierNum	TierName	ActiveFlag	StartDate	EndDate
MemNum50K101	400000000000001	Default tier	N	4/12/20 12:00:00 AM	5/12/20 12:00:00 AM
MemNum50K101	400000000000002	Base	N	5/12/20 12:00:00 AM	6/12/20 12:00:00 AM
MemNum50K101	400000000000003	Silver	Y	6/12/20 12:00:00 AM	6/12/21 12:00:00 AM

In the following sample source file, the user enters **MemTierNum** or **MemTierId** to identify the member tier, updating the ActiveFlag field of the MemberTier in Oracle Loyalty Cloud.

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MemTierNum or MemTierId	ActiveFlag
400000000000003	N

In the following sample source file, the user enters the **MemTierNum** or **MemTierId** to identify the program, deleting the program in Oracle Application Cloud by the given MemTierNum or MemTierId.

MemTierNum or MemTierId	
400000000000003	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Member Tier** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **In the MemberTier Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.
7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

Note: On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

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Import Your Member Accrual Item Data Using Optimized Import

Use this topic to import your member accrual item data into Oracle Loyalty using the optimized import mode. You can use the import functionality to create, update, or delete member accrual item records.

To import member accrual item records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your member accrual item into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to import promotion, transaction (if needed), pointType and member data before you import member accrual item data. This is because the member accrual item data typically contain references to members, promotions, pointType, and sometimes to transactions when accrual item is assigned through a transaction using qualified promotions. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

A preferred option to uniquely identify an object record is to use public unique identifiers (PUID). If you're creating new records, then you can provide a user-friendly PUID. These are attributes denoted with the word Number, and are usually visible in the business object's UI. If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Member accrual item object, the attribute is AccrualItemNumber.

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new member accrual item records, required attributes for updating these member accrual item records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member accrual item import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Accrual Item Record	Updating an Existing Loyalty Member Accrual Item Record
AccrualItemNumber	The member accrual item number. This is the unique identifier for any accrual item record.	Text	30	None	Not required Oracle Loyalty Cloud generates an accrual item number if one isn't provided in the import file.	Required
AccrualedValue	Number of points accrued by the member.	Number	18	None	Required	Not required.
DisplayName	The name of the pointType for which the accrual item is created.	Text	30	The pointType must exist.	Required	Not required.
MemberNumber	The member for whom the member accrual item is created.	Text	30	The member must exist.	Required	Not required
PromotionNumber	The promotion through which the accrualItem is assigned to the member.	Text	30	The promotion must exist.	Required	Not required
TypeCode	The typeCode of the accrual item.	Text	30	None	Required	Not required

You can view the Loyalty Member Accrual Item object along with all its attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

> **Note:** The Loyalty Accrual Item template doesn't display the AccrualedValue attribute as required, but you should pass this attribute in the input CSV file as a required attribute. The QualifyingFlag, Name, and TransactionNumber attributes are displayed as required in the input template. However, these attributes are optional and you don't require them for the input CSV file. It's not mandatory to pass these attributes in the CSV file and the user can continue to import the AccrualItem attribute without these attributes present in the input CSV file. The LoyAcrlItmId and PointBlkId attributes don't support optimized import, and you should not pass them in the input CSV file.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **AccrualItemNumber** information from a legacy system to identify and to create the new accrual item record in Oracle Loyalty Cloud.

AccrualItemNumber	AccrualedValue	DisplayName	MemberNumber	PromotionNumber	TypeCode
ACRLITM_NUM001	100	Regular	MEM_NUM2111	PROMO_NUM100	ORA_ACC_ENR_BNS
ACRLITM_NUM0100	200	Premium	MEM_NUM1000	PROMO_NUM200	ORA_ACC_ENR_BNS

In the following sample source file, the user enters the existing **AccrualItemNumber** to identify the existing accrual item, updating the Promotion of the existing accrual item in Oracle Loyalty Cloud.

AccrualItemNumber	PromotionNumber
ACRLITM_NUM001	PROMO_NUM001
ACRLITM_NUM0100	PROMO_NUM002

In the following sample source file, the user enters the **CardNumber** or **LoyCardId** to identify the program, deleting the program in Oracle Application Cloud by the given **CardNumber** or **LoyCardId**.

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AccrualItemNumber	
ACRLITM_NUM001	
ACRLITM_NUM0100	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Accrual Item** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In Advance Options, ensure the **Enable high-volume import** check box is selected, and click Next.
7. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.
8. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**.

To check the status of the import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

> **Note:** On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Member Voucher Data Using Optimized Import

Use this topic to import your member voucher data into Oracle Loyalty using the optimized import mode. You can use the import functionality to create, update, or delete your member voucher records.

Use this import mode to import a large number of member voucher records for the objects that are supported. When importing the data, select the Enable High-Volume Import option. The optimized import mode is designed to import

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millions of records in one import job. This mode doesn't trigger any custom logic configured through the application composer.

How to Map Your Member Voucher Source Data to Target Object Attributes

To import your member voucher data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start Importing Member Voucher Data

You need to set certain options for some attributes in the application before you can populate them. For example, you need to set up a program, promotion (if needed), transaction (if needed) and import member data before you import member voucher data. This is because the member voucher data typically contains references to members and sometimes references to promotions and transactions, in case a voucher is assigned through a transaction. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

A preferred option to uniquely identify an object record is to use public unique identifiers (PUID). If you're creating new records, then you can provide a user-friendly PUID. These are attributes denoted with the word Number, and are usually visible in the business object's UI. If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Member Voucher object, the attribute is VoucherNumber.

Required Attributes and Validations for Member Voucher Data Import

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

Note: In the following table, Product Number is listed. However, this attribute, when combined with Org ID, produces Product Name or Voucher Type, which appears in the Oracle Loyalty Cloud UI.

The following table lists the required attributes for importing new member voucher data records, required attributes for updating these transaction records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member voucher data import:

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Voucher Record	Updating an Existing Loyalty Member Voucher Record
MemberNumber	The member for whom the member voucher is created.	Text	30	The member must exist.	Required	Not required
ProductNumber	The product number for which the voucher is created.	Text	30	The product must exist.	Required.	Not required
VoucherNumber	The member voucher number.	Text	30	None	Required. Oracle Loyalty Cloud generates a voucher number if one isn't provided in the import file.	Required
ExpirationDt	The expiration date for the member voucher.	TIMESTAMP	Not applicable	None	Required	Not required
OrganizationCode	The organization code of the product.	Text	18	The organization code must exist.	Required	Not required

You can view the Loyalty Member Voucher object along with all its attributes in the **Import Objects** page of the **Import Management** flow. You can find attribute information like required, type, length, description, and so on, on this page.

Note: The Member Voucher template doesn't display the ProductNumber and OrganizationCode attributes as required. However, you must pass these attributes as required in the input CSV file. The ActivityDate and validFlag attributes don't support optimized import, and you should not pass these attributes in the input CSV file.

Create the Source CSV File for Member Voucher Data

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **VoucherNumber** information from a legacy system to identify the member.

MemberNumber	VoucherNumber	ExpirationDt	ProductNumber	OrganizationCode
MEM_NUM2111	VCHR_NUM001	6/23/2018 12:08:56 AM	PROD_NUM01	V1
MEM_NUM1000	VCHR_NUM100	6/29/2018 12:08:56 AM	PROD_NUM02	V2

In the following sample source file, the user enters an existing **VoucherNumber** to identify the voucher, updating the expiry date of the voucher in Oracle Loyalty Cloud.

VoucherNumber	ExpirationDt
VCHR_NUM001	12/11/2019 12:08:56 PM
VCHR_NUM100	12/11/2019 15:18:56 PM

In the following sample source file, the user enters the VoucherNumber to identify the voucher, deleting the voucher in Oracle Application Cloud by the given VoucherNumber.

VoucherNumber	
VCHR_NUM001	
VCHR_NUM100	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.

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3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Voucher** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In **Advanced Options**, ensure the **Enable high-volume import** check box is selected and click Next.
7. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.
8. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

Note: On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Redemption Items Using Optimized Import

Use this topic to import member redemption items into Oracle Loyalty Cloud using the optimized import mode. You can use the import functionality to create, update, or delete member redemption item records.

To import member redemption item records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your member redemption item data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

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- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to import promotion, transaction (if needed), pointType and member data before you import member redemption item data, because the member redemption item data typically contains references to members, promotions, point types, and sometimes to transactions when redemption item is assigned through a transaction using qualified promotions. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

A preferred option to uniquely identify an object record is to use public unique identifiers (PUID). If you're creating new records, then you can provide a user-friendly PUID. These are attributes denoted with the word Number, and are usually visible in the business object's UI. If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Member Redemption Item object, the attribute is RedemptionItemNumber.

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new member redemption item records, required attributes for updating these member redemption item records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member redemption item import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Redemption Item Record	Updating an Existing Loyalty Member Redemption Item Record
RedemptionItemN	The member redemption item number. This is the unique identifier for any redemption Item record.	Text	30	None	Not required Oracle Loyalty Cloud generates a redemption item number if one isn't provided in the import file.	Required
Value	Number of points redeemed by the member.	Number	18	None	Required	Not required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Redemption Item Record	Updating an Existing Loyalty Member Redemption Item Record
DisplayName	The name of the point type for which redemption item is created.	Text	30	The point type must exist.	Required	Not required
MemberNumber	The member for whom the member redemption item is created.	Text	30	The member must exist.	Required	Not required

You can view the Loyalty Member Redemption Item object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page. The import template displays it as not required, however you need to pass the Value attribute in your import data. The attributes PromotionNumber, AccrualItemNumber and TransactionNumber are displayed as Required in the input template, however these attributes aren't required for the input CSV. The LoyRdmItmId attribute doesn't support optimized import, and you should not pass it in the input CSV file, even though it's exposed in the import template.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **RedemptionItemNumber** information from a legacy system to identify and to create the new redemption item record in Oracle Loyalty Cloud.

RedemptionItemNumber	Value	DisplayName	MemberNumber
RDMITM_NUM001	100	Regular	MEM_NUM2111
RDMITM_NUM0100	200	Premium	MEM_NUM1000

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In the following sample source file, the user enters **RedemptionItemNumber** to identify the existing redemption item, updating the Promotion of the existing redemption item in Oracle Loyalty Cloud.

RedemptionItemNumber	PromotionNumber
RDMITM_NUM001	PROMO_NUM001
RDMITM_NUM0100	PROMO_NUM002

In the following sample source file, the user enters the **RedemptionItemNumber** to identify the redemption item, deleting the redemption item in Oracle Application Cloud by the given RedemptionItemNumber.

RedemptionItemNumber	
RDMITM_NUM001	
RDMITM_NUM0100	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **RedemptionItemNumber** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.
7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

> **Note:** On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Member Attributes Using Optimized Import

Use this topic to import member attributes into Oracle Loyalty Cloud using the optimized import mode. You can use the import functionality to create, update, or delete member attribute records.

To import member attribute records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your member attribute data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to import program data, member data, attribute definition data for which member attribute will be imported before you import member attribute data, because the member attribute data typically contains references to member, program and attribute definition using display name of attribute when member attribute record is created through a high volume import. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

One option to uniquely identify a member attribute records is to use an alternate key. If you're creating new records, you need to pass valid values to all the attributes which comprises the alternate key. If you update a record for which you have previously provided values to attributes of alternate key, you can use the same key to identify the record. For the Loyalty member attribute object, the alternate key consists of three attributes which are: ProgramNumber, DisplayName, and MemberNumber. You should pass a value to all three attributes of the alternative key to uniquely identify the member attribute record.

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new member attribute records, required attributes for updating these member attribute records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member attribute import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Attribute Record	Updating an Existing Loyalty Attribute Record
ProgramNumber	The program number to which member belongs and under which the attribute definition is added.	Text	30	The program must exist.	Required	Required
DisplayName	The display name of the program level attribute or attribute definition.	Text	30	The attribute definition must exist.	Required	Required
MemberNumber	The member for whom the member attribute is created.	Text	30	The member must exist.	Required	Required

You can view the Loyalty Member Attribute object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.

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4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses the ProgramNumber, DisplayName, and MemberNumber attribute information from a legacy system to identify and to create the new member attribute record in Oracle Loyalty Cloud.

ProgramNumber	DisplayName	MemberNumber	Value
PROG_NUM1	NumberOfTransactions	MEM_NUM2111	1
PROG_NUM2	NumberOfFlights	MEM_NUM1000	2

In the following sample source file, the user enters the existing information for the **ProgramNumber**, **DisplayName** and **MemberNumber** attributes from a legacy system to identify and to create the new member attribute record in Oracle Loyalty Cloud.

ProgramNumber	DisplayName	MemberNumber	Value
ACRLITM_NUM001	NumberOfTransactions	MEM_NUM2111	2
ACRLITM_NUM0100	NumberOfFlights	MEM_NUM1000	3

In the following sample source file, the user enters the **ProgramNumber**, **DisplayName** and **MemberNumber** attributes to identify the member attribute record, deleting the member attribute record in Oracle Application Cloud by the given alternate key.

ProgramNumber	DisplayName	MemberNumber
ACRLITM_NUM001	NumberOfTransactions	MEM_NUM2111

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Member Attribute** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.
7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

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Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

Note: On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Member Associations Using Optimized Import

Use this topic to import member associations into Oracle Loyalty Cloud using the optimized import mode. You can use the import functionality to create, update, or delete member association records.

To import member association records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your member association data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to set up a program and import member data of type Company and Individual before you import member

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association data, because the member association data typically contains references to programs and members. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

A preferred option to uniquely identify an object record is to use public unique identifiers (PUID). If you're creating new records, then you can provide a user-friendly PUID. These are attributes denoted with the word Number, and are usually visible in the business object's UI. If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Member Association object, the attribute is MemberAssociationPUID.

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new member association records, required attributes for updating these member association records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member association import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Association Record	Updating an Existing Loyalty Association Record
AssociationStartDa	The member association start date.	TIMESTAMP	Not applicable	None	Not required Oracle Loyalty Cloud uses the system date by default if a date isn't provided in the import file.	Not required
GroupMemberNun	The member of type Corporate.	Text	30	The Corporate Member must exist.	Required	Not required
MemberNumber	The member of type Individual.	Text	30	The Individual Member must exist.	Required	Not required
AssociationEndDat	The member association end date.	TIMESTAMP	Not applicable	None	Not required	Not required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Association Record	Updating an Existing Loyalty Association Record
MemberAssociatio	The member association number. This is the PUID for a member association record.	Text	30	None	Not required Oracle Loyalty Cloud generates a member association PUID if one isn't provided in the import file.	Required
MemberAssociatio	The member association ID. This is the unique ID for a member association record.	Number	18	None	Not required	Not required

You can view the Loyalty Member Association object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **MemberAssociationPUID** information from a legacy system to identify and to create the new member association record in Oracle Loyalty Cloud.

MemberAssociationPUID	GroupMemberNumber	MemberNumber
MEMASSOC_NUM001	MEM_NUM1000	MEM_NUM2100

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MemberAssociationPUID	GroupMemberNumber	MemberNumber
MEMASSOC_NUM0100	MEM_NUM1000	MEM_NUM3100

In the following sample source file, the user enters **MemberAssociationPUID** to identify the existing member association, updating the Association End Date of the existing member association in Oracle Loyalty Cloud.

MemberAssociationPUID	AssociationEndDate
MEMASSOC_NUM001	7/31/2021
MEMASSOC_NUM0100	12/31/2020

In the following sample source file, the user enters the **MemberAssociationPUID** to identify the member association, deleting the member association in Oracle Application Cloud by the given MemberAssociationPUID.

MemberAssociationPUID	
MEMASSOC_NUM001	
MEMASSOC_NUM0100	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Member Association** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.
7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.

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2. Open Tools, and click **Import Management**.

3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.

4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

> **Note:** On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Member Promotion Enrollments Using Optimized Import

Use this topic to import member promotion enrollment into Oracle Loyalty Cloud using the optimized import mode. You can use the import functionality to create, update, or delete member promotion enrollment records.

To import member promotion enrollment records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your member promotion enrollment data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to set up a program, a promotion that qualifies for enrollment, and import member data, before you import member promotion enrollment data. This is because the member promotion enrollment data typically contains references to promotions and members. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

A preferred option to uniquely identify an object record is to use public unique identifiers (PUID). If you're creating new records, then you can provide a user-friendly PUID. These are attributes denoted with the word Number, and are usually visible in the business object's UI. If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Member Promotion Enrollment object, the attribute is PromoMemNumber.

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new member promotion enrollment records, required attributes for updating these member promotion enrollment records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member promotion enrollment import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Promotion Enrollment Record	Updating an Existing Loyalty Member Promotion Enrollment Record
PromoMemNumber	The member promotion enrollment number. This is the PUID for a member promotion enrollment record.	Text	30	None	Not required Oracle Loyalty Cloud generates a member promotion enrollment PUID if one isn't provided in the import file.	Required
PromotionNumber	The promotion number of the promotion that qualifies for enrollment.	Text	30	The promotion must exist.	Required	Not required
MemberNumber	The member number of a member who's enrolled in the promotion.	Text	30	The member must exist.	Required	Not required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Promotion Enrollment Record	Updating an Existing Loyalty Member Promotion Enrollment Record
EnrollmentStart	The member promotion enrollment start date.	TIMESTAMP	Not applicable	None	Not required Oracle Loyalty Cloud uses the system date by default if one isn't provided in the import file.	Not required
EnrollmentEnd	The member promotion enrollment end date.	TIMESTAMP	Not applicable	None	Not required	Not required
IncentiveChoice	The incentive choice.	Text	30	None	Not required	Not required
EligFlg	This indicates if the member is eligible or enrolled.	Text	1	None	Not required	Not required
OfferNum	The offer number.	Text	30	None	Not required	Not required
PromotionName	The promotion name of the promotion that qualifies for enrollment.	Text	30	None	Not required	Not required
LoyPromomemId	The member promotion enrollment ID. This is the unique ID for a member promotion enrollment record.	Number	18	None	Not required	Not required
MemberId	The member ID of the member who's	Number	18	None	Not required	Not required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Promotion Enrollment Record	Updating an Existing Loyalty Member Promotion Enrollment Record
	enrolled in the promotion.					

You can view the Loyalty Member Promotion Enrollment object along with all its attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **PromoMemNumber** information from a legacy system to identify and to create the new member promotion enrollment record in Oracle Loyalty Cloud.

PromoMemNumber	PromotionNumber	MemberNumber
PROMOMEM_NUM001	PROMO_NUM1000	MEM_NUM1100
PROMOMEM_NUM0100	PROMO_NUM1000	MEM_NUM2100

In the following sample source file, the user enters **PromoMemNumber** to identify the member promotion enrollment, deleting the member promotion enrollment in Oracle Application Cloud by the given PromoMemNumber.

PromoMemNumber	EnrollmentEnd
PROMOMEM_NUM001	7/31/2020 12:00:00 AM
PROMOMEM_NUM0100	12/31/2020 12:00:00 AM

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In the following sample source file, the user enters the **PromoMemNumber** to identify the member promotion enrollment, deleting the member promotion enrollment in Oracle Application Cloud by the given PromoMemNumber.

PromoMemNumber	
PROMOMEM_NUM001	
PROMOMEM_NUM001	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Member Promotion Enrollment** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.
7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

Note: On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Promotion Attribute Transactions (Bucket Transactions) Using Optimized Import

Use this topic to import promotion attribute transaction data into Oracle Loyalty Cloud using the optimized import mode. You can use the import functionality to create, update, or delete promotion attribute transaction records.

To import promotion attribute transaction records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your promotion attribute transaction data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to set up program, promotion, promotion specific attribute and import transaction data before you import promotion attribute transaction data. This is because the promotion attribute transaction typically contains references to promotion attributes and transactions. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

One option to uniquely identify promotion attribute transaction records is to use an alternate key. If you're creating new records, you need to pass valid values to all the attributes which contain the alternate key. If you update a record for which you have previously provided values to attributes of alternate key, you can use the same key to identify the record. For the Loyalty promotion attribute transaction object, the alternate key consists of the attributes BucketUid and TxnNum. You should pass a value to all these alternate key attributes to uniquely identify the Loyalty promotion attribute transaction record.

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new loyalty promotion attribute transaction records, prerequisite setup tasks for the attributes, and specific validations, if any, for a Loyalty promotion attribute transaction import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Promotion Attribute Transaction Record	Updating an Existing Loyalty Promotion Attribute Transaction Record
BucketUid	This is the PUID column of the Loyalty bucket entity. This is one of the alternate keys to identify a row in this entity uniquely	Text	30	The bucket must exist.	Required	This isn't supported. This entity doesn't have its own PUID. If you need to correct the data, then you need to delete and re-create the promotion attribute transaction with the correct BucketUid and TxnNum attributes.
TxnNum	This is the PUID column of the Loyalty transaction entity. This is one of the alternate keys to identify a row in this entity uniquely	Text	30	The transaction must exist.	Required	This isn't supported. This entity doesn't have its own PUID. If you need to correct the data, then you need to delete and re-create the promotion attribute transaction with the correct BucketUid and TxnNum attributes.

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You can view the Loyalty promotion attribute transaction object along with all its attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses the BucketUid and TxnNum attribute information from a legacy system to identify and to create the new loyalty promotion attribute transaction record in Oracle Loyalty Cloud.

BucketUid	TxnNum
BUCKET_NUM001	TXN_NUM001
BUCKET_NUM002	TXN_NUM002

In the following sample source file, the user enters the BucketUid and TxnNum attributes to identify the loyalty promotion attribute transaction, which then deletes the loyalty promotion attribute transaction in Oracle Application Cloud by the given alternate key.

BucketUid	TxnNum
BUCKET_NUM001	TXN_NUM001
BUCKET_NUM002	TXN_NUM002

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.

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4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Promotion Attribute Transaction** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.
7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

Note: On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Member Attribute Items Using Optimized Import

Use this topic to import member attribute item data into Oracle Loyalty Cloud using the optimized import mode. You can use the import functionality to create, update, or delete member attribute item records.

To import member attribute item records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your member attribute item data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

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Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, when a loyalty member attribute item record is created in an optimized import, it typically contains references to members, programs, attribute definitions using the display name and program number attributes, member attribute or bucket attribute, or both. For this, you need to import the program, member, attribute definition, member attribute data, and bucket attribute data before you import loyalty member attribute item data. Also, before you import a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

One option to uniquely identify member attribute item records is to use an alternate key. If you're creating new records, you need to pass valid values to all the attributes which comprises the alternate key. If you update a record for which you have previously provided values to attributes of alternate key, you can use the same key to identify the record. For the Loyalty member attribute item object, the alternate key consists of these attributes: ProgramNumber, DisplayName, MemberNumber, TransactionNumber, PromotionNumber, BucketUid, UpdateDate. You should pass a value to all these alternate key attributes to uniquely identify the Loyalty member attribute item record. You only need to pass the BucketUid attribute in the alternate key for any records that are generated through bucket promotions. This attribute should also be empty for records that are generated through normal promotions. You only need to pass the UpdateDate attribute as part of alternate key when you need to identify the record uniquely in the evening that the TransactionNumber attribute is empty for a bucket promotion record.

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new member attribute item records, required attributes for updating these member attribute item records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member attribute item import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Attribute Item Record	Updating an Existing Loyalty Member Attribute Item Record
ProgramNumber	The program number to which member belongs to and under which attribute definition is added.	Text	30	The program must exist.	Required	Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Attribute Item Record	Updating an Existing Loyalty Member Attribute Item Record
DisplayName	The display name of the program level attribute or attribute definition	Text	30	The attribute definition must exist.	Required	Required
MemberNumber	The member for whom the loyalty member attribute item is created.	Text	30	The member must exist.	Required	Required
TransactionNumber	The transaction number through which member or bucket attribute item is created or updated for the input member.	Text	30	The transaction must exist.	Required only for records generated through normal transaction processing. Optional for bucket processing record.	Required only for records generated via normal transaction processing. Optional for bucket processing record.
PromotionNumber	The Promotion Number using which transaction has created/ updated the member attribute item.	Text	30	The promotion must exist.	Required	Required
BucketUid	The PUID of the bucket attribute created for the input member.	Text	30	The bucket attribute record must exist for the input member.	Required only for processing a bucket record.	Required only for processing a bucket record.
OperatorCode	The Operator Code using which operation on attribute value is performed.	Text	30	The operator code must be valid.	Required	Not required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Attribute Item Record	Updating an Existing Loyalty Member Attribute Item Record
UpdateDate	Update date of member attribute item.	Time stamp	Not applicable	The update date must be a valid date.	Required	Required when the TransactionNumber is empty when processing a bucket record.

You can view the Loyalty Attribute Item object along with all its attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses the **ProgramNumber**, **DisplayName**, **MemberNumber**, **TransactionNumber**, **PromotionNumber**, and **BucketUid** attribute information from a legacy system to identify and to create the new loyalty member attribute item record in Oracle Loyalty Cloud.

ProgramNum	DisplayName	MemberNum	TransactionN	PromotionNu	BucketUid	OperatorCode	UpdateDate	Value
PROG_NUM1	NumberOfTra	MEM_NUM211	TXN_NUM1111	PROMO_NUM	BUC1	SET	10-10-20 10:49	1
PROG_NUM2	NumberOfFlig	MEM_NUM100	TXN_NUM222	PROMO_NUM	BUC2	ADD	10-11-20 10:49	2

In the following sample source file, the user enters the existing attributes **ProgramNumber**, **DisplayName**, **MemberNumber**, **TransactionNumber**, **PromotionNumber**, and **BucketUid** to identify the existing loyalty member attribute item record, and to update the value of the existing member attribute in Oracle Loyalty Cloud.

ProgramNumber	DisplayName	MemberNumber	TransactionNumb	PromotionNumbe	BucketUid	Value
PROG_NUM1	NumberOfTransac	MEM_NUM2111	TXN_NUM1111	PROMO_NUM1111	BUC1	2
PROG_NUM2	NumberOfFlights	MEM_NUM1000	TXN_NUM2222	PROMO_NUM2222	BUC2	3

In the following sample source file, the user enters the existing attributes **ProgramNumber**, **DisplayName**, **MemberNumber**, **PromotionNumber**, **BucketUid**, and **UpdateDate** to identify the existing loyalty member attribute item record, and to update the value of the existing member attribute in Oracle Loyalty Cloud.

ProgramNumbe	DisplayName	MemberNumbe	TransactionNur	PromotionNum	BucketUid	UpdateDate	Value
PROG_NUM1	NumberOfTrans	MEM_NUM2111	Not applicable	PROMO_NUM11	BUC1	10-10-20 10:49	2
PROG_NUM2	NumberOfFlight	MEM_NUM1000	Not applicable	PROMO_NUM22	BUC2	10-11-20 10:49	3

In the following sample source file, the user enters the attributes **ProgramNumber**, **DisplayName**, **MemberNumber**, **TransactionNumber**, **PromotionNumber**, and **BucketUid** to identify the loyalty member attribute item record, and to delete the loyalty member attribute item record in Oracle Application Cloud using the given alternate key.

ProgramNumber	DisplayName	MemberNumber	TransactionNumber	PromotionNumber	BucketUid
PROG_NUM1	NumberOfTransaction	MEM_NUM2111	TXN_NUM1111	PROMO_NUM1111	BUC1

In the following sample source file, the user enters the attributes **ProgramNumber**, **DisplayName**, **MemberNumber**, **PromotionNumber**, **BucketUid**, and **UpdateDate** to identify the loyalty member attribute item record, and to delete the loyalty member attribute item record in Oracle Application Cloud using the given alternate key.

ProgramNumber	DisplayName	MemberNumber	TransactionNumb	PromotionNumbe	BucketUid	UpdateDate
PROG_NUM1	NumberOfTransac	MEM_NUM2111	Not applicable	PROMO_NUM1111	BUC1	10-10-20 10:49

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.

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3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Attribute Item** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.
7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

Note: On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Promotion Attributes (Buckets) Using Optimized Import

Use this topic to import promotion attribute data into Oracle Loyalty Cloud using the optimized import mode. You can use the import functionality to create, update, or delete promotion attribute records.

To import promotion attribute records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your promotion attribute data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.
- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to set up program, promotion, promotion specific attribute and import member data before you import promotion attribute data, because the promotion attribute typically contain references to promotion and member. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

A preferred option to uniquely identify an object record is to use public unique identifiers (PUID). If you're creating new records, then you can provide a user-friendly PUID. These are attributes denoted with the word Number, and are usually visible in the business object's UI. If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the number attribute to identify the record. For the Loyalty Promotion Attribute object, the attribute is BucketUid.

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new promotion attribute item records, required attributes for updating these promotion attribute records, prerequisite setup tasks for the attributes, and specific validations, if any, for a promotion attribute import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Promotion Attribute Record	Updating an Existing Loyalty Promotion Attribute Record
LoyBucketId	The unique ID for promotion attribute record.	Number	18	Not applicable	Not required	Not required
BucketUid	This is the PUID column for this entity. This alone should be able to identify a row in this entity uniquely.	Text	30	Not applicable	Not required Oracle Loyalty Cloud generates a promotion attribute PUID if one isn't provided in the import file.	Required
MemNum	The member for whom the	Text	30	The member must exist.	Required	Not required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Promotion Attribute Record	Updating an Existing Loyalty Promotion Attribute Record
	member tier is created.					
PromoNum	The promotion for which the promotion specific attributes are defined.	Text	30	The promotion must exist.	Required	Not required
DisplayName	The display name of the promotion specific attribute.	Text	30	The promotion specific attribute must be defined in the promotion under promotion specific attributes.	Required	Required
Value	The value of the promotion specific attribute.	Text	30	Not applicable	Not required	Not required
OrderNum	Not applicable	Text	30	Not applicable	Not required	Not required
ProcessedDt	The processed date of the promotion attribute.	Time stamp	Not applicable	Not applicable.	Not required	Not required
ProcessingComme	The processing comment of the promotion attribute.	Text	1000	Not applicable	Not required	Not required
ProcessingStatCod	The processing status code of the promotion attribute.	Text	30	Not applicable	Not required	Not required
StatusCode	The status code of the promotion attribute.	Text	30	Not applicable	Not required Oracle Loyalty Cloud defaults to the ORA_BUCKET_STA	Not required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Promotion Attribute Record	Updating an Existing Loyalty Promotion Attribute Record
					record if one isn't provided in the import file.	

You can view the Loyalty Promotion Attribute object along with all its attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses the **BucketUid** attribute information from a legacy system to identify and to create the new loyalty attribute item record in Oracle Loyalty Cloud.

BucketUid	MemNum	PromoNum	DisplayName	Value
BUCKET_NUM001	MEM_NUM2100	PROMO_NUM1000	NumberOfTransactions	1
BUCKET_NUM001	MEM_NUM2100	PROMO_NUM1000	PointsAssigned	N
BUCKET_NUM001	MEM_NUM2100	PROMO_NUM1000	PointsAssignedDate	1/1/2020 12:00:00 PM
BUCKET_NUM002	MEM_NUM3100	PROMO_NUM2000	NumOfShortFlights	4
BUCKET_NUM003	MEM_NUM4100	PROMO_NUM3000	NumOfLongFlights	2

In the following sample source file, the user enters the existing **BucketUid** attribute to identify the existing member promotion enrollment, updating the value of the existing loyalty promotion attribute in Oracle Loyalty Cloud.

BucketUid	DisplayName	Value
BUCKET_NUM001	NumberOfTransactions	3
BUCKET_NUM001	PointsAssigned	Y
BUCKET_NUM001	PointsAssignedDate	10/9/2020 11:00:00 PM
BUCKET_NUM002	NumOfShortFlights	6
BUCKET_NUM003	NumOfLongFlights	3

In the following sample source file, the user enters the **BucketUid** attribute to identify the loyalty promotion attribute, deleting the loyalty promotion attribute in Oracle Loyalty Cloud by the given BucketUid..

BucketUid	
BUCKET_NUM001	
BUCKET_NUM002	
BUCKET_NUM003	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Promotion Attribute Bucket** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.
7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.

2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

Note: On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

6 Import Data for Other Object Types

Import Your Program Data

Use this topic to import program data into Oracle Loyalty Cloud. You can use the import functionality to create, update, or delete program records.

To import program records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

Note: It's recommended that you verify your data before you import business data using Oracle Loyalty Cloud. The import process doesn't perform data validation.

How to Map Your Source Data to Target Object Attributes

To import your program data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

There are no prerequisite tasks for importing program data.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Public unique identifiers**: If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Program object, the attribute is ProgramNumber.

- **Internal ID**: If you're identifying a record that already exists in Oracle Loyalty Cloud, then you can use the internal ID of the record. An Internal ID is typically a system-generated unique identifier attribute with "id" in

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the attribute name. You can determine the internal ID of a record by exporting Oracle Loyalty Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Loyalty Program object, this attribute is LoyProgramId.

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new program records, required attributes for updating these program records, prerequisite setup tasks for the attributes, and specific validations, if any, for a program import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Program record	Updating an Existing Loyalty Program record
LoyProgramId	The unique ID for the Loyalty Program record.	Number	18	None	Not required	Conditionally required. A value is required if ProgramNumber is empty.
ProgramNumber	The program number.	Text	30	Not required Oracle Loyalty Cloud generates a program number if one isn't provided in the import file.	Required	Conditionally required. A value is required if LoyProgramId is empty.
Name	The name of the loyalty program.	Text	30	None	Required	Not required
ProgramOwner	The owner of the loyalty program.	Text	30	None	Required	Not required

You can view the Loyalty Program object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file inserts a new program with **Name** and **ProgramOwner** attributes.

Name	ProgramOwner
Program Name 1	Owner 1
Program Name 2	Owner 2

In the following sample source file, the user enters **ProgramNumber** or **LoyProgramId** to identify the record, updating the name of the program in Oracle Loyalty Cloud.

ProgramNumber	Name
PRG0000000041	Program Name replaced

In the following sample source file, the user enters the **ProgramNumber** or **LoyProgramId** to identify the program, deleting the program in Oracle Loyalty Cloud by the given **ProgramNumber** or **LoyProgramId**.

ProgramNumber	
PRG0000000041	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.

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3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Program** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.

> **Note:** Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.

7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

> **Note:** On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Promotion Data

Use this topic to import promotion data into Oracle Loyalty Cloud. You can use the import functionality to create, update, or delete promotion records.

To import promotion records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your promotion data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.
- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.
- Understand your options for uniquely identifying the records.

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- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to set up a program because promotion data contains references to programs. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Public unique identifiers**: If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Promotion object, the attribute is PromotionNumber.

- **Internal ID**: If you're identifying a record that already exists in Oracle Loyalty Cloud, then you can use the internal ID of the record. An Internal ID is typically a system-generated unique identifier attribute with "id" in the attribute name. You can determine the internal ID of a record by exporting Oracle Loyalty Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Loyalty Promotion object, these attributes are as follows:

  - LoyPromoId
  - LoyProgId
  - PartnerId

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new promotion records, required attributes for updating these promotion records, prerequisite setup tasks for the attributes, and specific validations, if any, for a promotion import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Promotion record	Updating an Existing Loyalty Promotion record
LoyPromoId	The unique ID for the promotion record.	Number	18	None	Not required	Conditionally required.

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Promotion record	Updating an Existing Loyalty Promotion record
						A value is required if PromotionNumber is empty.
PromotionNumber	The PUID of the promotion from which the promotion record can be uniquely identified.	Text	30	None	Not required	Conditionally required. A value is required if LoyPromoId is empty.
Name	The name of the promotion.	Text	50	If providing a value, then the value must be unique.	Required	Not required
ProgramNumber	The unique ID for the program.	Text	30	The program must exist.	Required	Not required
TypeCode	The promotion type code name. The accepted values are ORA_TXN_ACC, ORA_TXN_RED, and so on.	Text	30	If providing a value, then the value must be a valid, enabled lookup code for lookup type ORA_LOY_TXN_TY	Required	Not required
SubTypeCode	The promotion subtype name. This attribute is dependent on the TypeCodeName attribute. The accepted values are: A. If Accrual – ORA_ACC_MCR, ORA_ACC_PROD, and so on.	Text	30	If providing a value, then the value must be a valid, enabled lookup code for lookup type ORA_LOY_ACCRL_ or ORA_LOY_REDEM_	Required	Not required

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Promotion record	Updating an Existing Loyalty Promotion record
	B. If Redemption - ORA_RED_PROD, ORA_RED_MDT, and so on.					

You can view the Loyalty Promotion object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **Name** (promotion name) and **ProgramNumber** information from a legacy system to identify the promotion and program. A value is provided for **TypeCode** and **SubTypeCode** to identify the type of promotion being created.

Name	ProgramNumber	TypeCode	SubTypeCode
SLPromoImport1	PRG0000033020	ORA_TXN_ACC	ORA_ACC_PROD
SLPromoImport2	PRG0000033020	ORA_TXN_RED	ORA_RED_PROD

In the following sample source file, the user enters **PromotionNumber** to identify the promotion record, updating the name of the promotion in Oracle Loyalty Cloud.

PromotionNumber	Name
PROM0000003001	LDemo_Create_Update1

PromotionNumber	Name
PROM0000003002	LDemo_Create_Update2

In the following sample source file, the user enters the **PromotionNumber** to identify the promotion, deleting the promotion in Oracle Loyalty Cloud by the given **PromotionNumber**.

Note:
- You can only delete a promotion if the promotion is in **Inactive** status.
- Deletion of tier promotions isn't allowed from an import.

PromotionNumber	
PROM0000003001	
PROM0000003002	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Promotion** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.

   Note: Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.

7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.

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4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

Note: On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Promotion Incentive Choice Data

Use this topic to import promotion incentive choice data into Oracle Loyalty Cloud. You can use the import functionality to create, update, or delete promotion incentive choice records.

To import promotion incentive choice records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your promotion incentive choice data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to set up a promotion because a promotion incentive choice is a child of a promotion. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Internal ID**: If you're identifying a record that already exists in Oracle Loyalty Cloud, then you can use the internal ID of the record. An Internal ID is typically a system-generated unique identifier attribute with "id" in the attribute name. You can determine the internal ID of a record by exporting Oracle Loyalty Cloud object data,

or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Loyalty Promotion Incentive Choice object, these attributes are as follows:

- ○ LoyIncentiveChoiceId
- ○ PromotionId

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new promotion incentive choice records, required attributes for updating these promotion incentive choice records, prerequisite setup tasks for the attributes, and specific validations, if any, for a promotion incentive choice import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Incentive Choice record	Updating an Existing Loyalty Incentive Choice record
LoyIncentiveChoic	The unique ID for the incentive choice record.	Number	18	None	Not required	Required
PromotionNumber	The promotion for which the incentive choice is created.	String	30	The promotion must exist and be available for enrollment.	Required	Not required
IncentiveChoice	The name of the incentive choice.	String	50	The incentive choice value must be unique.	Required	Not required
DefaultFlag	The default indicator.	String	1	If the incentive choice being created is the first incentive choice record for the promotion, then set the default indicator to 'Y'.	Not required	Not required

You can view the Loyalty Promotion object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

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Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **PromotionNumber** information from legacy system to identify the Loyalty Promotion for which an incentive choice will be created. A value is provided for IncentiveChoice to uniquely identify the Promotion Incentive Choice record.

PromotionNumber	IncentiveChoice	DescriptionText
PROM0000003001	ICTest1	My first IC record
PROM0000003001	ICTest2	My second IC record
PROM0000003001	Text1	My text

In the following sample source file, the user enters **LoyIncentiveChoiceId** to identify the Promotion Incentive Choice, updating the default value of the promotion incentive choice in Oracle Loyalty Cloud.

> **Note:** You can only update the Promotion Incentive Choice, if the promotion is in Inactive status.

LoyIncentiveChoiceId	DescriptionText
300100180801400	First IC record
300100180801401	Second IC record

In the following sample source file, the user enters the **LoyIncentiveChoiceId** to identify the promotion incentive choice, deleting the promotion incentive choice in Oracle Loyalty Cloud by the given **LoyIncentiveChoiceId**.

LoyIncentiveChoiceId	
300100180801400	

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LoyIncentiveChoiceId	
300100180801401	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Promotion Specific Attribute** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.

    > **Note:** Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.

7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

> **Note:** On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Promotion Specific Attribute Data

Use this topic to import promotion specific attribute data into Oracle Loyalty Cloud. You can use the import functionality to create, update, or delete promotion specific attribute records.

To import promotion specific attribute records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.

2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

How to Map Your Source Data to Target Object Attributes

To import your promotion specific attribute data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.

- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.

- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.

- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to set up a promotion because a promotion specific attribute is a child of a promotion object. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Public unique identifiers**: If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Promotion Specific Attribute object, the attribute is Name.

- **Internal ID**: If you're identifying a record that already exists in Oracle Loyalty Cloud, then you can use the internal ID of the record. An Internal ID is typically a system-generated unique identifier attribute with "id" in the attribute name. You can determine the internal ID of a record by exporting Oracle Loyalty Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Loyalty Promotion Specific Attribute object, these attributes are as follows:

  - LoyAttrdefnBId
  - PromotionId

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

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The following table lists the required attributes for importing new promotion specific attribute records, required attributes for updating these promotion specific attribute records, prerequisite setup tasks for the attributes, and specific validations, if any, for a promotion specific attribute import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Promotion Specific Attribute record	Updating an Existing Loyalty Promotion Specific Attribute record
LoyAttrdefnBId	The unique ID for the Loyalty Promotion Specific Attribute record.	Number	18	None	Not required	Required
InternalName	The internal name of the promotion attribute.	Text	75	The internal name value entered should be unique. Possible values for the internal name attribute are: • Text 1 to 10 • Date 1 to 10 • Number 1 to 10	Required	Not required
DisplayName	The name of the promotion specific attribute.	Text	30	The display name entered must be unique.	Required	Not required
PromotionNumber	The unique ID for the promotion.	Text	30	The promotion must exist.	Required	Not required
DefaultValue	The default value of the promotion specific attribute.	Text	75	The default value, if provided, is dependent on the InternalName attribute.	Not required	Not required

You can view the Loyalty Promotion Specific Attribute objects in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **PromotionNumber** information from a legacy system to identify the promotion.

PromotionNunber	InternalName	DisplayName	DefaultValue
PROM0000003001	Number1	N1	1234
PROM0000003001	Date1	DT2	30-07-2019 04:25:55 AM
PROM0000003001	Text1	TXT1	TestRecord

In the following sample source file, the user enters **LoyAttrdefnBld** to identify the promotion specific attribute record, updating the default value of the promotion specific attribute in Oracle Loyalty Cloud.

Note: You can only update the promotion specific attribute if the promotion and promotion specific attribute are in **Inactive** status.

LoyAttrdefnBld	DefaultValue
300100178776416	23456
300100179259521	Test Record 1

In the following sample source file, the user enters the **LoyAttrdefnBld** to identify the promotion specific attribute, deleting the promotion specific attribute in Oracle Loyalty Cloud by the given **LoyAttrdefnBld**.

Note: You can only delete a promotion specific attribute if the promotion specific attribute and its parent promotion are in **Inactive** status.

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LoyAttrdefnBId	
300100178776416	
300100179259521	

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.
4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Promotion Specific Attribute** from the **Object** drop-down list.
5. In **File Name**, browse and upload the required CSV file, and click **Next**.
6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.

   > **Note:** Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.

7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity.

   The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

> **Note:** On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Import Your Promotion Rules Data

Use this topic to import promotion rules data into Oracle Loyalty Cloud or export them from Oracle Loyalty Cloud.

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General Prerequisites for Exporting or Importing Promotion Rules

Before you begin exporting or importing promotion rules, make sure that all the setup data required for creating a promotion rule is available and activated. The following is the list of objects used in the rules criteria and action:

- Promotion objects:

  - Promotion header object
  - Promotion specific attributes
  - Incentive choices

- Program objects:

  - Program level attributes:

    - Member dynamic attributes
    - Member field attributes
    - Transaction attributes
    - Calendar attributes
    - Point total attributes
    - Point type attributes
    - Member tier attributes
  - Point types
  - Point subtypes
  - Tiers
  - Event driven rewards

- Other objects:

  - Members (individual and company)
  - Vouchers

- External objects:

  - Products
  - Static Lists (FND_LOOKUP)
  - Partners

Prerequisites for Exporting Promotion Rules

When a promotion satisfies the following criteria, you can export the defined rules can be exported to a downloadable file by clicking the Rules Export menu item regardless of whether the promotion is active or not:

- The promotion must have a minimum of one rule.

- The promotion rules must be complete, in other words, both the IF and DO blocks must be defined.

- The promotion rules must be valid at the time of the export. If there are any errors or warnings for any of the rules, then the rules of a promotion can't be exported. You can verify the validity of the rules in the Rules At a Glance tab or by looking into rules through the Manage Rules functionality.

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Export the Promotion Rules

To export your promotion rules, complete the following steps:

1. Sign in as a setup user.
2. Open Promotions, and then the desired promotion.

   The Edit Promotion window opens.
3. Click the Actions menu, and then **Rules Export**.

   After clicking Rules Export menu item, a downloadable file is available for you to save. This file contains the necessary contents, such as attributes, object mapping information, and serialized promotion rules dictionary, to import rules into another promotion.

   The default file name is <Promotion Name>, and type of file is XML. If there are any errors or warnings for the rules, an appropriate error message is displayed.
4. Save the file.

   > **Note:** Ensure users don't modify this file.

5. If you receive Rules Export errors, the following is sample corrective action to fix certain errors:

   ○ Sample Error Message: The promotion rules for the promotion {PROMO_NAME} couldn't be exported due to errors. Fix them and try exporting the rules again.

     Make sure there are no warnings or errors in the rules. You can view them by clicking Navigator, Promotion, PromotionEdit, Promotion Rules at a Glance tab, and then the Manage Rules view.
   ○ Sample Error Message: There are no rules defined for this promotion.

     This error appears when the promotion doesn't have any rules defined. At least one complete valid rule is required to export rules. User must define a rule.

Prerequisites for Importing Promotion Rules

An import of promotion rules imports all the rules in the case of a successful import, but imports none if any import validations fail.

For newly created promotions, the rules import adds all rules to the promotions.

For existing promotions with rules, the rules import overwrites the existing rules with the imported rules.

The following are the prerequisites for promotion rules import:

- The uploaded import XML file containing promotion rules must be valid.

- The promotion must be in Inactive status. If the promotion is active, the Rules Import menu item is disabled.

- All setup data used in the exported promotion must be available and active as needed in this promotion as well, where the rules are being imported.

  ○ For attributes, Name, data-type and category (Transaction, Point Total, Calendar, and so on) used in the source promotion rule must match with that of the target promotion.
  ○ For objects like Point type, Point subtype, Tiers, and so on, the promotion name must match between the source and target promotion.

- The type and subtype of the two promotions must match.

- The kind of promotion must match, for example, Enrollment Required Promotion, Tier Promotion, Base Promotion and Normal Promotion.

Note: Names are case-sensitive and must match exactly between the two promotions for a successful rules import.

Import the Promotion Rules

To import your promotion rules, complete the following steps:

1. Sign in as a setup user.
2. Open Promotions, and then the desired promotion.

   The Edit Promotion window opens.
3. Click the Actions menu, and then **Rules Import**.
4. In the file browser dialog that opens, browse and select the XML file containing the rules, and click OK to upload the file.
5. After uploading exported file, click OK to import the rules.

   If all validations are successful, all the rules are imported and the following message is displayed: `You have imported all rules to the promotion.`
6. If you receive a Rules Import error message, click the **Download** link in the message and download the <PromotionName>Import.xml file.

   This file contains all the errors for the import process. You can find these errors inside the RulesImportErrorSummary tag of the file. After fixing the errors listed in the downloaded file, you can attempt to import rules again. See the following topic on actions to correct sample errors.

Corrective Actions to Fix Rule Import Errors

The following are actions to take for sample error messages:

Sample Error Message	Corrective Actions

The member dynamic attribute with name Member Preferred Program is either inactive or undefined.	Check whether an attribute named Member Preferred Program is available and in active status by navigating to Program, Program Level Attributes, and then Member Dynamic Attributes.
	
	• If the attribute isn't available under this attribute category, then create a new Member Preferred Program attribute with the same data type as that of exported promotion, and activate the promotion. In case you don't have the source program, you can look for the data type inside the exported XML.
	• If the attribute exists and is in inactive status, simply activate it.
	• If the attribute exists and is in active status and you receive this error message, check the Name value and make sure it matches the name in ErrorMessage. Name is case sensitive field.
	
	The category of the attribute can be identified from the error message. The category can be one of the following:
	
	    ○ Member Dynamic Attribute
	    ○ Transaction Attribute
	    ○ Member Field Attribute
	    ○ Member Tier Attribute
	    ○ Calendar Attribute

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Sample Error Message	Corrective Actions
	○ Point Totals Attribute ○ Promotion Specific Attribute The expected name of the attribute is available in the error message followed by the "with name" text. For example, **The transaction attribute with name TRANS_ATTR_NAME is either inactive or undefined.**
The member field attribute with the point type name Regular is either inactive or undefined.	• If the category is Member Field Attribute, and if the error message mentions the point type, then check whether a Point Type with the given name exists and is in active status by navigating to Program, then Point Types. • If the category isn't Member Filed Attribute, then create a new point type and activate it.
The promotion type and subtype don't match the uploaded file's promotion type and subtype.	1. Check for the type and subtype of the promotion from where rules are being imported to that of the source promotion to where the rules were exported. If the rules were exported from a promotion of type Accrual and subtype Product, then only import rules into a promotion of type Accrual and subtype Product. 2. Change the type and subtype to match in order to import the rules. 3. Importing Tier kind promotion rules into a normal promotion isn't supported.
You must change the data type of point totals attribute YearTotals to data type String. This type must match the promotion rules you're importing.	1. Identify the category of the attribute mentioned in error message which in this example is Point Totals Attribute. 2. Identify the name of attribute mentioned in error message which in this example is YearTotals. 3. Navigate to Program, then Program Level Attributes, and then in the Point Totals Attribute section, locate the YearTotals attribute. 4. If attribute data type isn't String, ensure the data type is string and try importing rules again, do one of the following: ○ Create a new attribute with the same name: Delete the existing attribute after inactivating it, create a new attribute with the expected data type, and then activate it. ○ Update the existing attribute: Inactivate the attribute, update the data type to the expected data type, and then activate it.
You can't import enrollment required rules to the promotion with name HighMiles. This isn't an enrollment required promotion. You can only use the enrollment attribute {ENROLL_ATTR_NAME} in an enrollment required promotion.	This error message appears if you attempt to import rules of an enrollment required promotion into a normal promotion. If possible, you must prevent doing such an import. The kind of promotion between the source and target promotion must match. If you pursue this type of import, then change the promotion to an enrollment required promotion by checking the Enrollment Required check box by navigating to Loyalty, Promotion, and then Promotion Edit.
The rules can't be imported because the promotion with name {PROMO_NAME} isn't a base promotion.	You're attempting to import base promotion rules into an unsupported promotion (Tier, Enrollment Required, Normal). Base promotion rules can be imported only to another base promotion.
The point type with name Regular wasn't found.	During an import, objects are mapped internally between a source promotion or program to the target promotion or program. They're mapped using the unique identifier, Name. For example, if a point type named Regular is used in the Assign Points action when importing rules into another promotion, a point type named Regular must exist in the target promotion. Otherwise, the import throws this sample error. A similar error can be found for the objects which are mapped as part of the import flow.

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Sample Error Message	Corrective Actions
	The following objects are mapped as part of an import (you can navigate to these objects by clicking Navigator, Loyalty, Program, Program Edit, and then the object type): • Point Type. The point type must be available and in active state with the given point type name. If it isn't, then create a new point type with the given name and activate it. • Point Subtype. The point subtype with the given name must be available. If it isn't, then create a new point subtype with the given name. • Tier. The tier with the given name must exist under the default tier class. If it doesn't, then create a new tier with the given name. If the tier class isn't active, then activate it with the appropriate tier class model. • Event. The event driven reward must be active with the given event name. If it isn't, then create a new event with the given name and activate it. • Incentive Choice. The incentive choice with the given name must be available. If it isn't, then create a new incentive choice with the given name. The following objects aren't mapped as part of an import: • Partners • Voucher Number • Voucher Type • All Members • Company Members • Member • Products • Static List If these unmapped objects are used in the exported rules, then they wouldn't be validated and mapped in the target promotion during import flow. After the import, a warning is displayed for these objects usage in the Rules UI (Manage Rules, Promotion Rules at a Glance) and you must fix them manually before activating them. For static lists, ensure they're available in both the source and target environments, or else fix the rule manually.
You must provide a valid action for this promotion. The promotion action with name {ACTION_NAME} is invalid.	Ensure that the type and subtype of the source and target promotions are one and the same. This error message appears if you attempt to import rules which have an action that isn't appropriate for target promotion type and subtype combinations. For example, a Cancel Voucher action isn't applicable for a promotion type of Accrual and subtype of Product. Cancel actions are applicable only for the Cancellation promotion subtype.

Import Your Member Association Data

Use this topic to import member association data into Oracle Loyalty Cloud. You can use the import functionality to create and update member association records.

To import member association records, perform the following tasks:

1. Map your source data to Oracle Loyalty Cloud object attributes.
2. Create the source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import activity.

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How to Map Your Source Data to Target Object Attributes

To import your member association data into Oracle Loyalty Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Loyalty Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Loyalty Cloud.
- Ensure that the prerequisite steps, such as understanding what attributes are required for importing your objects, are complete.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. For example, you need to set up a loyalty program and import member data first before you import member association data, because member association data references loyalty programs and members. Also, when importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Loyalty Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Loyalty Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Public unique identifiers**: If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Loyalty Member Association object, the attribute is MemberAssociationPUID.
- **Internal ID**: If you're identifying a record that already exists in Oracle Loyalty Cloud, then you can use the internal ID of the record. An Internal ID is typically a system-generated unique identifier attribute with "id" in the attribute name. You can determine the internal ID of a record by exporting Oracle Loyalty Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Loyalty Member Association object, these attributes are as follows:
  - GroupMemberId
  - MemberId

Required Attributes and Validations

To import data successfully into Oracle Loyalty Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new member association records, required attributes for updating these member association records, prerequisite setup tasks for the attributes, and specific validations, if any, for a member association import:

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Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Loyalty Member Association record	Updating an Existing Loyalty Member Association record
AssociationEndDat	The date when the association between the company or host member and the individual member ends.	TIMESTAMP	Not applicable	None	Optional	Optional
AssociationStartDa	The date when the association between the company member and individual member begins.	TIMESTAMP	Not applicable	Start date must not duplicate the end date.	Required	Required
GroupMemberNun	The PUID of the group (company or household) member.	Text	30	The company or household member must exist.	Required	Required
MemberAssociatio	Primary key	Text	30	None	Not required	Required
MemberAssociatio	The PUID of the member association.	Text	30	None	Not required. Oracle Loyalty Cloud will generate the PUID if it isn't provided in the import file.	Not required
MemberAssociatio	The value is from the group member type code, which represents the association type.	Text	30	None	Not required	Not required
MemberNumber	The PUID of the individual member.	Text	30	The individual member must exist.	Required	Required

You can view the Loyalty Member Association object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The CSV file is provided as input to the data import process. You must populate the CSV file with the data you want to import into Oracle Loyalty Cloud.

You can either create a CSV file on your own or use templates available in pre-existing mappings. To download a template, do the following:

1. Open Tools, and click **Import Management**.
2. Click the **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

You must edit the template CSV file and provide valid values for the required attributes. In the following sample source file, the import CSV file uses **MemberNumber** information from a legacy system to identify the member.

AssociationEndDate	MemberName	AssociationStartDate	GroupMemberNumber
9/1/2021	MEM0000040001	3/1/2019	MEM0000040002
9/1/2030	MEM0000040001	4/1/2019	MEM0000040002

In the following sample source file, the user enters **MemberAssociationId** to identify the member association record, updating the value of the AssociationEndDate or AssociationStartDate attribute of the member association in Oracle Loyalty Cloud.

AssociationEndDate	MemberName	AssociationStartDate	GroupMemberNumber
9/1/2031	MEM0000040001	3/1/2019	MEM0000040002
9/1/2030	MEM0000040001	14/1/2019	MEM0000040002

Create the Import Activity

To import data into Oracle Loyalty Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, click **Create Import Activity**.

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4. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Loyalty Member Association** from the **Object** drop-down list.

5. In **File Name**, browse and upload the required CSV file, and click **Next**.

6. In the **Create Import Activity: Map Fields** page, edit the attribute mappings if required, and click **Next**.

> **Note:** Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.

7. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do the following:

1. Sign in as a setup user.
2. Open Tools, and click **Import Management**.
3. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
4. Check the **Status** column for the import activity.

   The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

> **Note:** On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

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7 Export Loyalty Data

Export Loyalty Data

For details about exporting data, see the chapter on exporting your data in the Understanding Import and Export Management for CX Sales and B2B Service and Administering Loyalty guides. You must select a parent loyalty object and a set of associated child objects to export. The export activity creates an output ZIP file containing a separate export file for each loyalty object. You must create a filter for the parent object. You can define the conditions for the records to export in the filter. The exported data sets contain only those parent loyalty records that match the specified filter criteria on the parent/child object.

You might want to export data in the following scenarios:

- You might want to move data out of Oracle Loyalty into another Oracle application. To perform this activity you have to export the data into a ZIP file and import the exported data into the target application.

- You might want to format the loyalty data to meet your requirements.

- You might want to identify the unique identifiers of an object such as Member ID or Member Number. You can use this information to update an object record.

Note: The export process is generic across different Oracle Cloud applications.

Related Topics

- Understanding Import and Export Management for CX Sales and B2B Service

- Administering Loyalty

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